ScholarOne Abstracts ™

Sessioner User Guide

05-December-2018

Clarivate Analytics

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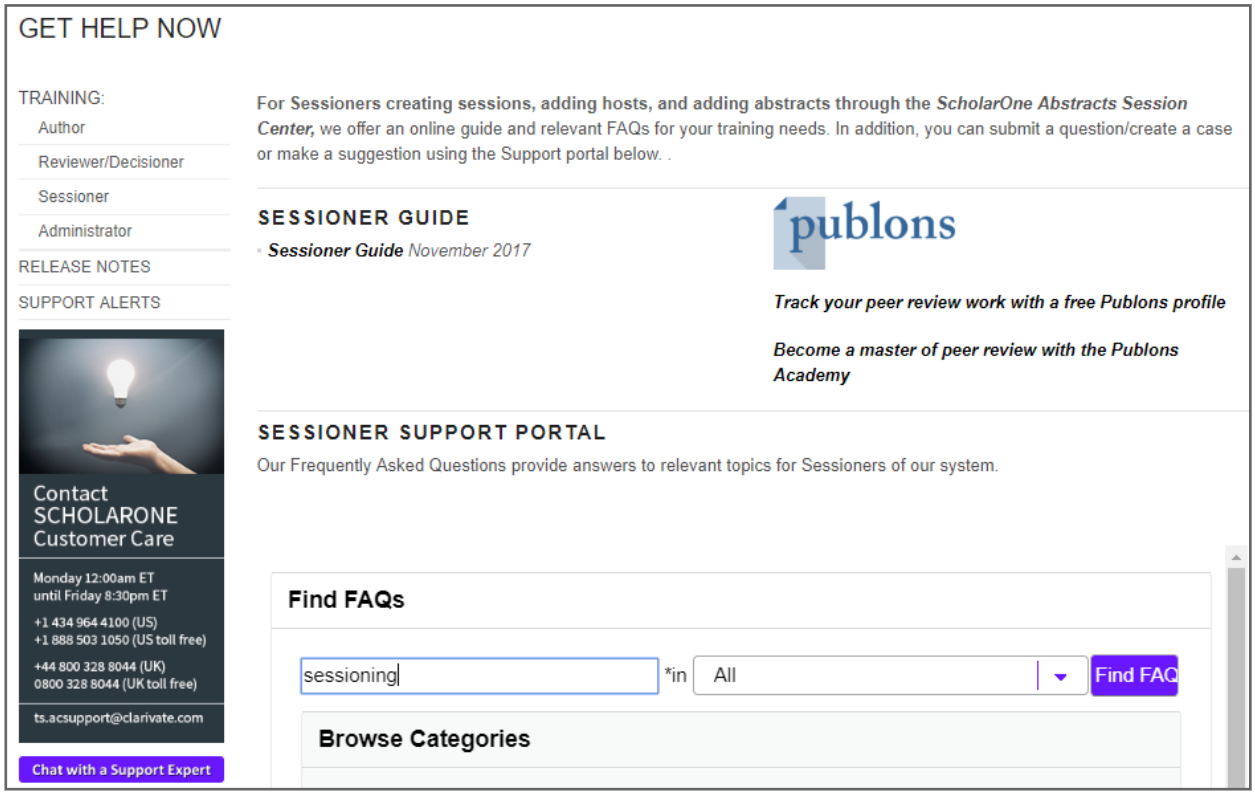
USE GET HELP NOW & FAQS

As a ScholarOne Abstracts Sessioner, 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.



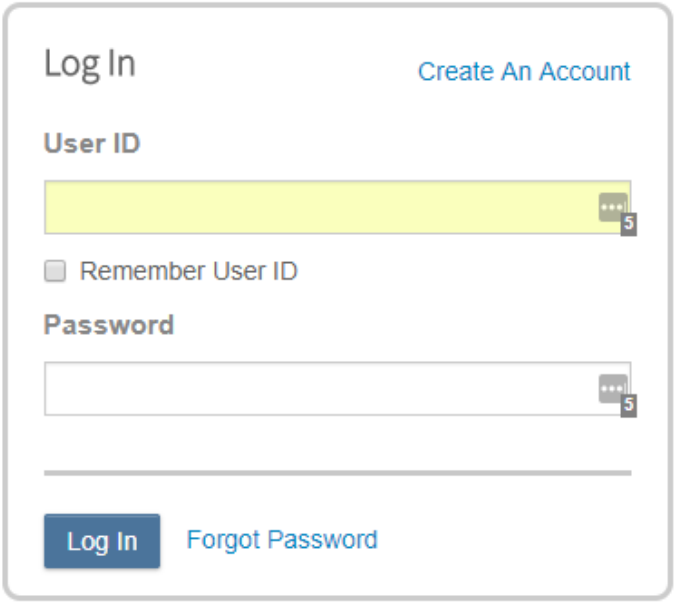
OVERVIEW OF THE SESSION CENTER

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

This Guide provides a general overview of the Session Center capabilities. Your Society's specific workflow options may differ depending on the Society's requirements. You may need to contact your Society Administrator for site specific procedures.

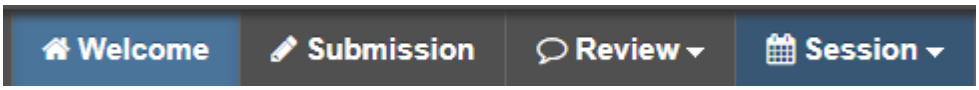
ACCESS THE SESSION CENTER

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



If you have forgotten your Password, click on **Forgot Password**. You will enter the email address associated with the account and will then receive a link via email to update your Password. Be sure to not create a second account as this will create duplicate accounts for you.

Select the **Session** tab at the top of your Welcome Screen.



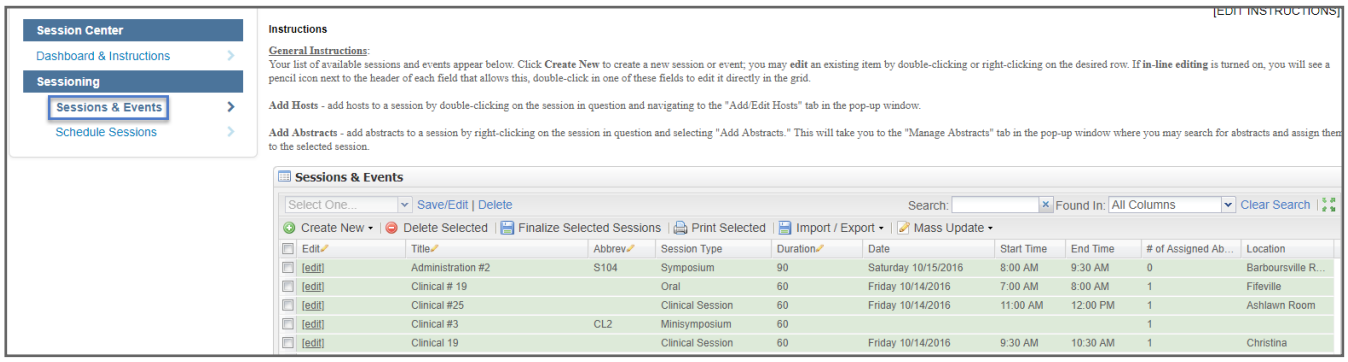
SESSION & EVENTS

Programming **Sessions & Events** involves several steps. In this guide you will learn how to:

- Enter the basic information about a session or event (title, type, and session duration)
- Add/remove abstracts to/from sessions
- Add hosts to Sessions and Events
- Set durations for session presentations
- Use the Session Builder Tool (if configured)

ACCESS SESSIONING

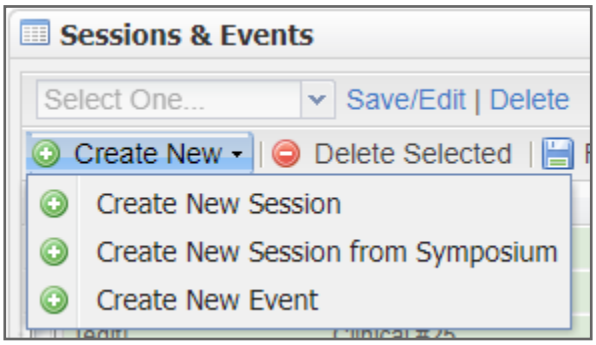
Select **Sessioning** on the left menu. Then select **Sessions & Events**. The **Sessions & Events** grid displays.



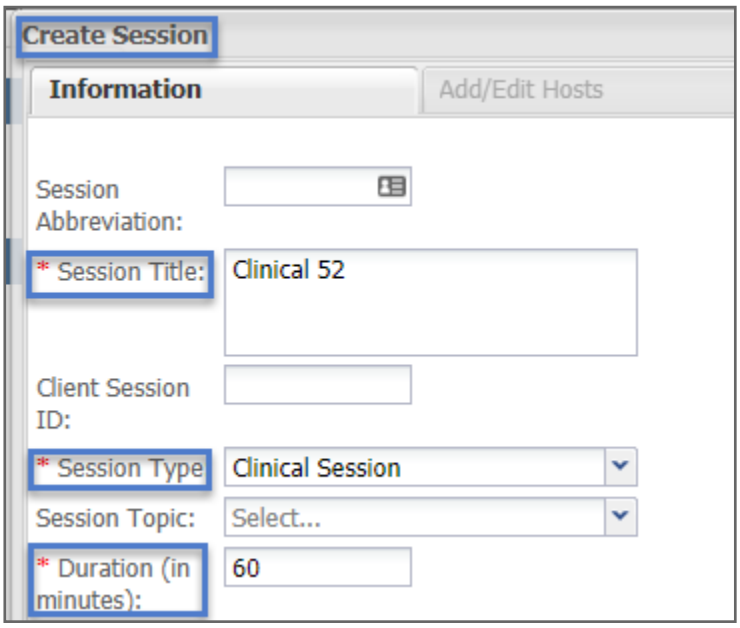
CREATE/EDIT/DELETE SESSIONS AND EVENTS

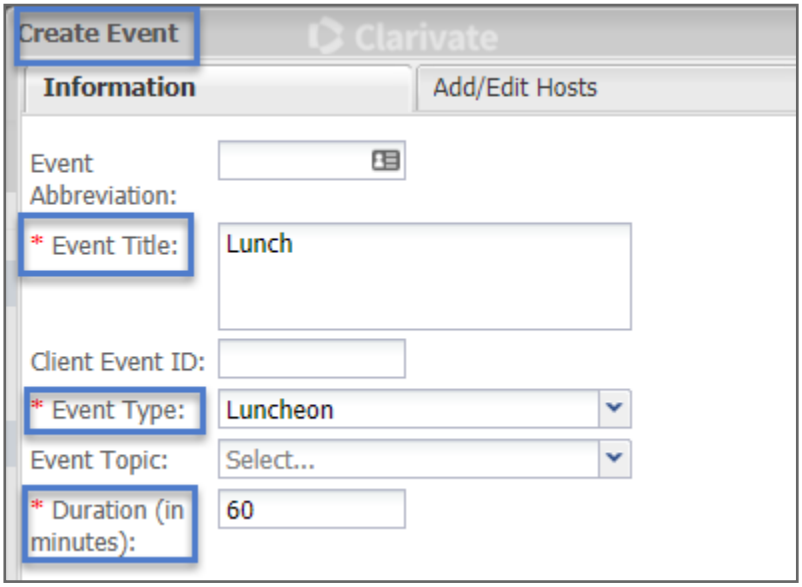
To begin, navigate to the **Sessions & Events** area on the left side the grid, click the **Create New** button near the top left of the grid. Choose either **Create New Session, Create New Session from Symposium** (if configured) or **Create New Event**.

