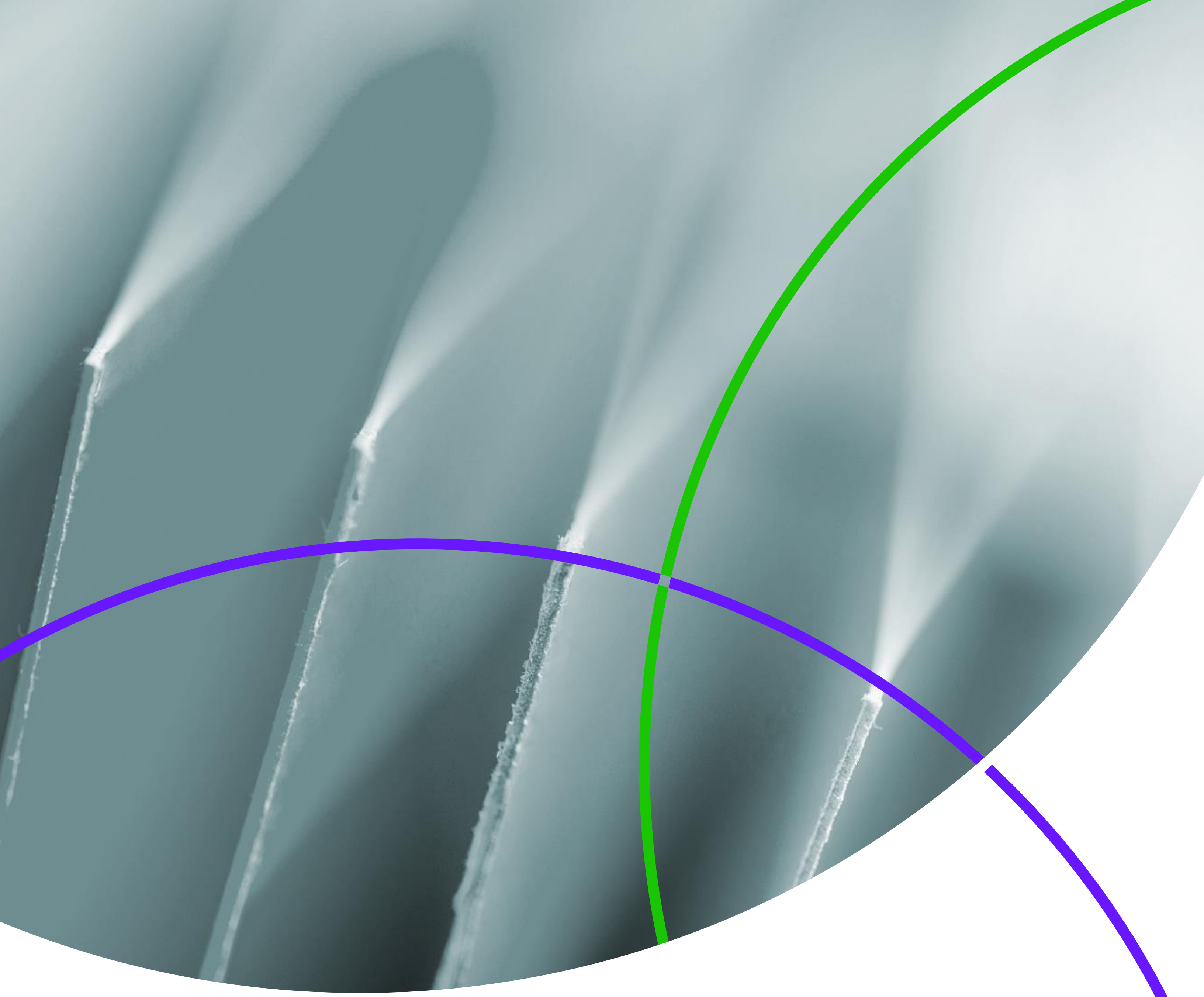


ScholarOne Abstracts ™

Speaker Management Administrator Guide

6-December-2018

Clarivate Analytics

TABLE OF CONTENTS

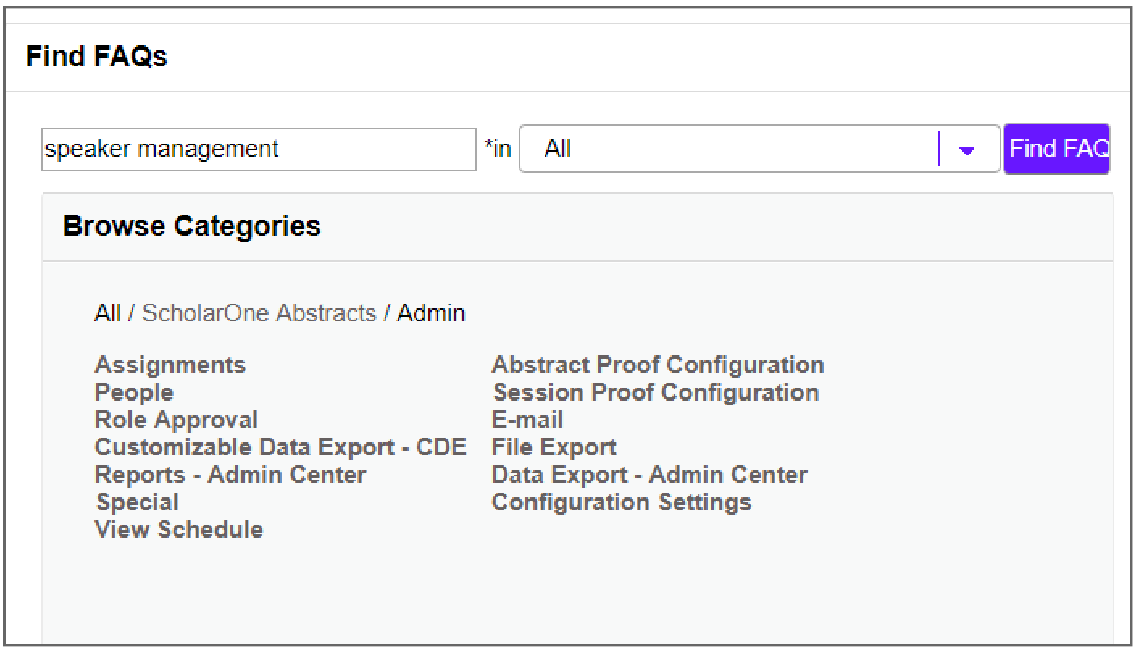
Select an item in the table of contents to go to that topic in the document.

Effective Date: 6-December-2018
Document Version: 3.0

USE GET HELP NOW & 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 create a case to get assistance from our Customer Care team. We recommend that you bookmark our help site and visit often.



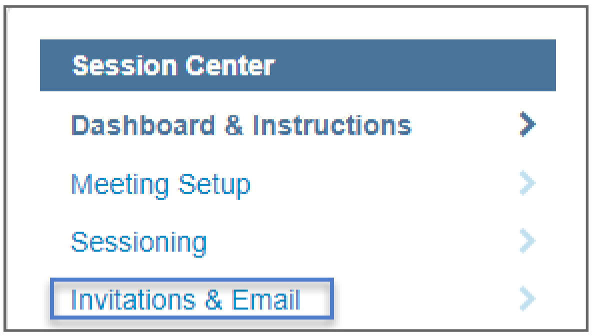
OVERVIEW OF SPEAKER MANAGEMENT

Once your program has been scheduled and finalized, you may begin using the **Speaker Management** tool to invite your presenters, hosts, and session owners to attend your meeting. The **Speaker Management** system allows you to create custom invitations, create targeted emails to hosts, presenters, and owners, email presenters, hosts and owners, and track invitation responses. Presenters, hosts, and owners receive the designated invitation email, log in to their account, and accept/decline the invitation. They may view their formal Invitation from their **Message Center**.

There is a separate module that can be configured which provides hosts the ability to view presenter's files and responses to other questions as configured. They can then provide feedback to the presenter. This module can be added by contacting your Relationship Manager.

ACCESSING SPEAKER MANAGEMENT

The **Speaker Management** tool is in the Session Center under **Invitations & Email**. First, select the **Session Tab** and then select **Session Admin**. **Invitations & Email** appears in the left-hand menu under the **Session Center**. We will continue to refer to this section as **Speaker Management** but note the link will read "**Invitations & Email**."

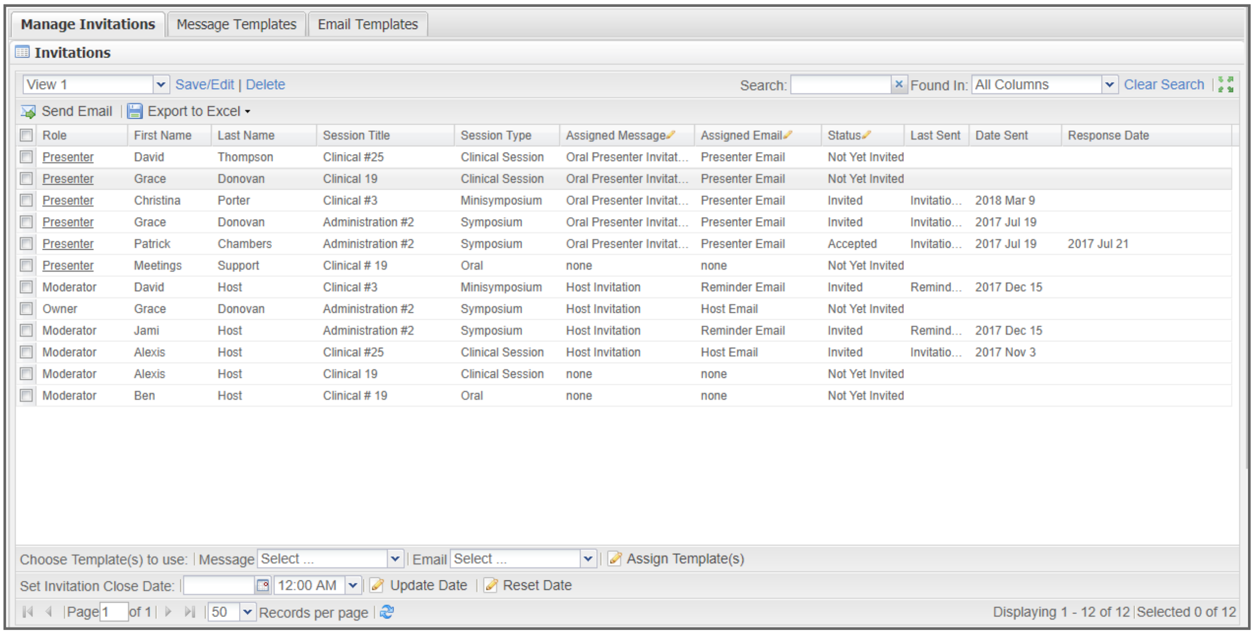


The Speaker Management grid has three main sections: Manage Invitations, Message Templates, and Email Templates. Details about how each are used are below.

- The **Manage Invitations** tab allows you to email presenters, hosts, and owners and the ability to select which invitation template and email template each host and presenter sees in their **Message Center**. This also allows you to track individual invitation responses. You may also send reminders and notifications via the **Manage Invitations** grid.

- The **Message Templates** tab allows you to create customized invitation templates. Message and Invitation are synonymous terms in the Speaker Management tool. There is no limit to the number of invitation templates that can be created, and each template can be customized based on the task or recipient.

- The **Email Templates** tab allows you to create customized email templates for hosts, presenters, and owners. There is no limit to the number of email templates that may be created.



