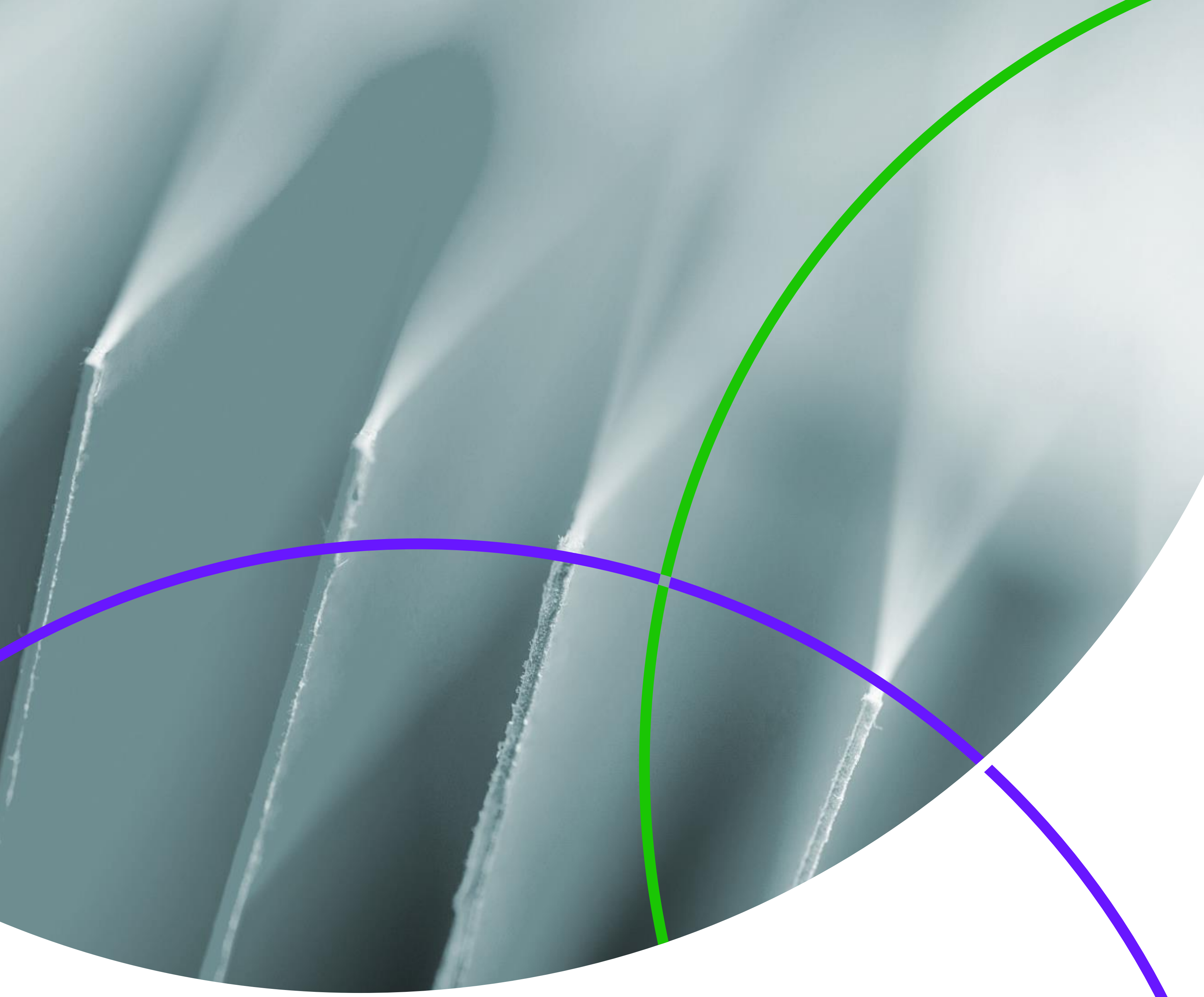


ScholarOne Abstracts

Session Administrator Guide

18-October-2018

Clarivate Analytics

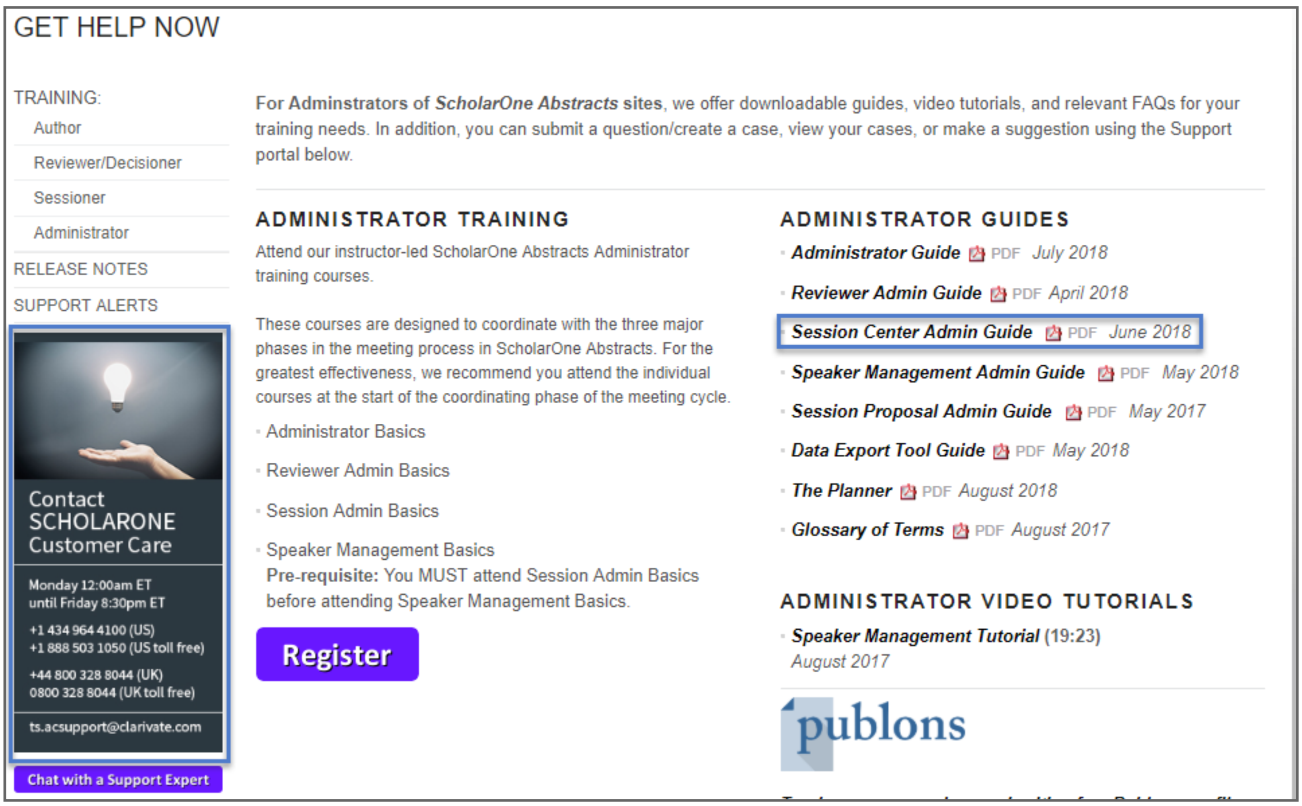
TABLE OF CONTENTS

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

USE GET HELP NOW AND FAQS

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.

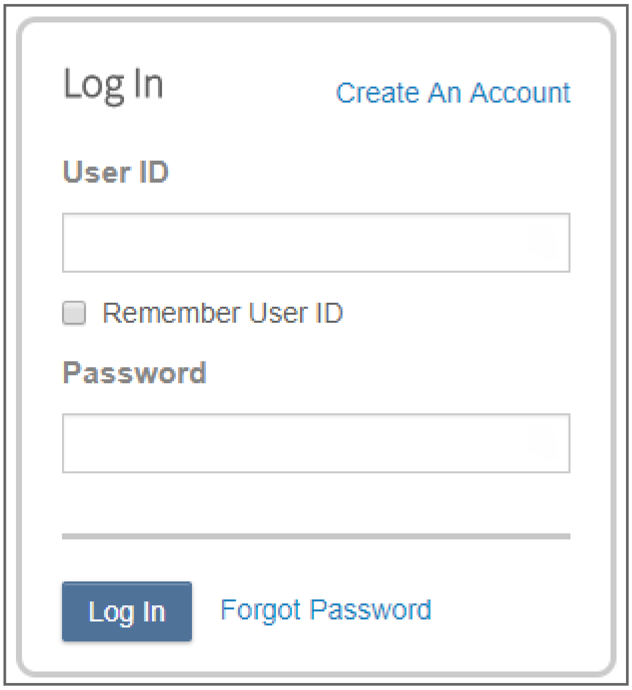


OVERVIEW OF THE SESSION CENTER

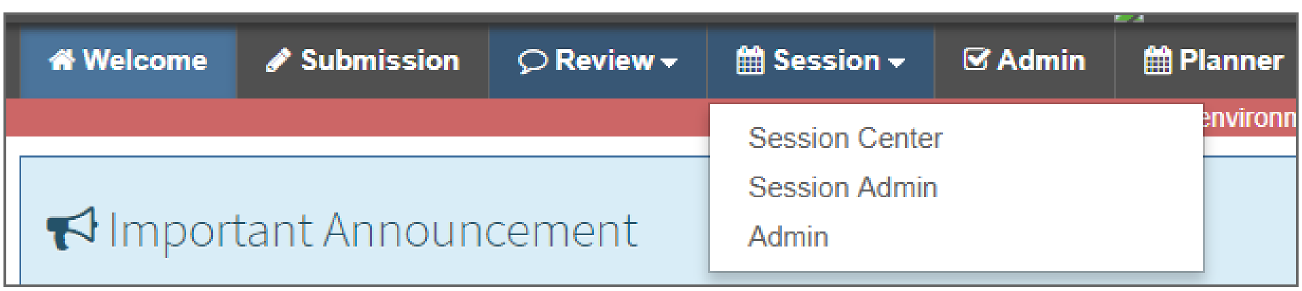
The ScholarOne Abstracts Session Center uses a set of cutting-edge Web 2.0 tools designed for usability, flexibility, and performance when managing the sessioning process for meetings.

ACCESSING THE SESSION CENTER

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



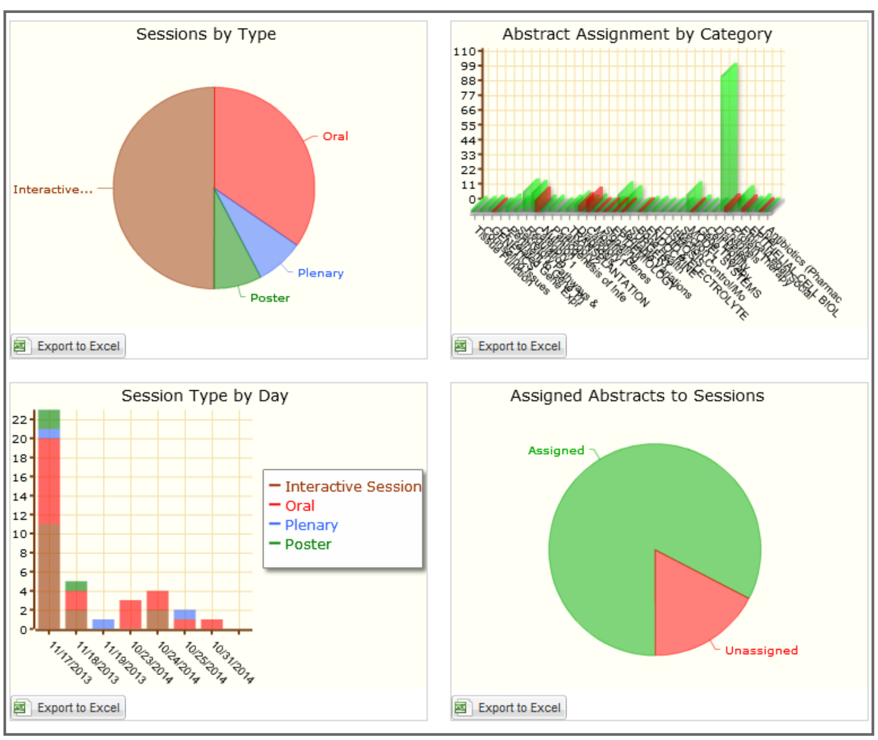
Select the **Session** tab at the top of your Welcome Screen. If you have more than one session center role, choose which role you want to access in the dropdown.



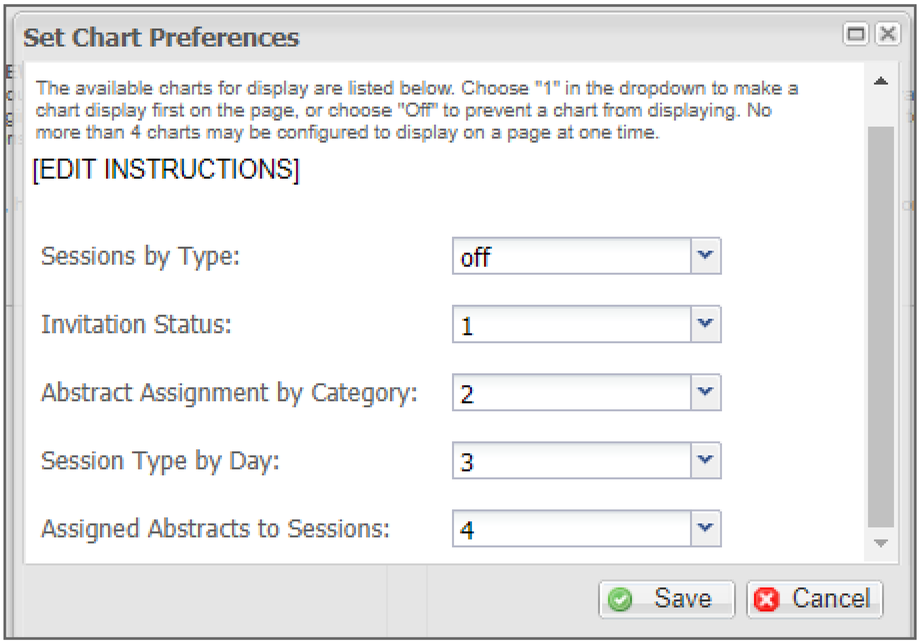
THE DASHBOARD

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.



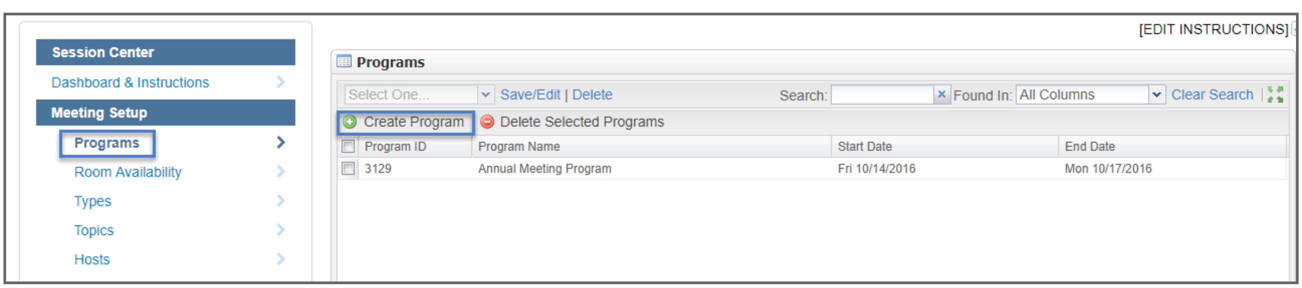
To set-up the Dashboard, select **Set Preferences**. You will select the four of five charts to display. Order the charts by selecting the dropdown orders.



SETUP A MEETING

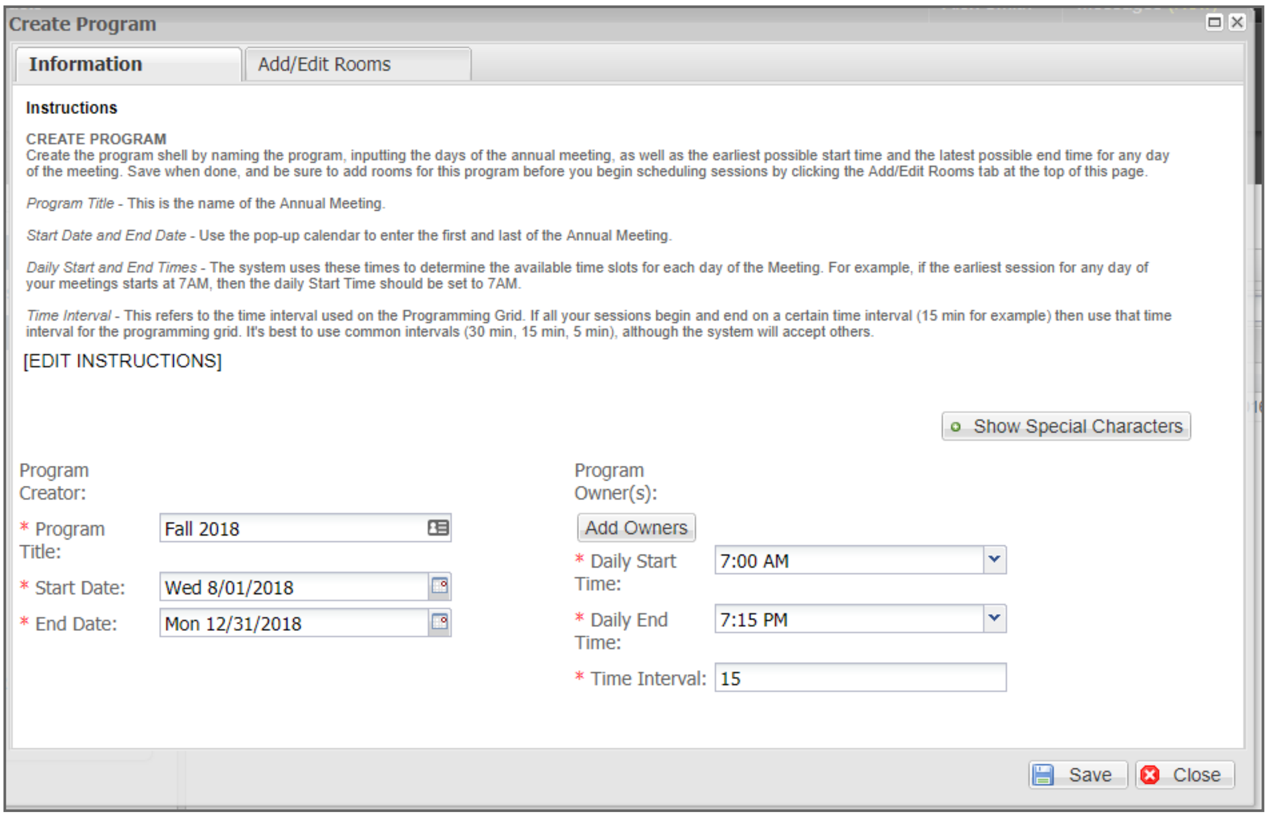
PROGRAMS

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.



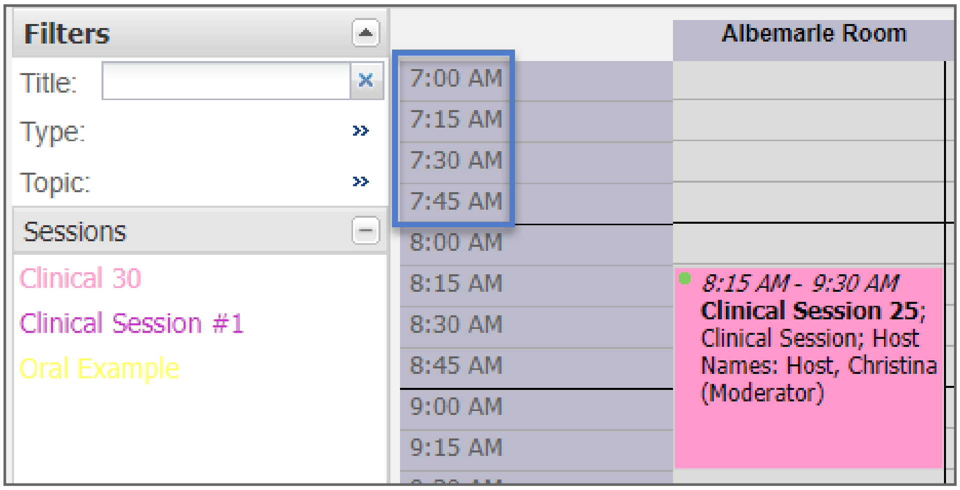
Note: In some cases, a default program may already be started for you.

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.



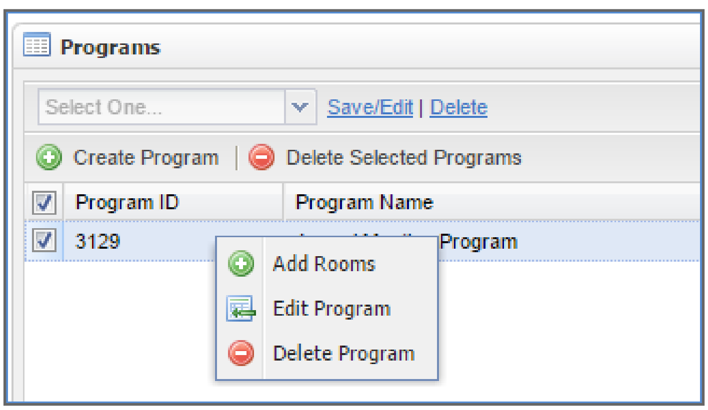
The time interval selected when you create the program will affect all session schedules in your program. For example, in the Schedule Sessions screenshot below, Time Interval is set at 15 minutes. This means all sessions will have 15-minute intervals available for scheduling. Set your interval to the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

Clarivate Analytics

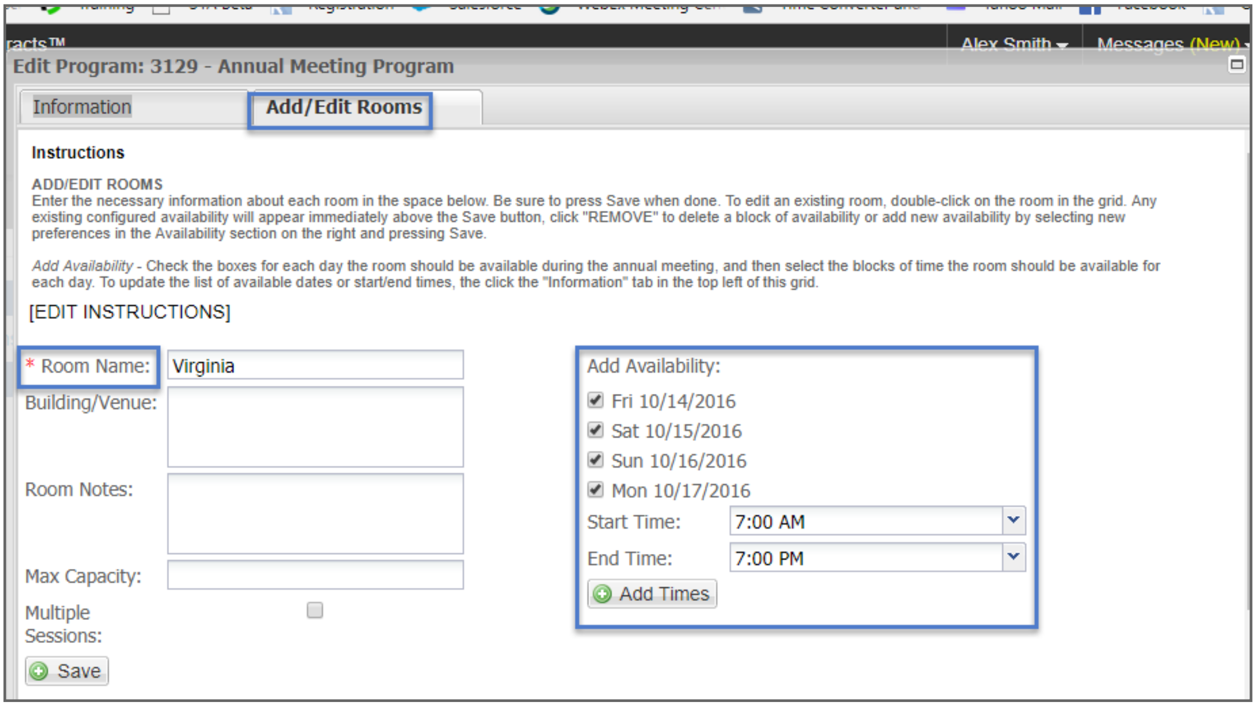


CREATE ROOMS

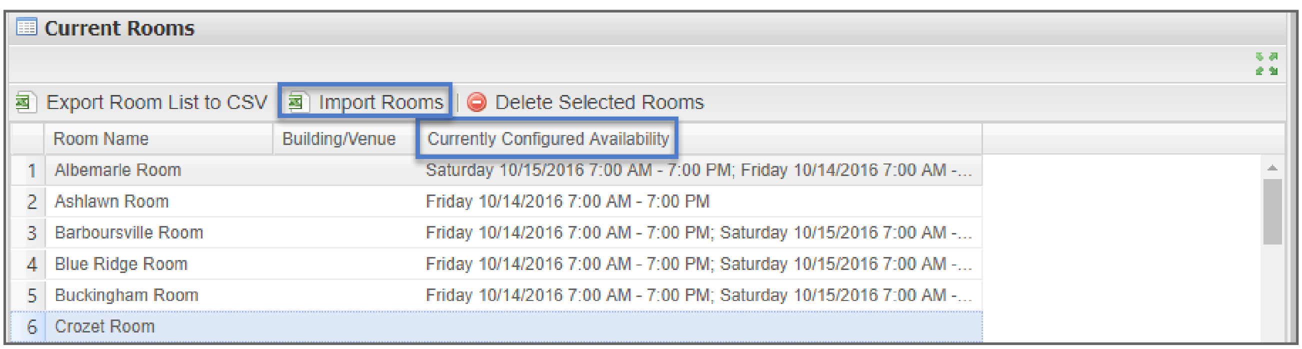
Once you have created a Program, it is time to add the rooms that will house the sessions. To do this, double-click on the **Program Name** and go to the **Add/Edit Rooms** tab or right-click on the program name and choose **Add Rooms** from the menu list.