Note: In some cases, your session will already be created so you will only need to assign the abstracts.

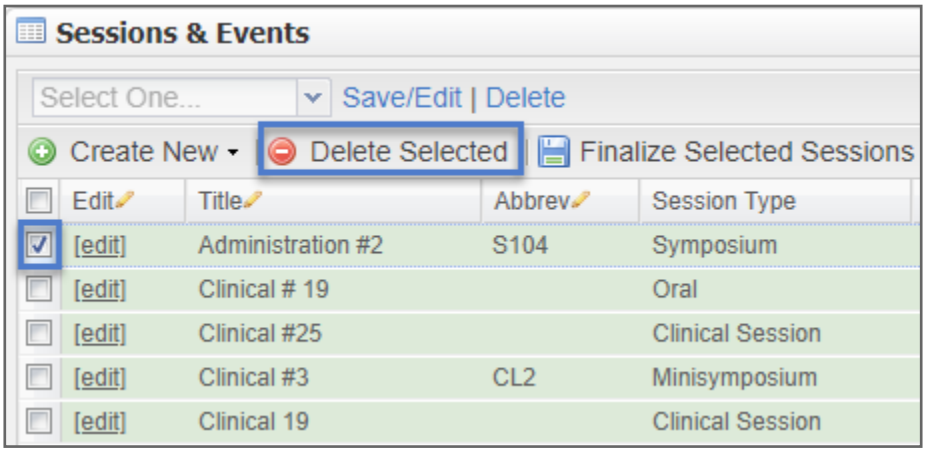


Choosing one of the options will open the **Information** tab where you assign the Session or Event a title, as well as assign additional data items such as Session Type, Topic/Track, and Duration. Once you have entered all the required items, indicated by a red asterisk (*), press the **Save** button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





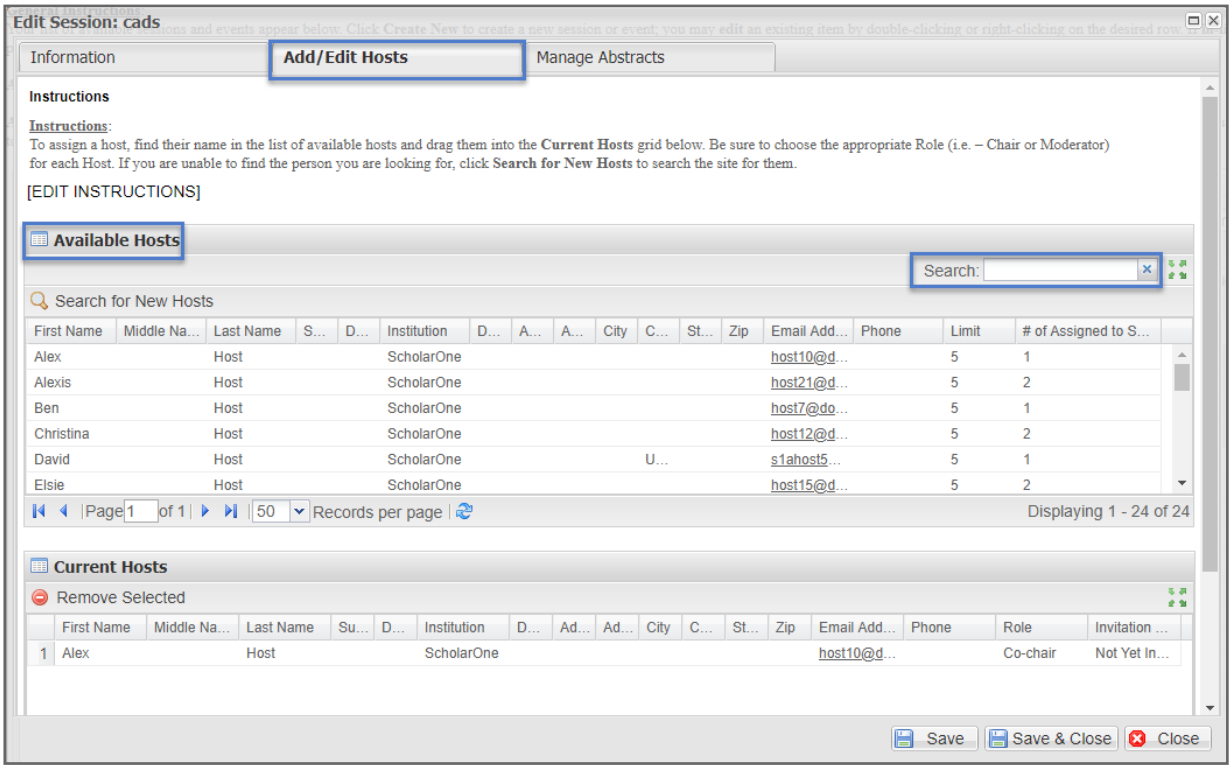
Once a session has been created, it will automatically be available in the grid. Deleting a session or event is just like editing a session or event – navigate to **Sessions & Events**, find your session or event in the list, check the box, then press the **Delete Selected** button from the action bar.



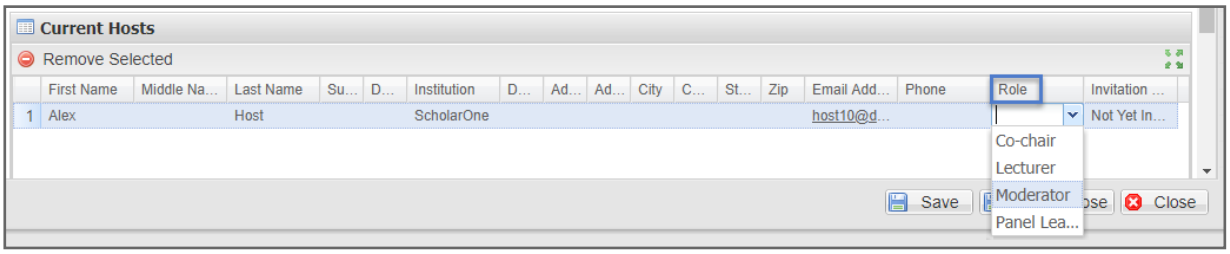
Note: If a session has abstracts assigned to it, the abstracts will first need to be removed from the session.

ADD/EDIT HOSTS

Next, you will add Hosts (chairs, co-chairs, moderators, etc.) to your session or event. Navigate to the **Add/Edit Hosts** tab next to the **Information** tab.



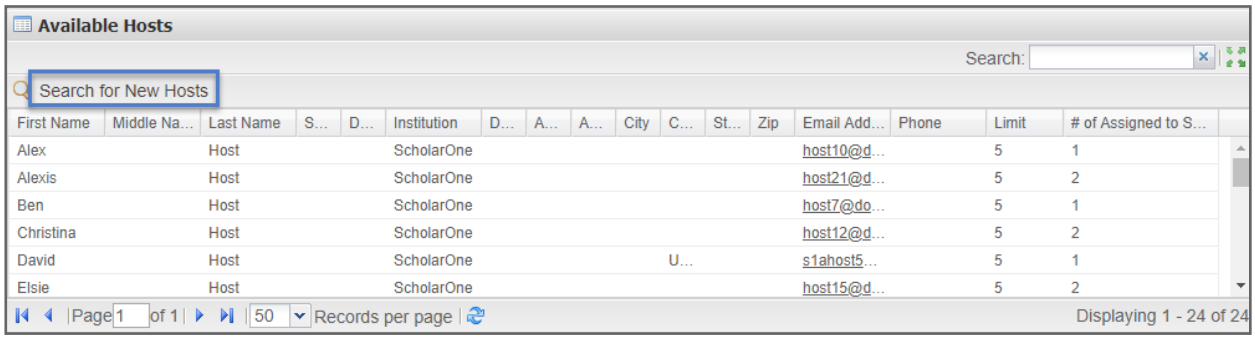
A list of available hosts will automatically populate in the top grid and you may type a name in the **Search** area to narrow the list. Once you have the correct person, simply drag and drop them from the top grid to the bottom grid. If you have multiple hosts to select, you can hold down the control key to select them all at once. You will need to assign the person a role by clicking the **Role** field and choosing the desired role from the drop-down box.



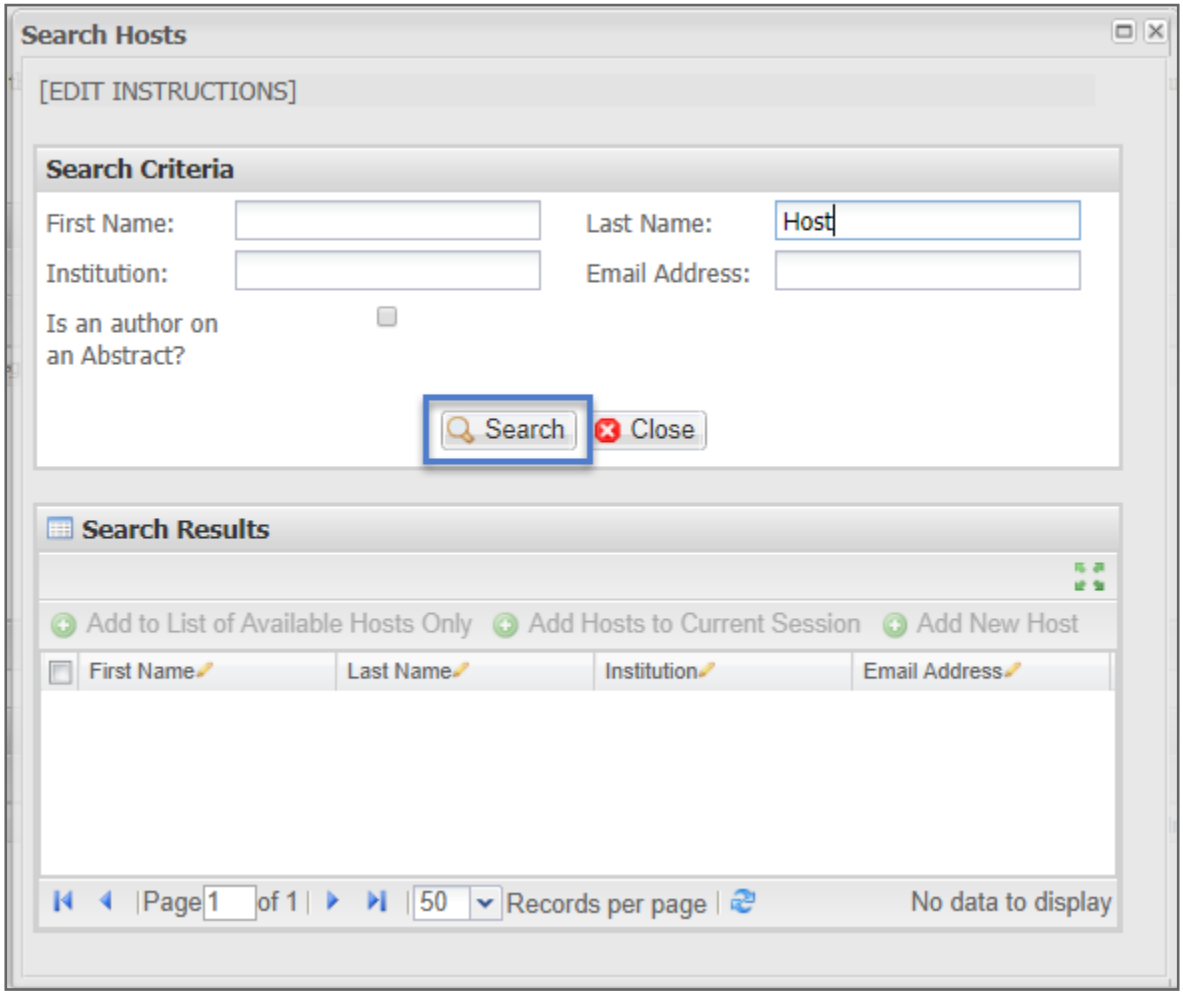
Note: If there is only one host role configured, that role will be assigned to a host automatically when the host is added to the session or event. If there are more than one host roles created, the user will be prompted to select the host role from the host role name dropdown.