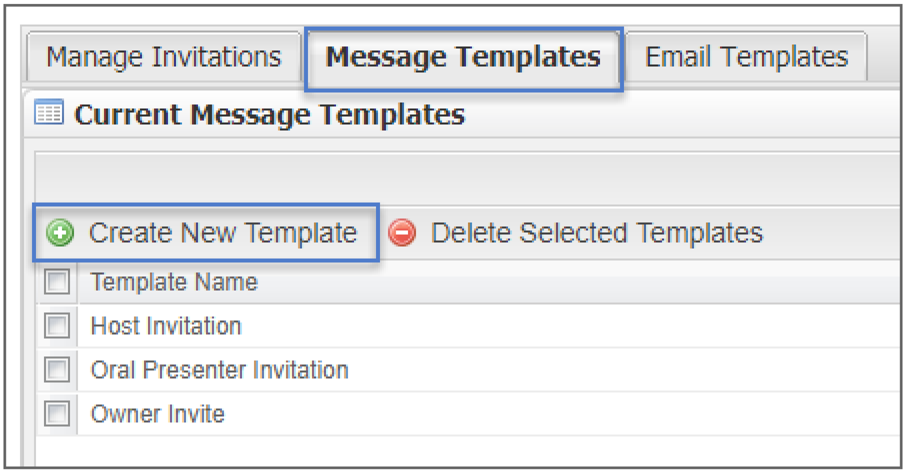
Role	First Name	Last Name	Session Title	Session Type	Assigned Message	Assigned Email	Status	Last Sent	Date Sent	Response Date
Presenter	David	Thompson	Clinical #25	Clinical Session	Oral Presenter Invitat...	Presenter Email	Not Yet Invited			
Presenter	Grace	Donovan	Clinical 19	Clinical Session	Oral Presenter Invitat...	Presenter Email	Not Yet Invited			
Presenter	Christina	Porter	Clinical #3	Minisymposium	Oral Presenter Invitat...	Presenter Email	Invited	Invitatio...	2018 Mar 9	
Presenter	Grace	Donovan	Administration #2	Symposium	Oral Presenter Invitat...	Presenter Email	Invited	Invitatio...	2017 Jul 19	
Presenter	Patrick	Chambers	Administration #2	Symposium	Oral Presenter Invitat...	Presenter Email	Accepted	Invitatio...	2017 Jul 19	2017 Jul 21
Presenter	Meetings	Support	Clinical # 19	Oral	none	none	Not Yet Invited			
Moderator	David	Host	Clinical #3	Minisymposium	Host Invitation	Reminder Email	Invited	Remind...	2017 Dec 15	
Owner	Grace	Donovan	Administration #2	Symposium	Host Invitation	Host Email	Not Yet Invited			
Moderator	Jami	Host	Administration #2	Symposium	Host Invitation	Reminder Email	Invited	Remind...	2017 Dec 15	
Moderator	Alexis	Host	Clinical #25	Clinical Session	Host Invitation	Host Email	Invited	Invitatio...	2017 Nov 3	
Moderator	Alexis	Host	Clinical 19	Clinical Session	none	none	Not Yet Invited			
Moderator	Ben	Host	Clinical # 19	Oral	none	none	Not Yet Invited			

CREATING MESSAGE (INVITATION) TEMPLATES

Message templates are customized Invitations. The invitations are viewable by the presenter or host in their **Message Center**. (They can access this either by logging in or by clicking a deep link, which is an optional email tag that can be included in the email template.) The Host, Presenter, or Owner will note their accept or decline within their view of the invitation.

You will often want to create several different invitation templates geared toward different types of hosts, presenters, and owners. For instance, you may want to have certain information in a presenter template and different information in a host template. You may also want to have a different message for Oral versus Poster presenters, for example.

Click on **Message Templates** tab to begin creating your invitations. Then select **Create New Template**. You can also edit existing templates by double-clicking on the template name or by right clicking and selecting Edit Template.



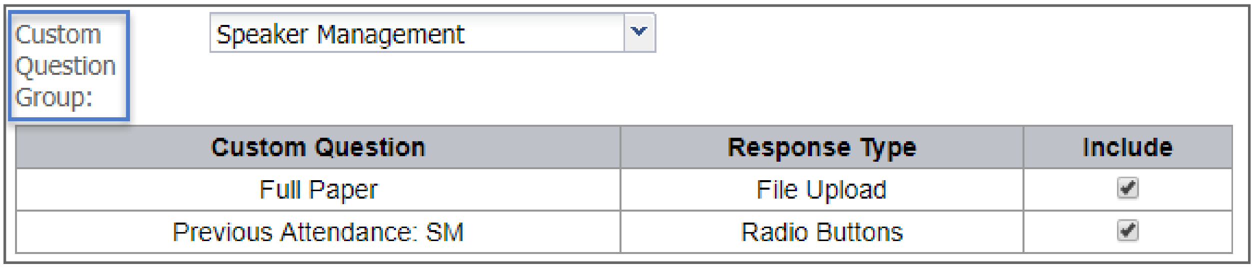
CREATING A MESSAGE TEMPLATE

First give the message (invitation) template a **Name** and **Subject**. The Subject field will display on the Invitations Summary Page in the user's Message Center. The Name field is for internal use only. Use the **Data Tags, Rich Text Editing** and **HTML** options to create your customized template.

Note: Data tag usage is encouraged. This makes updating from year to year efficient. Data tags will render what is configured for that tag and updates are only needed in one place to be reflected in all templates.

CUSTOM QUESTIONS

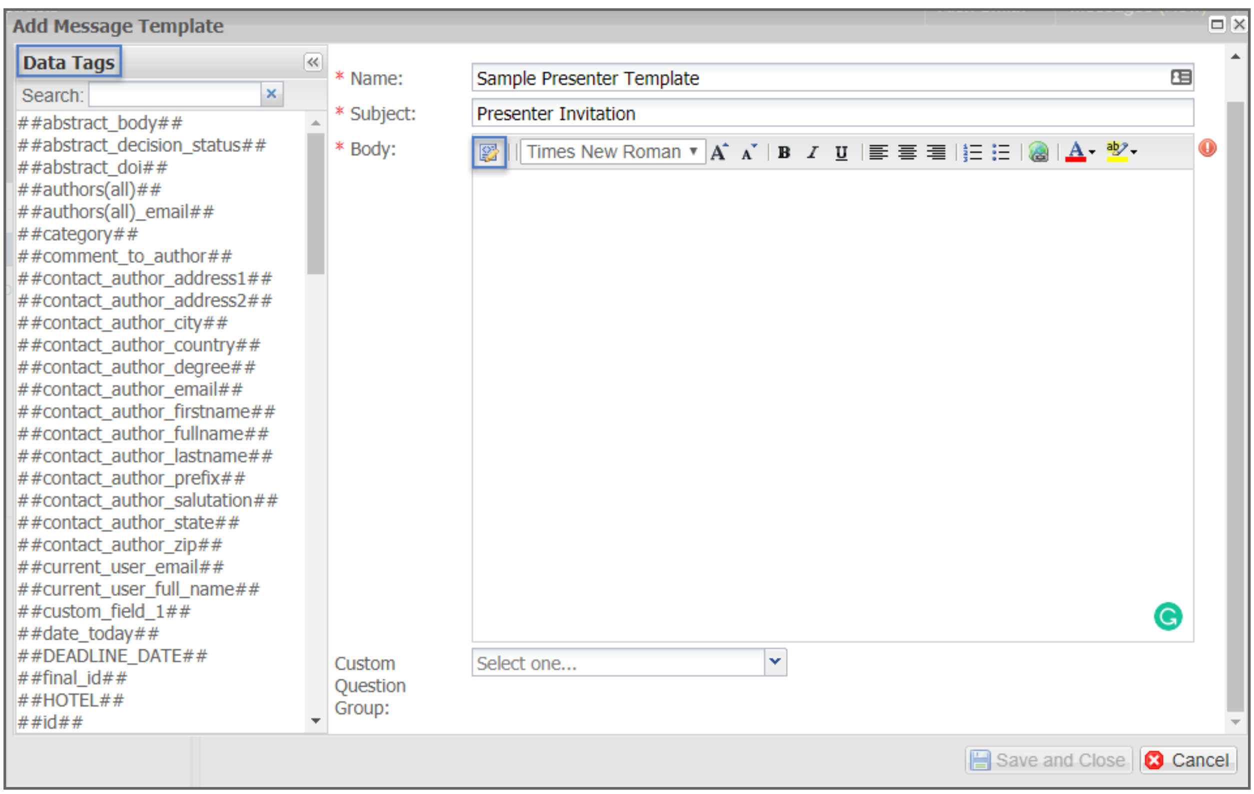
If configured, you can also choose to add **Custom Questions** to a Message Template. A custom question can include a file upload requirement or a targeted question with radio buttons or multi-select boxes. Click on the **Custom Question Group** dropdown to select the custom questions to include in the invitation. Custom questions are configured for you by your Client Implementation Manager.



Note: If the Invitation has custom questions which are required, the Invitation will have a status of Incomplete Accept until the questions are completely answered.

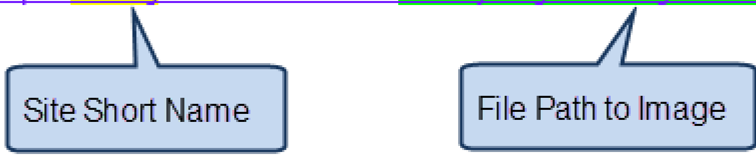
HEADER AND FOOTER IMAGES

You can also use HTML coding to insert a header or footer image from your Society or Association. To switch to HMTL, click on **Source Edit** icon in the top left portion of the template body.



Using the following html, place your header or footer details in the body of your template.

<img src="https://training.abstractcentral.com/societyimages/training/clarivate_letterhead_header.jpg">



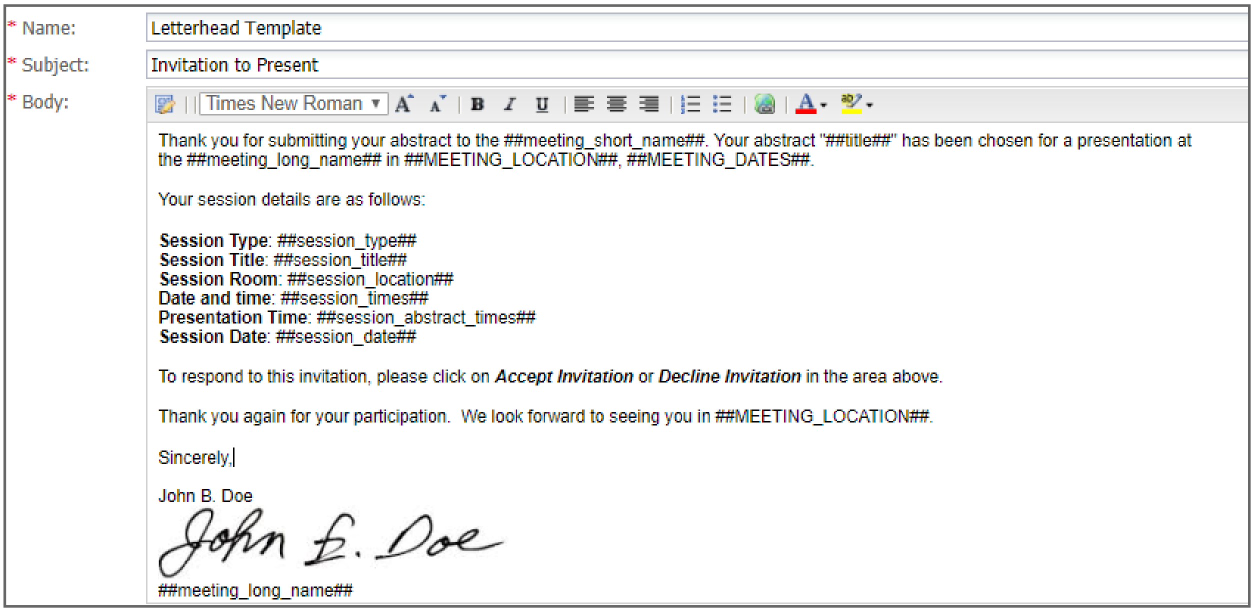
Insert your site short name in the yellow highlight section and in the green highlight you will insert the file path you created when you uploaded the image to the Welcome and File Uploads section of Administration > Client Configuration > Welcome and File Uploads.