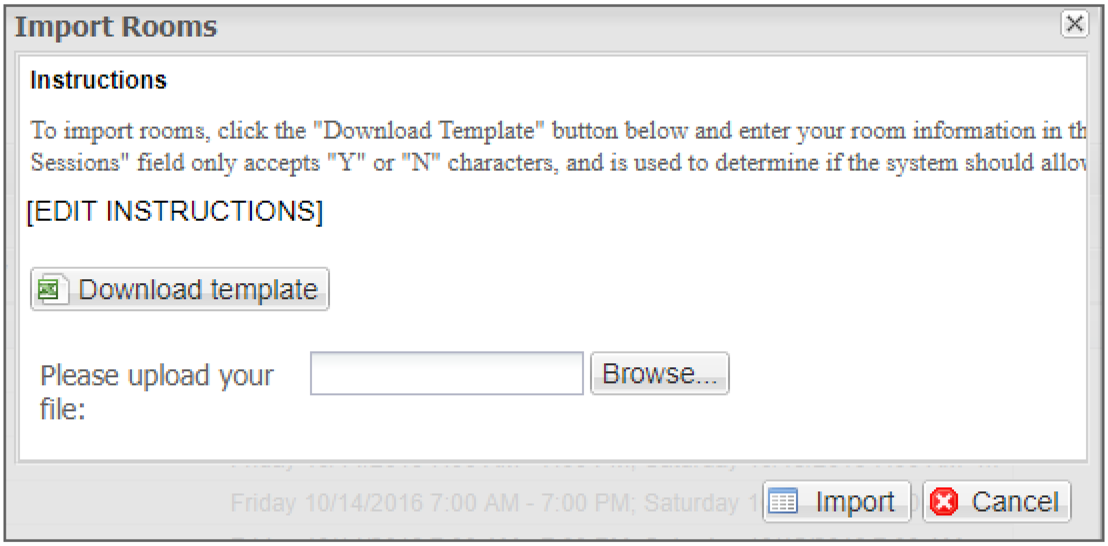
In the **Add/Edit Rooms** section, add a room by entering the room name and availability, and clicking **Save**. You can set the availability for a room by checking the desired days, choosing the Start and End times, and clicking the **Add Times** button.



Previously created rooms are visible in the Current Rooms section.

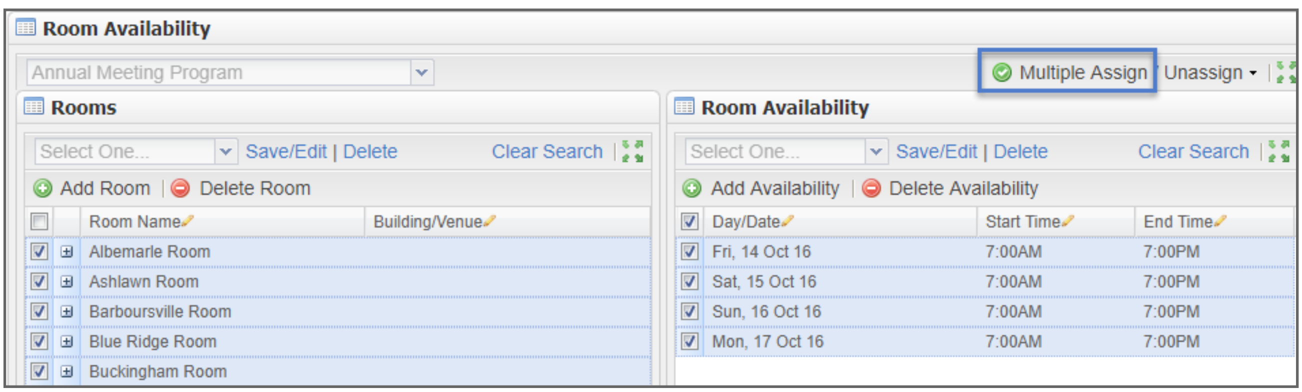


You can also import rooms using the **Import** function noted above. Click on **Import** and then download the template**.** The template downloads a .csv file that opens in Excel. Fill in your template and save it as a .csv file. Browse to your completed template and click **Import**.



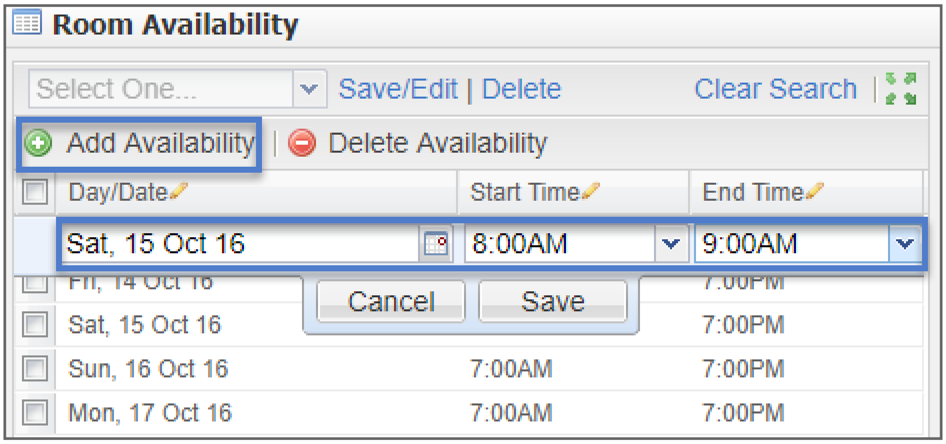
Room Availability

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



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

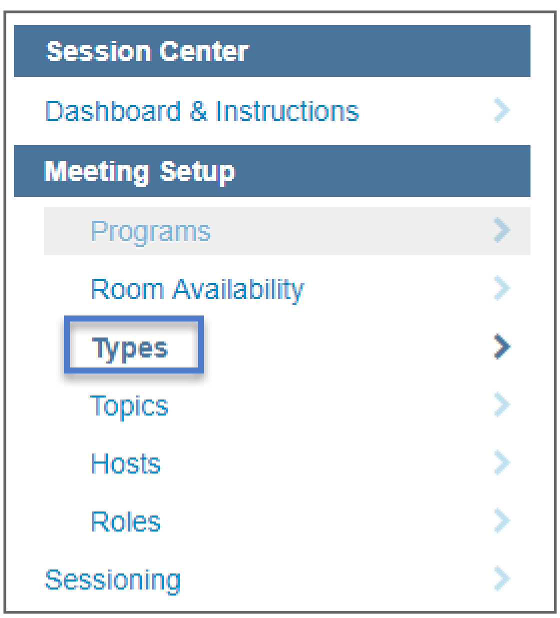


TYPES

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.

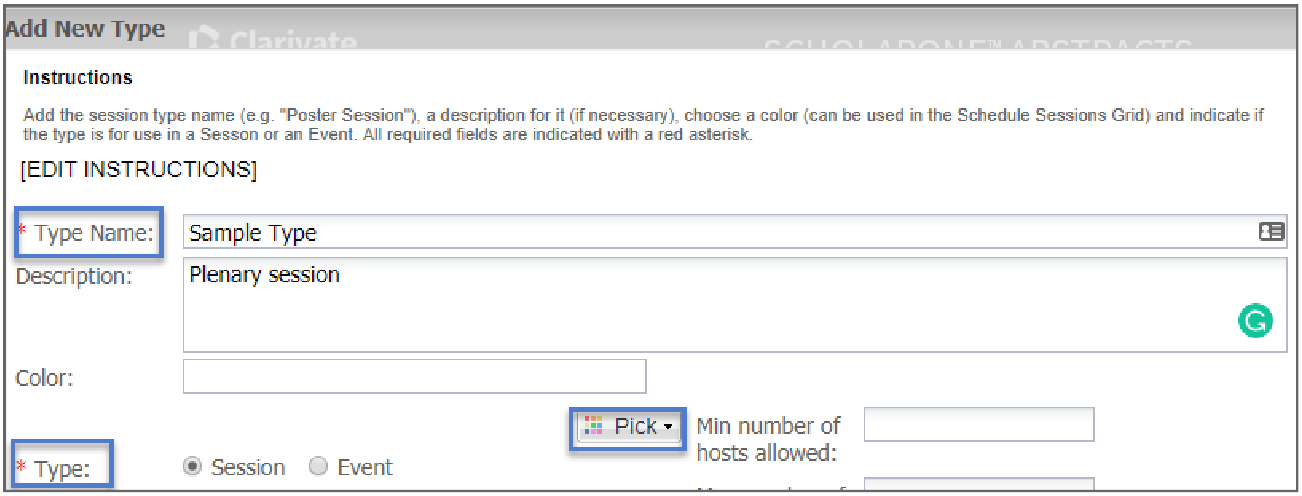
Session types are those sessions that contain abstracts. Events are sessions that do not contain abstracts (coffee breaks or lunches, for example).

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

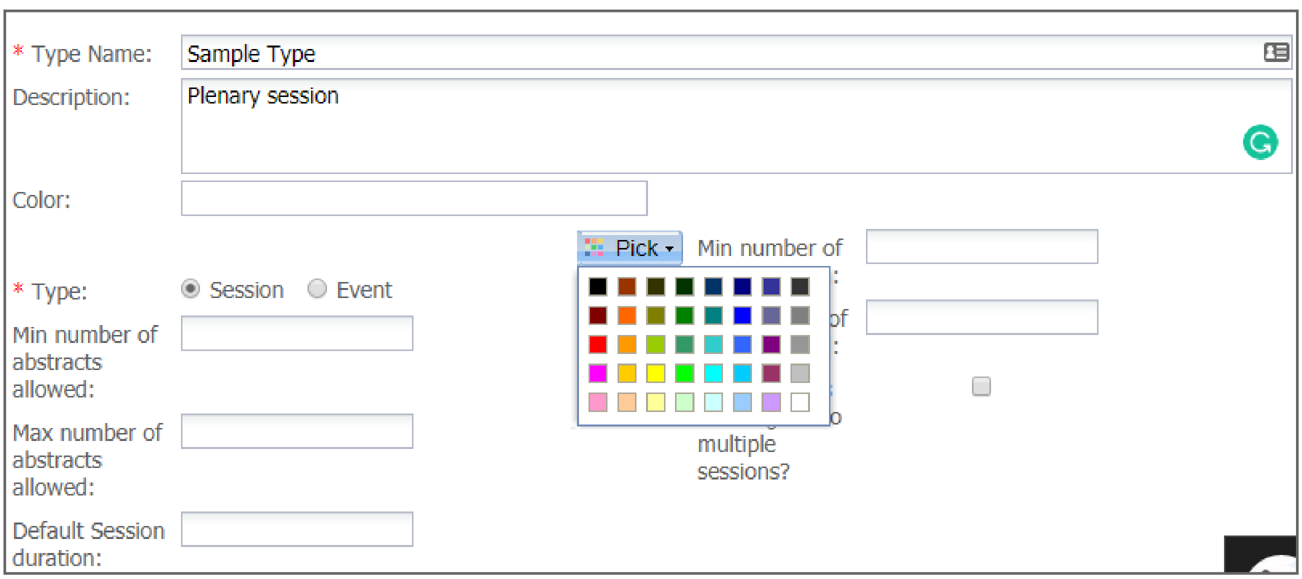


You **Add** or **Delete** types at your discretion by utilizing the buttons along the top of the window. You may also right-click individual types to edit or delete based on the needs of your meeting.

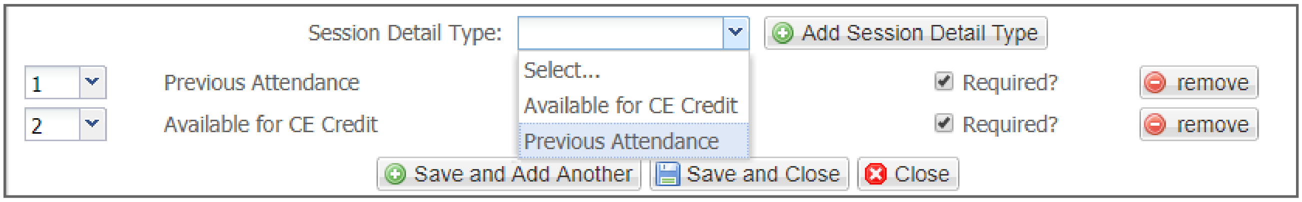
The types you create will become the **Type** dropdown selections when you create a new session or event. Note if any changes are made to these types from year to year you will want to communicate this to your Client Implementation Manager.



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**.

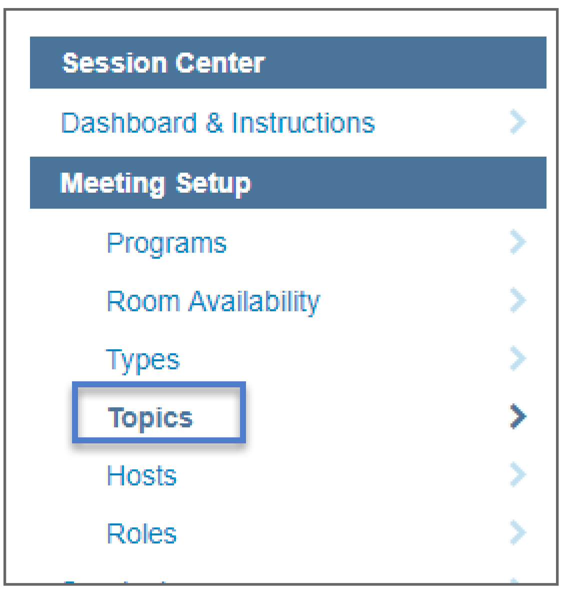


You can also create custom question on all session types or for certain session types. The custom questions can be configured by your Client Implementation Manager. You can make these questions required for a session type or not required.

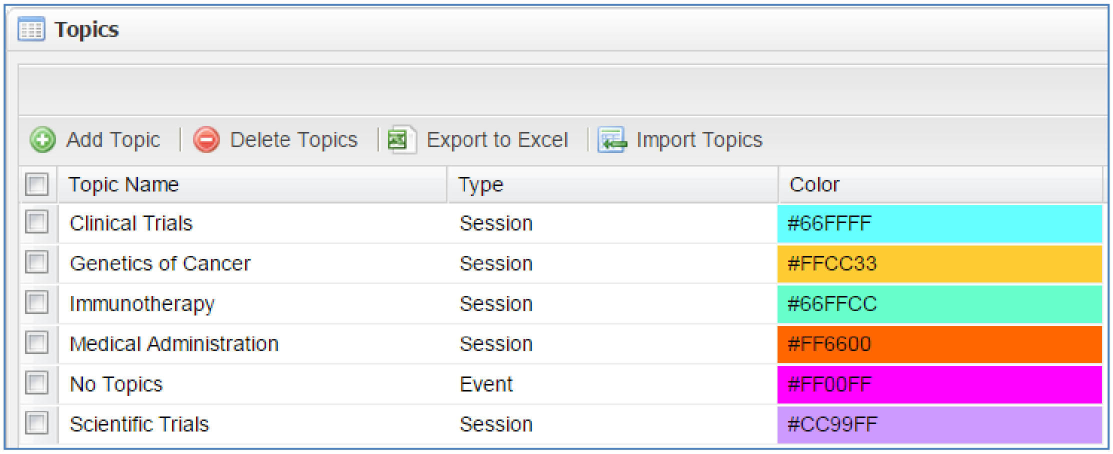


TOPICS (TRACKS)

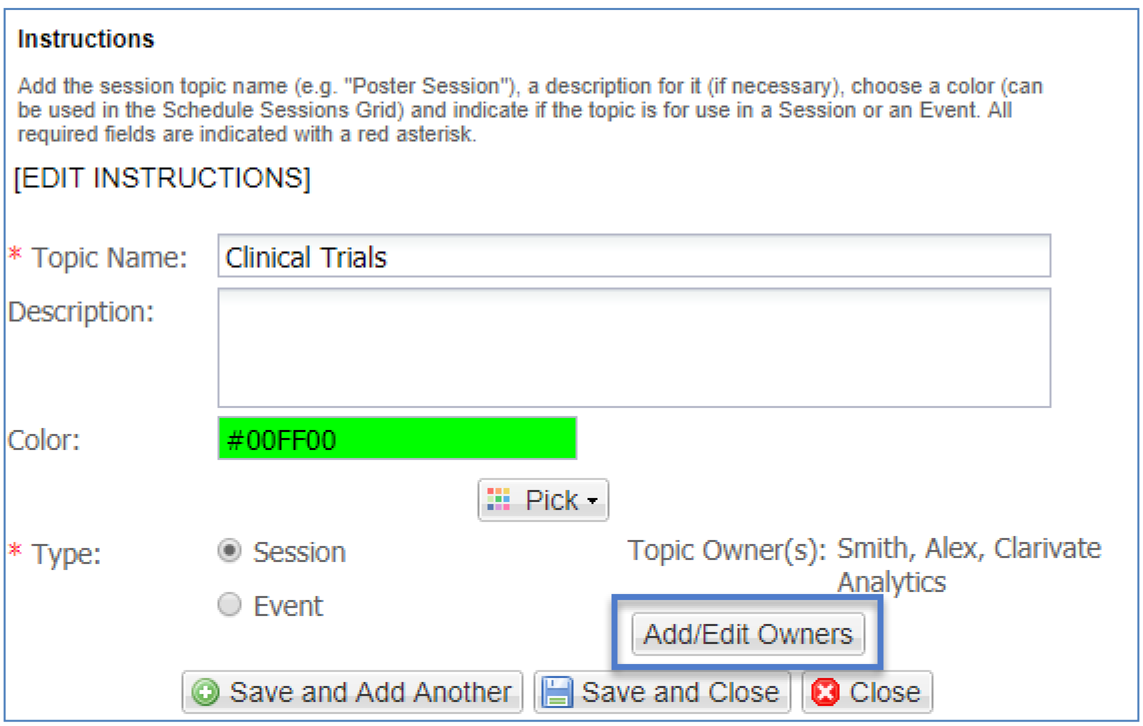
If your site uses Topics, create the topics for your meeting by navigating to **Topics** under the **Meeting Setup** menu on the left side of your screen. Topics are a higher level of categorization than types. Often a Topic will encompass several types.



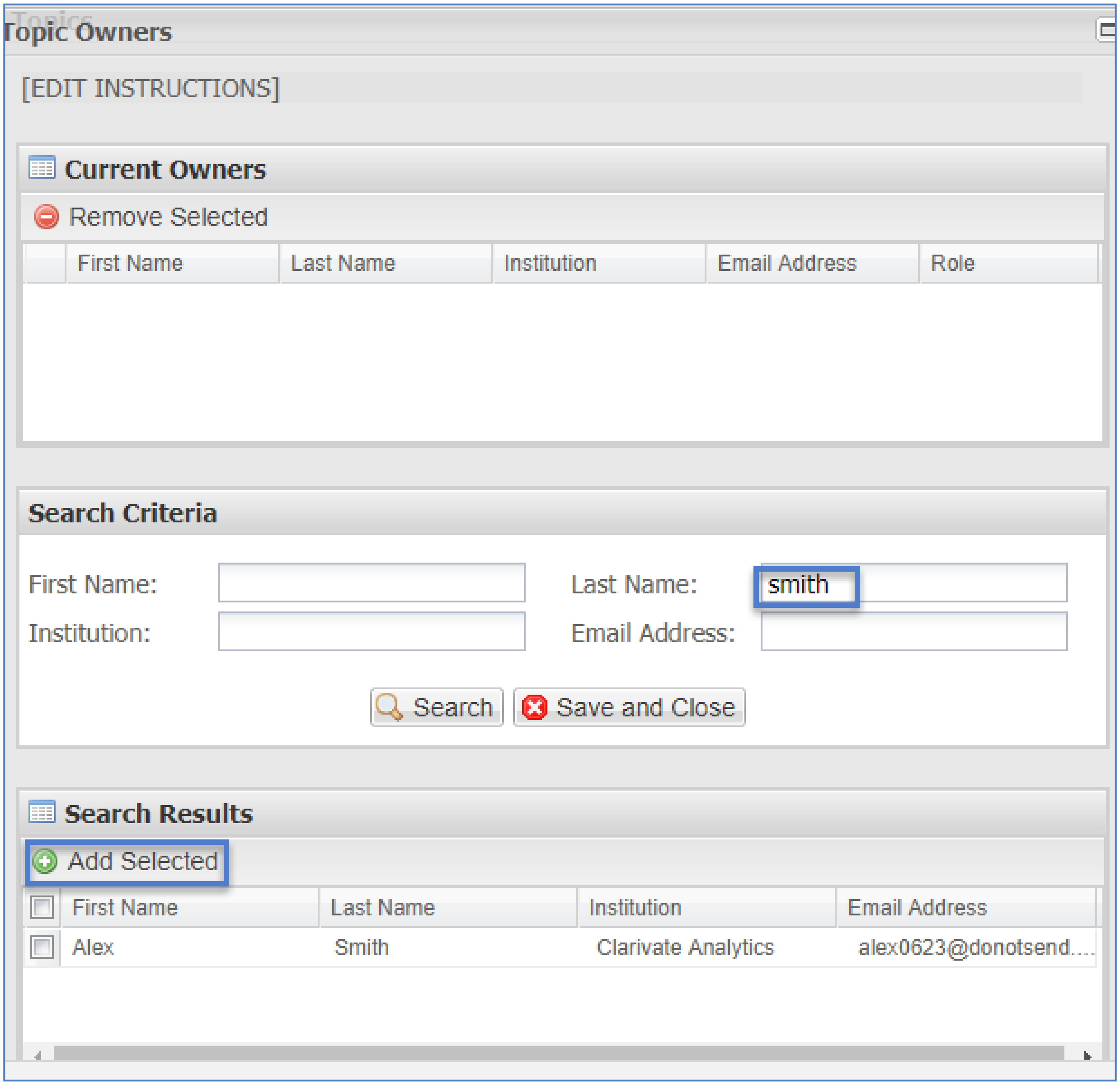
The **Current Topics** toolbar gives you the options to **Add**, **Delete**, **Export**, or **Import** topics. You may also right-click individual topics to edit or delete based on the needs of your meeting. Select a color if you wish to color code your topics for easy visual tracking on the **Scheduling**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



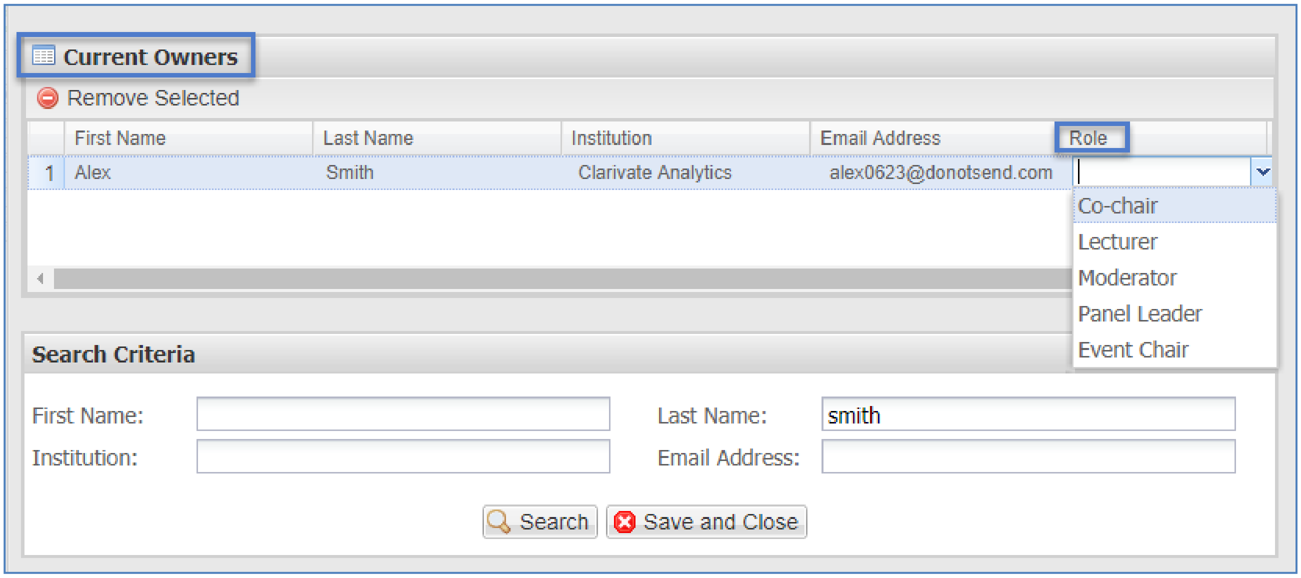
Topic Owners can be added. Select **Add Owners** from the **Edit Topic Screen**.



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.

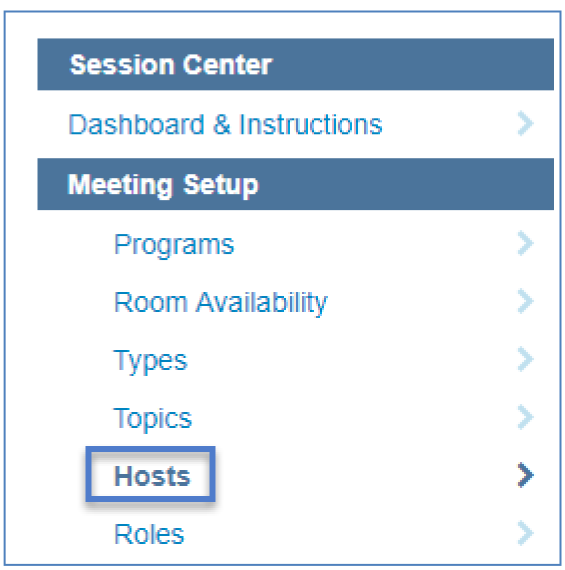


The last step is to select the **Topic Owner's** role. Topic Owner roles are configured under **Meeting Setup/Roles**. We will cover this in the next section of **Meeting Setup**.