Create Host Account on the Fly

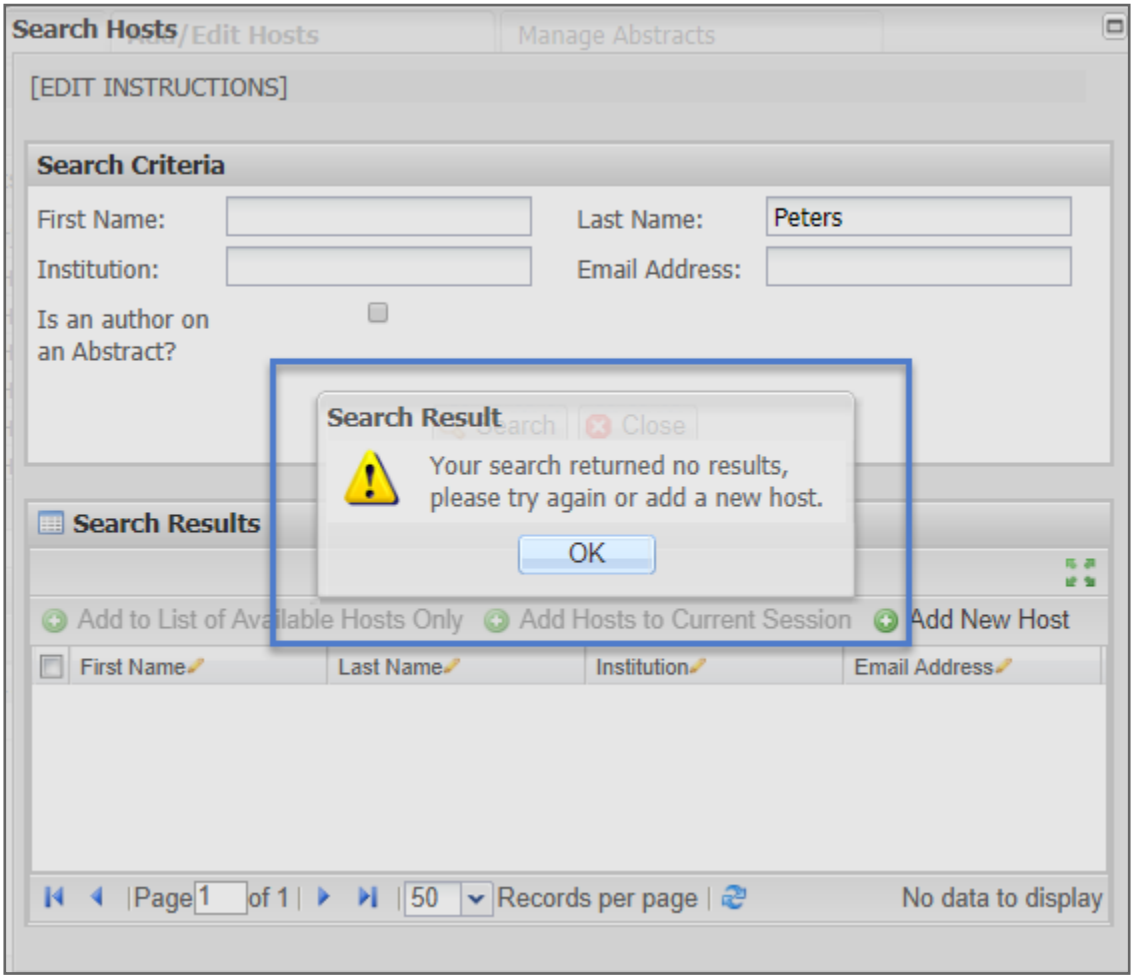
If you search for a host and they do not have an account in the system, you can add a new host on-the-fly. Click the **Search for New Hosts** link at the top left of the **Available Host**s grid. You will first search for the new host and if no account is found, you will be able to add a host account.



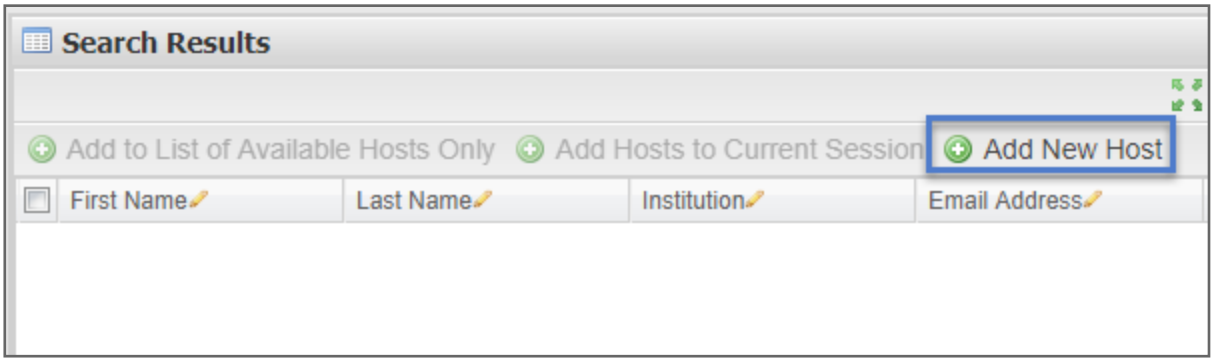
Enter the information for the Host you would like to search for and click **Search**. You can search on **First Name**, **Last Name**, **Institution** or **Email Address**. If there is no host account found, you will receive a message for adding a new host.



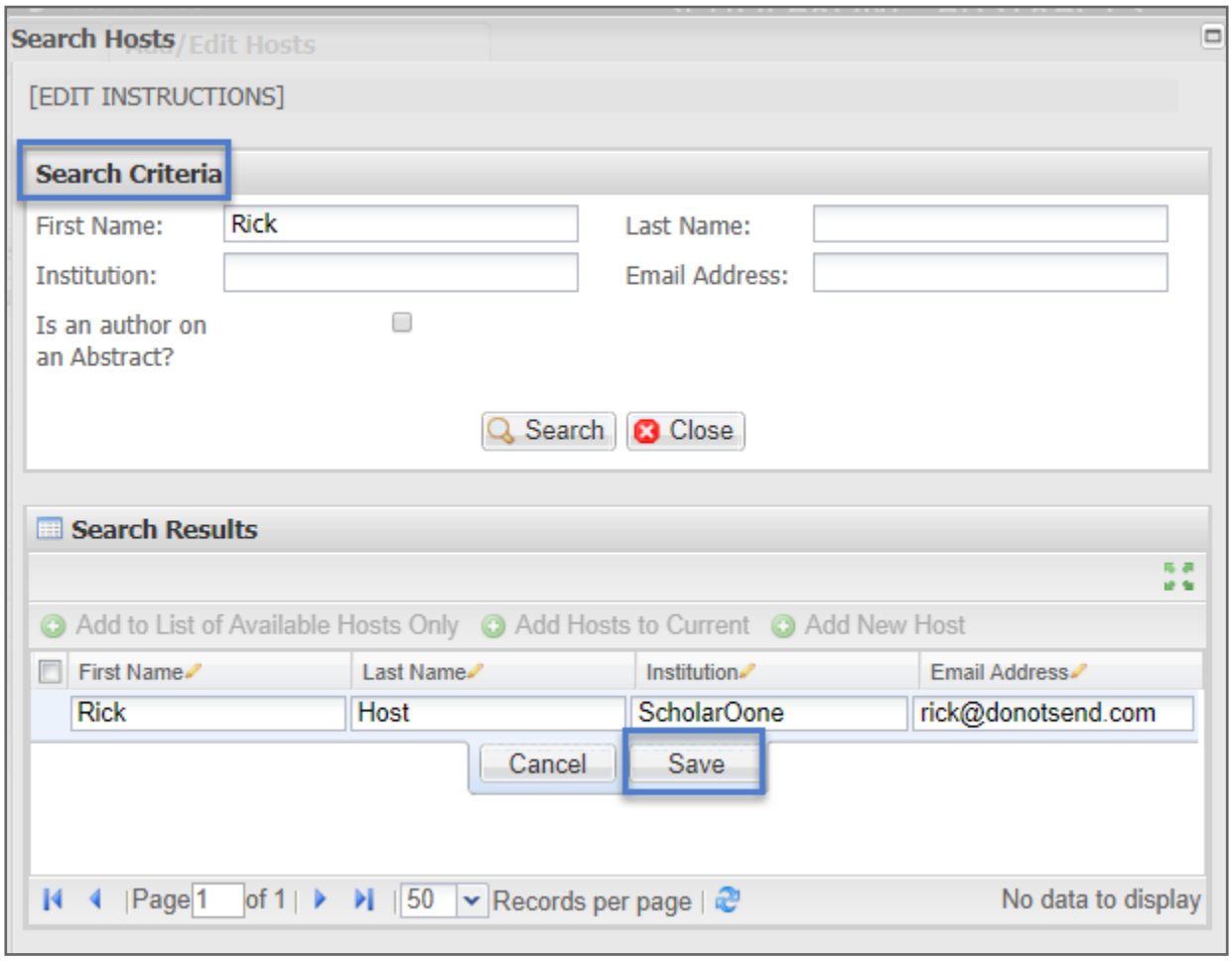
The following message will display if the person does not have an account in the system. Click **Ok**.