Site Wide Banner & File Uploads Edit

FILE NAME	BANNER?	LOGO?	FILE PATH	UPLOADED ON
Banner.png	No	Yes	/societyimages/training/Banner.png	24-Oct-2018
clarivate_letterhead_header.jpg	No	No	/societyimages/training/clarivate_letterhead_header.jpg	25-Oct-2018
Institution_List.txt	No	No	/societyimages/training/Institution_List.txt	06-Sep-2018
S1A_Training_Header_(002).gif	Yes	No	logos/S1A_Training_Header_(002).gif	08-May-2018
signature.jpg	No	No	/societyimages/training/signature.jpg	25-Oct-2018
Test.csv	No	No	/societyimages/training/Test.csv	30-Aug-2018

TEMPLATE VIEW

Here is a sample of an Invitation Template which employs **Data Tags, Rich Text Editing**, and a **Header** and **Footer**.



* Name:	Letterhead Template
* Subject:	Invitation to Present
* Body:	Times New Roman

Thank you for submitting your abstract to the ##meeting_short_name##. Your abstract "##title##" has been chosen for a presentation at the ##meeting_long_name## in ##MEETING_LOCATION##, ##MEETING_DATES##.

Your session details are as follows:

Session Type: ##session_type##
Session Title: ##session_title##
Session Room: ##session_location##
Date and time: ##session_times##
Presentation Time: ##session_abstract_times##
Session Date: ##session_date##

To respond to this invitation, please click on ***Accept Invitation*** or ***Decline Invitation*** in the area above.

Thank you again for your participation. We look forward to seeing you in ##MEETING_LOCATION##.

Sincerely,

John B. Doe

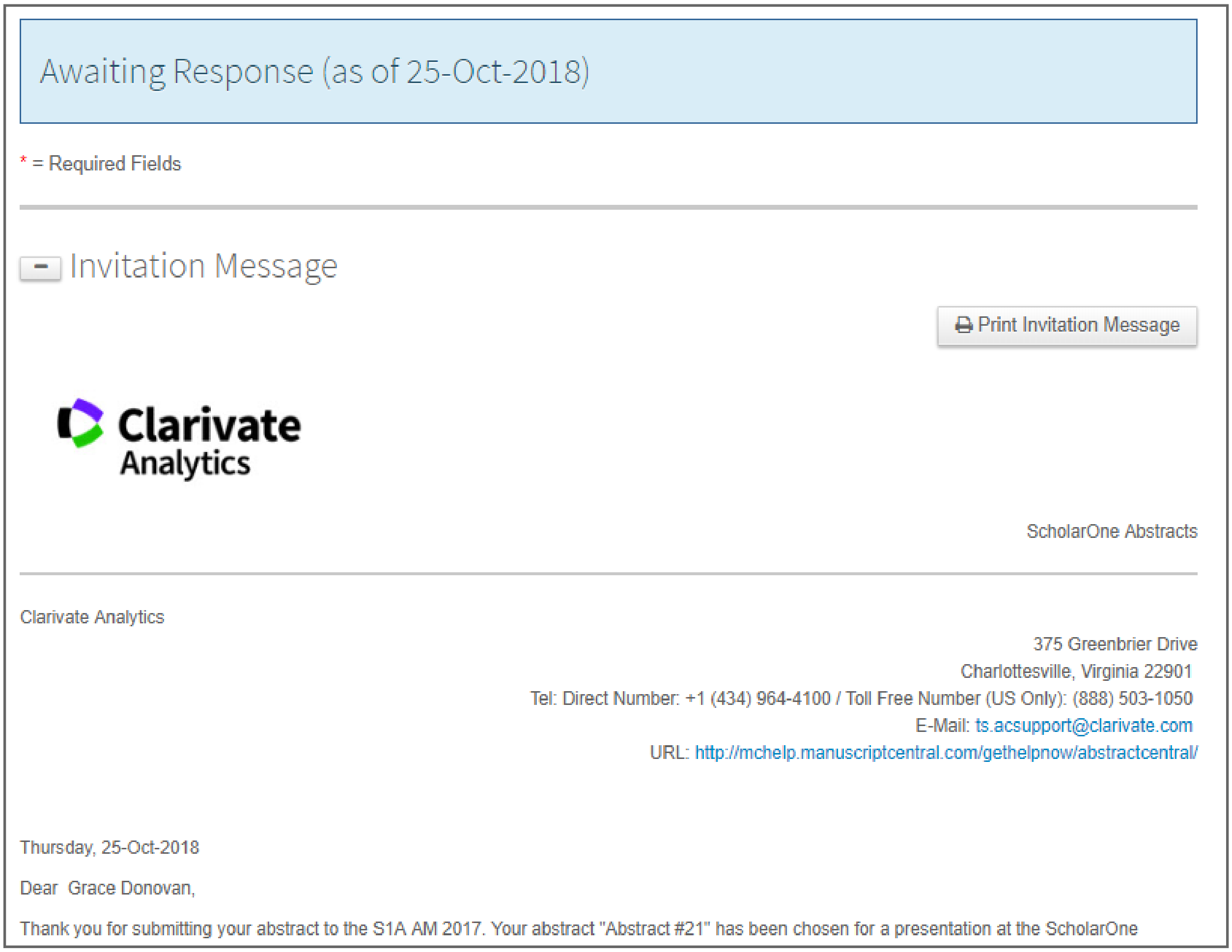
John B. Doe

##meeting_long_name##

RECIPIENT VIEW

The following three images represent a complete example of how a Message (Invitation) can appear to the presenter, host, or owner.

Note: To view an invitation, proxy in as a user you have send an invitation to and view the invitation in their Message Center. You can also preview an invitation during the Send Email task.


Awaiting Response (as of 25-Oct-2018)
* = Required Fields
Invitation Message
Print Invitation Message
Clarivate Analytics
ScholarOne Abstracts
Clarivate Analytics
375 Greenbrier Drive
Charlottesville, Virginia 22901
Tel: Direct Number: +1 (434) 964-4100 / Toll Free Number (US Only): (888) 503-1050
E-Mail: ts.acsupport@clarivate.com
URL: http://mchelp.manuscriptcentral.com/gethelpnow/abstractcentral/
Thursday, 25-Oct-2018
Dear Grace Donovan,
Thank you for submitting your abstract to the S1A AM 2017. Your abstract "Abstract #21" has been chosen for a presentation at the ScholarOne

375 Greenbrier Drive
Charlottesville, Virginia 22901
Tel: Direct Number: +1 (434) 964-4100 / Toll Free Number (US Only): (888) 503-1050
E-Mail: ts.acsupport@clarivate.com
URL: http://mchelp.manuscriptcentral.com/gethelpnow/abstractcentral/

Thursday, 25-Oct-2018

Dear Grace Donovan,

Thank you for submitting your abstract to the S1A AM 2017. Your abstract "Abstract #21" has been chosen for a presentation at the ScholarOne Annual Meeting in Charlottesville, Virginia, October 19-24, 2019.

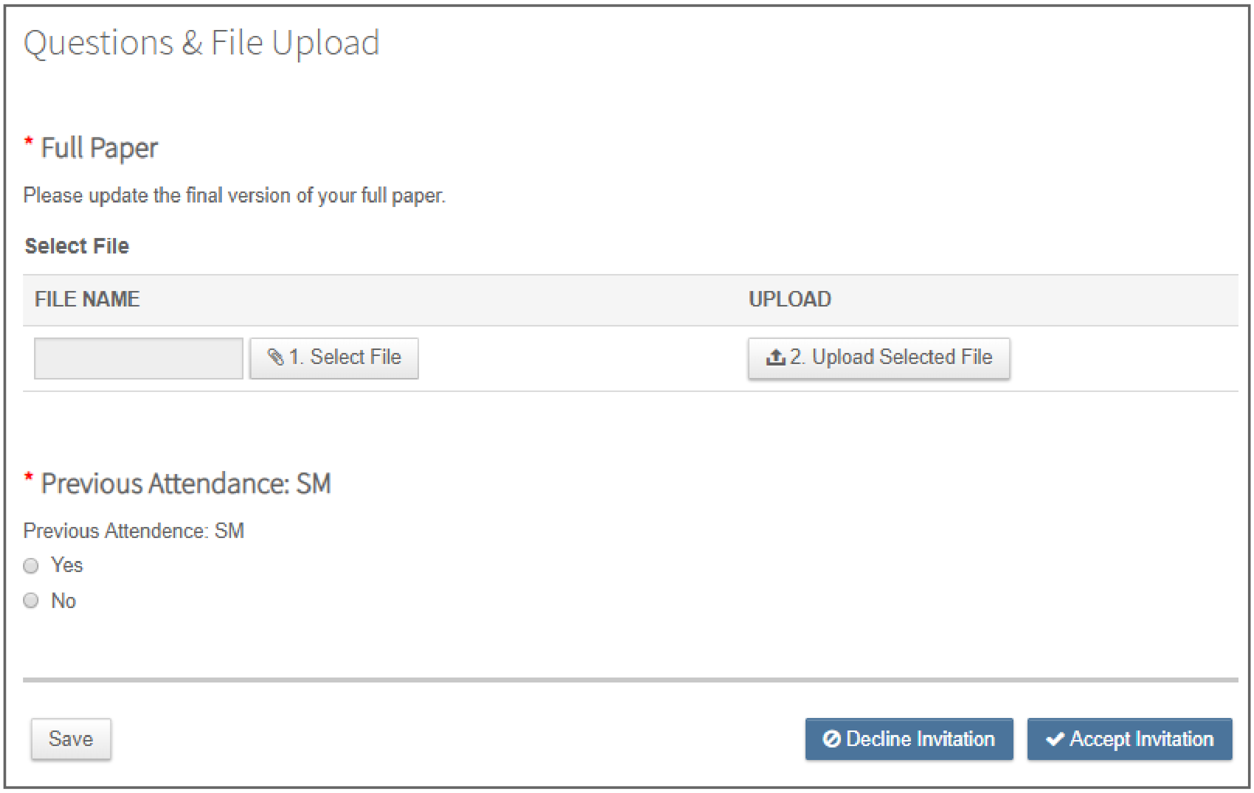
Your session details are as follows:

Session Type: Clinical Session
Session Title: Clinical 30
Session Room: Barboursville Room
Date and time: October 14, 2016 from 3:00 PM to 4:00 PM
Presentation Time: 3:30 PM to 4:00 PM
Session Date: October 14, 2016
To respond to this invitation, please click on Accept Invitation or Decline Invitation in the area above.

Thank you again for your participation. We look forward to seeing you in Charlottesville, Virginia.