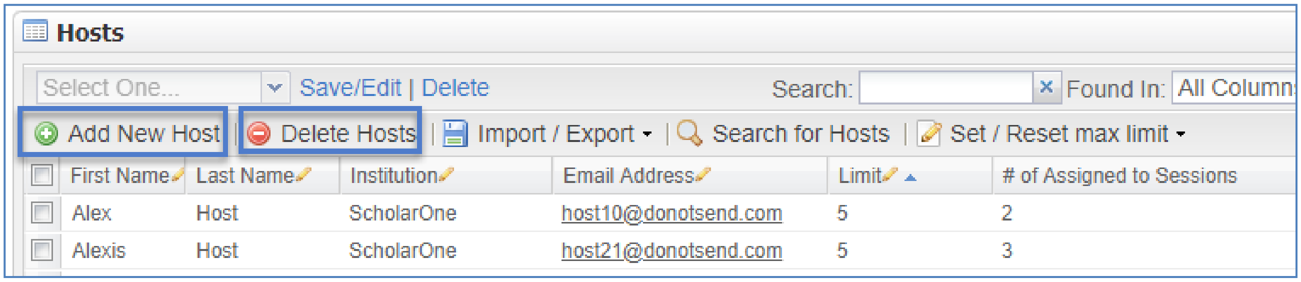


HOSTS

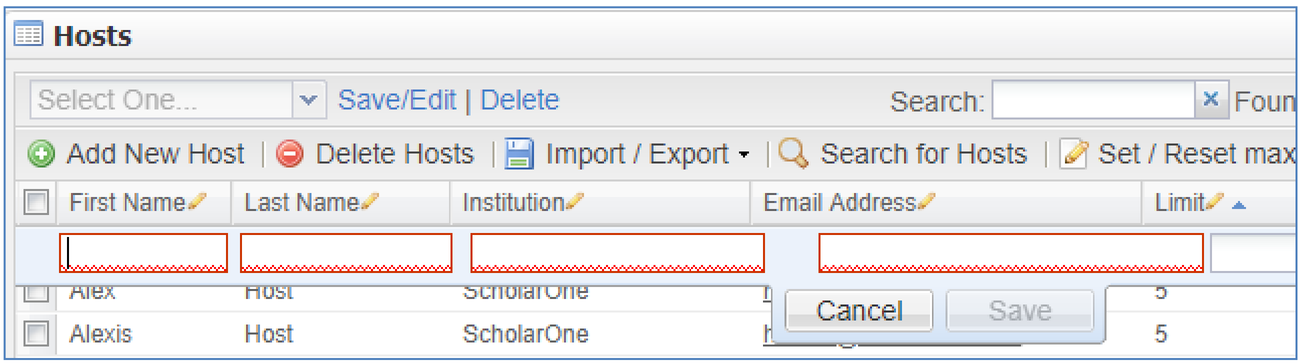
In addition to Rooms, Types, and Topics, you'll need to create a pool of hosts to choose from when you create your Sessions and Events. Under the **Meeting Setup** option on the side bar, select **Hosts**.



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



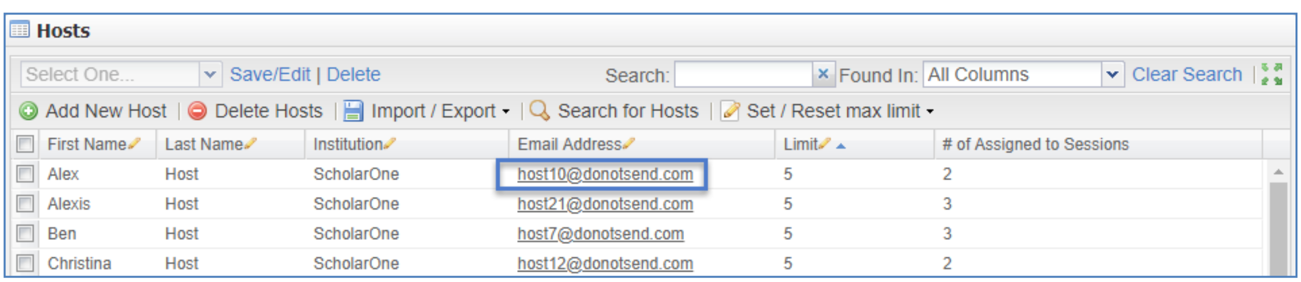
First name, Last name, Institution and Email address are all required fields for adding a host.



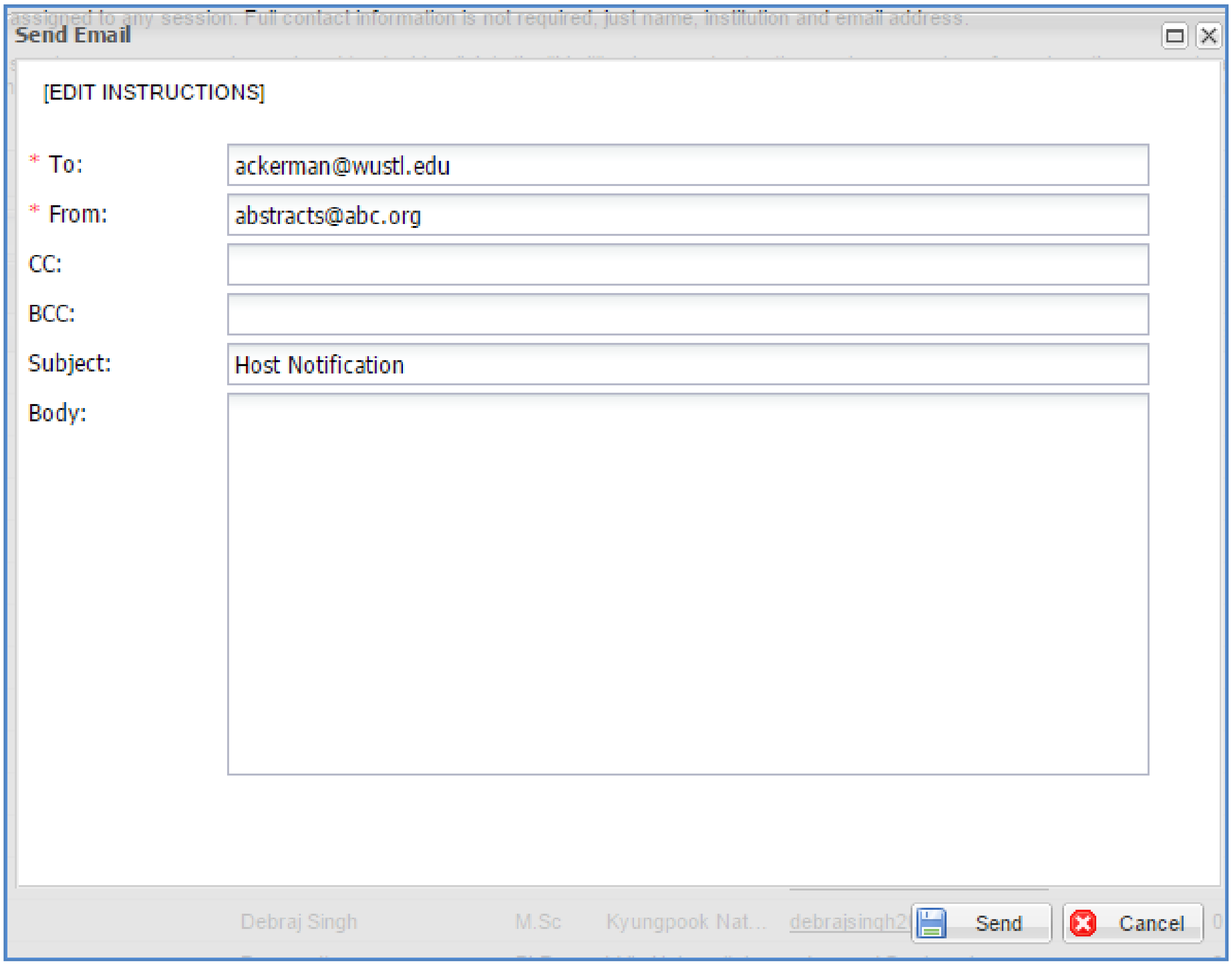
You may also double click individual Hosts to edit or delete based on the needs of your meeting and how your site is configured.

Email Potential Host

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

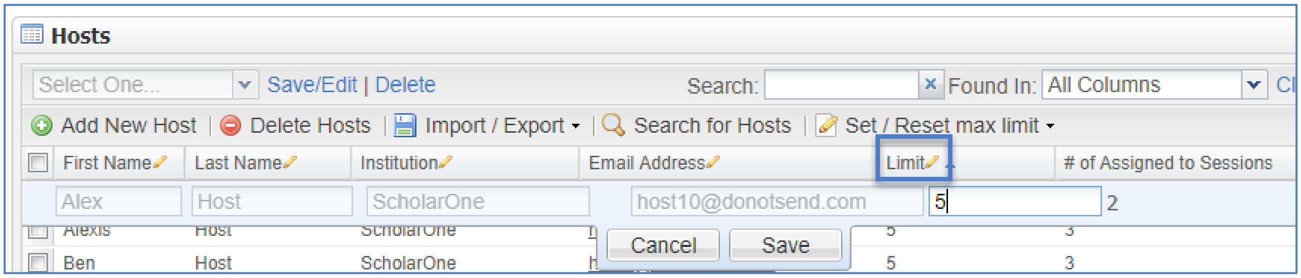


Clicking on the host email address will bring up an email template for you to complete. Click **Send** when you have completed your template updates. If you would like to pre-load text into this email template, the template can be configured under **Admin > Email Administration > System emails.**

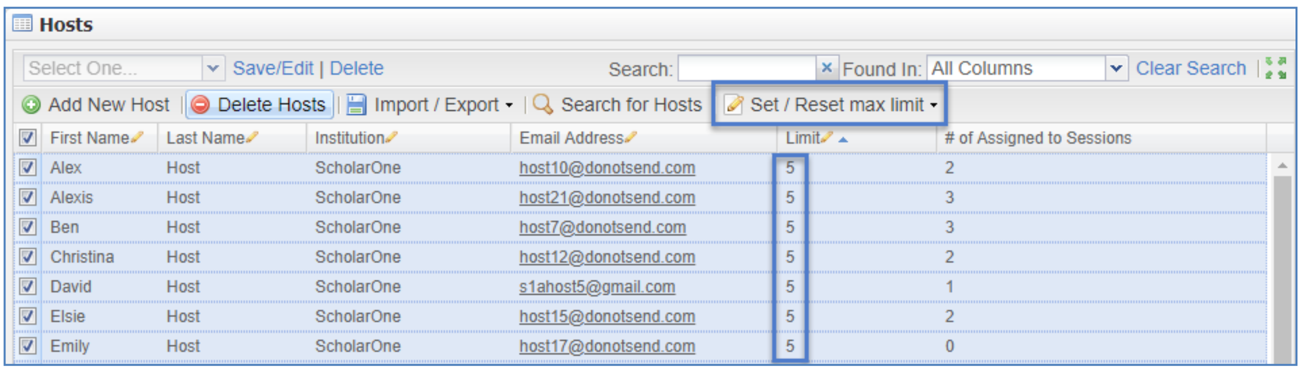


Track and Limit Host Assignments

To assist Sessioners and Adminstrators 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**.

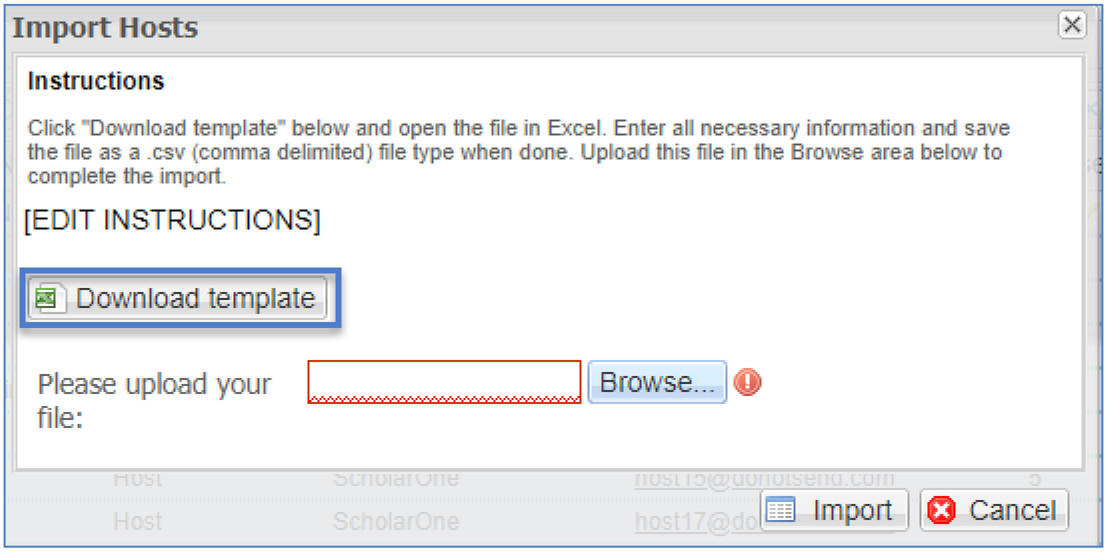


To set limits for multiple hosts, check the box beside the hosts' first names and click **Set/Reset Max Limit**. Enter a limit value and select **OK**.



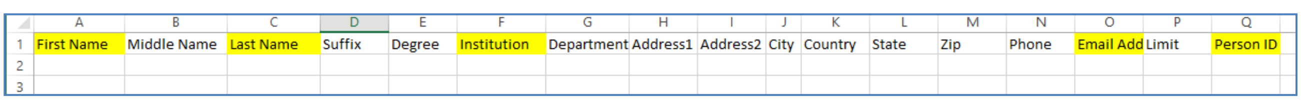
Import Hosts

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.

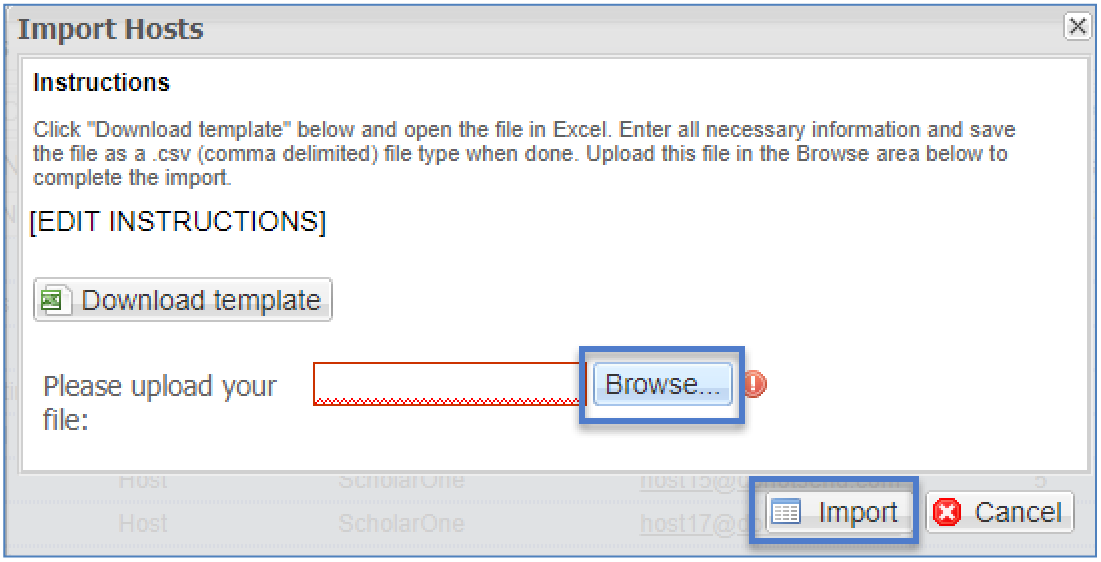
Note: First Name, Last Name, Institution, and Email Address are required fields.



	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																	

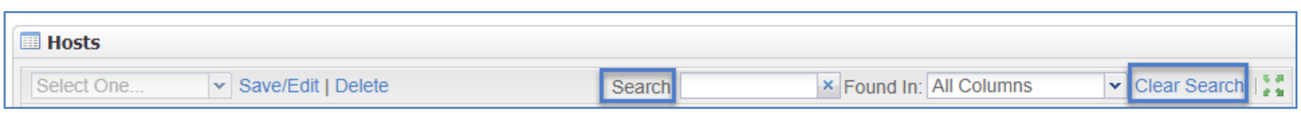
Save the completed template as a .csv file.

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



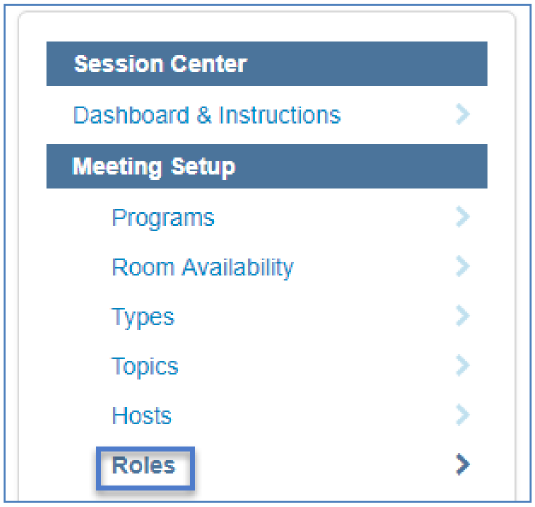
Note: To export the host data, select **Export** to Excel from the **Import/Export** button.

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.

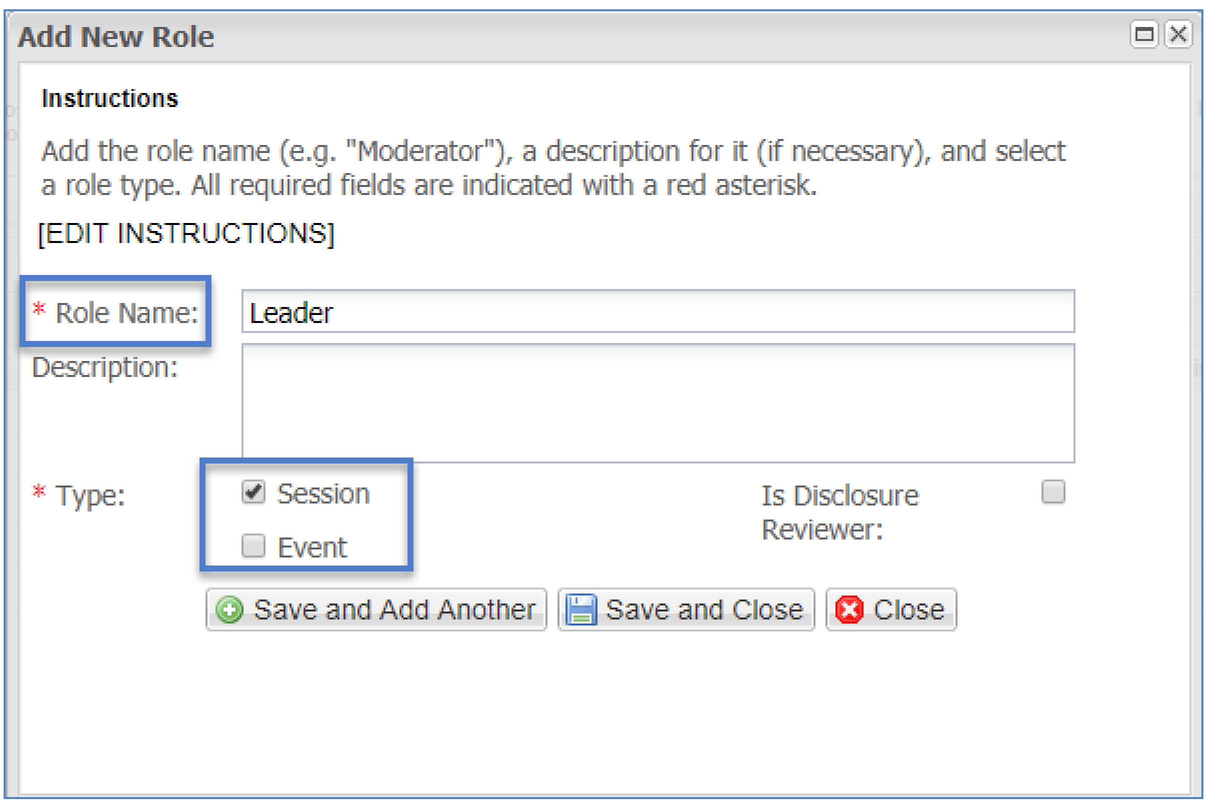


ROLES

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.



SESSIONS & EVENTS

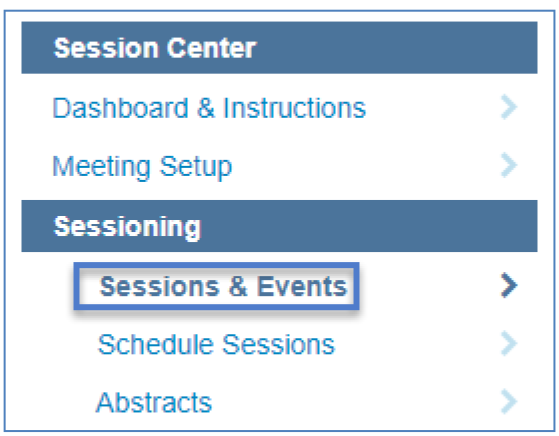
Programming Sessions & Events involves several steps:

- 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.

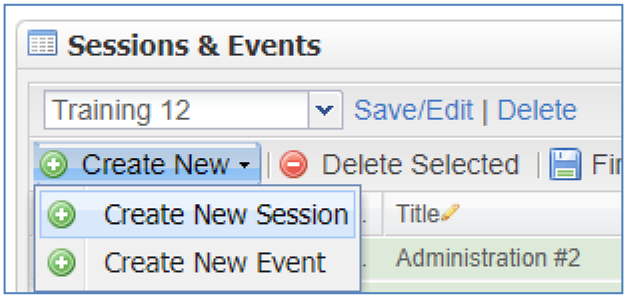
ACCESSING SESSIONING

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



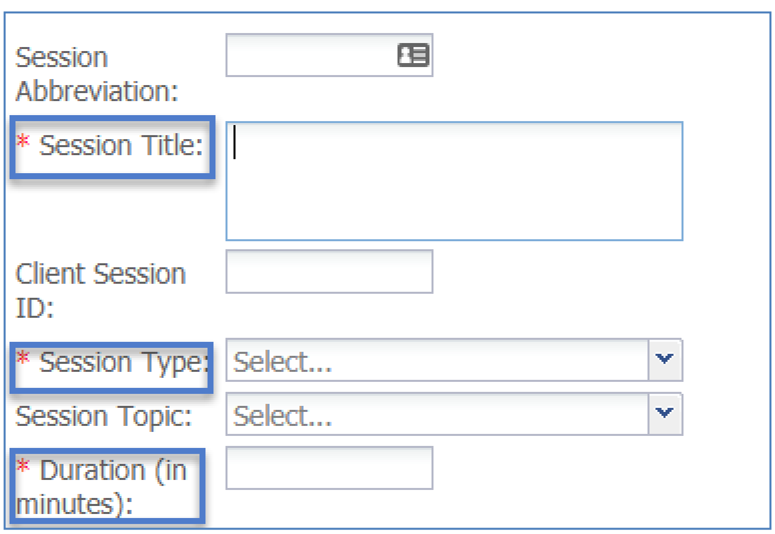
CREATE/EDIT/DELETE SESSIONS & EVENTS

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.

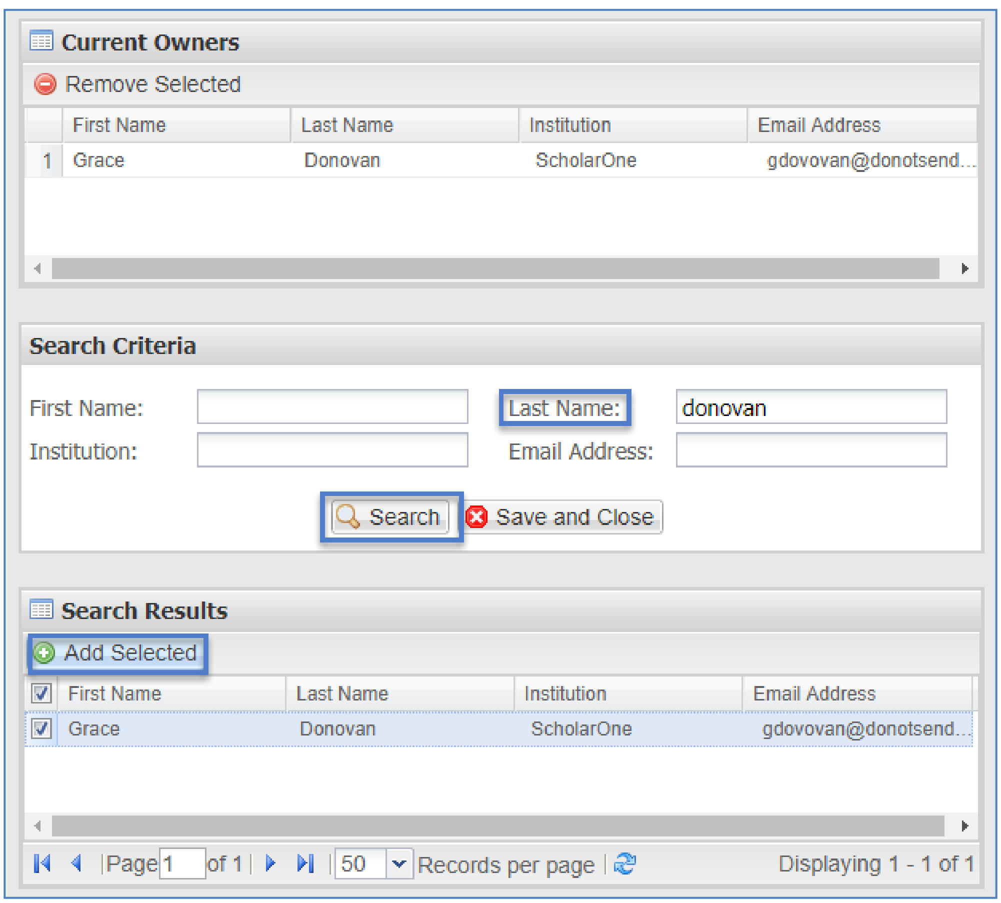


SESSION OWNERS

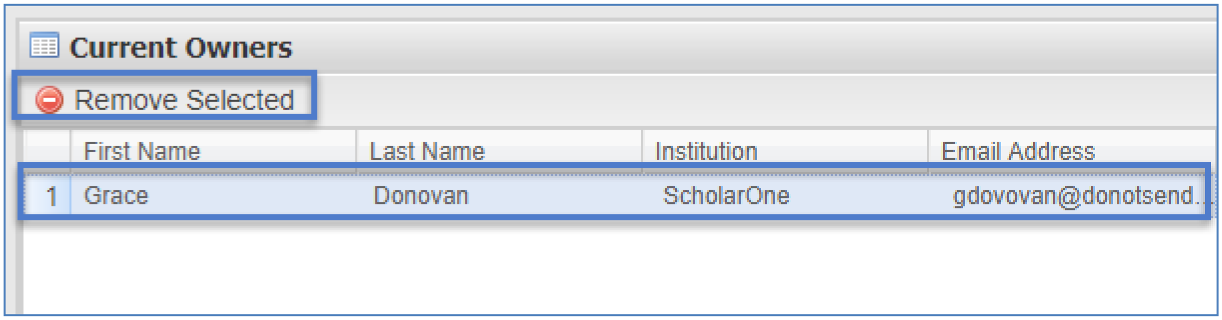
Some societies will have Sessioner Owners who will perform tasks on sessions. A sessioner owner is a user who can see/take action on any sessions that they own. The level of access (view only or ability to make full session changes, add hosts/abstracts and schedule) is determined by the society.