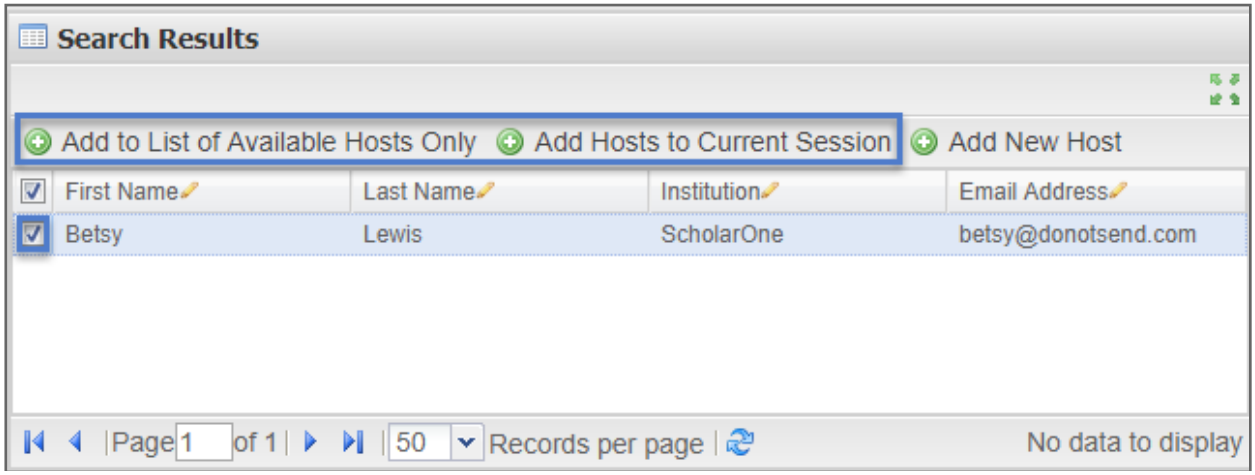
To add the host, click **Add New Host.**



Then 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** (so they may be added to other sessions) or **Add Host to Current Session**.



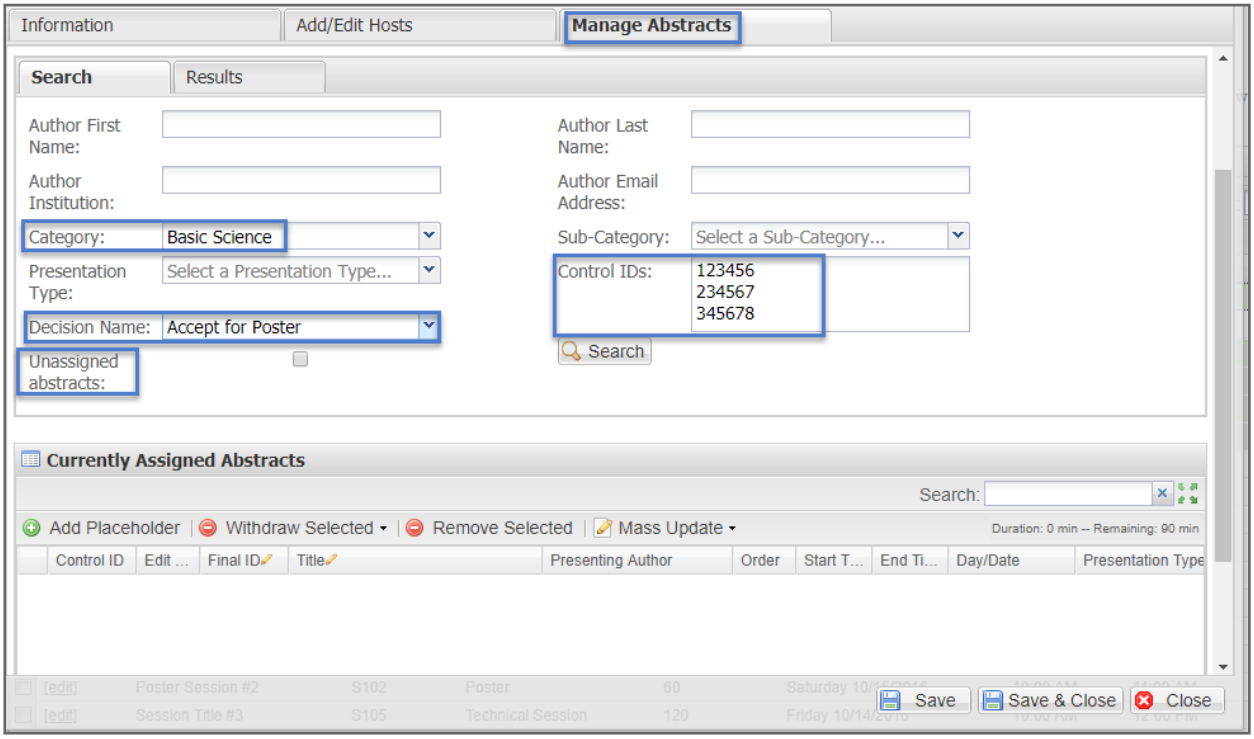
COMPLETING EVENTS

If you are building an **Event**, you are complete after you add hosts. You may not have hosts associated with an **Event** and will only complete the **Information** tab.

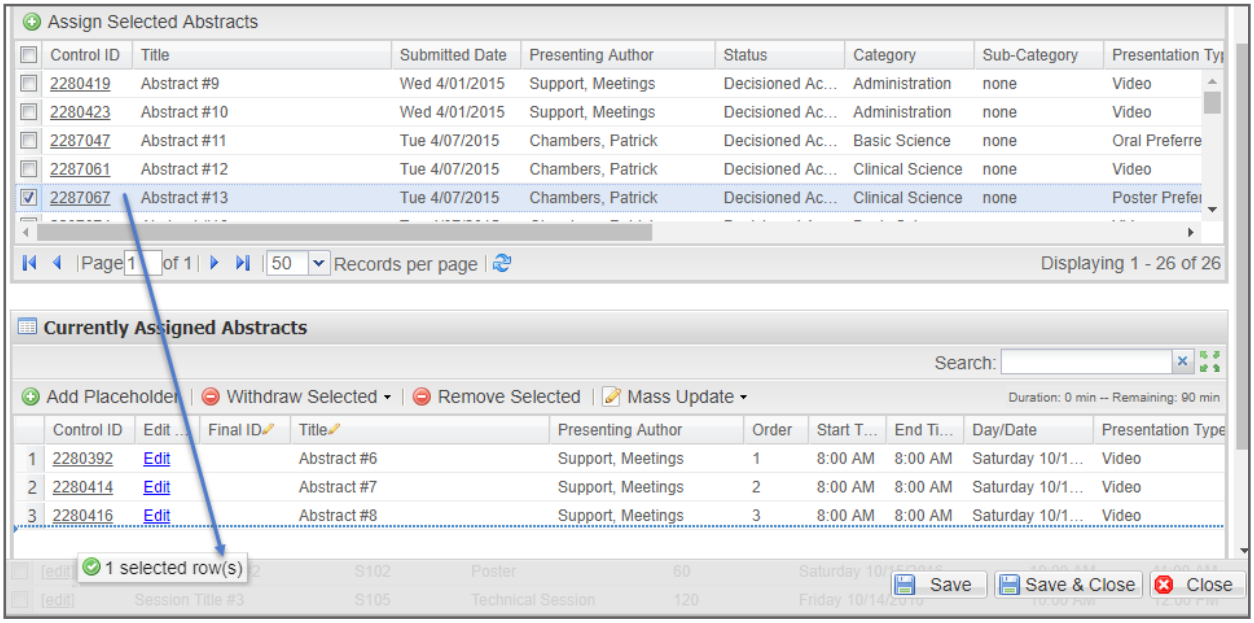
ADD ABSTRACTS TO SESSIONS

The final step in building a complete session is adding the abstracts to the session. Click on the third tab to go to **Manage Abstracts.** Search for the abstracts you would like to assign to the session.

Note: You may search for abstracts by: Decision Status Category, Sub- Category, Presentation Type, specific Author Name or Email Address, and Control Id. All unassigned abstracts will list those abstracts that have yet to be assigned to any session. You can also assign abstracts by Control ID.

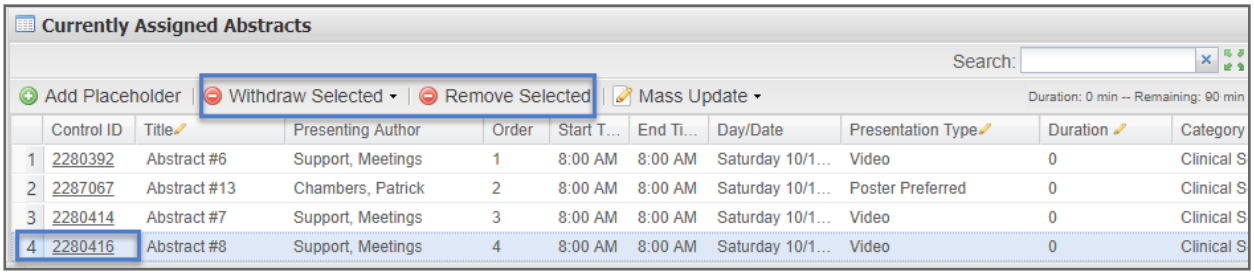


Assign the abstracts returned in the search by dragging and dropping them into the **Currently Assigned Abstracts** grid. If you have multiple abstracts to assign from your search results, you can also check the box next to each abstract and click **Assign Selected Abstracts.**



You can drag and drop between both grids or within each individual grid, allowing you to both add and remove abstracts or to change the order of abstract presentations in the Session.

Removing an abstract from the session will return it to unassigned status so that it may be selected for another session. Withdrawing an abstract will leave the abstract in the session, but it will appear with a red (w) next to it. Highlight the abstracts and click **Withdraw Selected** or **Remove Selected**. Withdrawing abstracts and maintaining their inclusion in the session is a configurable option.