Sincerely,

John B. Doe
John B. Doe
ScholarOne Annual Meeting



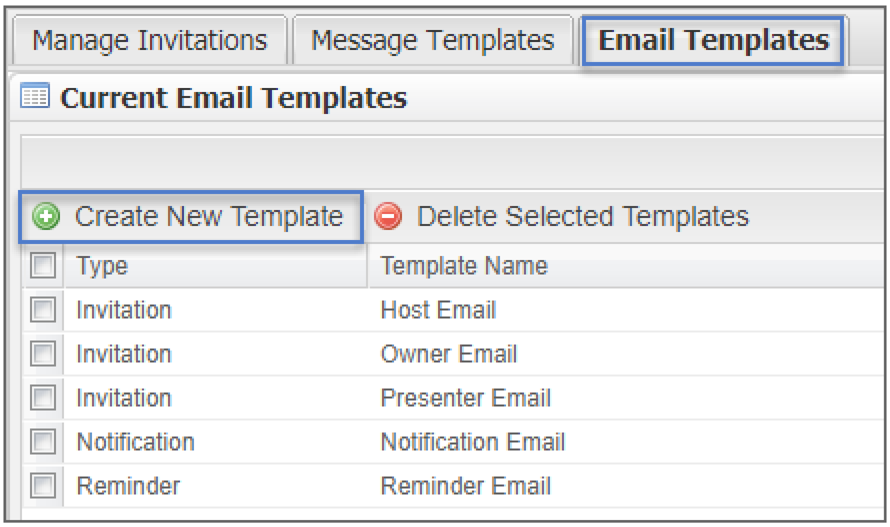
Note: When a presenter's abstract is moved within a session there is no need to re-invite the presenter. Session data (date, time, location) will automatically update on the invitation when changes are made. When a presenter's abstract is moved to a different session, the invitation may or may not stay intact depending on your specific configuration. Please contact your Client Implementation Manager to discuss the best option for your site.

CREATING EMAIL TEMPLATES

Email templates are customized emails that request the presenter, host, or owner to login to your meeting site to view their **Invitation (Message)** in their **Message Center**. Reminder emails and notification emails will also be available in their **Message Center**.

CREATING EMAIL TEMPLATES

Click on the **Email Templates** tab and then click on **Create New Template**.



You will begin by indicating whether the email is an invitation, reminder, or notification type email. The labels are ways for you to distinguish one type of email from another for internal organization.

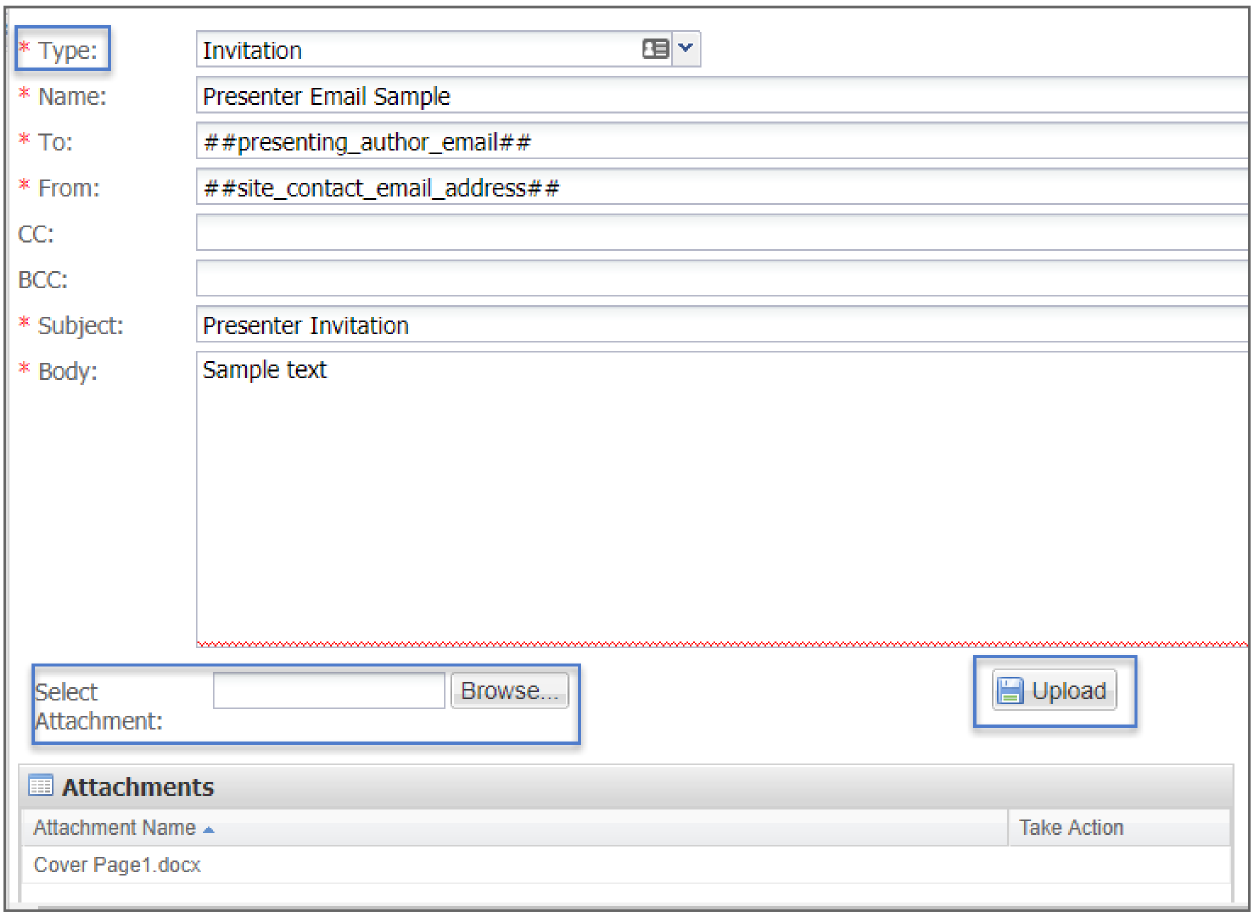
Invitation: The invitation email would normally be used to notify a person on the first interaction with the Message. It indicates that there is an invitation to respond to. Consider using a deep link tag (or instructing the person to login to the site and respond via the Message Center). Deep links include ##view_invitation(deep_link)_plain_text##. See the Special Tags chart.

Notification: A notification email would be labeled and used after the invitation or first initial email to make the presenter or host aware of additional information.

Reminder: A reminder email is used to remind users (Presenters/Hosts) of an upcoming response deadline. Consider using the custom deadline tag: ##Invitation_close_date## in the template. See the Special Tags chart.

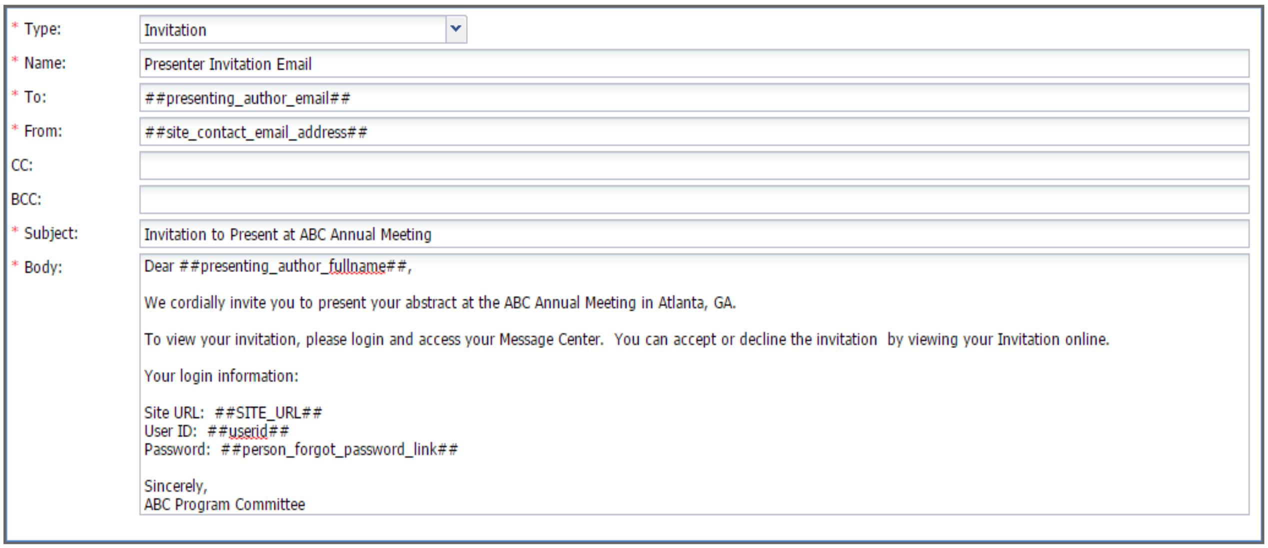
Give the template a descriptive **Name** and complete the **To**, **From**, and **Subject** lines. Create the **Body** of your email using the **Data Tags**. Attachments can be included with the invitation email. First browse to your document and then click **Upload**. The attachment is then tied to your email template.

Note: Use the ##user_email## tag for all your template To: lines.



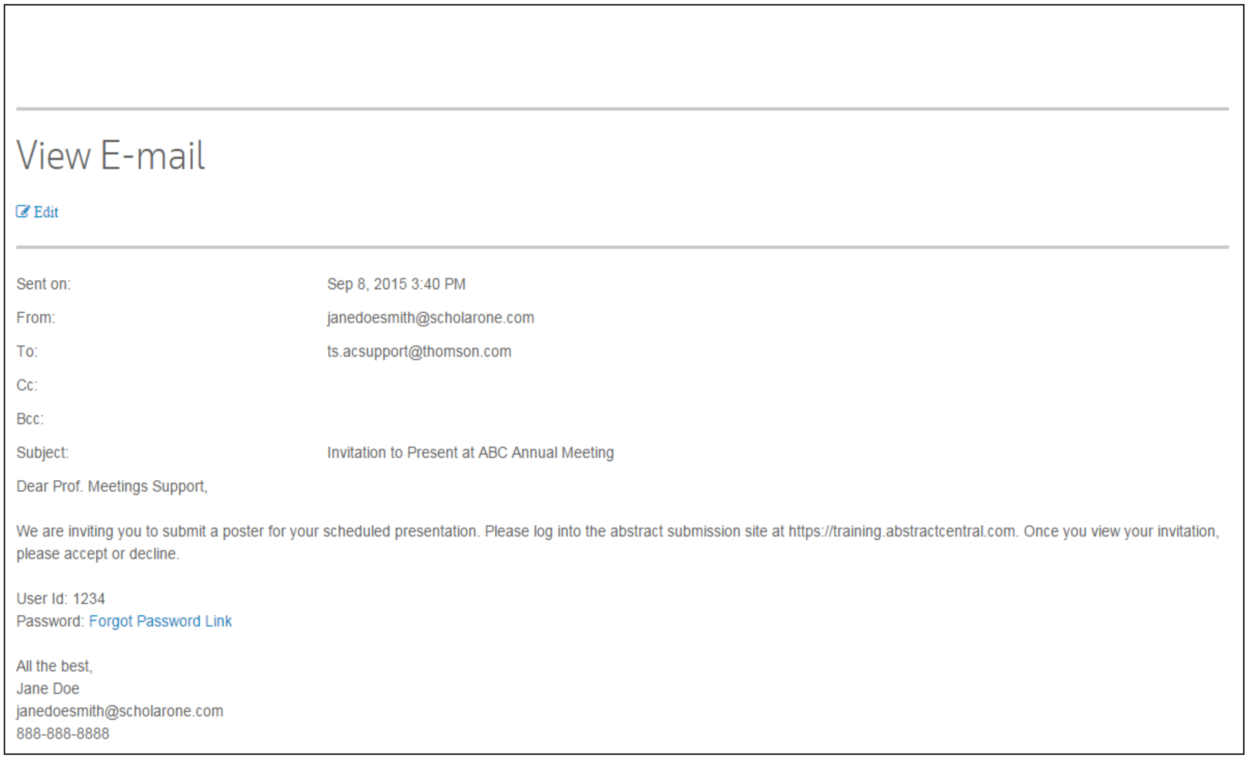
Each email template should include login information for the presenter, host, or owner or a deep link for them to access the invitation or invitations page directly from the email. See the Special Tags chart for more information on the links). If your site uses Single Sign-on, you would not include ScholarOne's login information. Either use deep links or include instructions on logging in to their account through your society's website. Below is a sample template. You can add attachments to the email.