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.



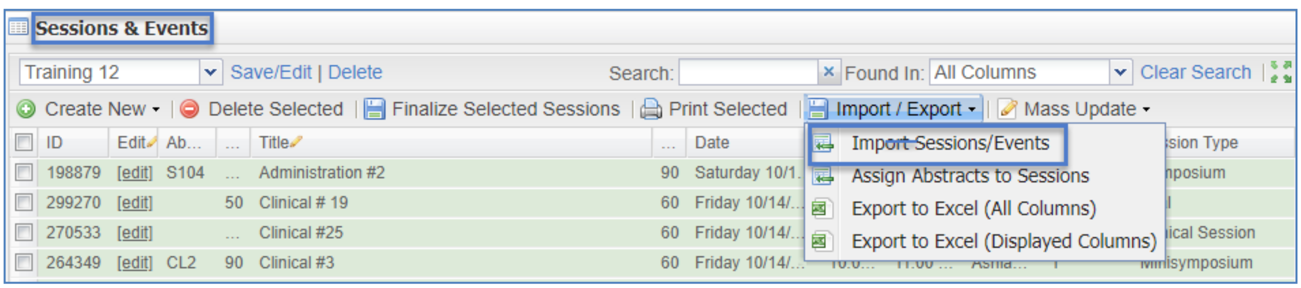
To remove a Session Owner, highlight his or her name in the **Current Owners** section and click on **Remove Selected.**



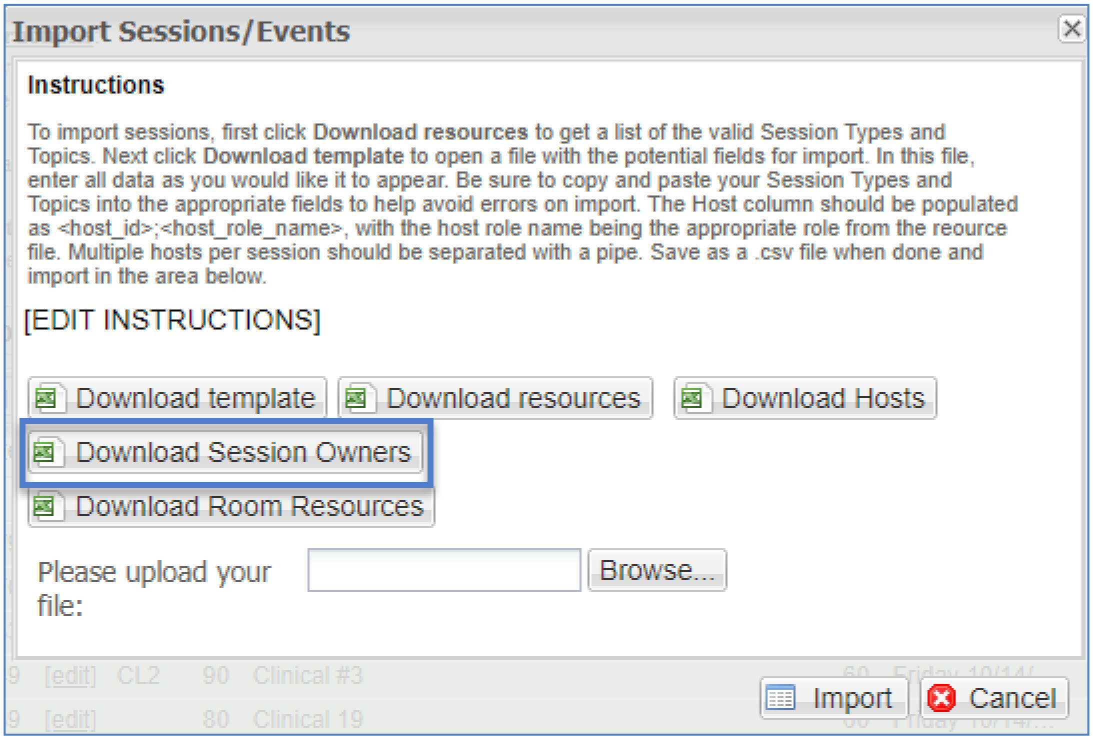
Importing Session Owners

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

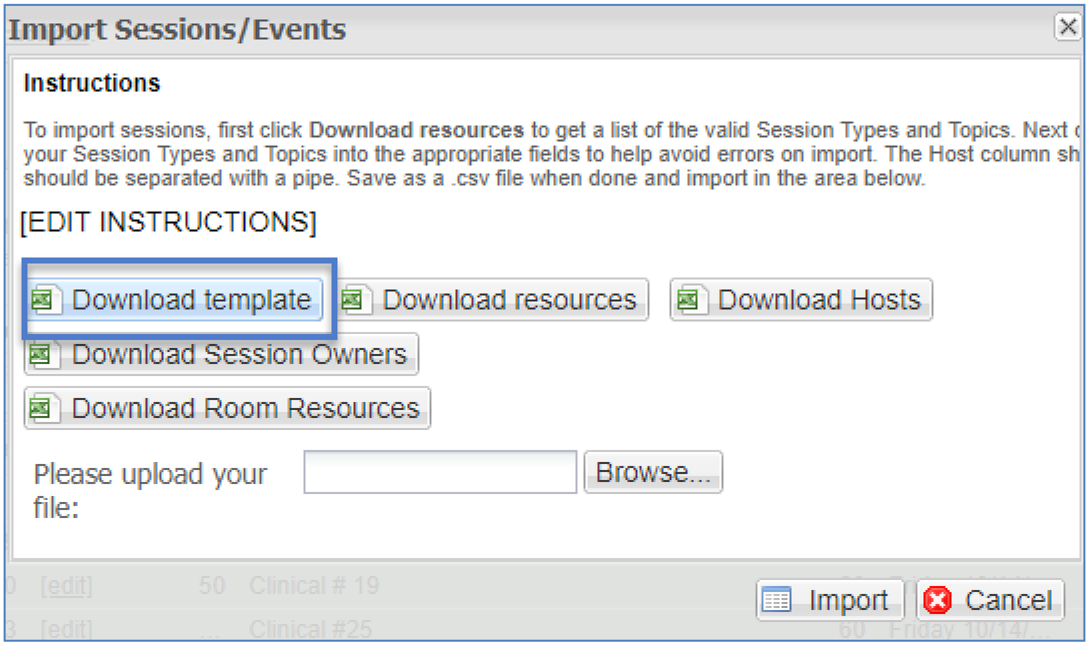
To import session owners to sessions using the import tool, go to the **Sessions & Events** grid and select the **Import/Export** option. From the dropdown, select **Import Sessions/Events**.



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).

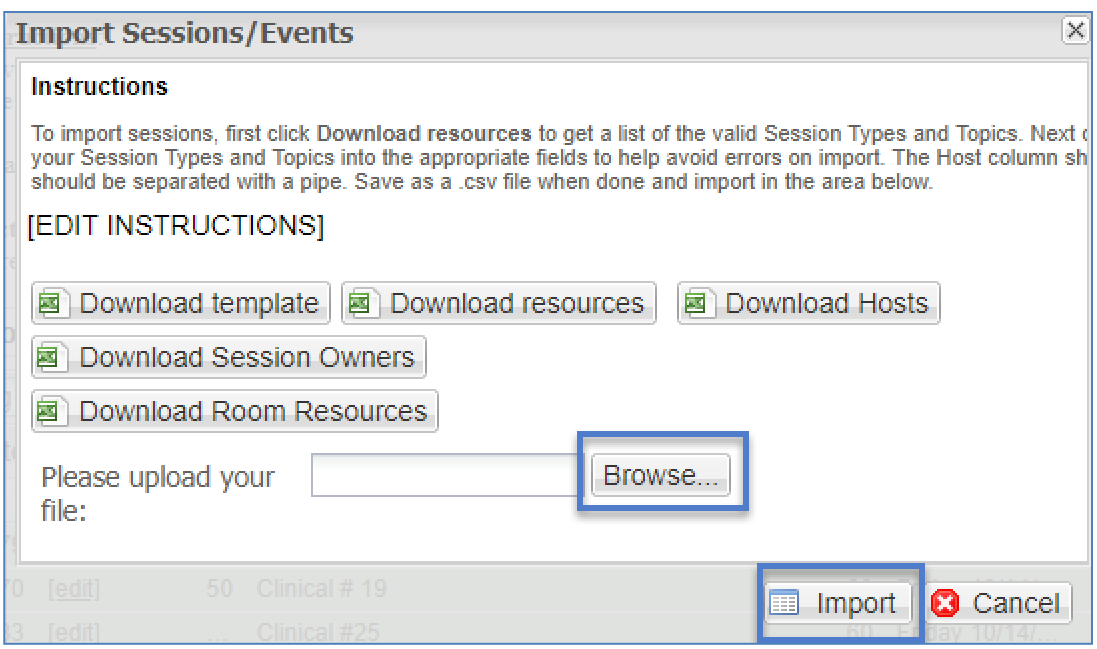


Next click **Download template** to open a file with the potential fields for import. In this file, enter all data as you would like it to appear. Owners can be populated with the <person_id> found in the **Owner resource file**. Multiple owners per session should be separated with a pipe. Ex: 1234567**|**3456789



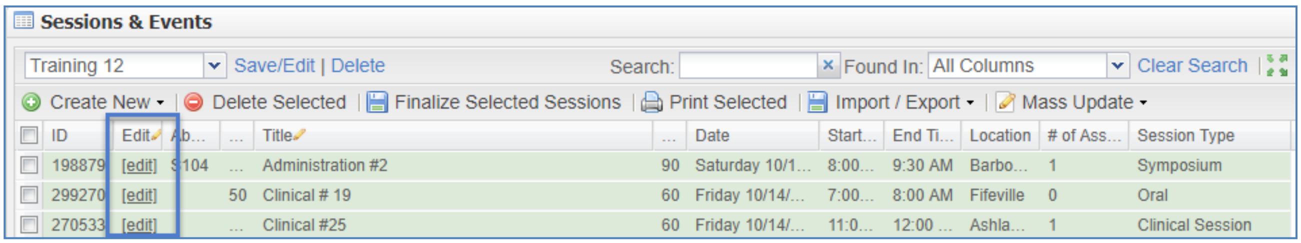
Complete the template using the person IDs in the Owner spreadsheet.

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.

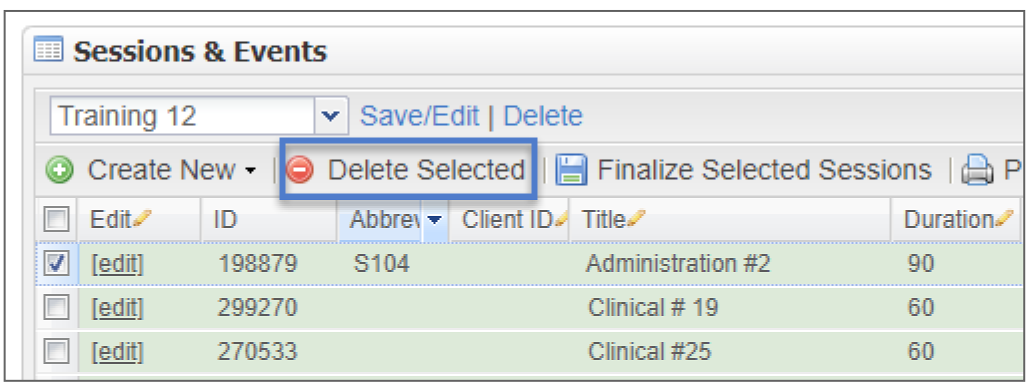


SESSIONING NEXT STEPS

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.



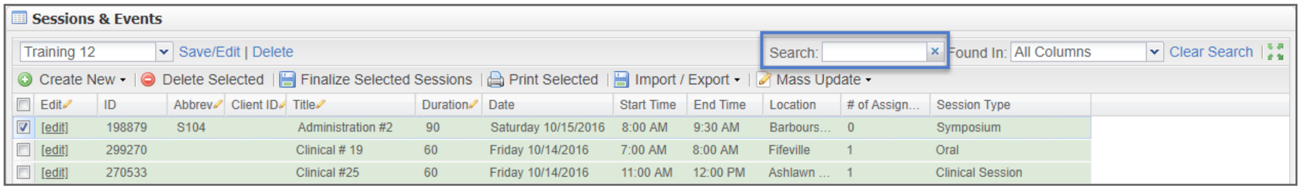
Deleting a session is just like editing a session. Navigate to **Sessions & Events**, find your Session in the list, check the box next to the Title, then press the **Delete Selected** button from the action bar. If a session has abstracts tied to it, you will first need to remove the abstracts from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



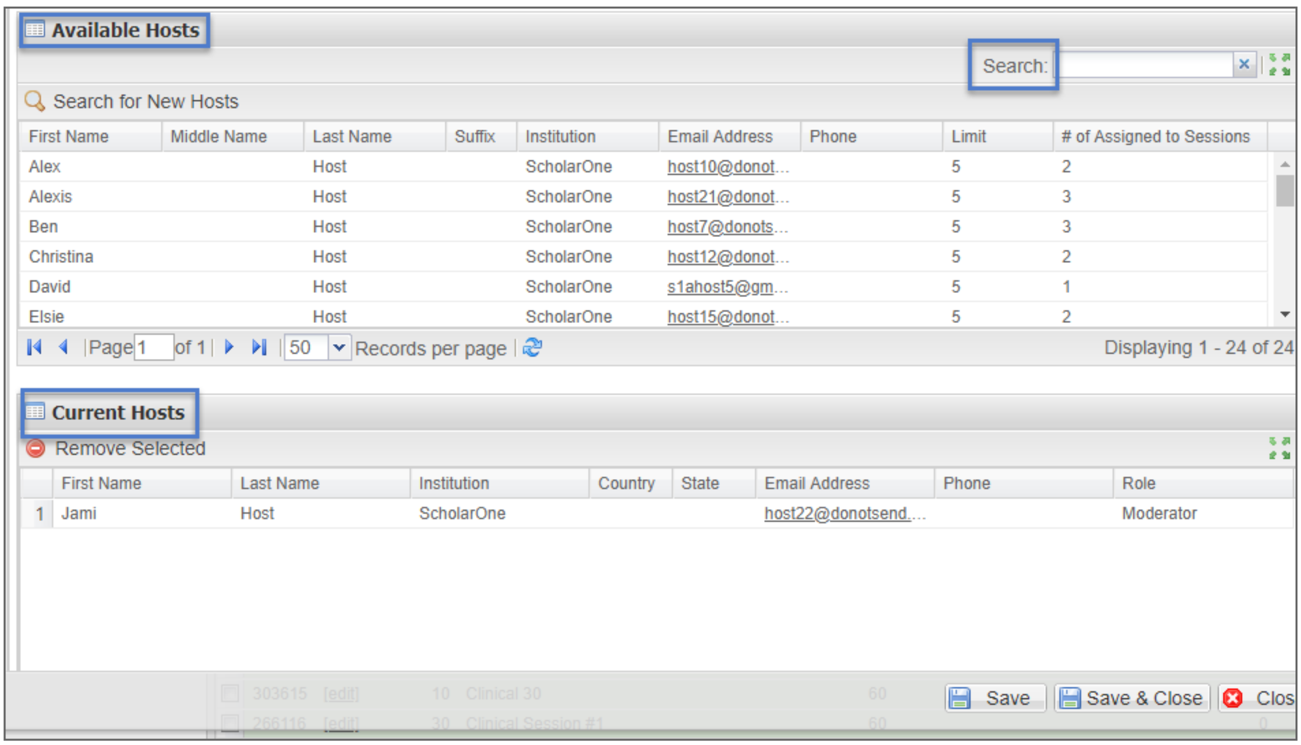
ADD/EDIT HOSTS

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.

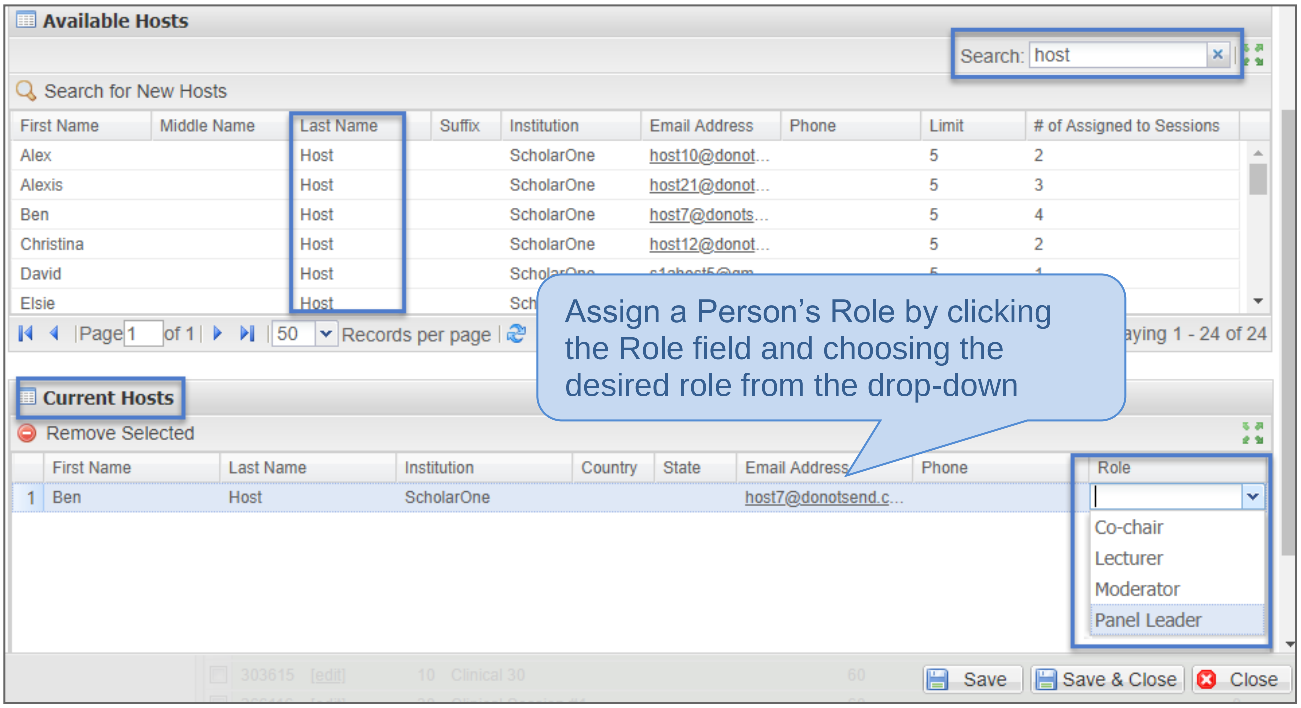
Clarivate Analytics



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.



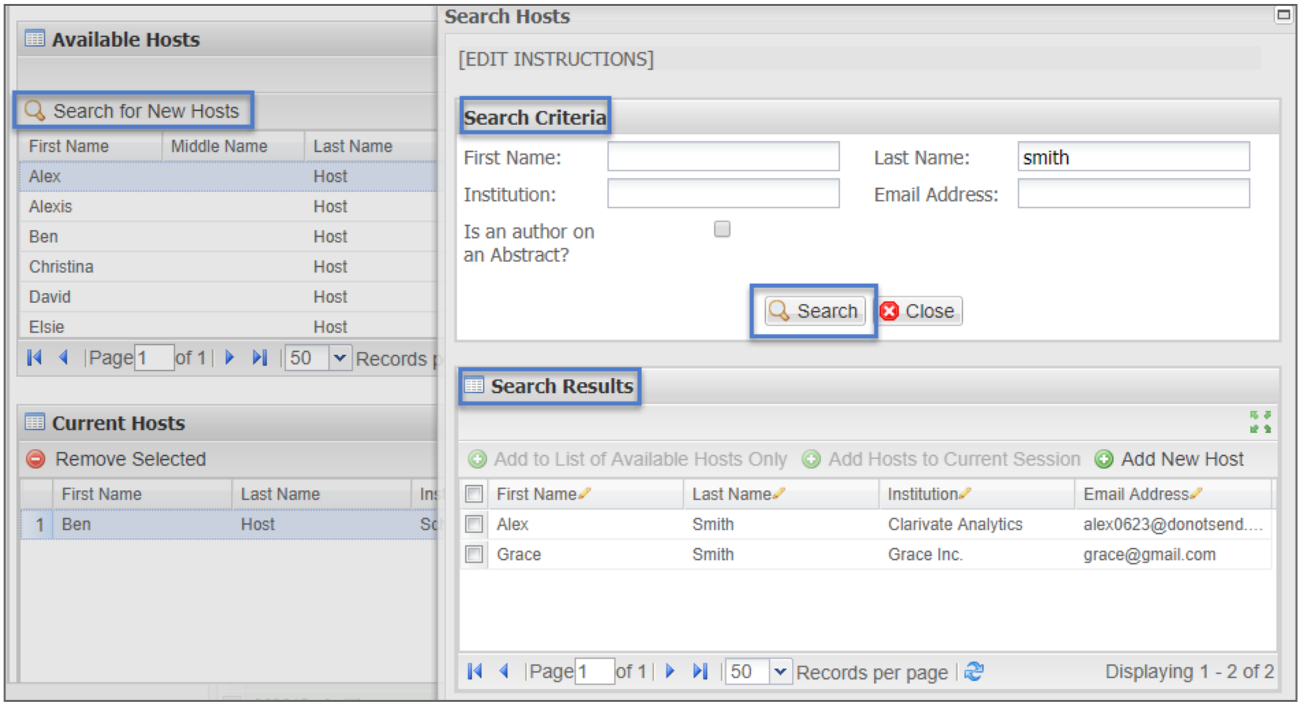
Once you have the correct person, simply drag and drop them from the top grid to the bottom grid. You will need to assign the person a role by clicking the **Role** field and choosing the desired role from the drop-down box. The roles listed in the dropdown are the roles you created in **Meeting Setup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



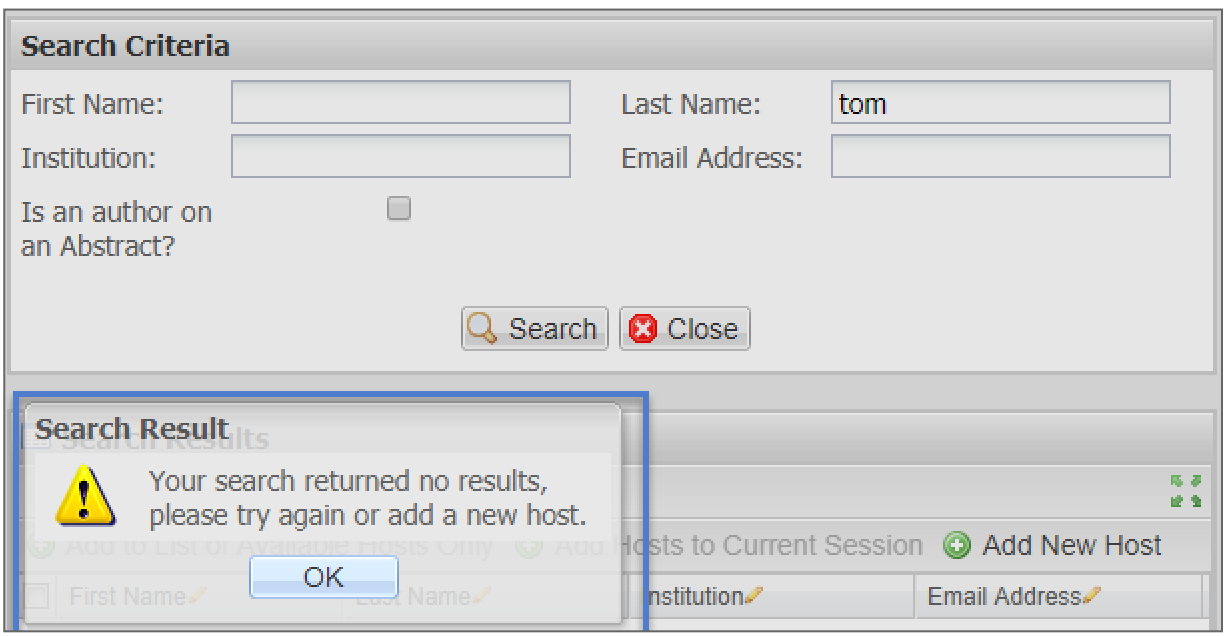
Create Host Account On the Fly

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**.