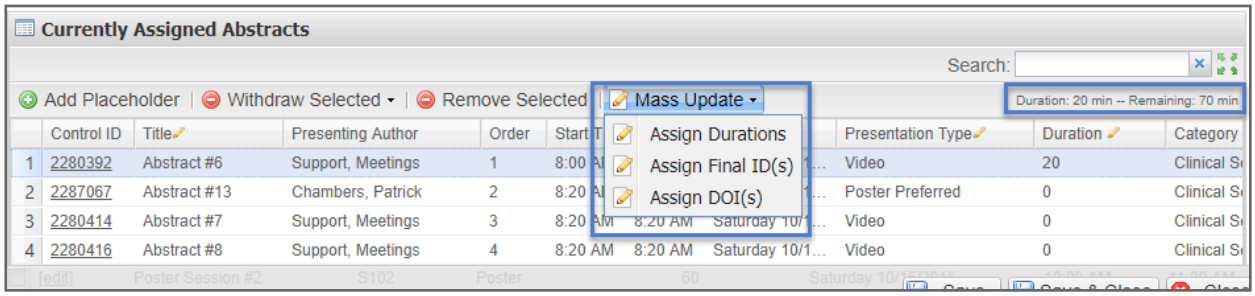


SET DURATIONS

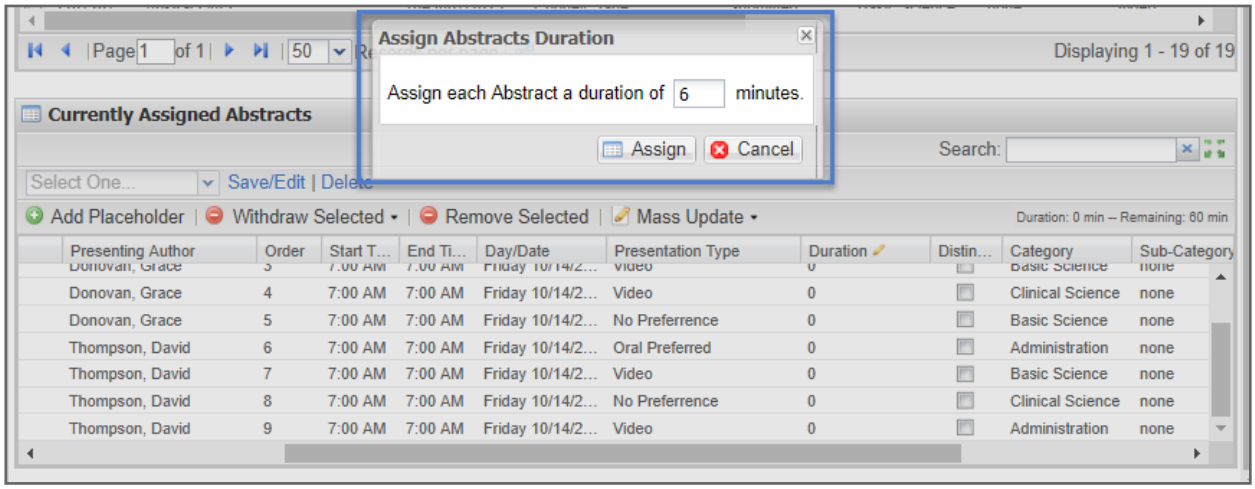
To set the duration of an abstract presentation, go to the **Currently Assigned Abstracts** grid located on the **Manage Abstracts** tab of the **Edit Session** window.

If the **Session Type** has a configured default duration value, it will be set 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 the field and typing in the desired value.

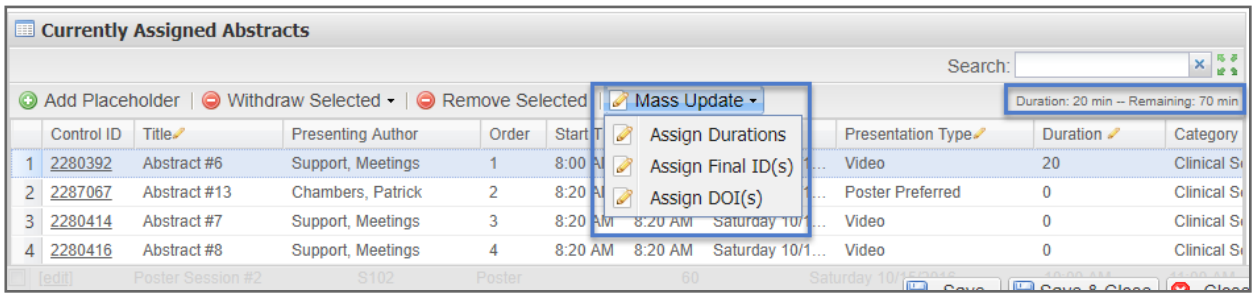
If you wish to assign durations of equal value to the current presentations, select **Mass Update.** The **Assign Durations** option will suggest a time to set for all session presentations based on the number of abstracts in the session and the total duration of the session.



For example, if the session duration is 60 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 6 minutes. However, you may overwrite the suggested value by simply typing in a new value via inline editing.



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

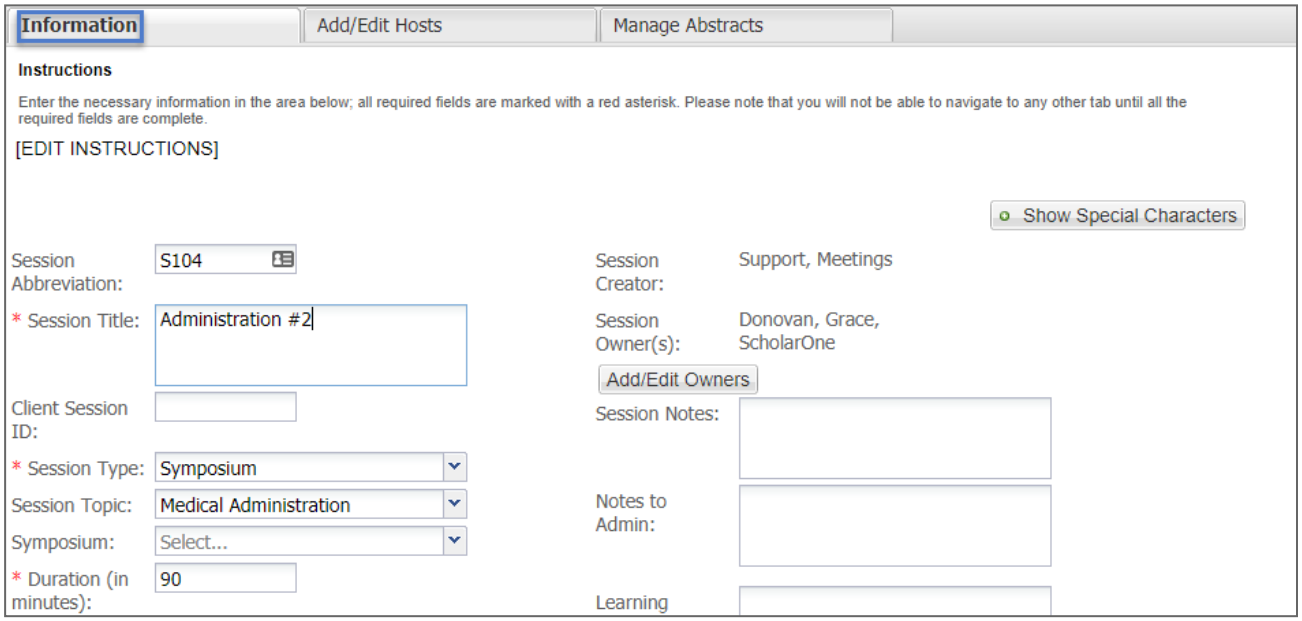


EDIT SESSION OR EVENT INFORMATION

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

Edit in New Window

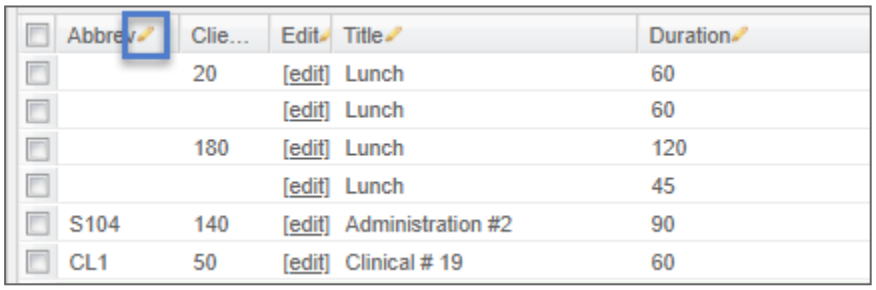
To edit type items (Session Types, Session Topics, or even the session or event data) and to access the **Information, Add/Edit Hosts** and **Manage Abstracts** tabs, double click on the checkmark field to the left of the session or event. The **Information Tab** opens.



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. **Inline Editing** is available for basic session data.

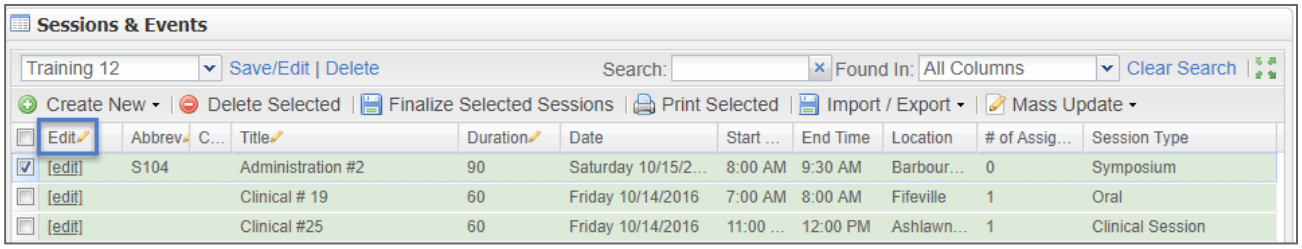
Columns allowing in-line editing are indicated with a pencil icon in the column header.



Abbrev	Clie...	Edit	Title	Duration
	20	[edit]	Lunch	60
		[edit]	Lunch	60
	180	[edit]	Lunch	120
		[edit]	Lunch	45
S104	140	[edit]	Administration #2	90
CL1	50	[edit]	Clinical # 19	60

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 in the grid using the drag and drop feature.



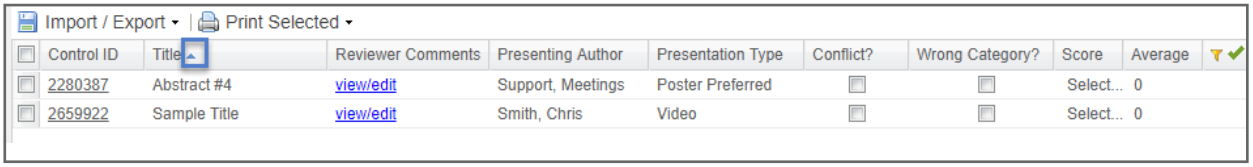
Clicking Edit will open the Information tab by default.

CHANGING YOUR VIEW

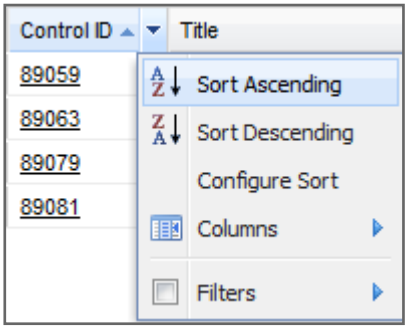
You can customize your view to display the information sorted as you specify. You can also filter the display to limit the submissions listed.