TEMPLATE VIEW



* Type:	Invitation
* Name:	Presenter Invitation Email
* To:	##presenting_author_email##
* From:	##site_contact_email_address##
CC:	
BCC:	
* Subject:	Invitation to Present at ABC Annual Meeting
* Body:	Dear ##presenting_author_fullname##, We cordially invite you to present your abstract at the ABC Annual Meeting in Atlanta, GA. To view your invitation, please login and access your Message Center. You can accept or decline the invitation by viewing your Invitation online. Your login information: Site URL: ##SITE_URL## User ID: ##userid## Password: ##person_forgot_password_link## Sincerely, ABC Program Committee

RECIPIENT VIEW



View E-mail

Edit

Sent on: Sep 8, 2015 3:40 PM

From: janedoesmith@scholarone.com

To: ts.acsupport@thomson.com

Cc:

Bcc:

Subject: Invitation to Present at ABC Annual Meeting

Dear Prof. Meetings Support,

We are inviting you to submit a poster for your scheduled presentation. Please log into the abstract submission site at https://training.abstractcentral.com. Once you view your invitation, please accept or decline.

User Id: 1234
Password: Forgot Password Link

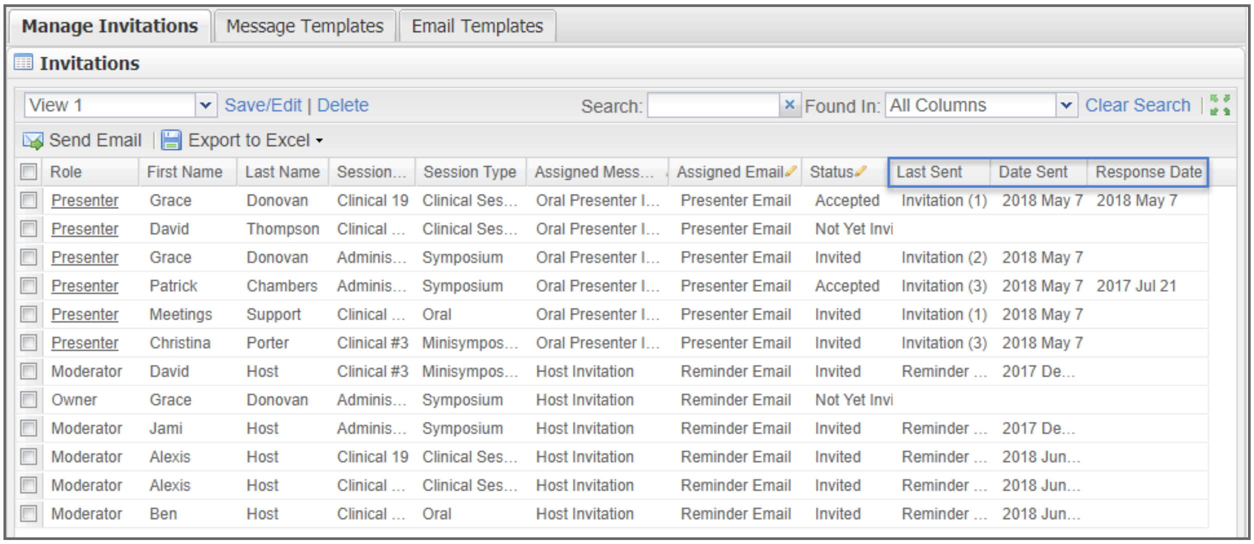
All the best,
Jane Doe
janedoesmith@scholarone.com
888-888-8888

SPECIAL TAGS

TAG	DESCRIPTION
##custom_field_1##	This field can be populated with site specific data. See the Admin User Guide for more information on populating the tag. Admin Center > Email Administration > Upload Custom Field Data.
##Invitation_close_date##	Displays the close date as indicated at the bottom of the Manage Invitations Grid. This tag will update if the close date is updated.
##invitation_custom_message##	This tag displays a customized message when inserted into a Message Template. Contact your Client Implementation Manager to configure the message.
##view_invitation(deep_link)##	Displays "View Invitation" in the email. The link will take the user directly to one particular message to accept or decline. *The disadvantage is that the link may make the email fail due to the deep link.*
##view_invitation(deep_link)_plain_text##	The full URL will display for this link. The user will be taken directly to the accept or decline options. The email will not fail using this method.
##view_invitations(deep_link)##	Displays "View Invitations" in the email. The link will take the user to the **Message Center** where all invitations can be viewed. *The disadvantage is that the link may make the email fail due to the deep link.*
##view_invitations(deep_link)_plain_text##	The full URL will display for this link. The user will be taken to their **Message Center** where he or she can view all invitations. The email will not fail using this method.

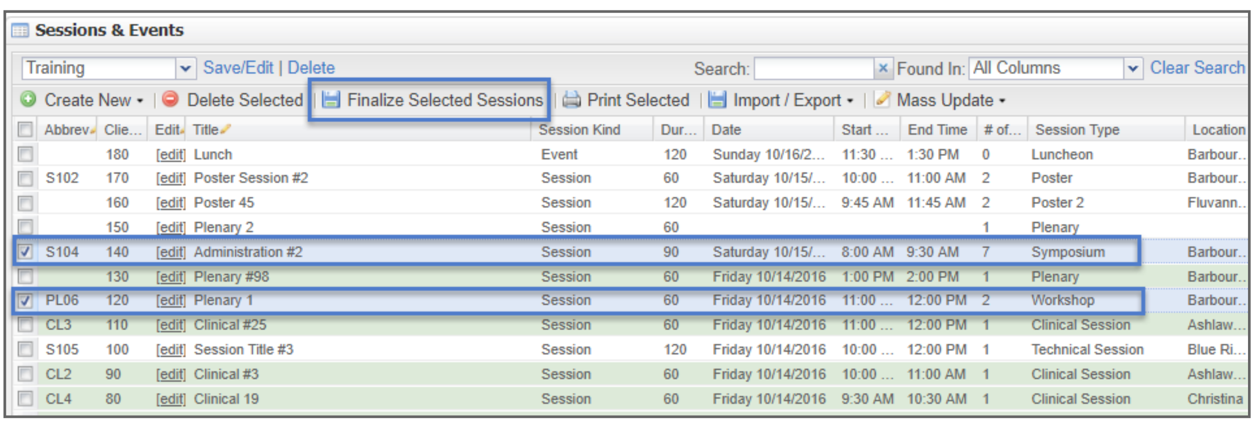
MANAGING INVITATIONS

Once you have your templates in place, the next step is to **Manage Invitations**. You can send emails and manage sent emails using the manage invitations functionality. The **Manage Invitations** grid shows real time status of all invitations.



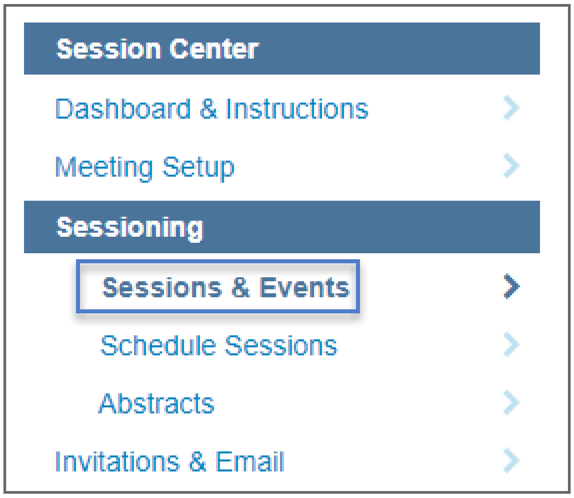
PREPARING TO SEND EMAILS

Before beginning the process of selecting templates, you must finalize sessions in the **Sessions & Events** grid. If a session is not finalized, the presenters, hosts, and owners will not populate in the **Manage Invitations** grid.

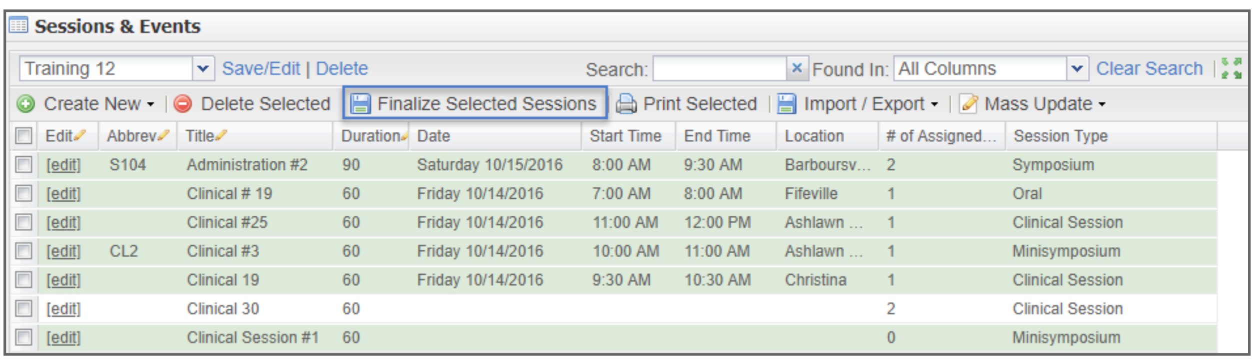


Note: It is important to note that a session or event may become unfinalized if you remove or add a presenter, host, or owner to a session. You may need to re-finalize after you update sessions and events.

Access the **Sessions & Events** grid by navigating to **Sessioning** in the left-hand menu.



Select the sessions you want to populate in the **Manage Invitations** grid and click **Finalize Selected Sessions**.



	Edit	Abbrev	Title	Duration	Date	Start Time	End Time	Location	# of Assigned...	Session Type
☐	[edit]	S104	Administration #2	90	Saturday 10/15/2016	8:00 AM	9:30 AM	Barboursv...	2	Symposium
☐	[edit]		Clinical # 19	60	Friday 10/14/2016	7:00 AM	8:00 AM	Fifeville	1	Oral
☐	[edit]		Clinical #25	60	Friday 10/14/2016	11:00 AM	12:00 PM	Ashlawn ...	1	Clinical Session
☐	[edit]	CL2	Clinical #3	60	Friday 10/14/2016	10:00 AM	11:00 AM	Ashlawn ...	1	Minisymposium
☐	[edit]		Clinical 19	60	Friday 10/14/2016	9:30 AM	10:30 AM	Christina	1	Clinical Session
☐	[edit]		Clinical 30	60					2	Clinical Session
☐	[edit]		Clinical Session #1	60					0	Minisymposium