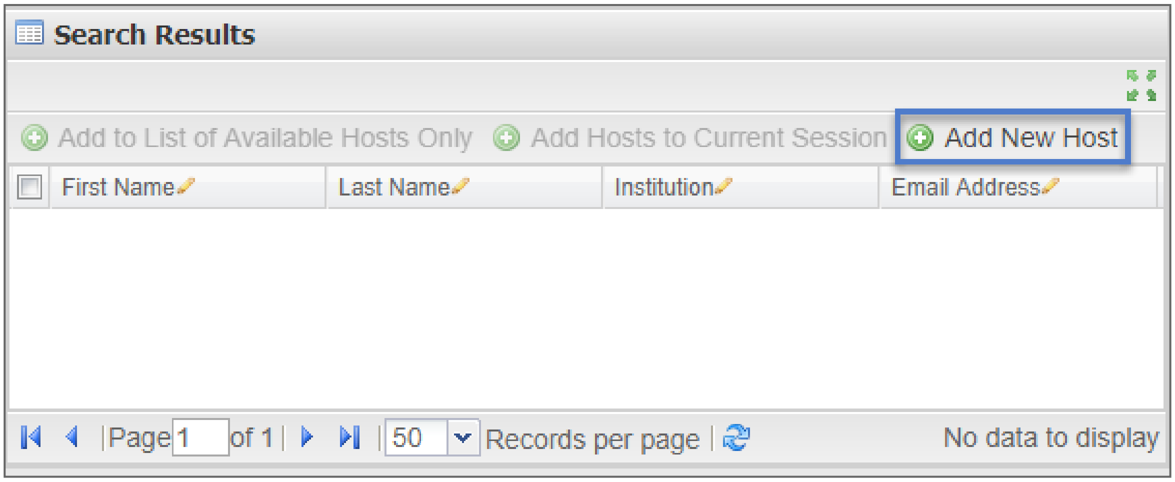


The following message will display if the person does not have an account in the system. Click **Ok**.

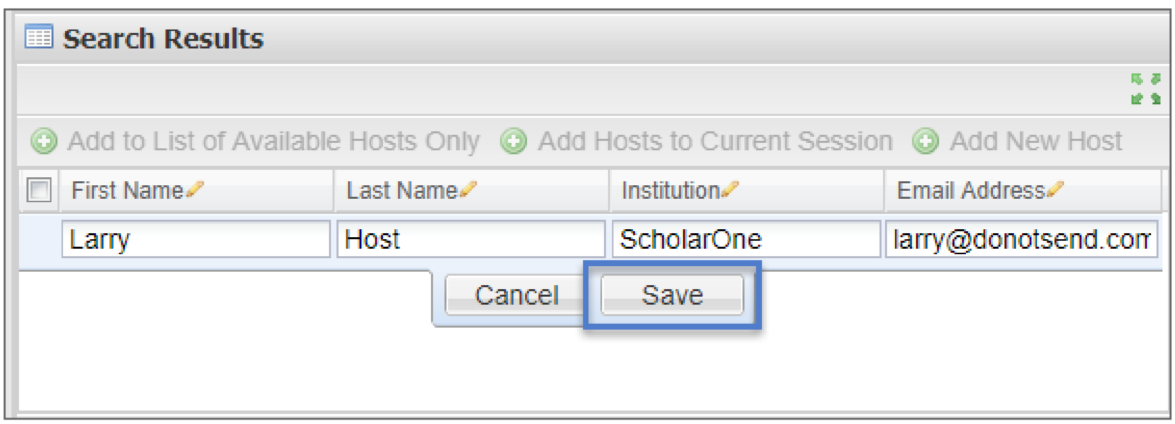


Clarivate Analytics

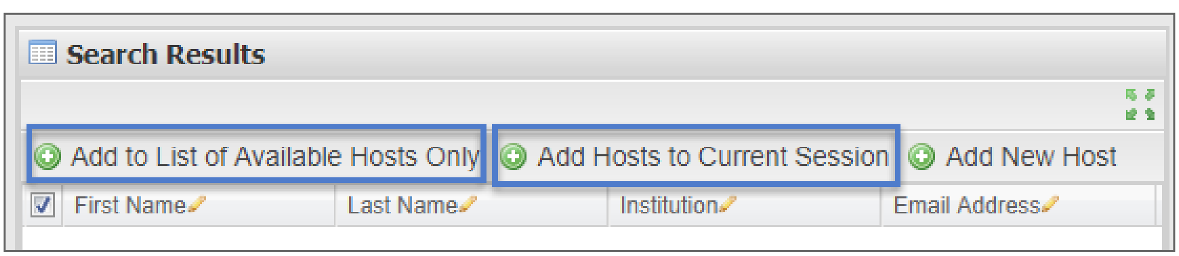
To add the host, click the **Add New Host** button.



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



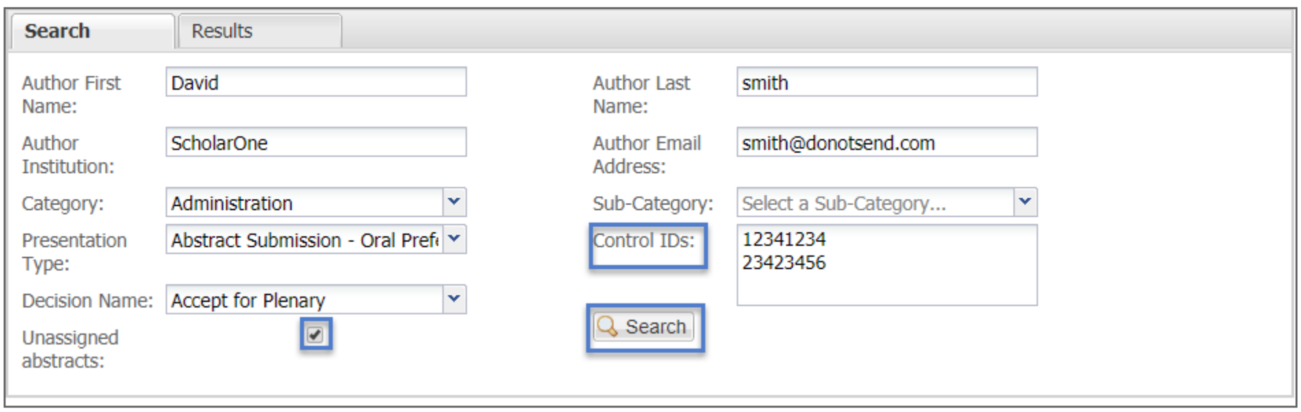
Once the host has been saved, click the checkbox to the left of the host name and select **Add to List of Available Hosts** or **Add Host to Current Session**.



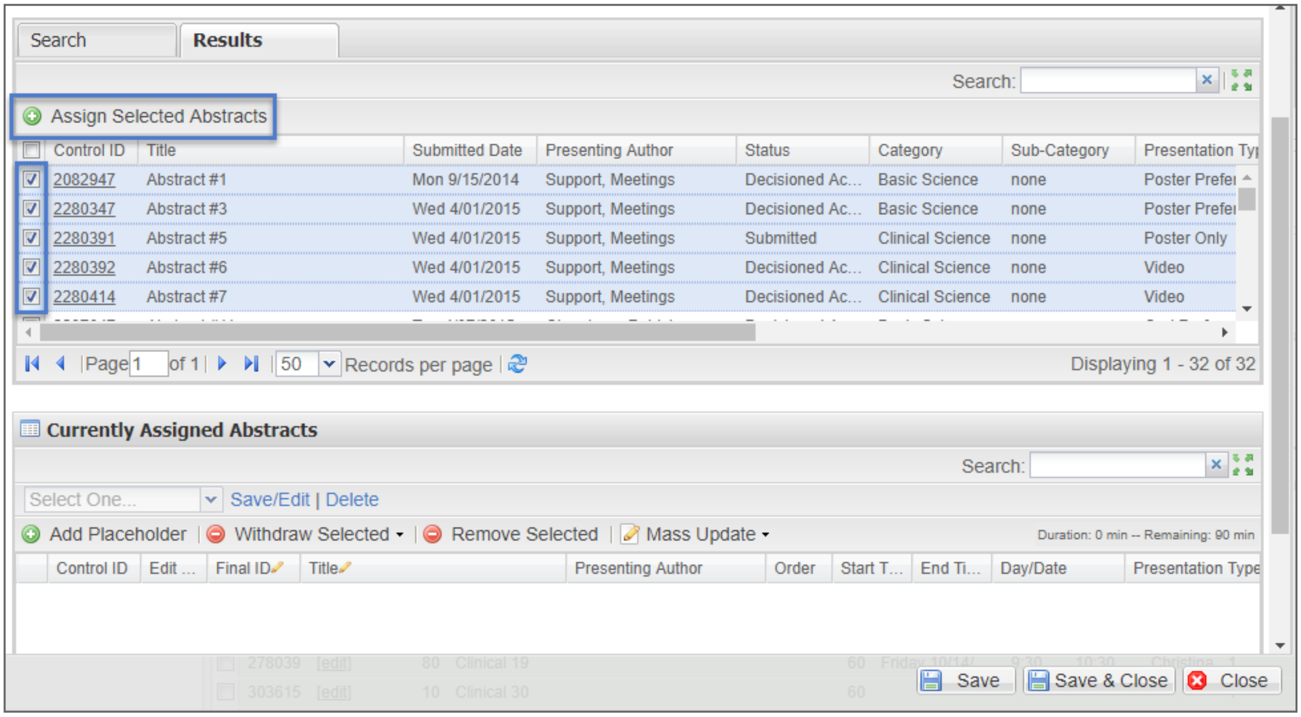
ADD ABSTRACTS TO SESSIONS

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.

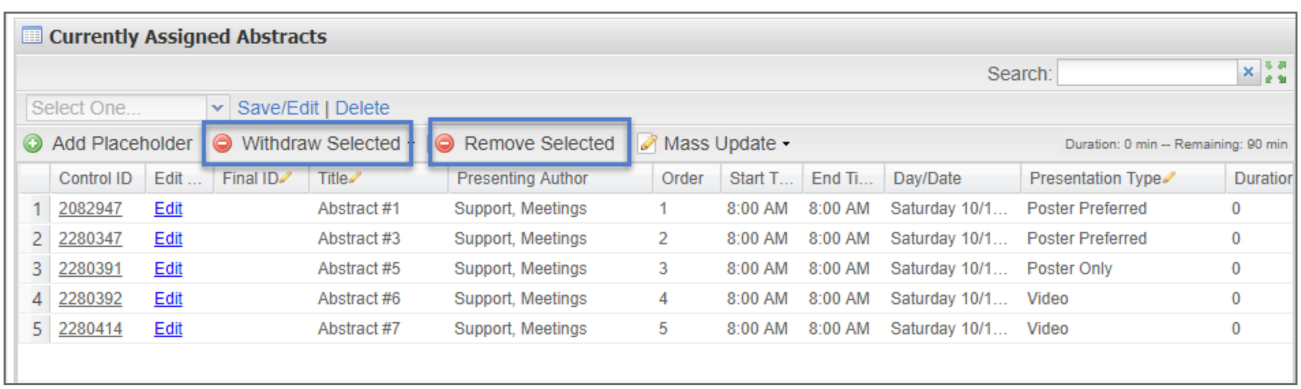


Assign the abstracts by dragging and dropping them into the **Currently Assigned Abstracts** area. If you have multiple abstracts to assign from your search results, you can also check the box next to each abstract and click **Assign Selected Abstracts**. Once the abstracts are assigned, they will appear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



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.

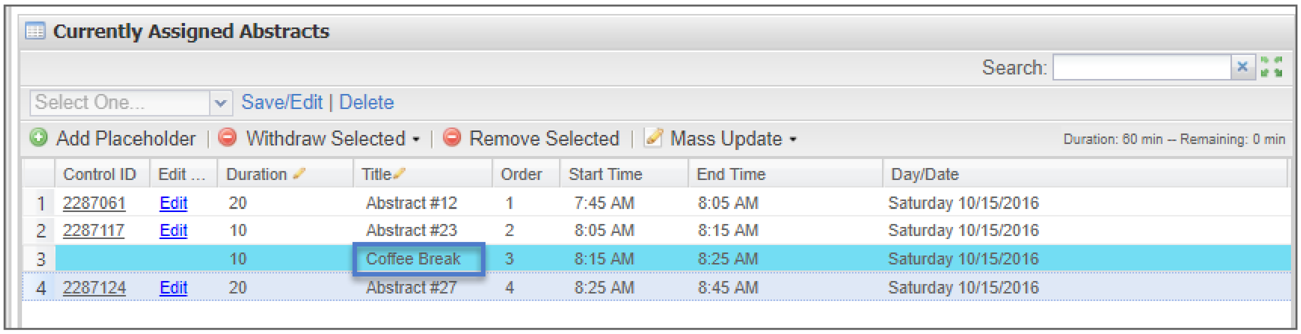
Should someone need to have their presentation withdrawn for any reason, click on the abstract and either click the **Withdraw Selected** button or right-click and select **Withdraw** from the option list. Abstracts that are withdrawn are kept in the session and may show in exports (if configured). If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



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	Edit	20	Abstract #12	1	7:45 AM	8:05 AM	Saturday 10/15/2016
2	2287117	Edit	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	Edit	20	Abstract #27	4	8:25 AM	8:45 AM	Saturday 10/15/2016

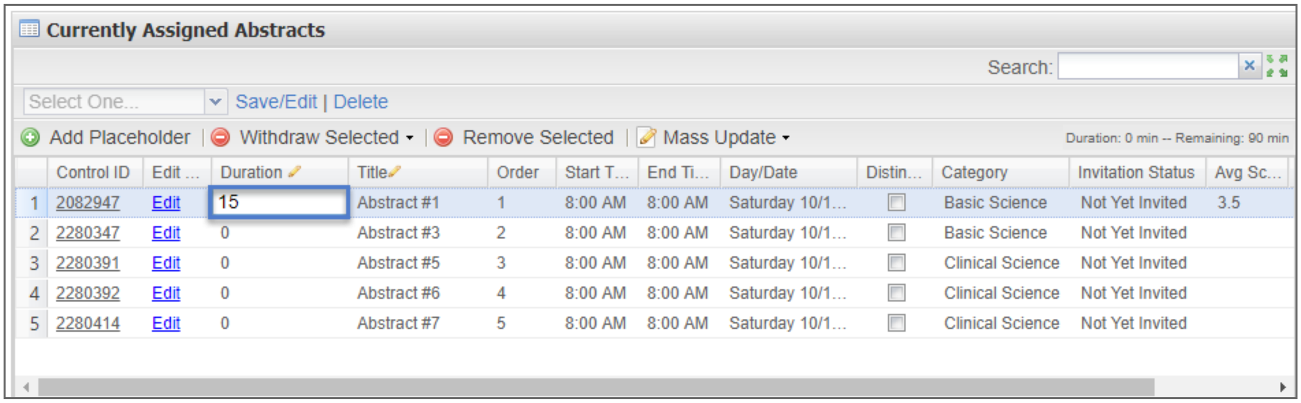
Note: Placeholders can also be used to designate times in a session where the Admin knows an invited speaker will present.

SET DURATIONS

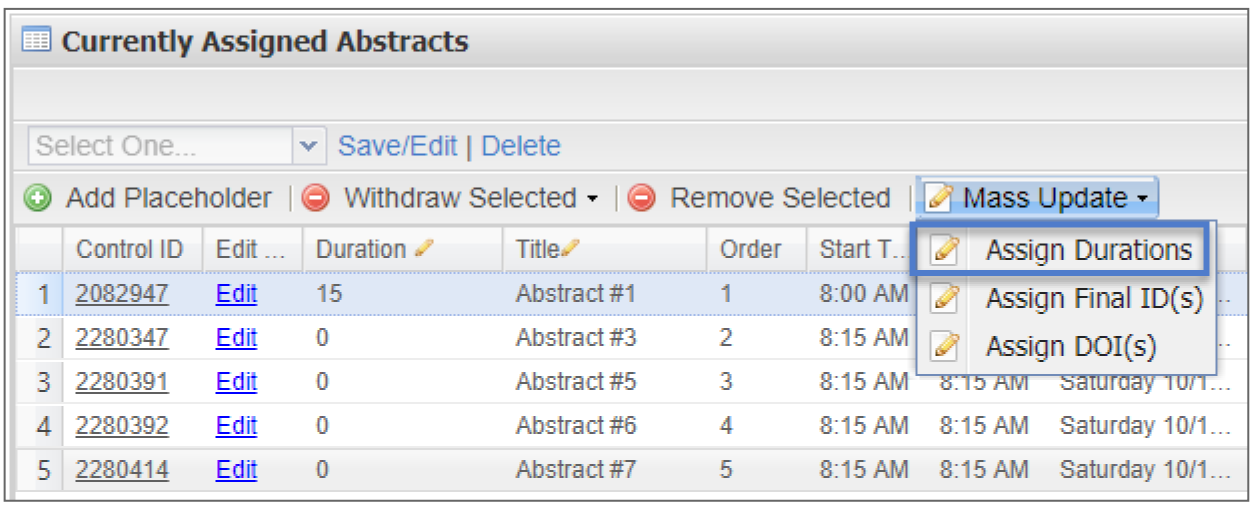
Using the Mass Update Tab

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.

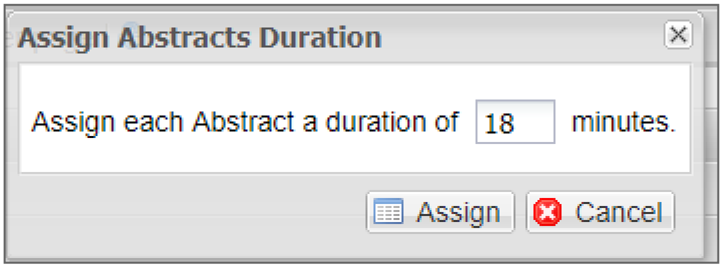
If the Session Type has a configured default duration value (available in **the Meeting Setup** > **Session Type**), it will set the duration for each abstract as it is added to the session. Otherwise, you may manually set the presentation duration in the **Duration** column by double clicking in that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



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.



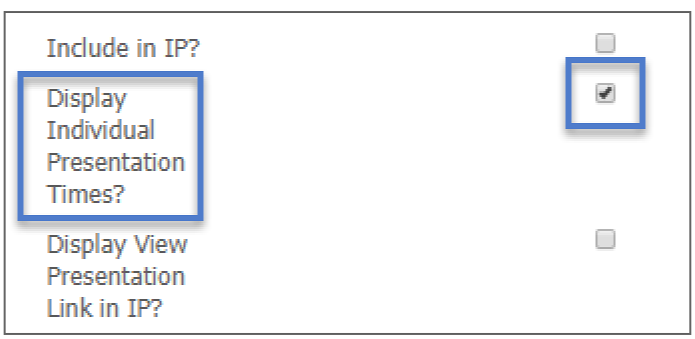
For example, if the session duration is 90 minutes and there are 9 presentations in the session, clicking the **Assign Durations** button will trigger a prompt to set all presentations to a duration of 10 minutes. However, you may overwrite the suggested value by simply typing in a new value via inline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



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.

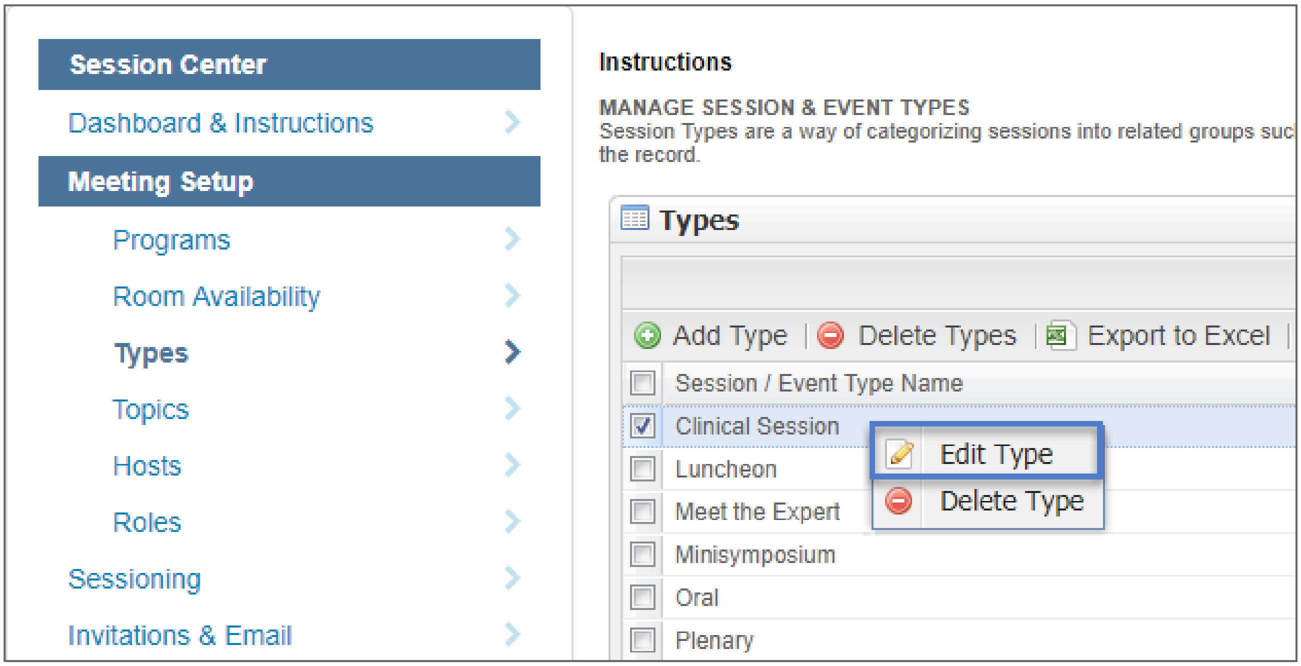
In the Information tab, you can configure a presentation to be either set at the full session duration or set by individual presentation type.



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**.



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.

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.

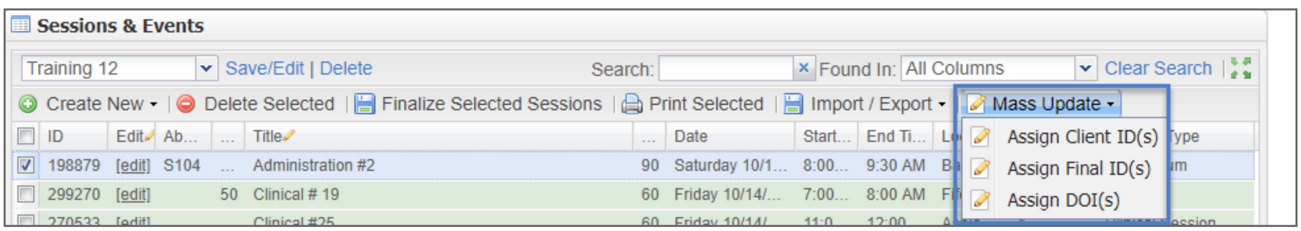
For abstracts that meet the Role/Presentation Type for a specific session type, the durations will be automatically assigned.

Adjust Duration

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

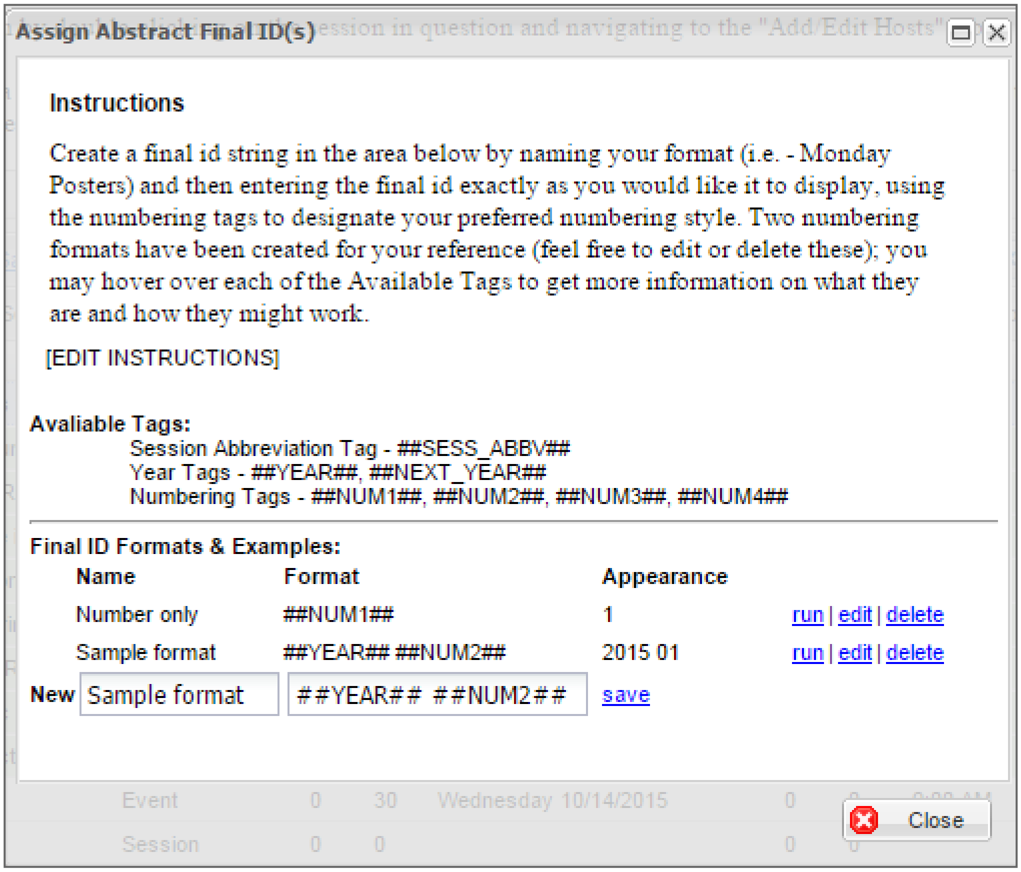
ASSIGNING IDS

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.