Sorting

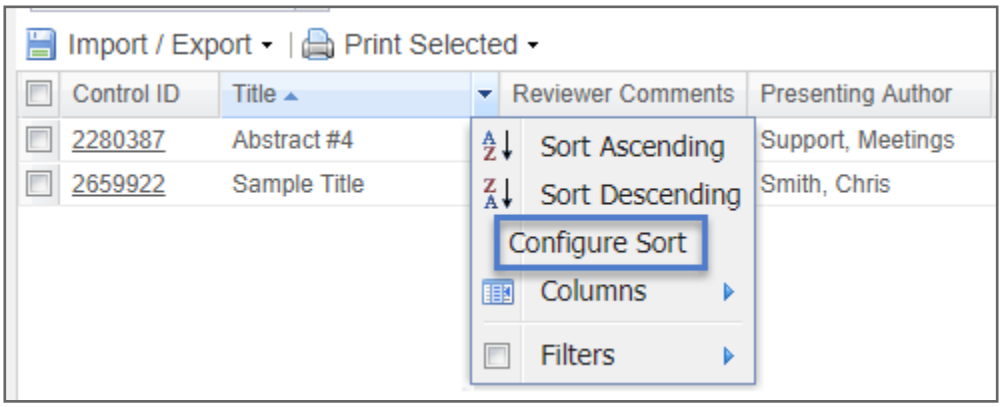
To sort by a column, you can simply click on the column header. An arrow appears indicating that the display is sorted by this column in ascending order. Click again to change from ascending to descending order.

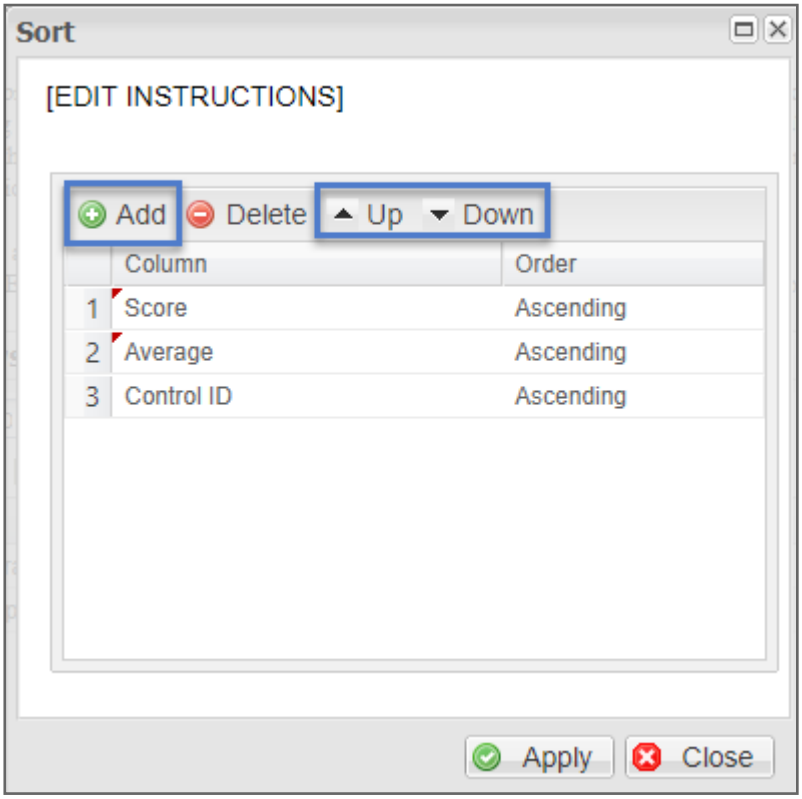


Alternately, you may place your mouse over any column header and click the down-arrow to display a list of sorting and configuration options. To sort by the selected column, choose either Sort Ascending or Sort Descending.



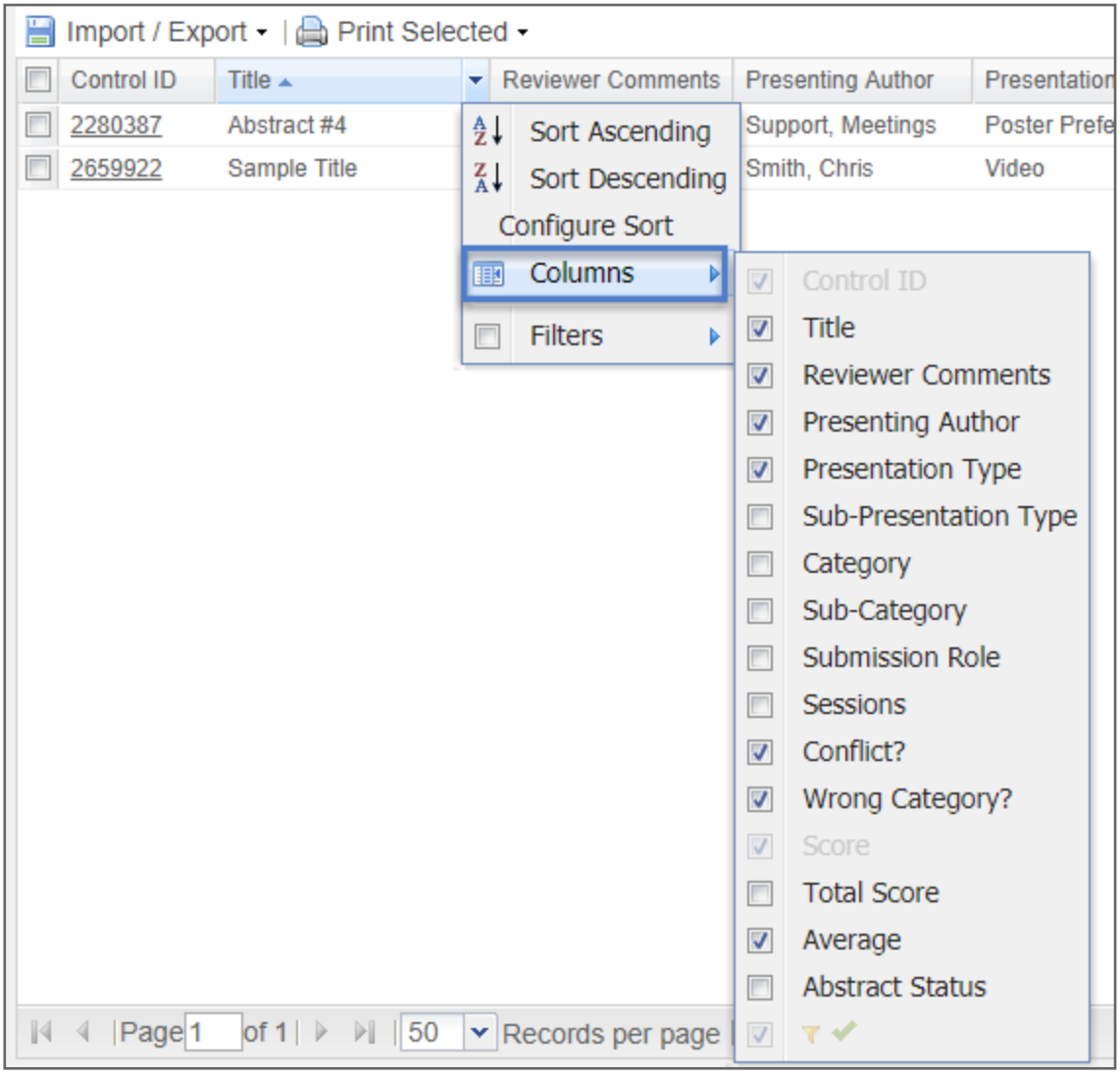
To sort by multiple columns, select **Configure Sort** from the dropdown list on the column header. Click the **Add** button to select a column then select ascending or descending order. Repeat for each column you want to sort by. You may re-order the sort options by selecting a sort and clicking the Up or Down buttons. Click the **Apply** button.





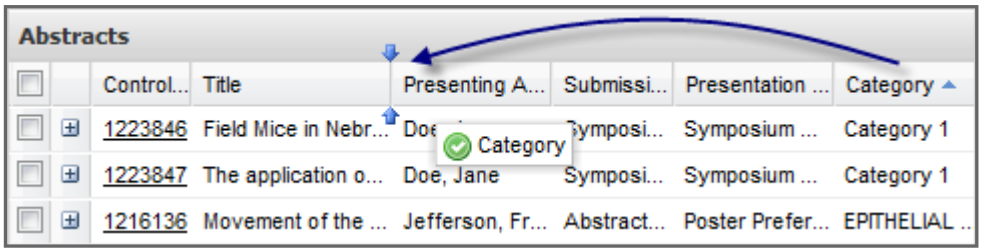
Display or Hide Columns

Place your mouse over any column header and select the down arrow. Select the **Columns** item to view a list of available columns. Place a check next to any column you wish to display. Uncheck any column you wish to hide.



Reorder Columns

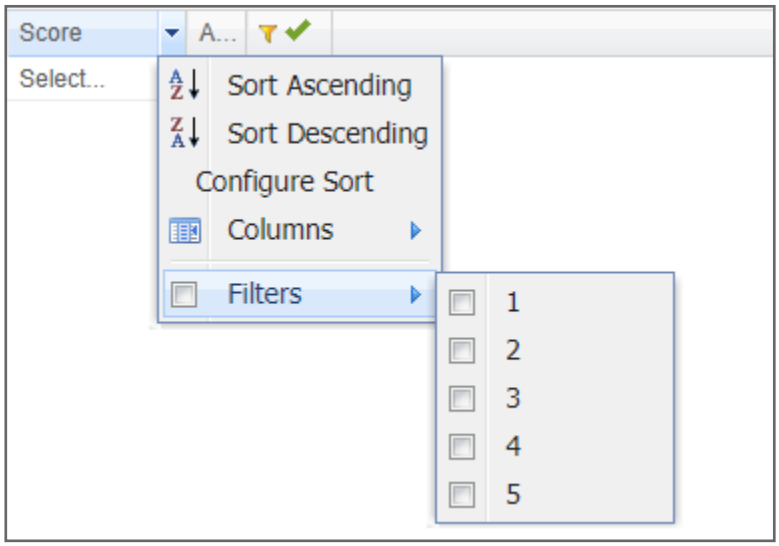
You may re-order the columns in your view by dragging and dropping the column header. Click the column header of the column you want to move and then drag it to where you want it to display. You will see blue arrows indicating the location it will display. In the example below, the **Category** column is being moved to the right of the **Title** column.



Filter Displayed Information

You can filter the data displayed to meet your specific needs.

You can filter by selecting one or more values from a column. Place your mouse over any column header and click the down arrow. Hover over **Filters** then check all values to include from the checklist.