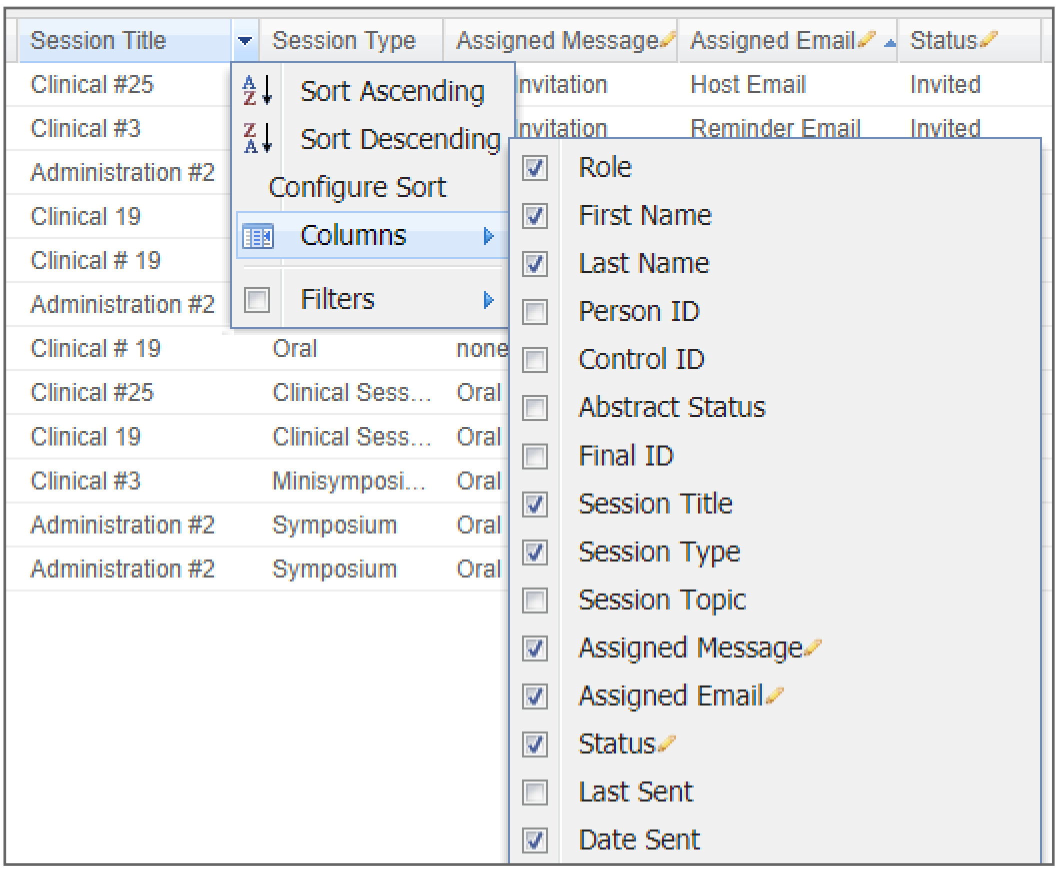
Note: Finalized sessions will appear in green highlight.

CUSTOMIZING THE GRID

Once your sessions and events have been finalized, you can begin the process of sending out the invitation emails. The first step is to customize and sort the grid data.

Columns

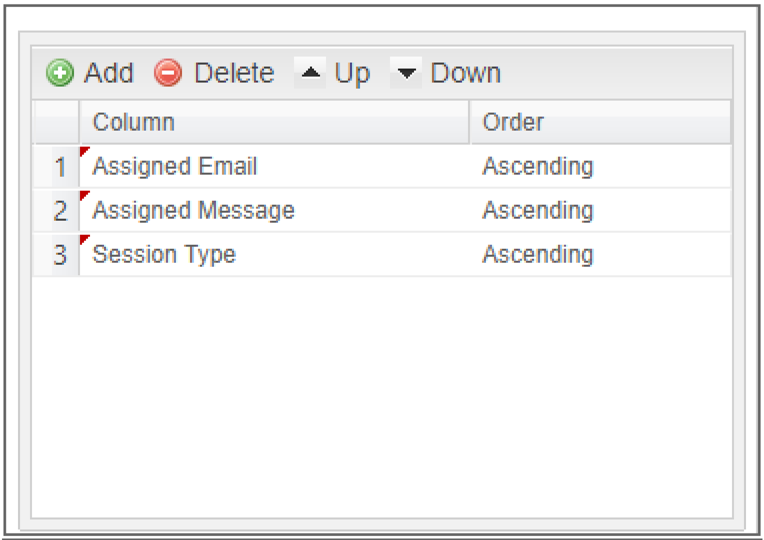
As with the **Session & Events** grid, you can configure the columns. To customize what columns appear in the grid, click to the right of any column header to access the column configuration options. Check or uncheck which columns you want to appear. You can sort the column ascending or descending.



Sorting

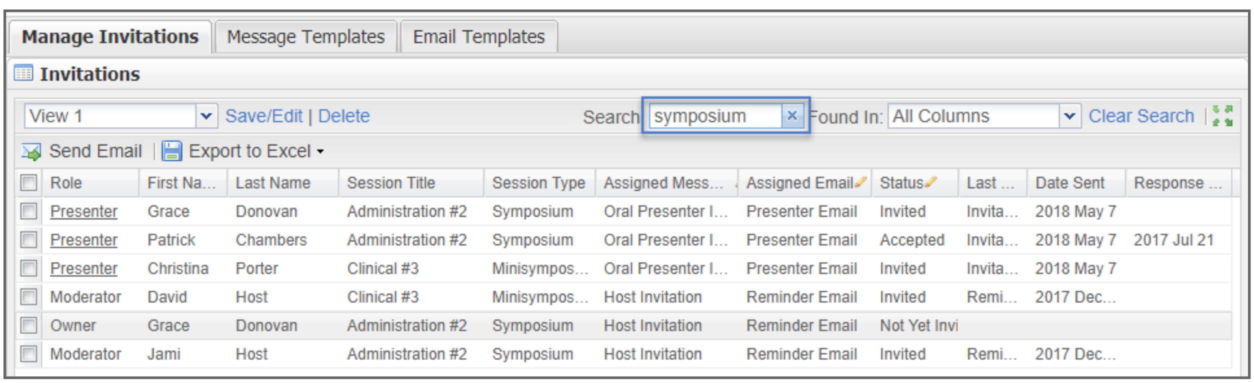
Use **Configure Sort** to do a multi-level sort on the grid data.

Clarivate Analytics



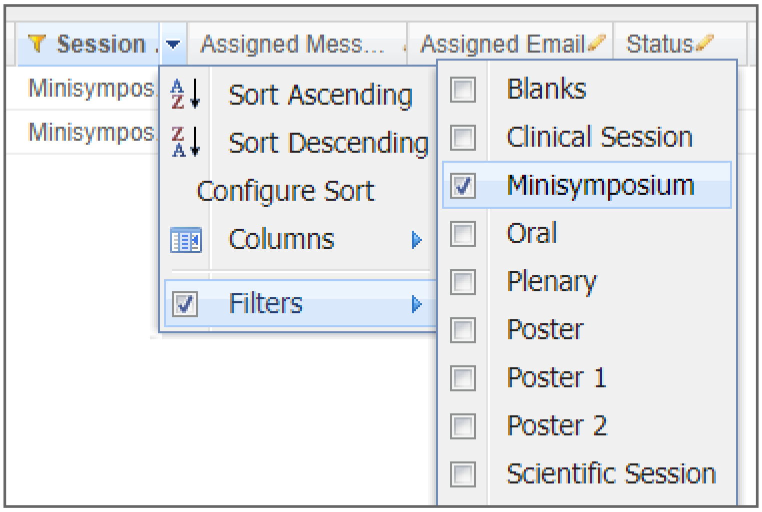
Searching

You may find it convenient to search for specific data. Type your search criteria in the text box at the top of the grid. You can search across all columns or by a specific column. Click **Clear Search** to bring back all data to the grid.



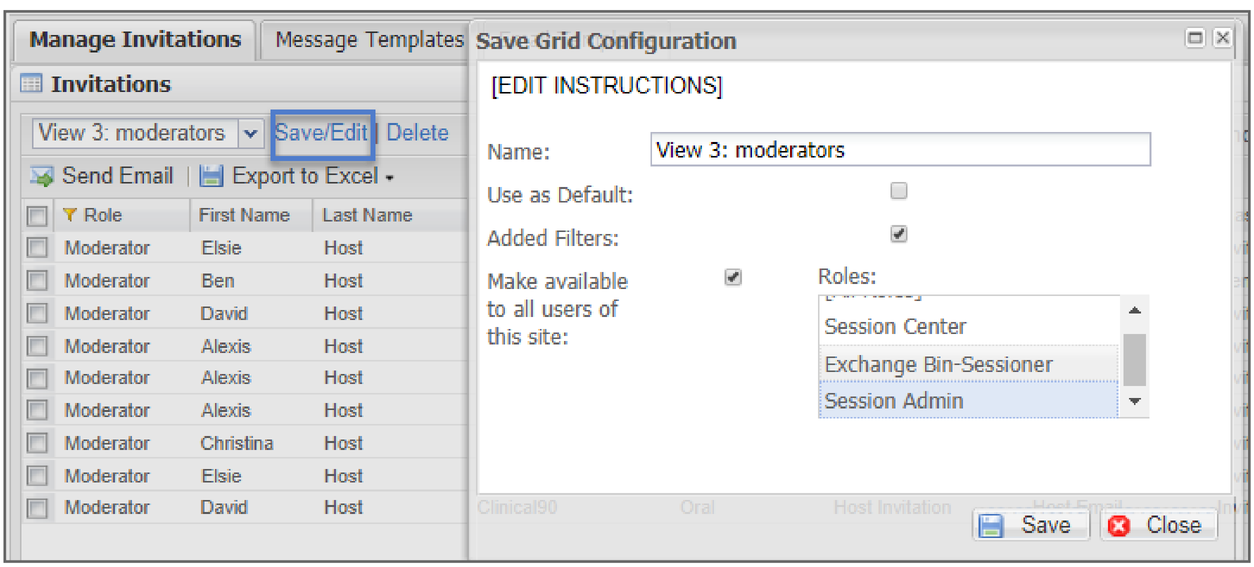
Filtering

You can also use the dropdown arrow beside the column headers to access the **Filter** option in the dropdown. This is especially useful in assigning different messages and email templates to different types of users. For example, your presenters for Oral sessions may receive different messages and emails than your Poster session presenters.



Saved Views

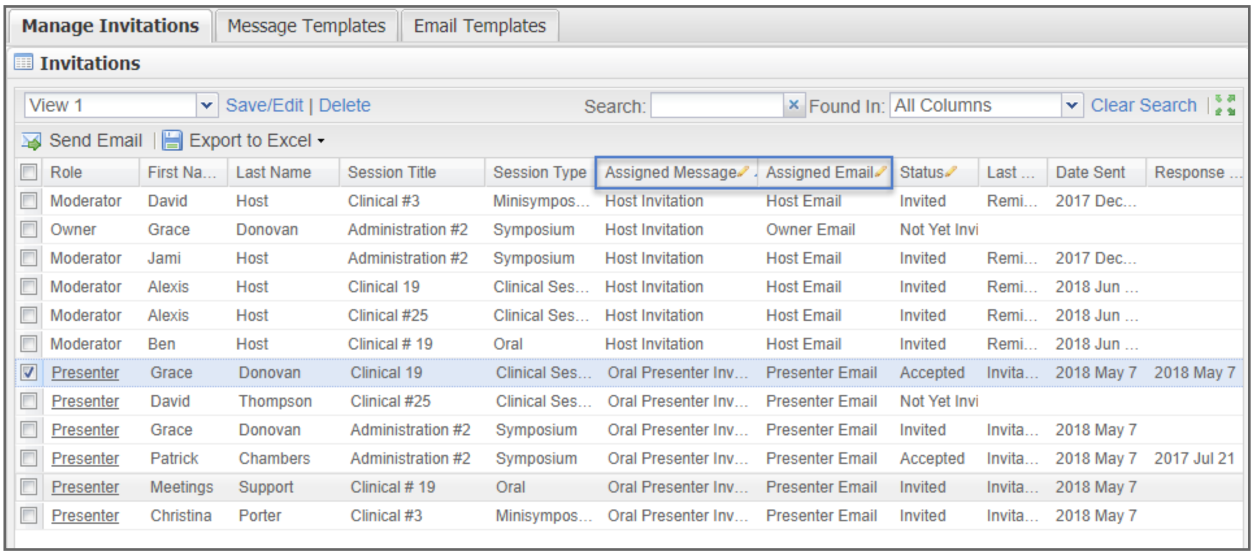
It is helpful to save your sorting by click on **Save/Edit**. Give the sort a descriptive name and include filters if used. Apply the view to all administrators. This will assist in making template assignment efficient. You will also want a default view with all information available.