<u>Final IDs and DOIs</u>

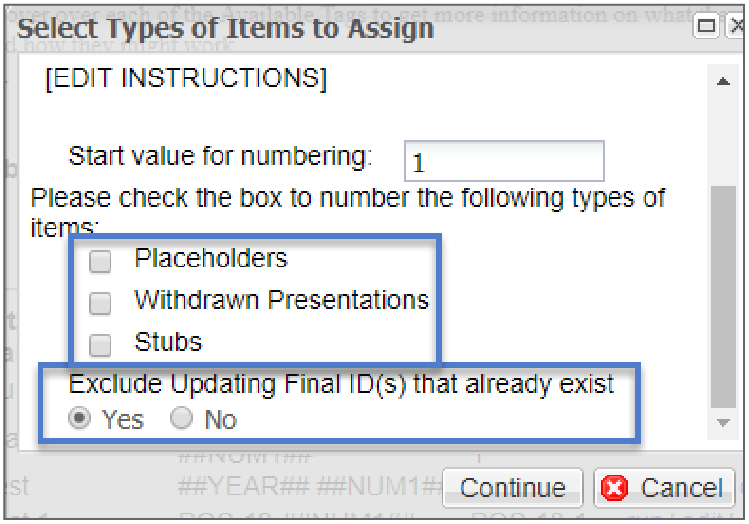
Final IDs are used to assign unique numbering formats to presentations across all presentations in a program or by specified sessions. You can also apply sequential numbering within a session. Arrange your sessions and presentations in the desired order. **Select Assign Final ID** or **Assign DOI** from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



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

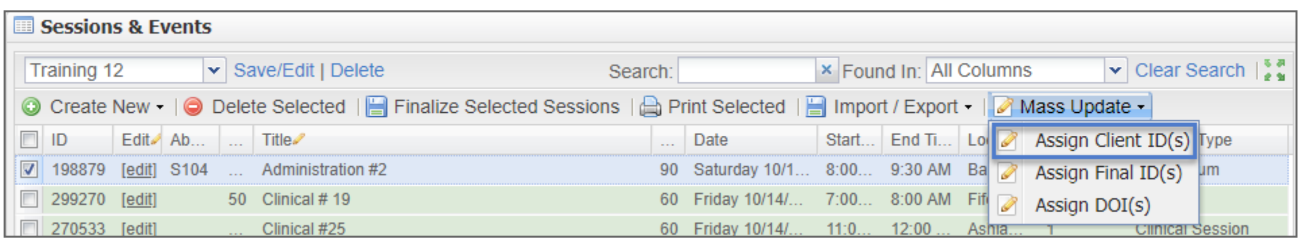
You may choose to skip numbering on abstracts that already have final IDs assigned. You can also choose to skip numbering on placeholders, withdrawn abstracts, and stubs.

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.



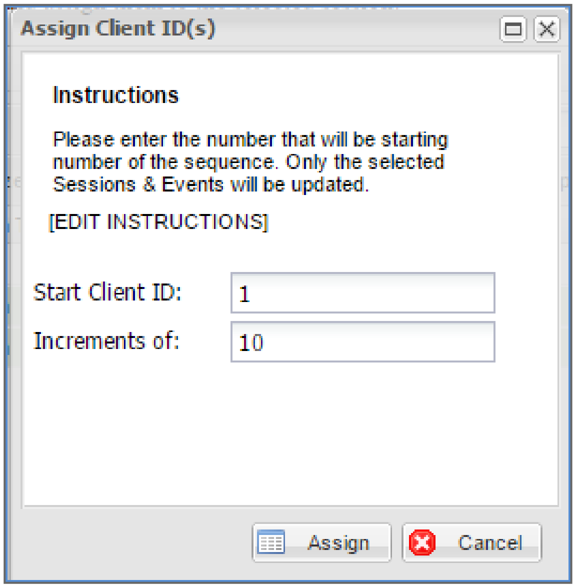
Client Session IDs

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.

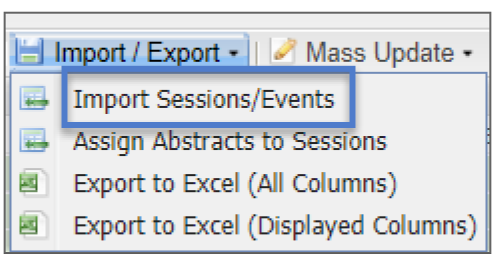


Note: You can do all three steps of building a session in one process. Move from task to task by clicking on the tabs of the session (Information, Add/Edit Hosts, Manage Abstracts).

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**.

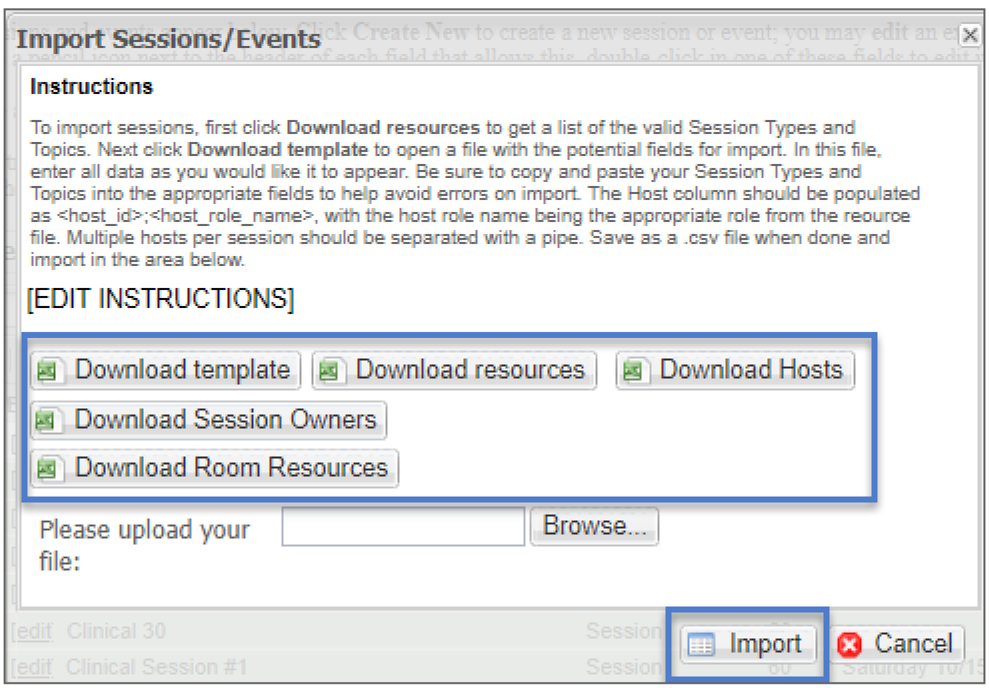


Download the template and resources files. You will use the resources to properly designate the data in the fields you will include in your import. The template includes all possible sessioning and scheduling fields. It is not necessary to populate all fields. Session title, type and duration are the 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.

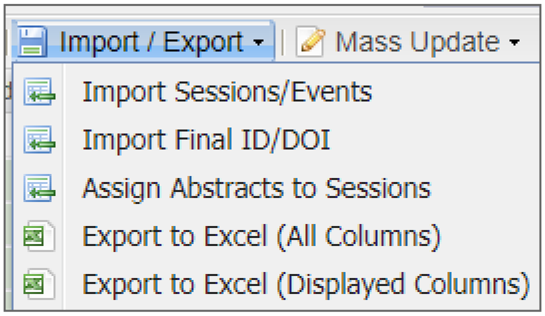
Once you have your template completed, save it as a .csv file and Import it.



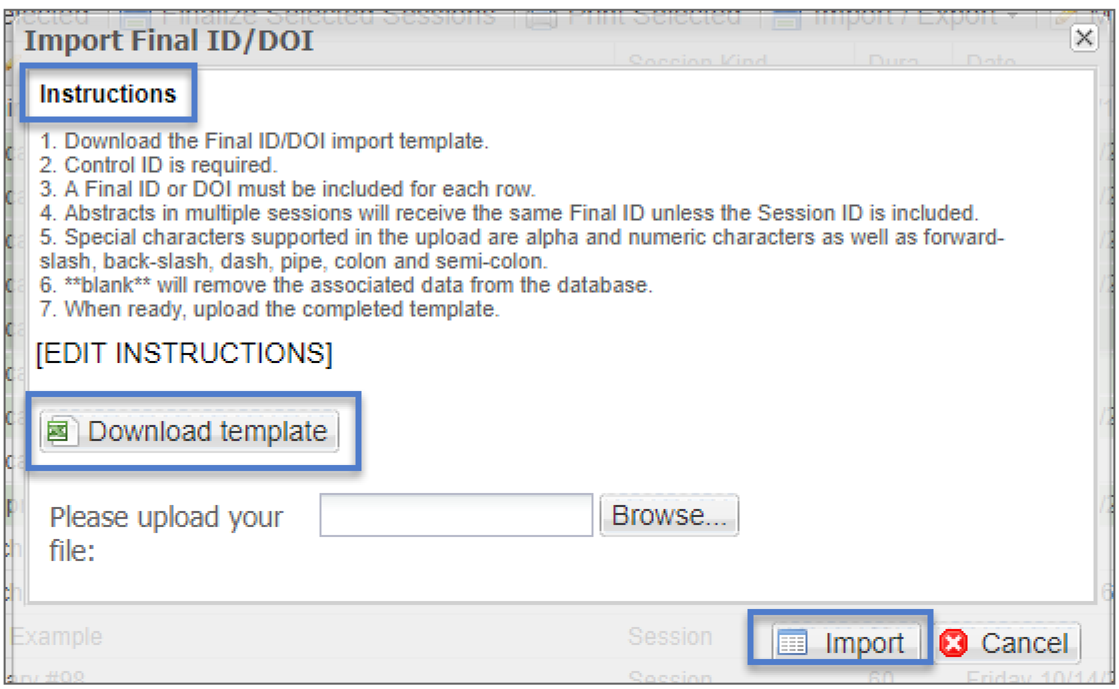
Note: You can do more than one import.

Import Final ID/DOI

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



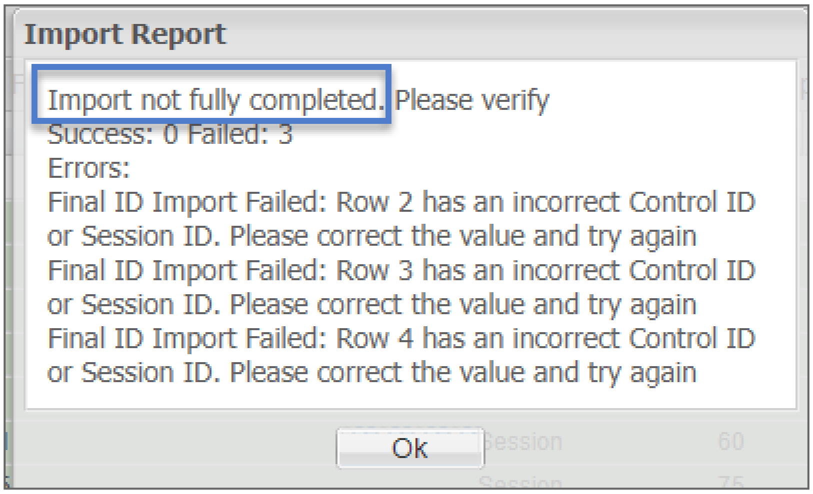
In the pop-up window, download the import template. Instructions are available above the template download. Complete the template, save the file as a .csv file and click **Upload**.



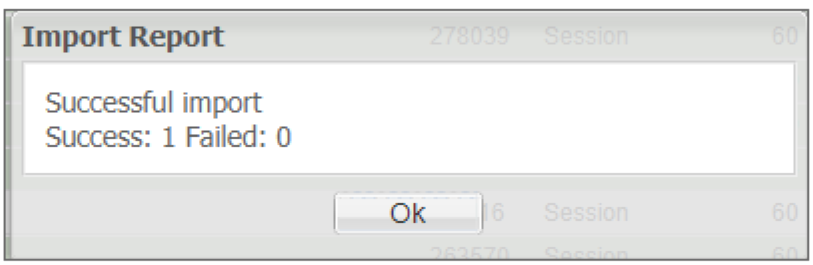
Note: Either a Final ID or DOI is required for a successful import.

Clarivate Analytics

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.



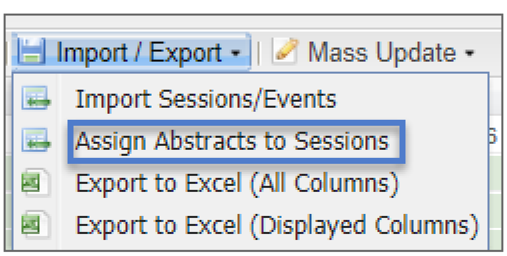
If the import is successful, a confirmation message will display.



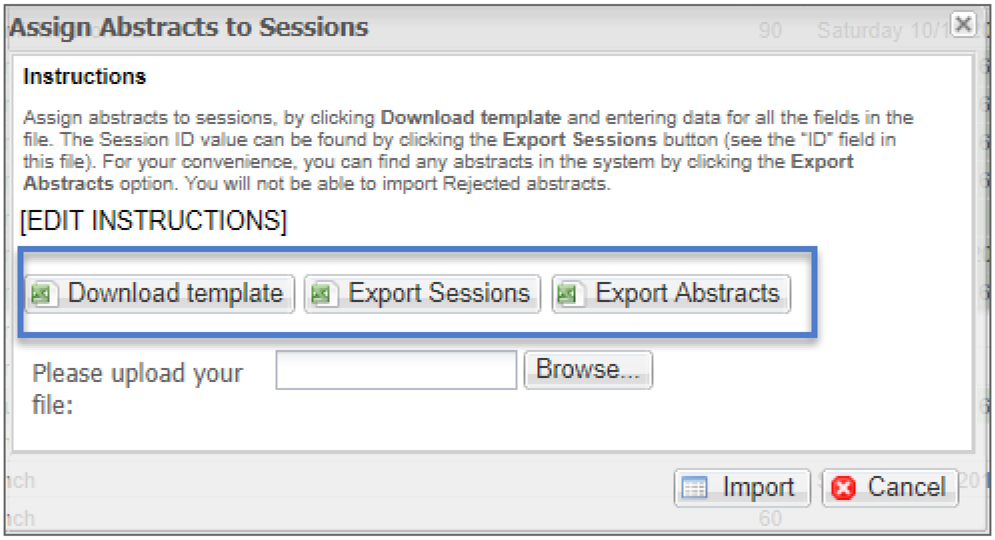
Import Abstracts

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

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



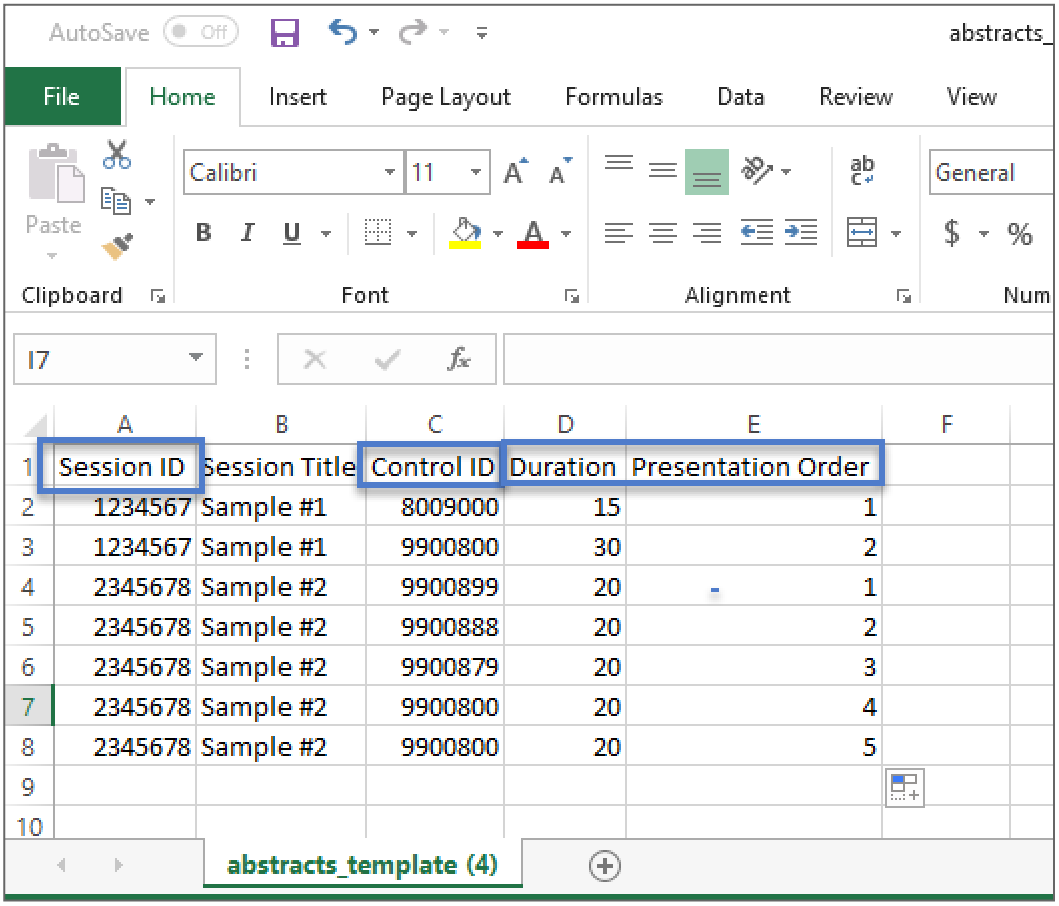
Download the template and the two export files.



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:



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

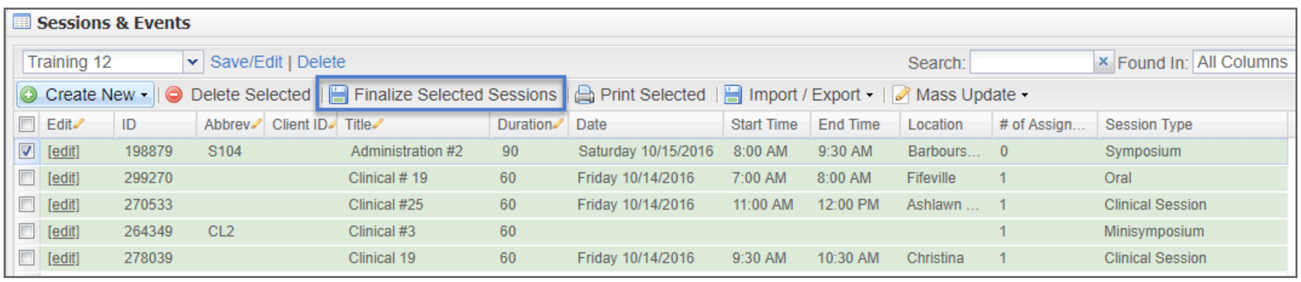
Do not change column headers or resources. Imports with altered headers and resources will fail.

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.



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

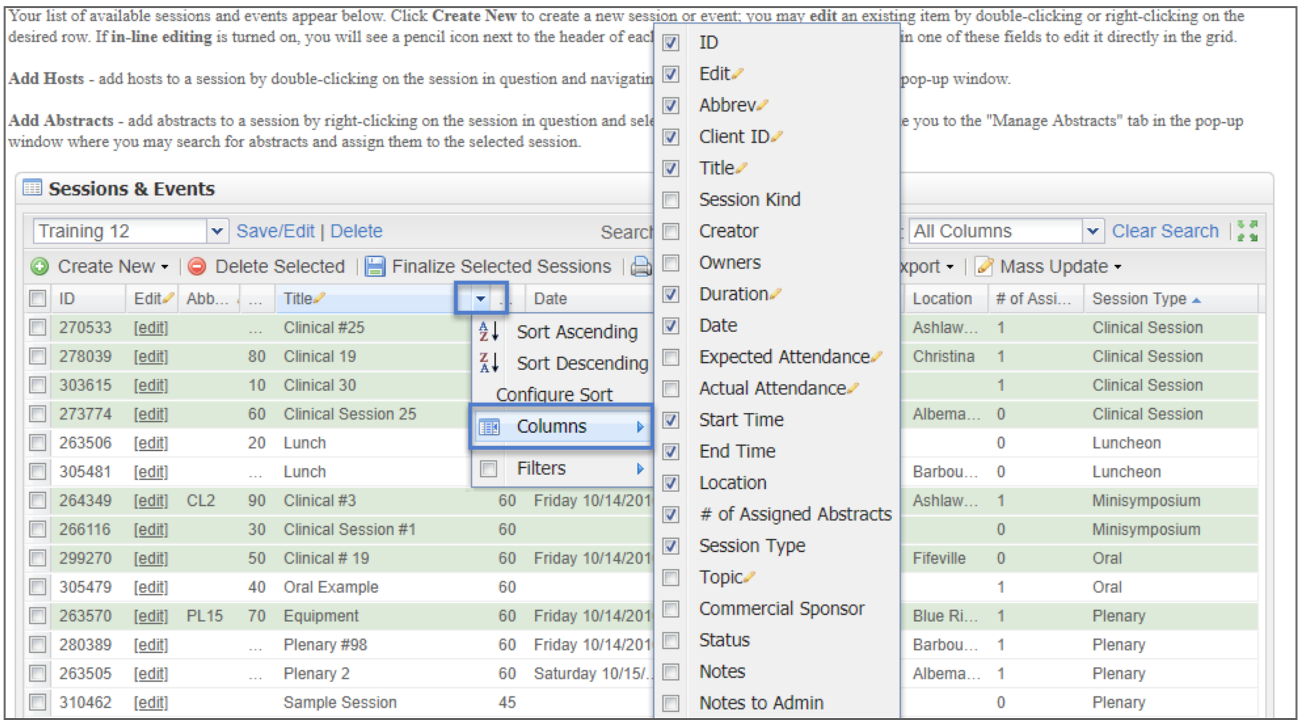
CUSTOMIZE THE SESSION AND EVENTS GRID

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.

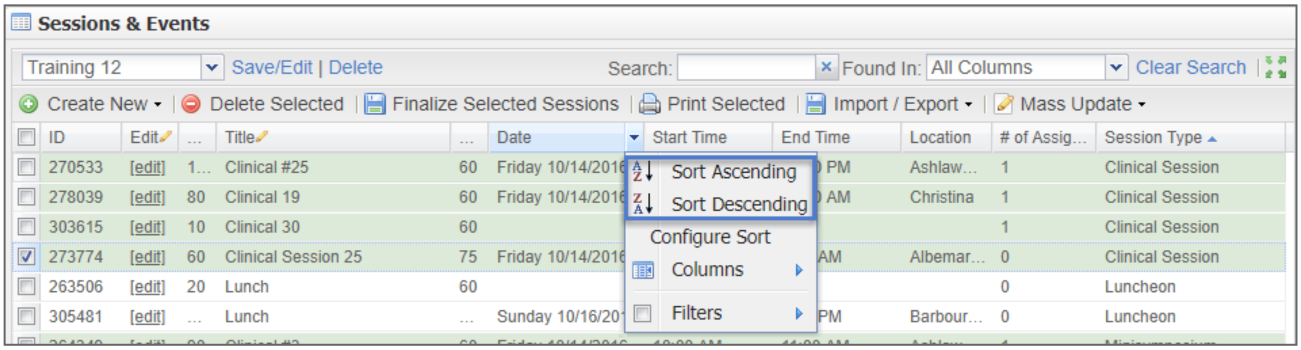


REARRANGE COLUMNS

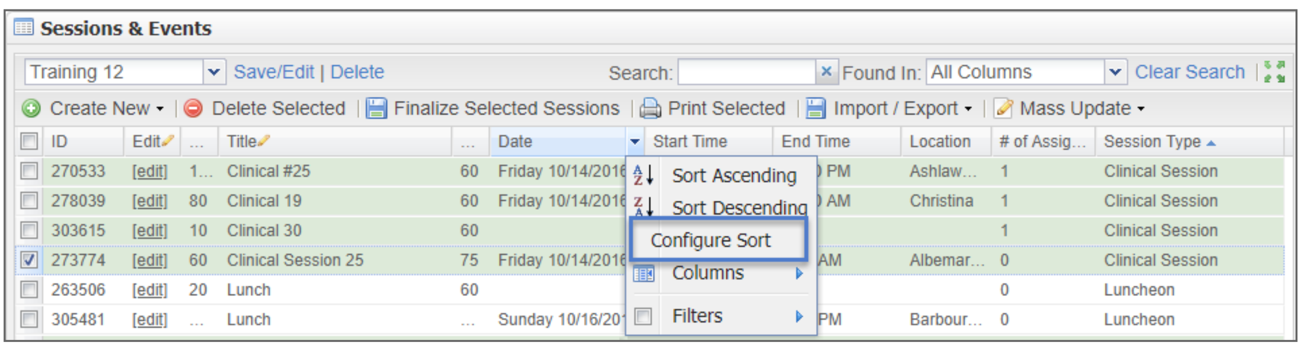
Drag and Drop functionality also allows for rearranging of columns. Simply left click on a column header and with the left mouse button pressed down, drag the column to the position in the Grid you wish for it to appear. Release the left mouse button. You will see two blue arrows indicating the new position.

SORT GRID DATA

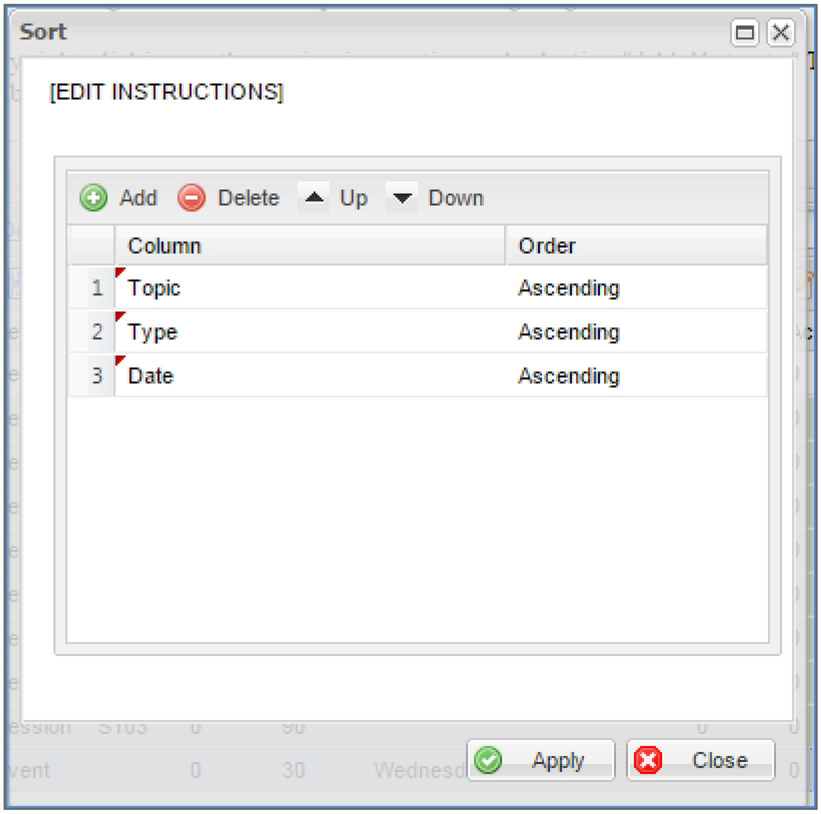
Data sort order can be modified for a column by clicking once on the column header. A drop-down menu will display both Ascending and Descending sorts. Click on the preferred sort to activate. If you would like to switch the sort order from Ascending and Descending or vice versa, simply repeat this process.