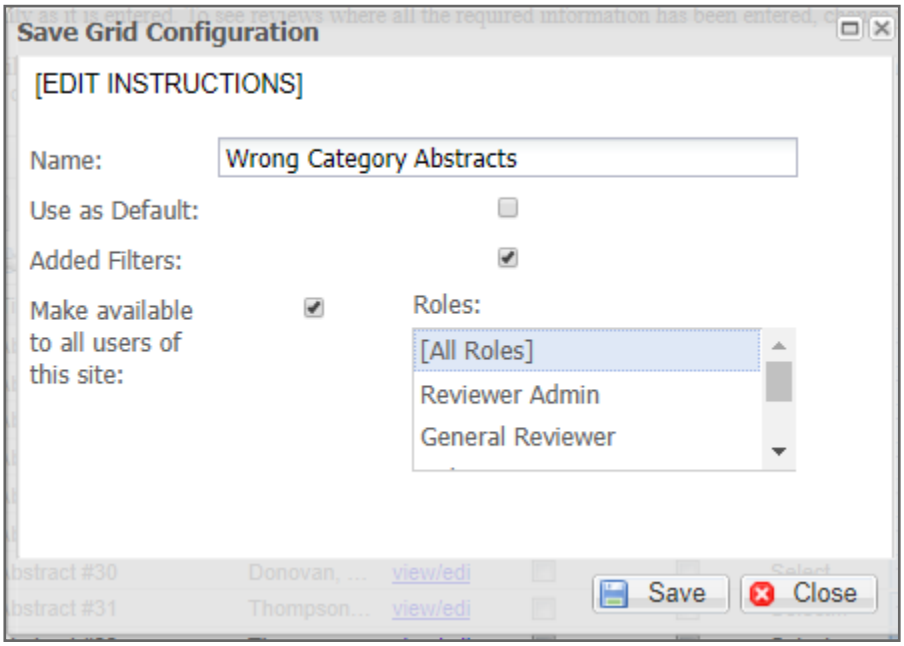


To remove filters from the current view, click the **Clear Search** link in the upper right corner of the grid. This refreshes the view to include all submissions from the previous view.

Note: Use the Search feature to show only the abstracts that fit your specified criteria.

Saving Views

When you have a view configured that you want to save, select **Save/Edit** and give the view a name. If you wish to mark it as your default view, click **Use as Default**. If you have used filters for the view, check **Added Filters**. The view will then appear in the dropdown for you to use when you want that specific view to be applied.

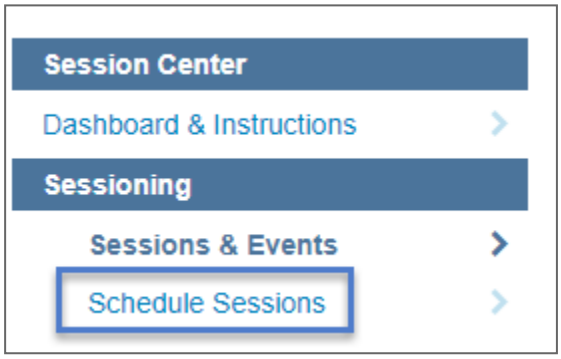


SCHEDULING SESSIONS & EVENTS

The Session Center features session scheduling tools designed to help you create your complete meeting program.

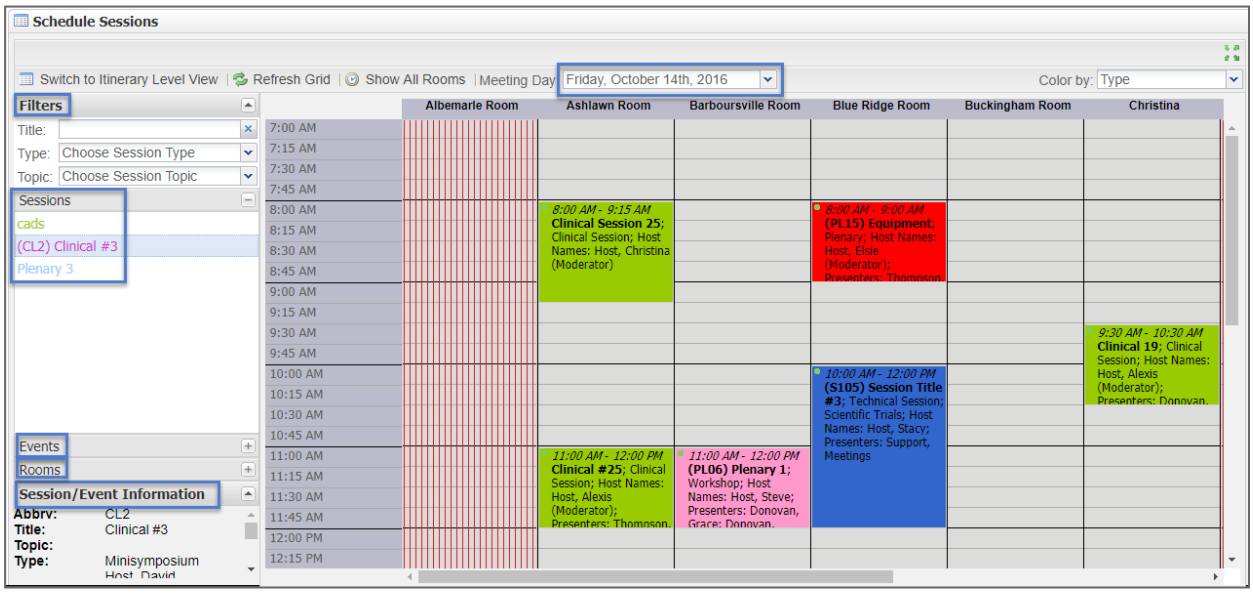
GRID SCHEDULER

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.

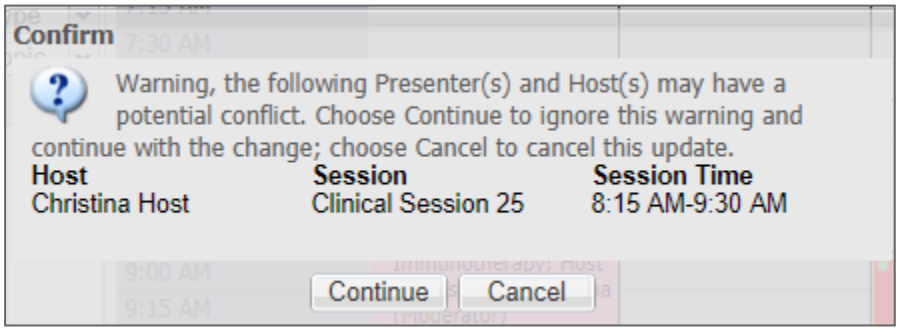


Select the day from the top drop-down menu and then drag sessions to and from the pre-loaded sessions list into any of the available rooms. This tool allows users to drag sessions from room to room or time to time without needing to un-schedule them first. Follow the same process for Events using the Event listing. Red lines in a room indicate the unavailability of that room and time.

In addition, you may filter down the list of available sessions by typing in the Title field, or by selecting sessions and events by type or topic (if configured). Clicking on a session or event will reveal details about that session or event in the space immediately below the Rooms option.

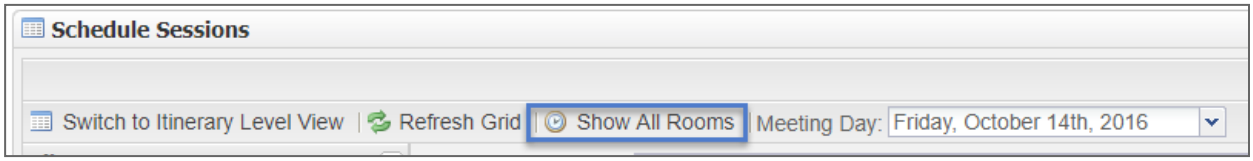


Tip: Assignments that run over the available time, conflict with previously assigned sessions, or result in Presenter or Host conflicts will generate an error message, and the assignment can continue to be made or the scheduling can be canceled.

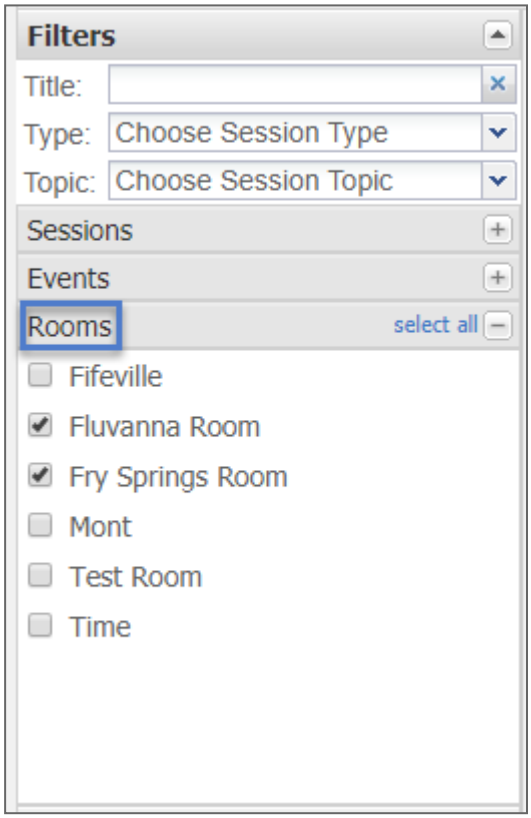


Room Views

By default, the first ten rooms will be displayed (in alphabetical sort). To show all rooms in the **Scheduling Grid**, click **Show All Rooms.**



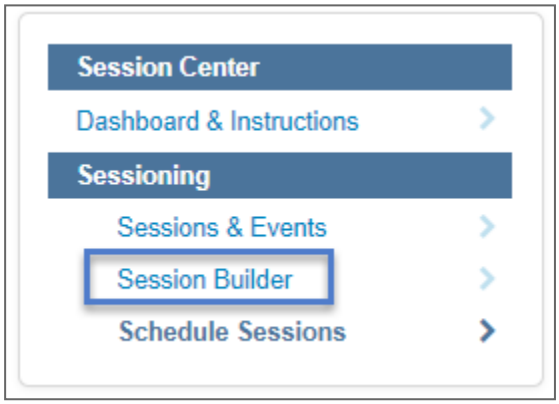
You can also change the number of rooms displayed by dragging and dropping the rooms to the room listing in the left portion of the Grid. This will remove the room from the scheduling grid.



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**.

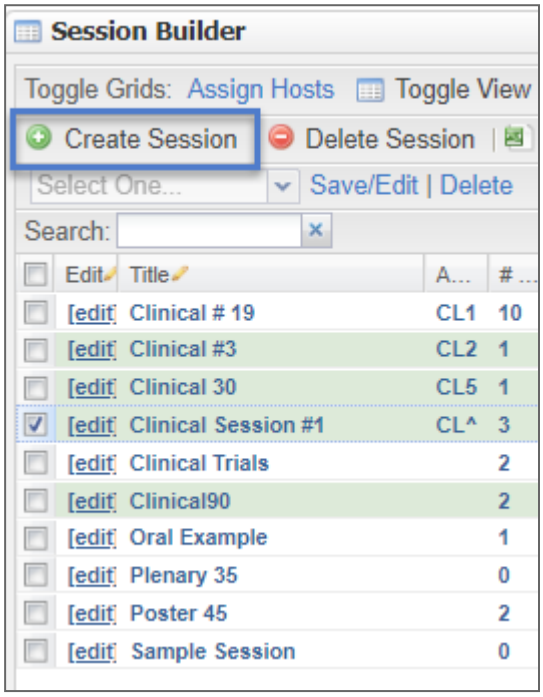
To access the Session Builder, select **Sessioning** on the left menu and then **Session Builder**. The default view is Assign Abstracts.