SELECT YOUR TEMPLATES

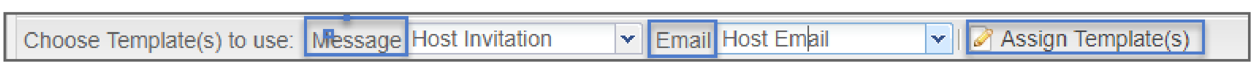
With the data sorted and filtered, you can now apply your templates in the grid. You can select the templates one by one or apply templates to many records at once. Each record must have an email template and a message template selected to complete the invitation email process.

To select an individual template, click in the **Assigned Message** and **Assigned Emails** fields and choose the correct template from the dropdown.



	Role	First Na...	Last Name	Session Title	Session Type	Assigned Message	Assigned Email	Status	Last ...	Date Sent	Response ...
☐	Moderator	David	Host	Clinical #3	Minisympos...	Host Invitation	Host Email	Invited	Remi...	2017 Dec...	
☐	Owner	Grace	Donovan	Administration #2	Symposium	Host Invitation	Owner Email	Not Yet Invi			
☐	Moderator	Jami	Host	Administration #2	Symposium	Host Invitation	Host Email	Invited	Remi...	2017 Dec...	
☐	Moderator	Alexis	Host	Clinical 19	Clinical Ses...	Host Invitation	Host Email	Invited	Remi...	2018 Jun ...	
☐	Moderator	Alexis	Host	Clinical #25	Clinical Ses...	Host Invitation	Host Email	Invited	Remi...	2018 Jun ...	
☐	Moderator	Ben	Host	Clinical # 19	Oral	Host Invitation	Host Email	Invited	Remi...	2018 Jun ...	
☑	Presenter	Grace	Donovan	Clinical 19	Clinical Ses...	Oral Presenter Inv...	Presenter Email	Accepted	Invita...	2018 May 7	2018 May 7
☐	Presenter	David	Thompson	Clinical #25	Clinical Ses...	Oral Presenter Inv...	Presenter Email	Not Yet Invi			
☐	Presenter	Grace	Donovan	Administration #2	Symposium	Oral Presenter Inv...	Presenter Email	Invited	Invita...	2018 May 7	
☐	Presenter	Patrick	Chambers	Administration #2	Symposium	Oral Presenter Inv...	Presenter Email	Accepted	Invita...	2018 May 7	2017 Jul 21
☐	Presenter	Meetings	Support	Clinical # 19	Oral	Oral Presenter Inv...	Presenter Email	Invited	Invita...	2018 May 7	
☐	Presenter	Christina	Porter	Clinical #3	Minisympos...	Oral Presenter Inv...	Presenter Email	Invited	Invita...	2018 May 7	

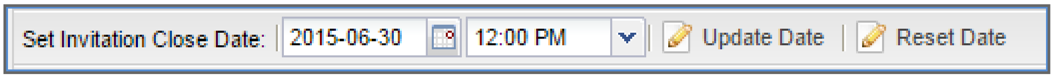
To apply templates to more than one record, use the **Choose Template** function at the bottom of the grid. Select a **Message Template** (Invitation template) and an **Email Template**. Check the records you want to apply the templates to and then click **Assign Template(s)**. Using your saved views can make the assignment process efficient.



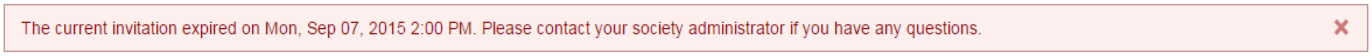
SET INVITATION CLOSE DATE

In some situations, you may want to apply a deadline for the presenters, hosts, and owners to complete their invitation. Using the **Set Invitation Close Date** functionality, select the appropriate hosts and presenters, enter a date and time for the deadline and click **Update Date.** Click **Reset Date** to reset to a later date. You can have multiple close dates for different user types.

Clarivate Analytics



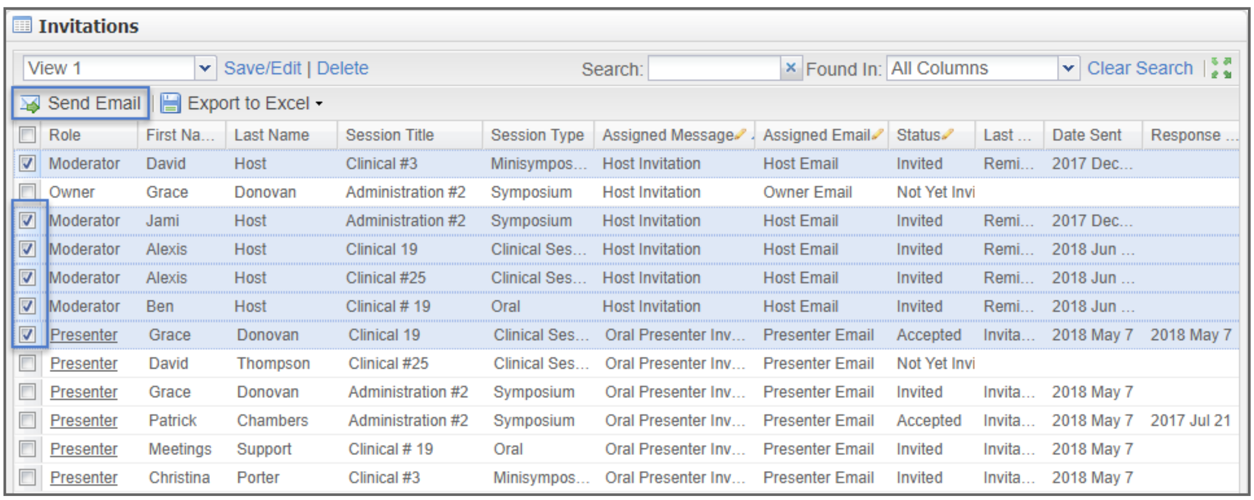
Presenters and hosts who do not respond before the invitation close date will receive an invitation closed message such as the one below:



SEND EMAIL

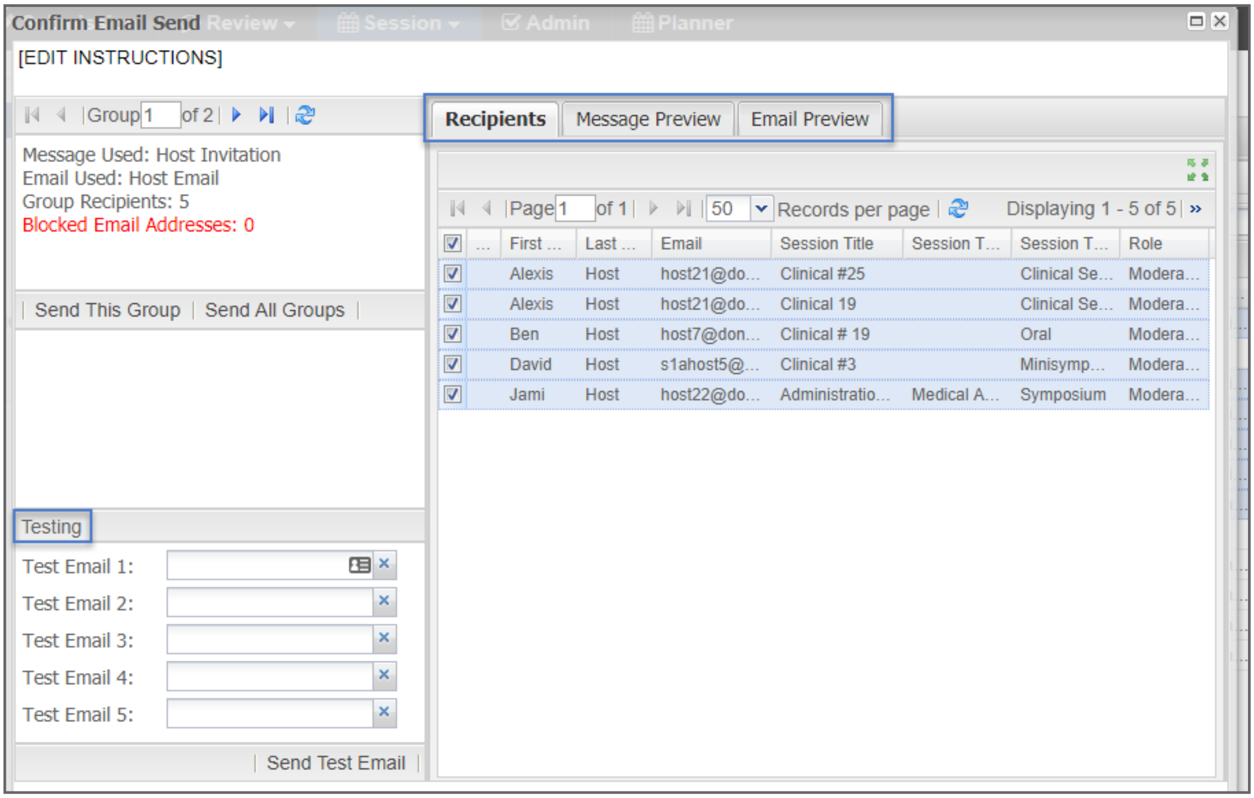
When you have the templates assigned, the next step is to complete the process by sending the emails.

First, select the invitations to which you wish to send an email by checking the box in each row. To select all entries, click the box at the top left of the grid. Then click **Send Email** at the top of the grid. Use you views to quickly identify which emails to send.



	Role	First Na...	Last Name	Session Title	Session Type	Assigned Message	Assigned Email	Status	Last ...	Date Sent	Response ...
☑	Moderator	David	Host	Clinical #3	Minisympos...	Host Invitation	Host Email	Invited	Remi...	2017 Dec...	
☐	Owner	Grace	Donovan	Administration #2	Symposium	Host Invitation	Owner Email	Not Yet Invi			
☑	Moderator	Jami	Host	Administration #2	Symposium	Host Invitation	Host Email	Invited	Remi...	2017 Dec...	
☑	Moderator	Alexis	Host	Clinical 19	Clinical Ses...	Host Invitation	Host Email	Invited	Remi...	2018 Jun ...	
☑	Moderator	Alexis	Host	Clinical #25	Clinical Ses...	Host Invitation	Host Email	Invited	Remi...	2018 Jun ...	
☑	Moderator	Ben	Host	Clinical # 19	Oral	Host Invitation	Host Email	Invited	Remi...	2018 Jun ...	
☑	Presenter	Grace	Donovan	Clinical 19	Clinical Ses...	Oral Presenter Inv...	Presenter Email	Accepted	Invita...	2018 May 7	2018 May 7
☐	Presenter	David	Thompson	Clinical #25	Clinical Ses...	Oral Presenter Inv...	Presenter Email	Not Yet Invi			
☐	Presenter	Grace	Donovan	Administration #2	Symposium	Oral Presenter Inv...	Presenter Email	Invited	Invita...	2018 May 7	
☐	Presenter	Patrick	Chambers	Administration #2	Symposium	Oral Presenter Inv...	Presenter Email	Accepted	Invita...	2018 May 7	2017 Jul 21
☐	Presenter	Meetings	Support	Clinical # 19	Oral	Oral Presenter Inv...	Presenter Email	Invited	Invita...	2018 May 7	
☐	Presenter	Christina	Porter	Clinical #3	Minisympos...	Oral Presenter Inv...	Presenter Email	Invited	Invita...	2018 May 7	