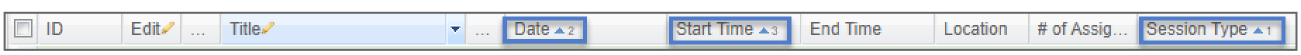
Data can also be sorted on multiple criteria. Select **Configure Sort** in the column header drop-down.



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

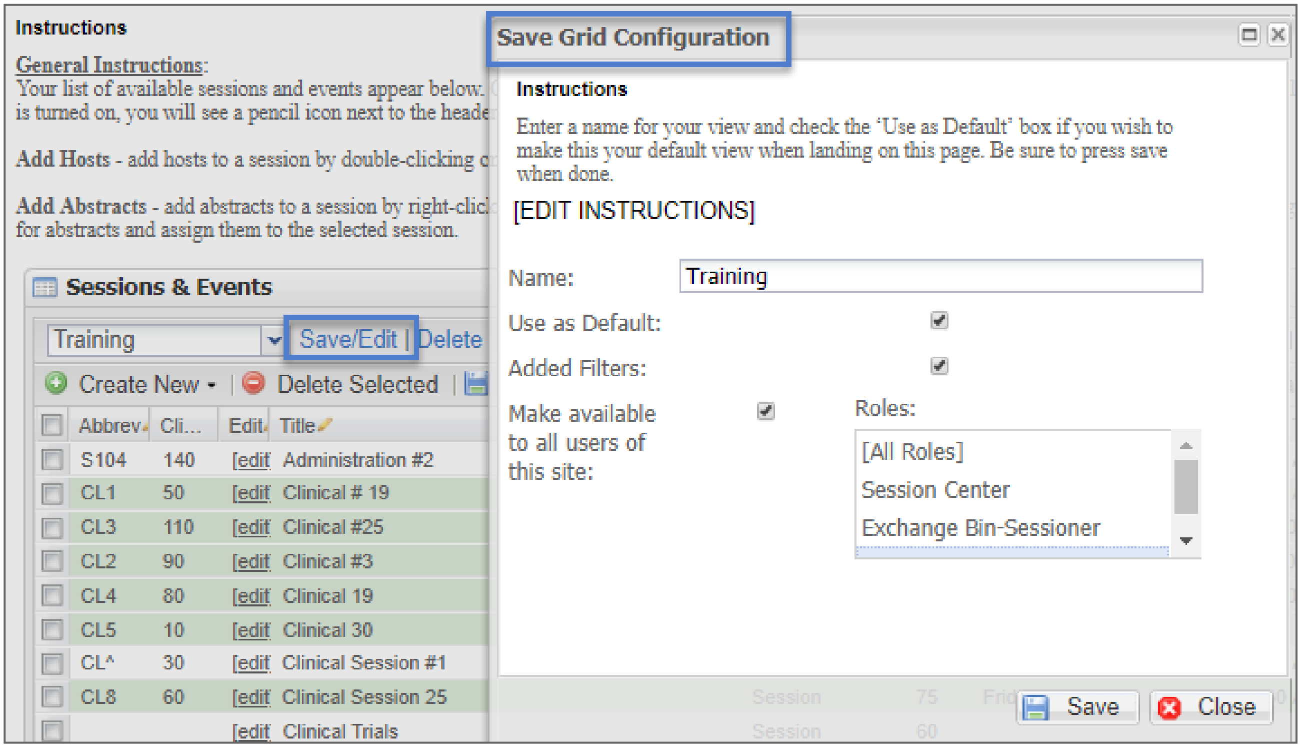


Once the sort is complete, numbering next to the column headers will indicate the appropriate sort that was applied.



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.

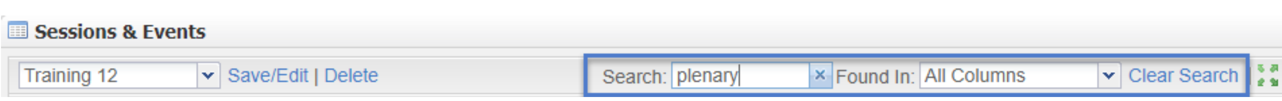


In the grid configuration, give the view a descriptive name. Mark the view as Default only if you want the view to appear as the default view each time. If your view has used filters, check the Added Filters box. Finally mark the roles the view should be available to.

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

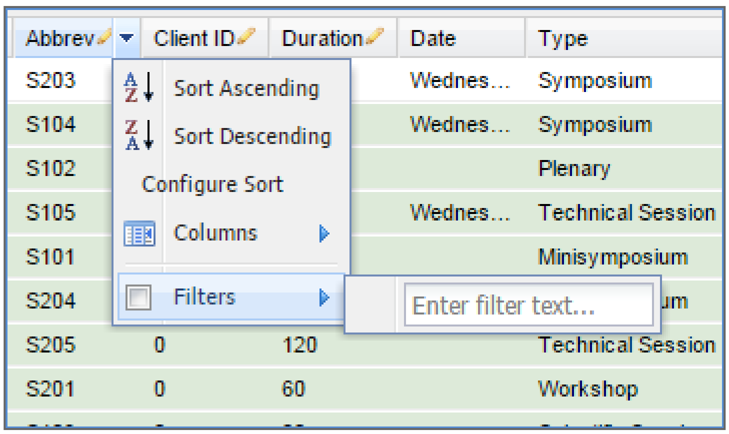
SEARCH GRID DATA

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.



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.

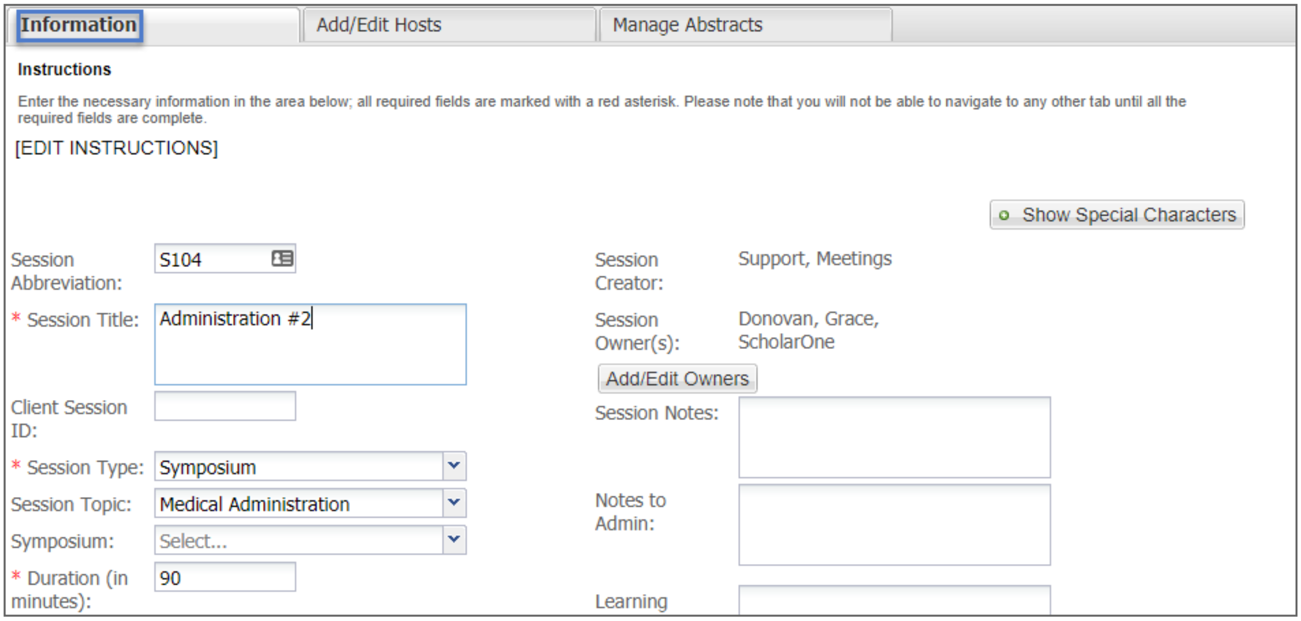


EDIT SESSION OR EVENT INFORMATION

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

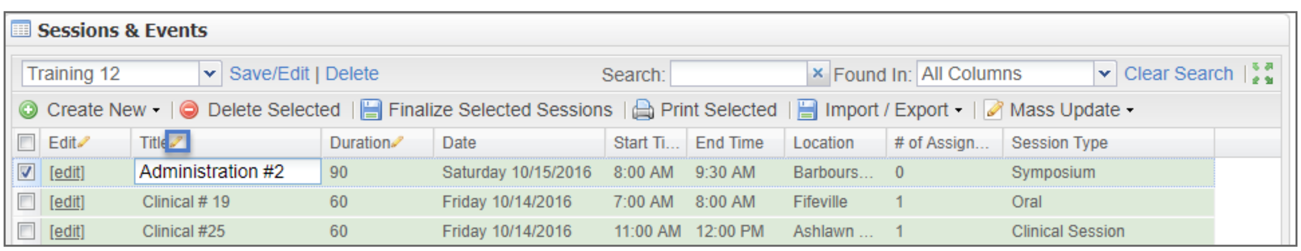
To edit type items (Session Types, Session Topics, or even the session or event data) and to access the **Information**, **Add/Edit Hosts** and **Manage Abstracts** tabs, double click on the checkmark field. The **Information** tab opens.



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.

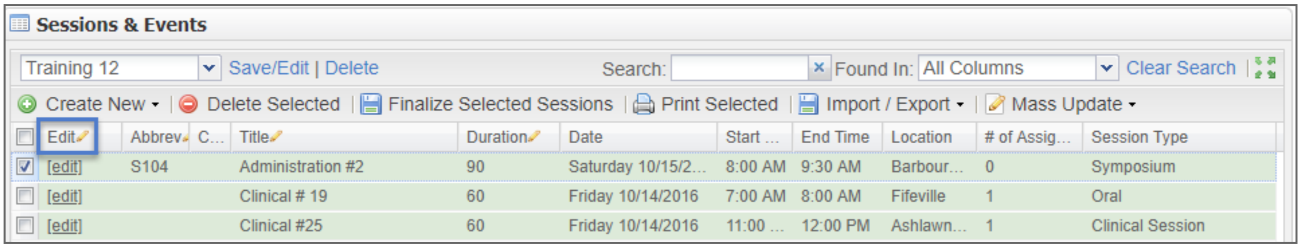
Columns allowing in-line editing are indicated with a pencil icon in the column header.



Clarivate Analytics

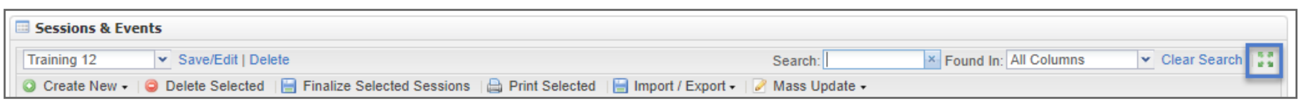
Edit Link

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.

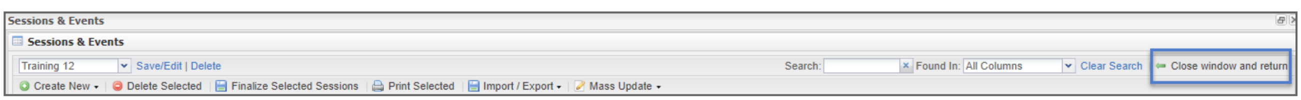


VIEW FULL SCREEN

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

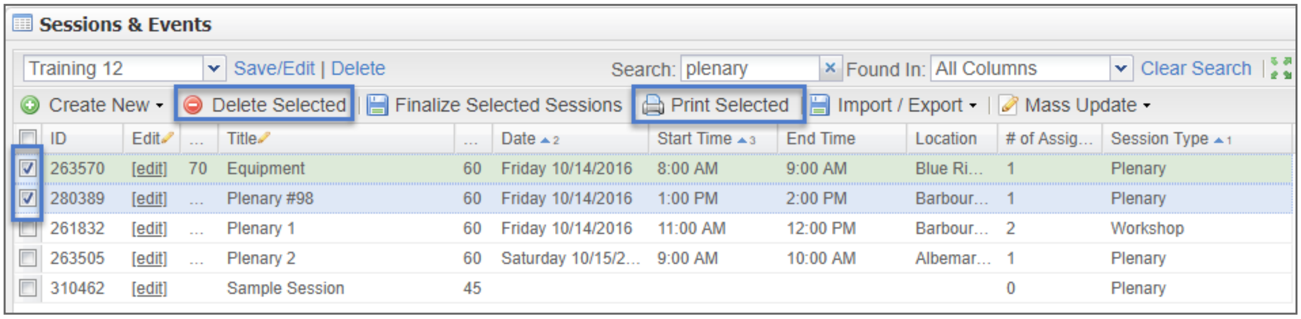


To return to the standard view, select **Close Window and Return**.



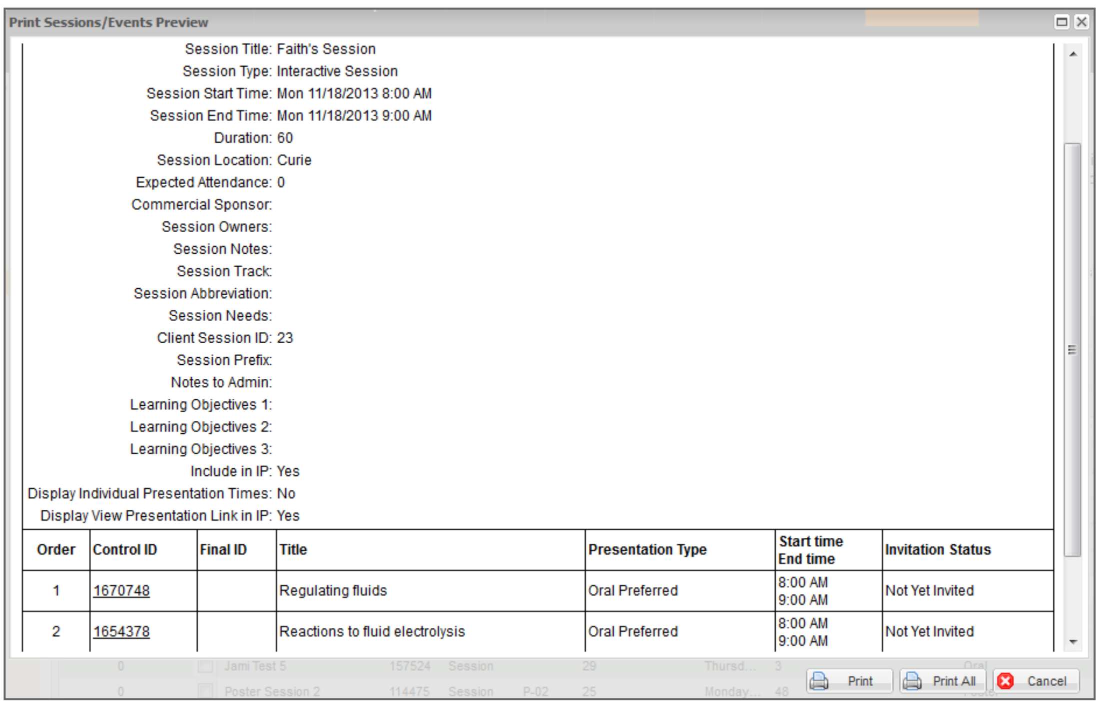
DELETE/PRINT GRID DATA

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.



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.

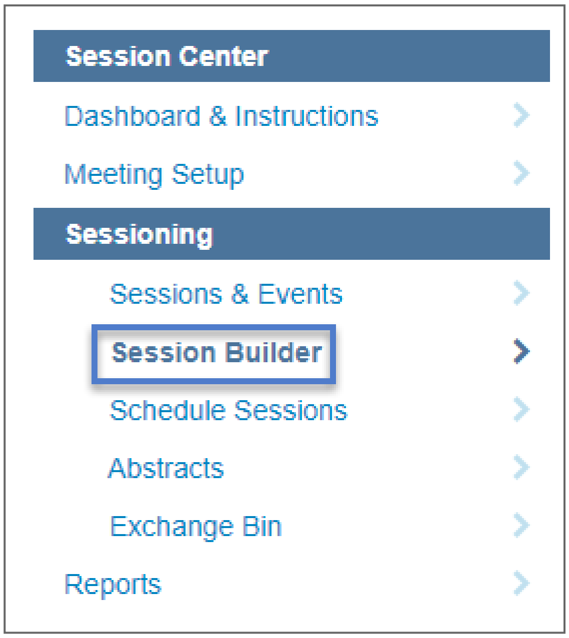


The Session Proof displayed above is a configurable item. Navigate to **Admin>Client Configuration>Session Proof Configuration** to modify the contents of the proof.

SESSION BUILDER

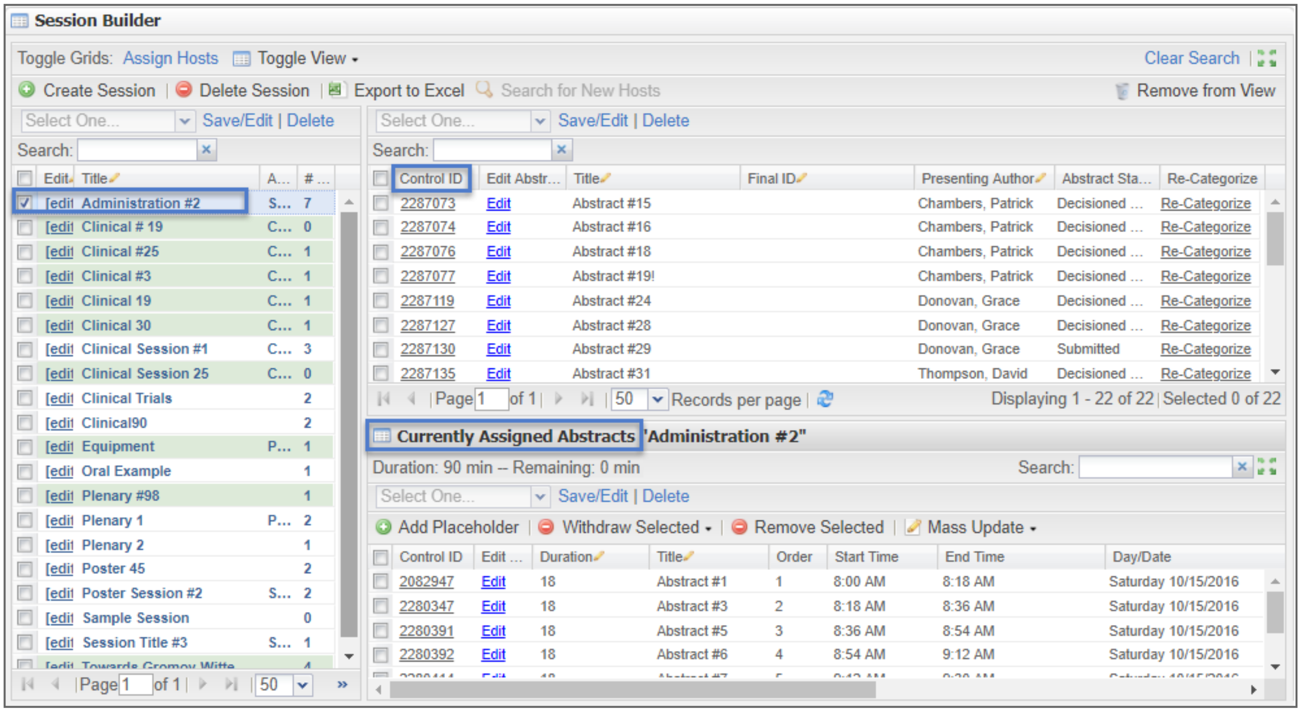
As an added feature, the **Session Builder** can be used to create sessions, add abstracts to sessions, and add hosts. There are two views to work with: **Assign Abstracts** and **Assign Hosts**.

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

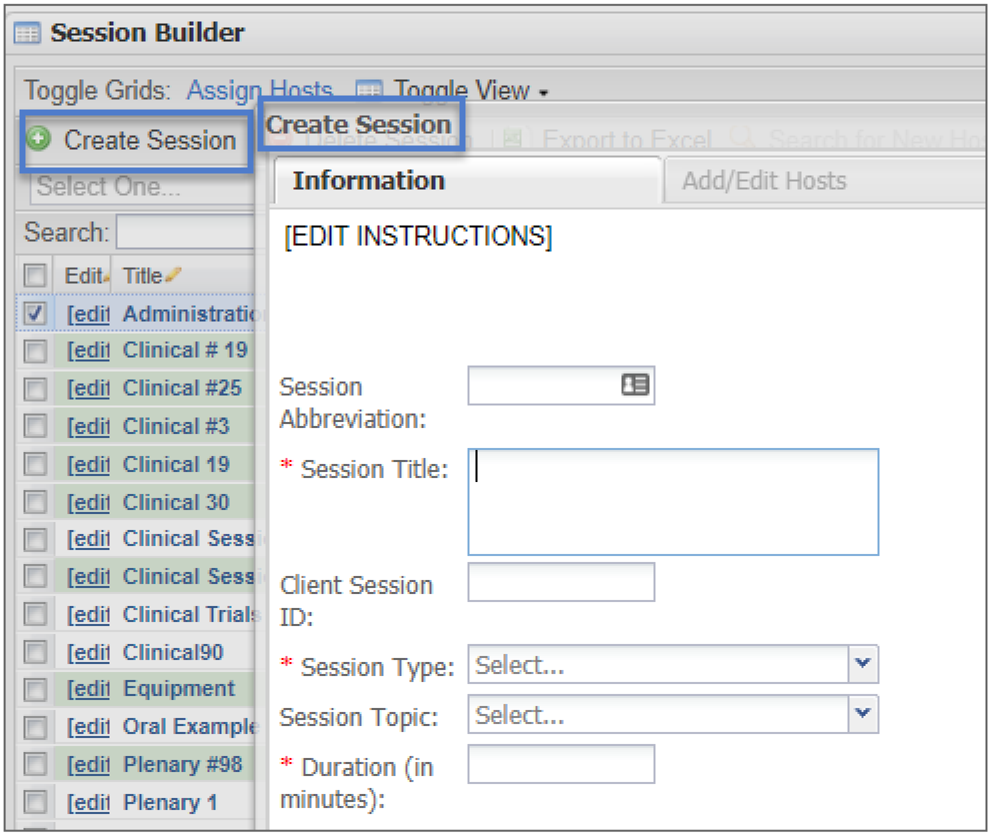


ASSIGN ABSTRACTS TOGGLE VIEW

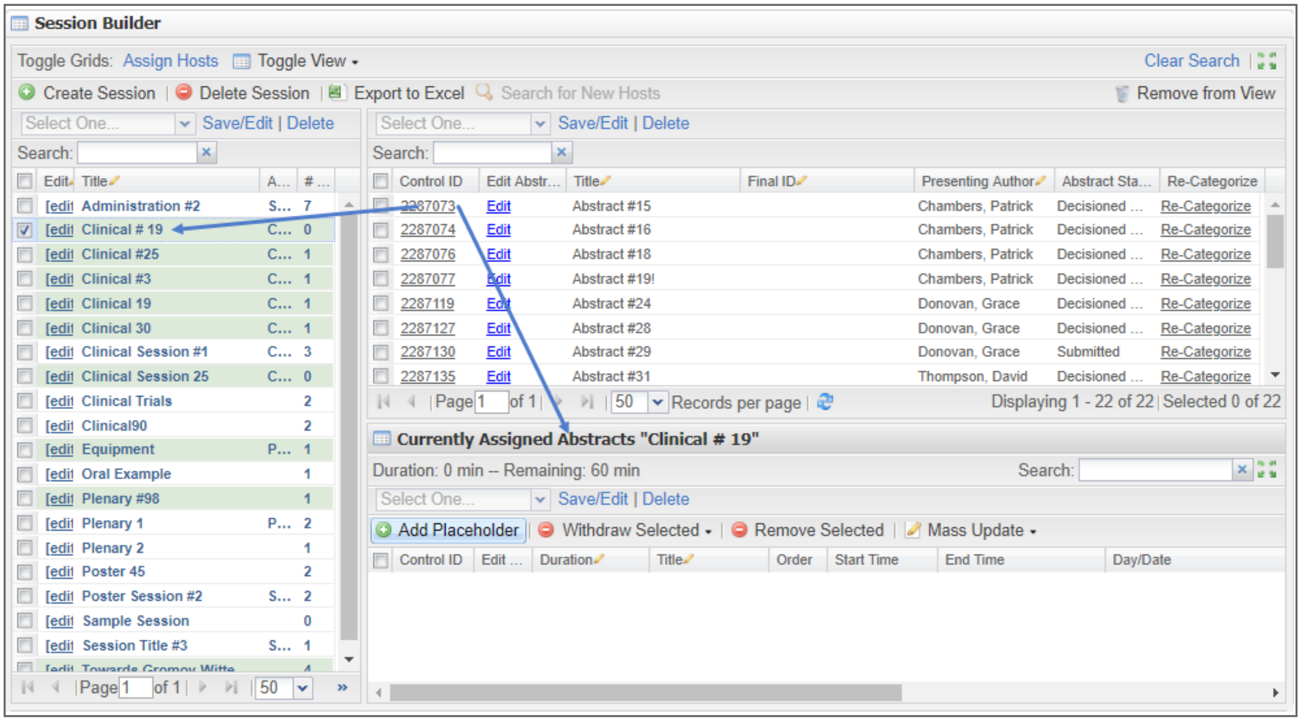
The **Assign Abstracts Toggle View** has three sections: Sessions on the left, Submitted Abstracts on the top right and Currently Assigned Abstracts on the bottom right.