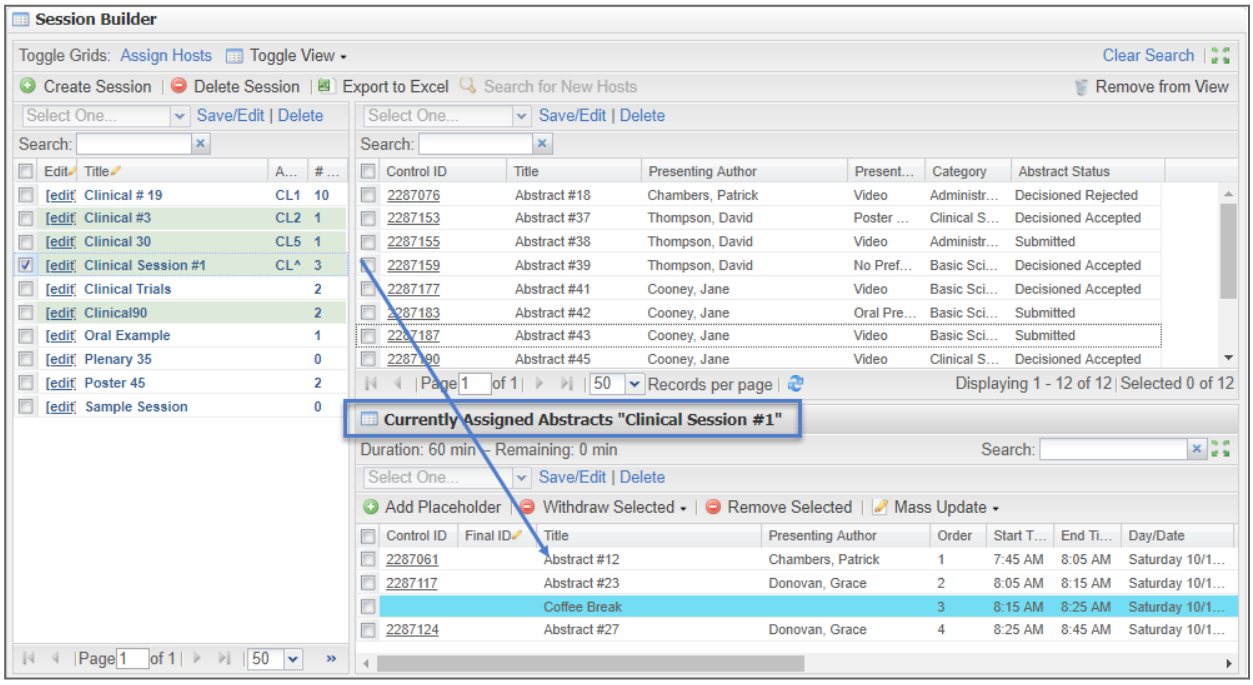
ASSIGN ABSTRACTS TOGGLE VIEW

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.

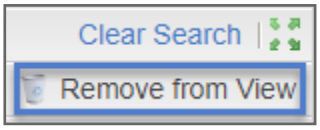
To begin building your session, click **Create Session** at the top left of the Grid. Enter the required data and click **Save**. Your session will appear in the session listing on the left.



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. Alternately, drop and drag the abstract straight to the session title. Check more than one abstract to move several to the Currently Assigned grid at one time.

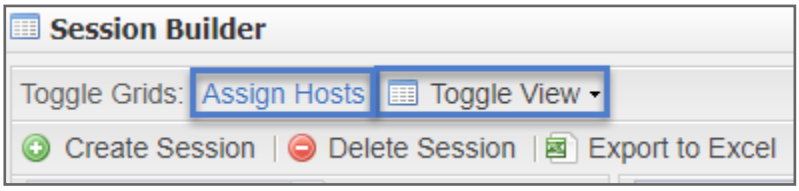


To hide abstracts in the Abstracts section of the Grid, check the abstracts you wish to hide and select **Remove from View** in the top right corner. To make the abstracts reappear in the grid, reload the Session Builder grid by clicking on **Session Builder** in the left-hand menu.

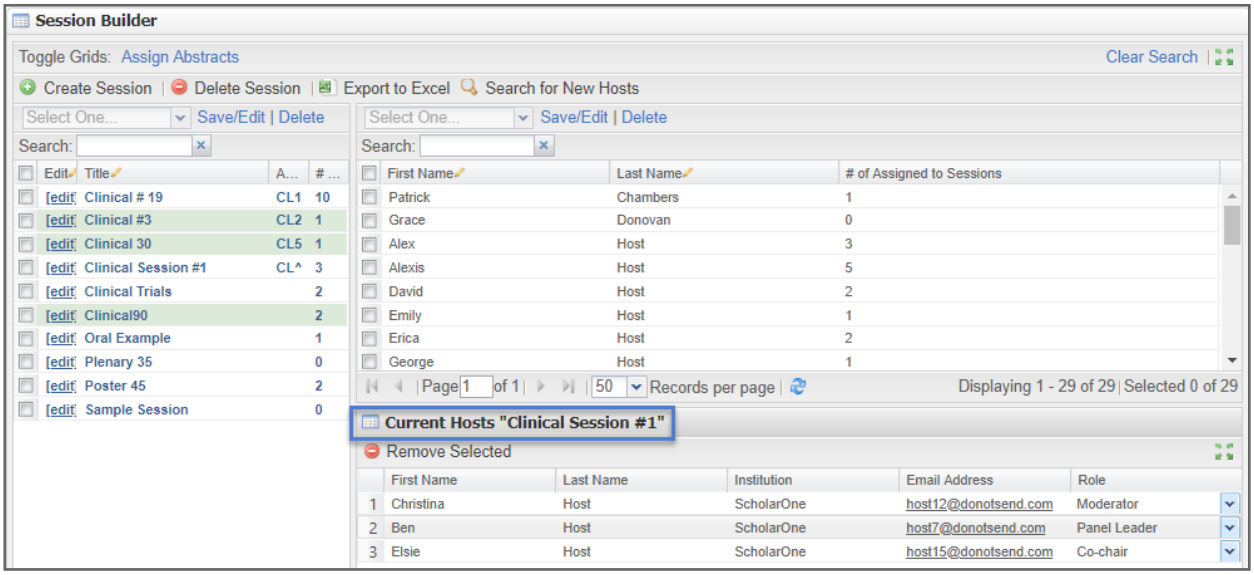


ASSIGN HOSTS TOGGLE VIEW

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

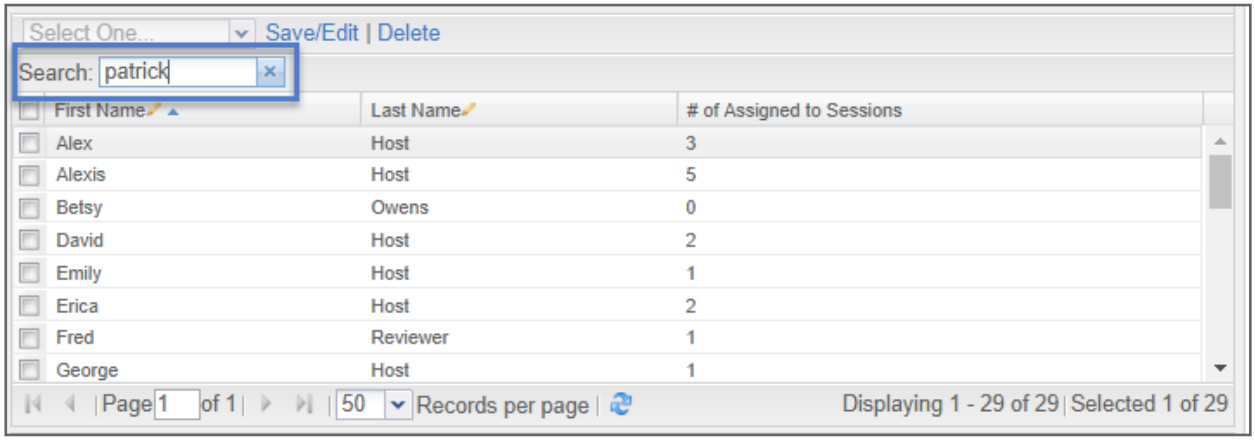


The grid has three main sections: **Sessions** on the left, **Available Hosts** on the top right, and **Current Hosts** on the bottom right.



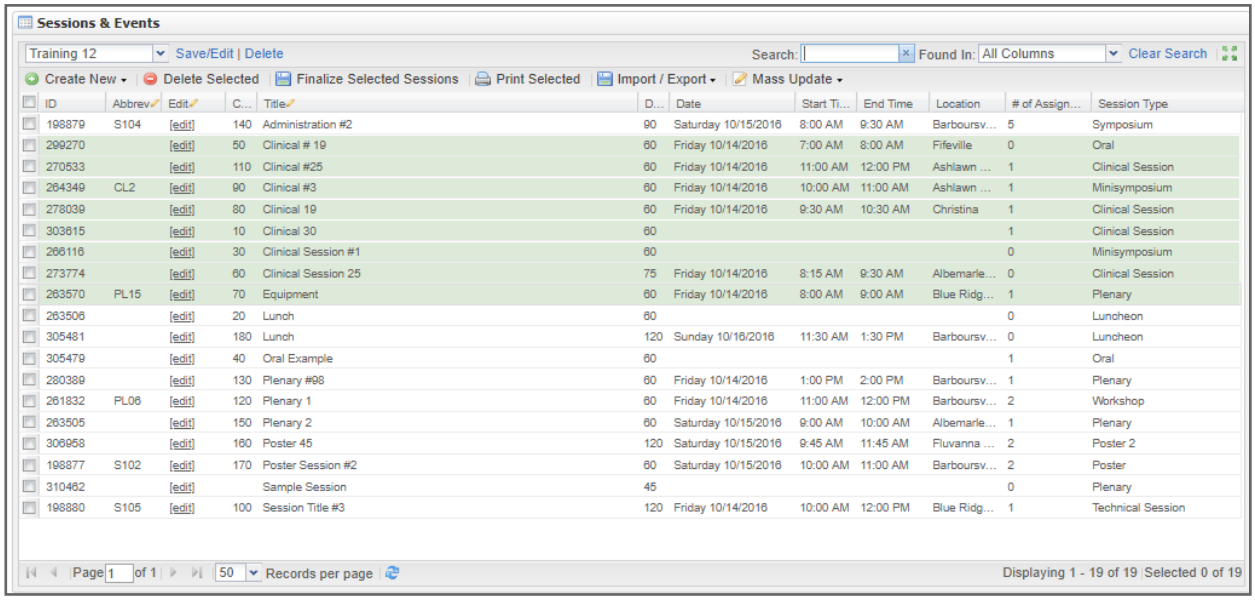
Note: Each of the three grids in the Session Builder view have their own customizable view. When a view is saved as a default view that view will appear each time a sessioner uses each portion of the grid.

To search for a host to add to the session, use the Search option at the top of the grid.



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.



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