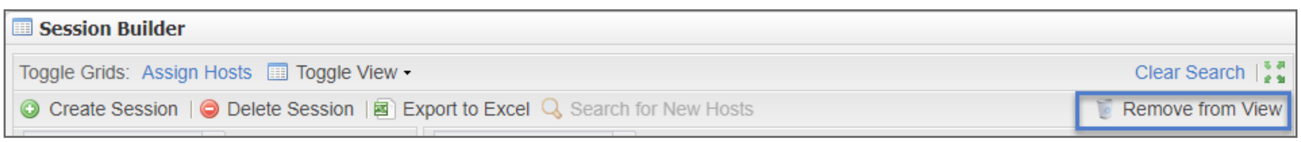
To begin building your session, click **Create Session** at the top left of the Grid. Enter the required data and click **Save**. Your session will appear in the session listing on the left.



The 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.

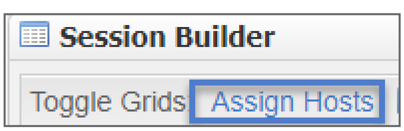


To hide abstracts in the Abstracts section of the Grid, check the abstracts you wish to hide and select **Remove from View** in the top right corner. To make all abstracts visible again, click **Return to All Abstracts**.

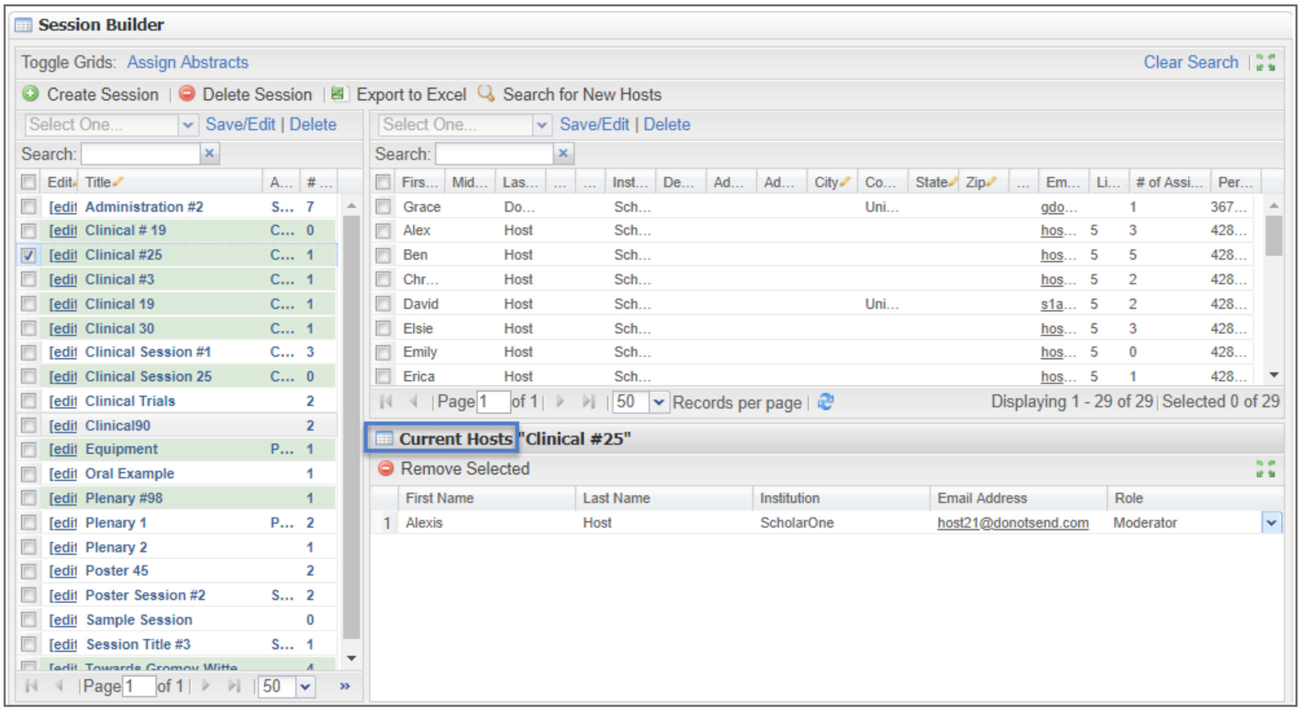


ASSIGN HOSTS TOGGLE VIEW

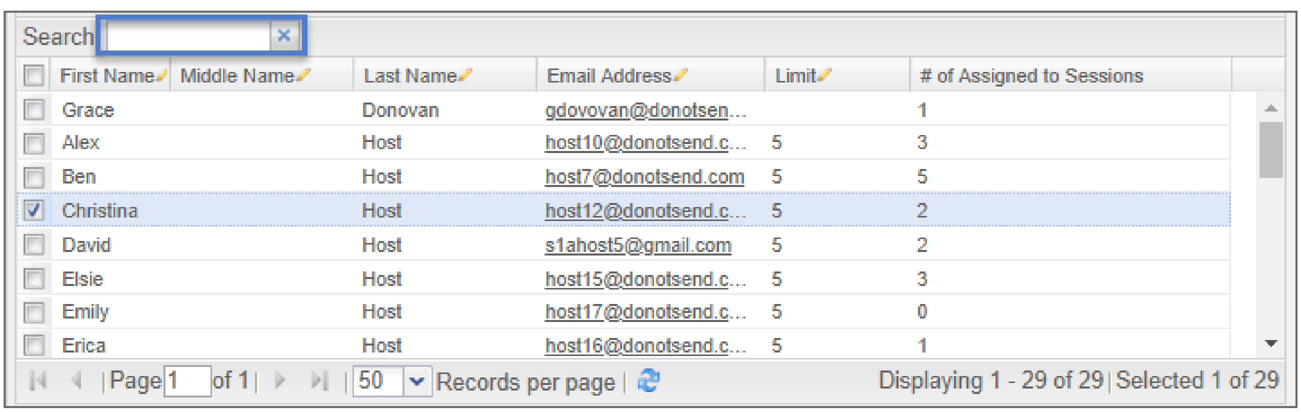
After abstracts have been assigned to the Session, the next step is to add hosts. Select **Toggle Grids: Assign Hosts**.



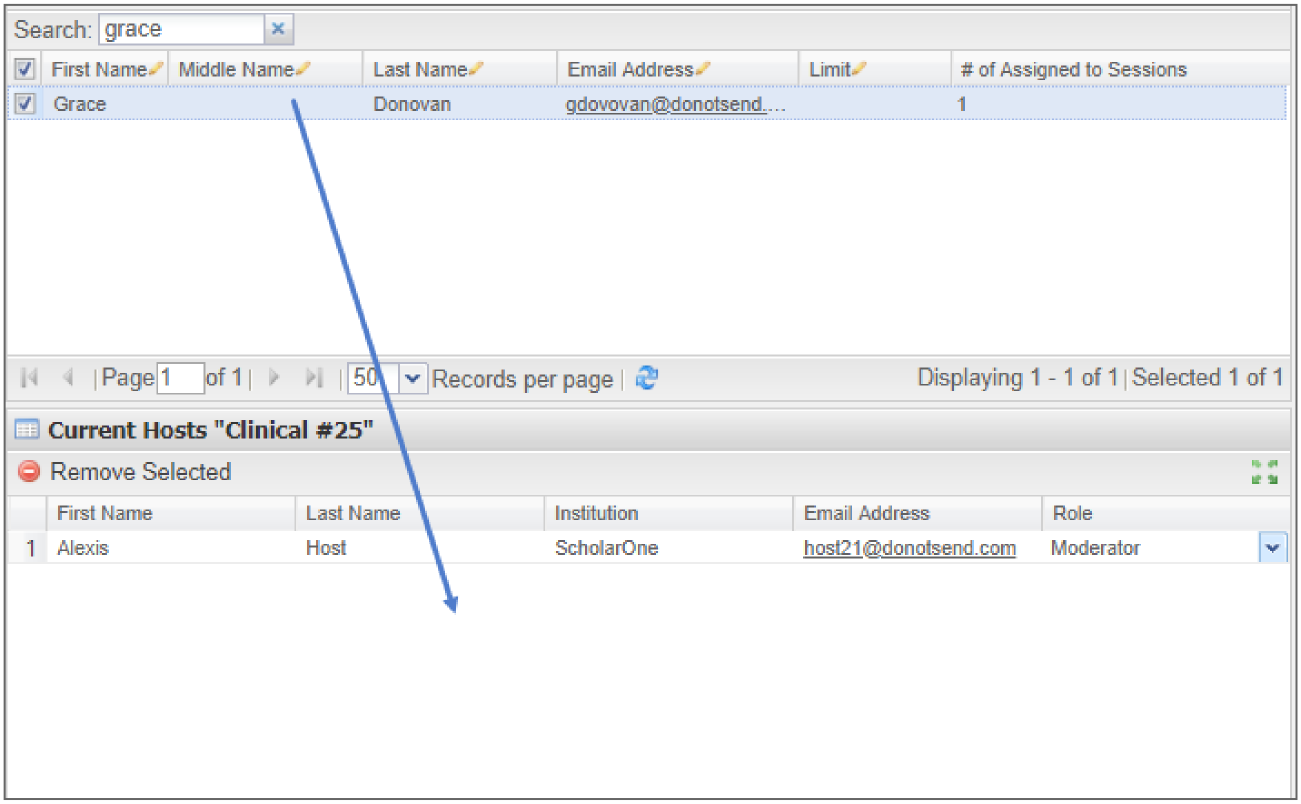
The grid has three main sections: Sessions on the left, Available Hosts on the top right, and Current Hosts on the bottom right.



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.



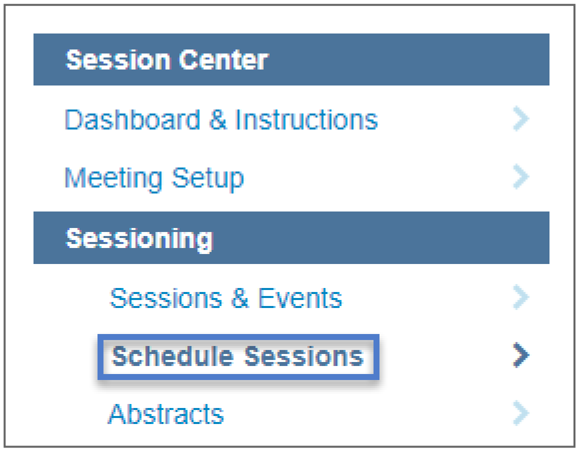
After you have added the abstracts and hosts, return to the **Session & Events** grid to view the complete session.

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**.**

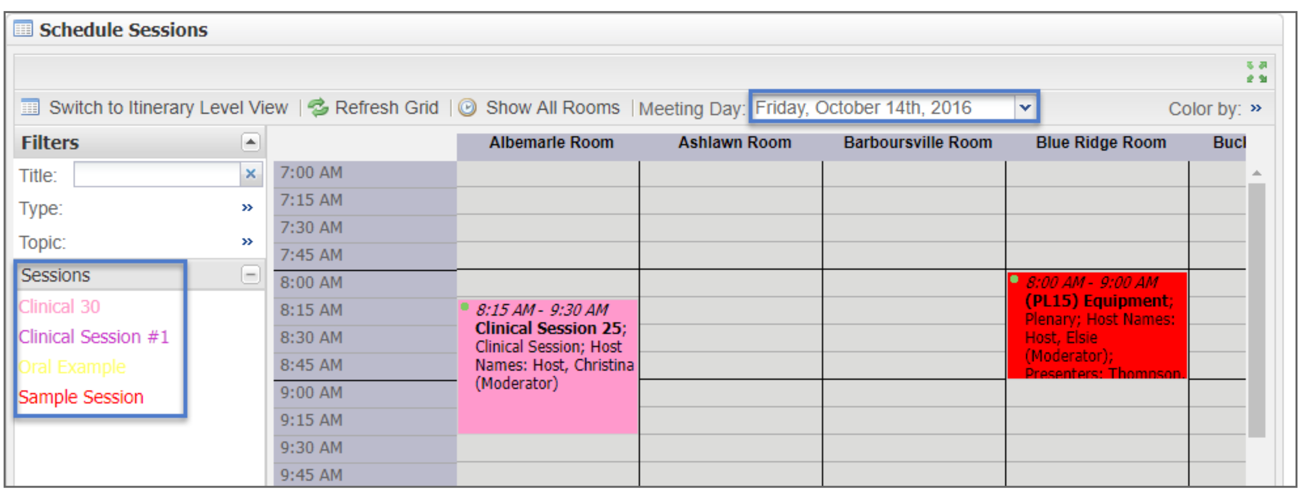
GRID SCHEDULER

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.



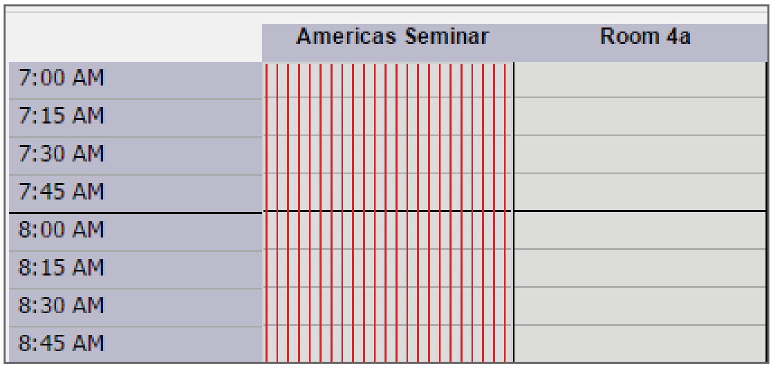
Select the **Meeting Day** from the top drop-down menu and then drag **Sessions** to and from the pre-loaded sessions list into any of the available rooms. This tool allows users to drag sessions from room to room or time to time without needing to un-schedule them.

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



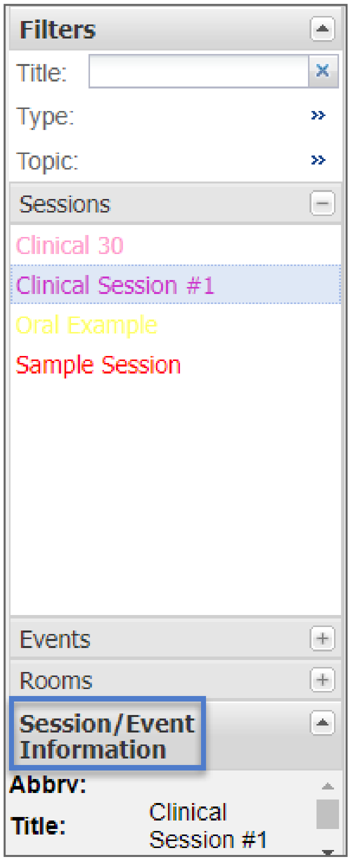
Follow the same process for Events using the Event listing.

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



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.

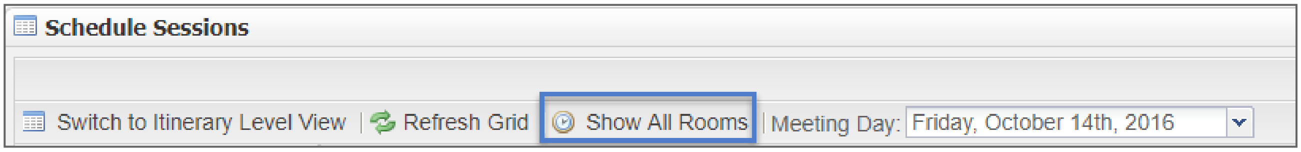
In addition, a Sessioner may filter down the list of available sessions by typing text into the **Filter** area and pressing **Enter**. Clicking on a session will reveal details about that session or event in the **Session/Event Information** field.



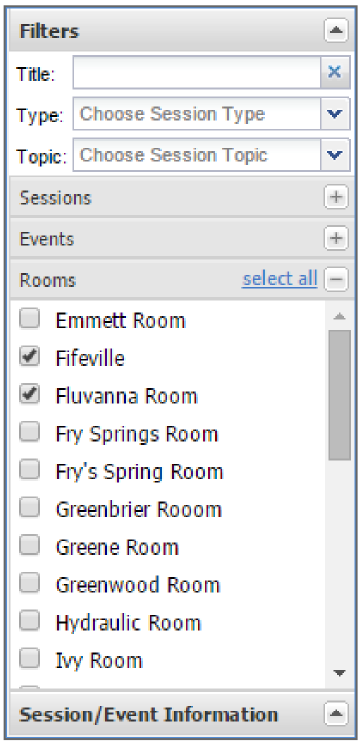
Tip: Assignments that run over the available time, conflict with previously assigned sessions, or result in Presenter conflicts will generate an error message, and the assignment will not be made. Assignment of concurrent sessions to a Room is allowed if the **Multiple Sessions** option is checked in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

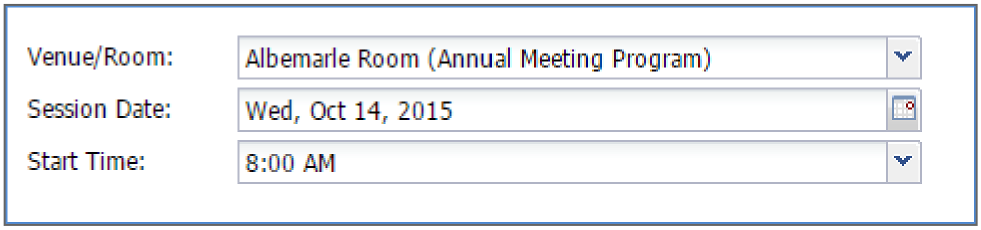


You may also change the number of rooms displayed by dragging and dropping the rooms to the room listing in the left portion of the grid.



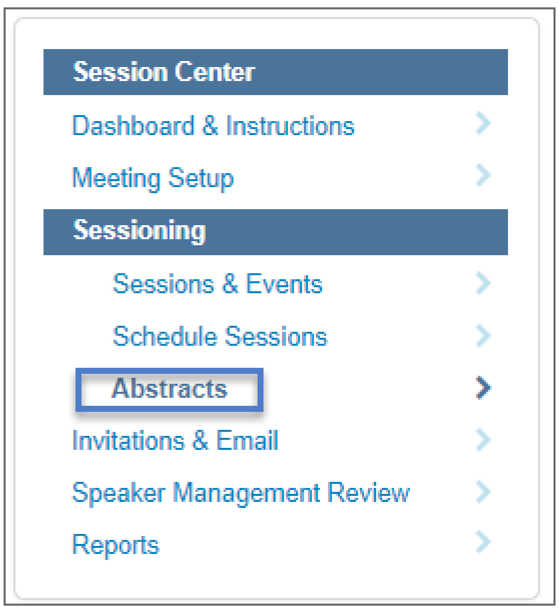
THE SESSION INFORMATION TAB

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.

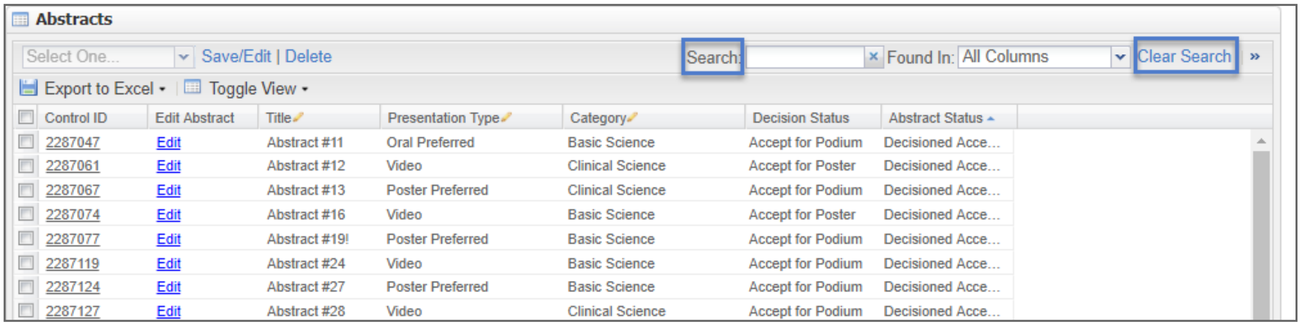


ABSTRACTS GRID

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.



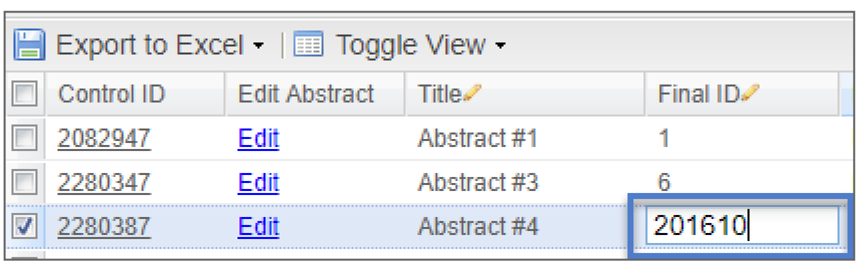
The **Abstracts** grid can be customized in the same way as the **Session & Events** grid. Columns are sortable and configurable. There is also a **Search** option**.**



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.

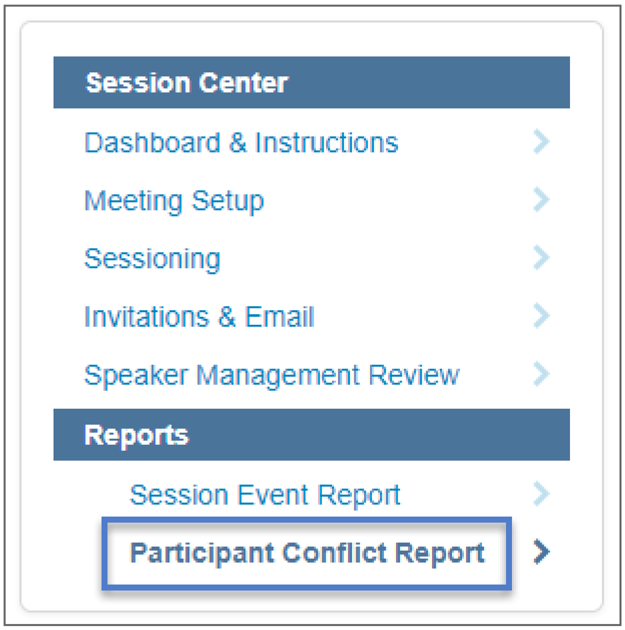
If you have the Final ID column configured, you can edit a Final ID directly from the grid. Use in-line editing to access the field and then edit the ID.



REPORTS

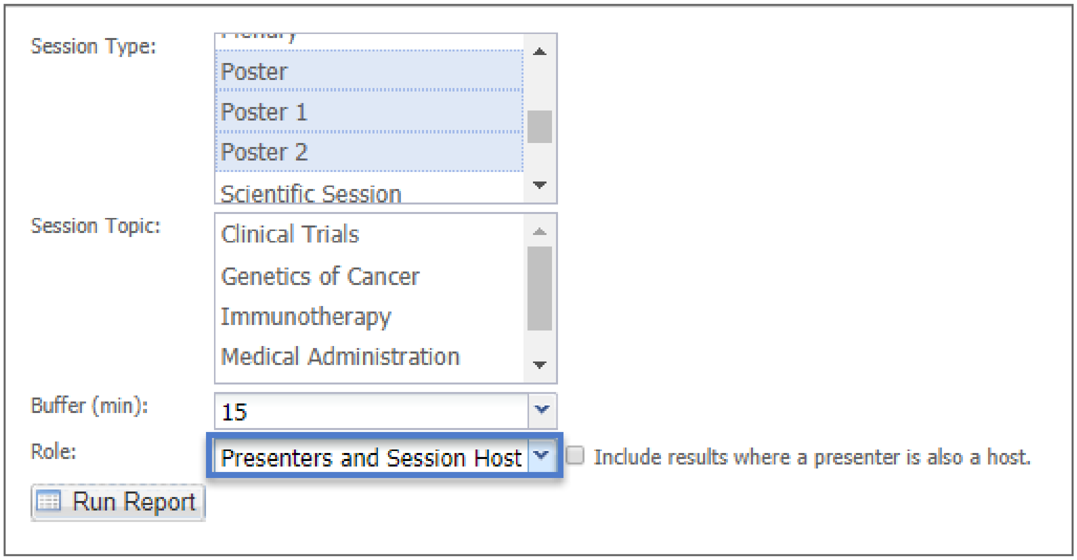
PARTICIPANT CONFLICT REPORT

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.



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								

ScholarOne®

ScholarOne, a Clarivate Analytics Business, provides comprehensive workflow management systems for scholarly journals, books, and conferences. Its web-based applications enable publishers to manage the submission, peer review, production, and publication processes more efficiently, increasing their profile among authors, decreasing time-to-market for critical scientific data, and lowering infrastructure costs. ScholarOne offers workflow solutions for the submission and review of manuscripts, abstracts, proceedings, books, grants & awards, and production. Supporting over 365 societies and publishers, over 3,400 books and journals, and 13 million users, ScholarOne is the industry leader.

To learn more, visit: Clarivate.com

CLARIVATE ANALYTICS MAIN OFFICES

North America:
+1 888 399 2917

Europe, Middle East & Africa:
+442038114093

Latin America:
+551183709845

Japan:
+81345893100

Asia Pacific:

Australia +61285877636
New Zealand +61285877636
China +861057601200
India +911130446419
Korea +82220768100
SE Asia & Pakistan +6567755088
Taiwan +886225033034

 clarivate.com

Effective Date: 18-October-2018
Document Version: 3.0

Clarivate Analytics