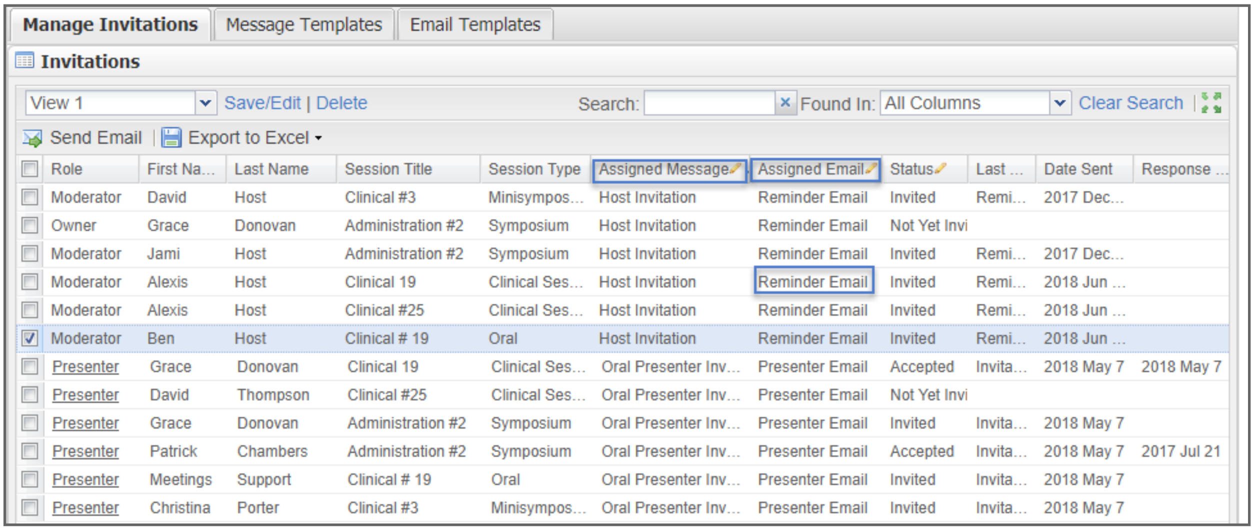
On the **Confirm Email Send** page, you can preview the **Message (Invitation)** and **Email** templates. You can also verify the **Recipients**. If you want to send yourself a test email, put your email address in one of the test fields and click **Send Test Email**.



When your verification process is complete, click on **Send This Group** or **Send All Groups**. You can create multiple batches by exiting out of the **Confirm Email Send** grid and returning to the **Mange Invitation** grid to start a new batch. Each email/message template combination is a new group. Groups are most easily created using sorting and filtering (or using saved views) of the Manage Invitations grid.

SENDING NOTIFICATIONS AND REMINDERS

Sending reminders and notifications follows the same steps as your original email send. Select the appropriate **Reminder** or **Notification Email Template** for each presenter, host, or owner, check the desired presenters and hosts and then click **Send Email**. You will leave the same message template assigned (you would not want to change their invitation).



	Role	First Na...	Last Name	Session Title	Session Type	Assigned Message	Assigned Email	Status	Last ...	Date Sent	Response ...
☐	Moderator	David	Host	Clinical #3	Minisympos...	Host Invitation	Reminder Email	Invited	Remi...	2017 Dec...	
☐	Owner	Grace	Donovan	Administration #2	Symposium	Host Invitation	Reminder Email	Not Yet Invi			
☐	Moderator	Jami	Host	Administration #2	Symposium	Host Invitation	Reminder Email	Invited	Remi...	2017 Dec...	
☐	Moderator	Alexis	Host	Clinical 19	Clinical Ses...	Host Invitation	Reminder Email	Invited	Remi...	2018 Jun ...	
☐	Moderator	Alexis	Host	Clinical #25	Clinical Ses...	Host Invitation	Reminder Email	Invited	Remi...	2018 Jun ...	
☑	Moderator	Ben	Host	Clinical # 19	Oral	Host Invitation	Reminder Email	Invited	Remi...	2018 Jun ...	
☐	Presenter	Grace	Donovan	Clinical 19	Clinical Ses...	Oral Presenter Inv...	Presenter Email	Accepted	Invita...	2018 May 7	2018 May 7
☐	Presenter	David	Thompson	Clinical #25	Clinical Ses...	Oral Presenter Inv...	Presenter Email	Not Yet Invi			
☐	Presenter	Grace	Donovan	Administration #2	Symposium	Oral Presenter Inv...	Presenter Email	Invited	Invita...	2018 May 7	
☐	Presenter	Patrick	Chambers	Administration #2	Symposium	Oral Presenter Inv...	Presenter Email	Accepted	Invita...	2018 May 7	2017 Jul 21
☐	Presenter	Meetings	Support	Clinical # 19	Oral	Oral Presenter Inv...	Presenter Email	Invited	Invita...	2018 May 7	
☐	Presenter	Christina	Porter	Clinical #3	Minisympos...	Oral Presenter Inv...	Presenter Email	Invited	Invita...	2018 May 7	

ACCEPT AND DECLINE CONFIRMATION EMAILS

There are six system emails in Admin > System Emails that must be configured. To learn more about Emails, please reference the Admin Guide located under **Get Help Now**.

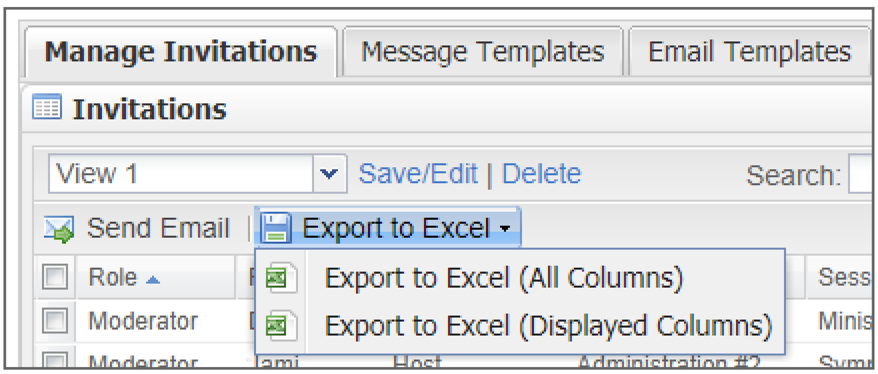
- Author Invitation Accepted (presenter acceptance confirmation email)
- Author Invitation Declined (presenter decline confirmation email)
- Host Invitation Accepted (host invitation acceptance confirmation email)
- Host Invitation Declined (host invitation decline confirmation email)
- Owner Invitation Accepted (owner invitation accept confirmation email)
- Owner Invitation Declined (owner invitation decline confirmation email)

The emails are triggered by the responses given by presenters and hosts. If there are required questions on the message that are not complete, the accept email will not trigger until all parts of the message have been completed.

Note: Many administrators will CC or BCC the society email address when invitations are declined. This allows time to make a replacement presenter, host, or owner. The system email templates are located in Administration>Email Administration>System Emails>Author Invitation Declined, Host Invitation Declined, and Owner Invitation Declined.

EXPORT TO EXCEL

You can export the **Manage Invitations** grid data to Excel. Select **Export to Excel** and then choose to either export all column data or only export displayed column data.



SPEAKER MANAGEMENT REVIEW

OVERVIEW

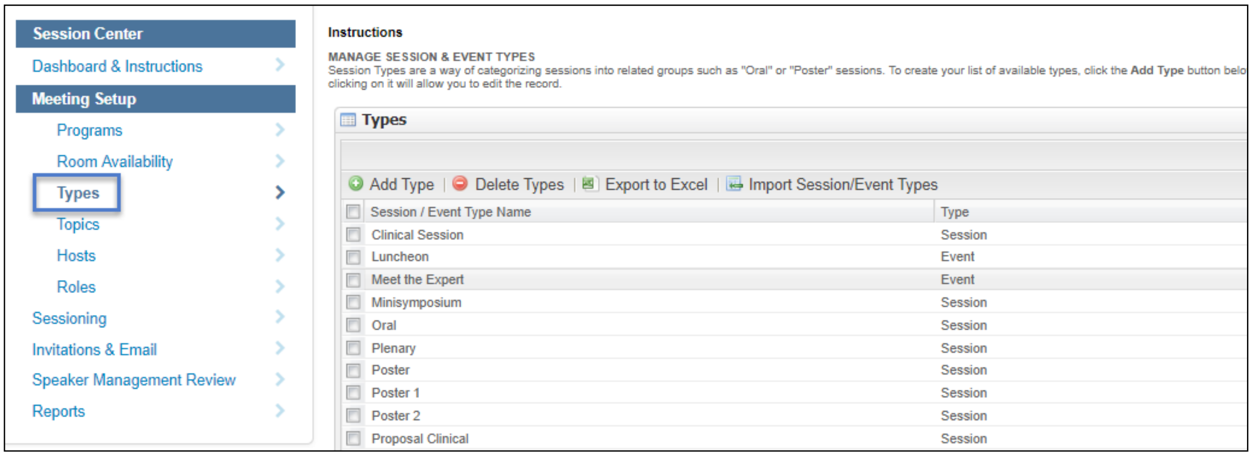
This add-on is available for the **review of files or other information completed during the invitation process**. In the image of Questions & File Upload, the presenter is asked to upload a Full Paper and answer a custom question during the acceptance of the invitation. If configured, this file is then visible to the Session Host and Owner in his/her Message Center. The host and/or owners are considered the "Reviewers".

Note: Common uploaded files are Full Papers and Slides.

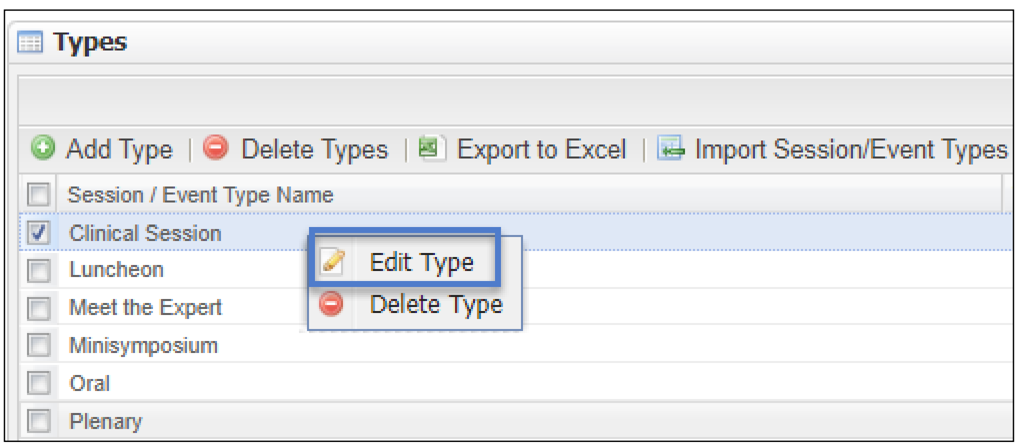
SESSION SETUP

To begin using the tool, you must first setup the sessions to reflect speaker management review.

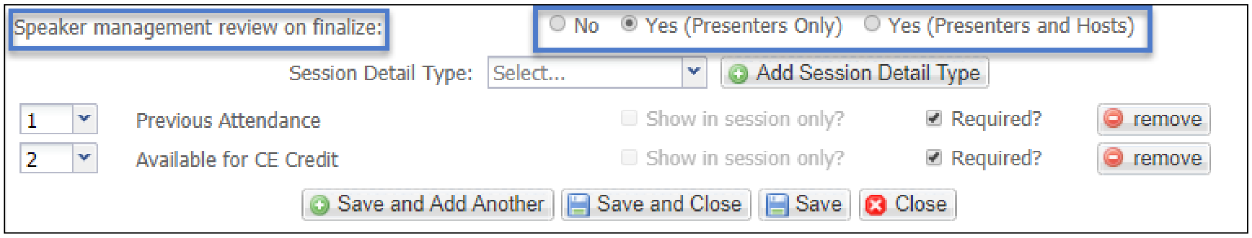
Select **Meeting Setup** from the session menu. Navigate to **Types**.



Select the session type you want to include in the review process. Right click and choose **Edit Type**.



At the bottom of the type information is an option to make **Speaker Management Review** active.

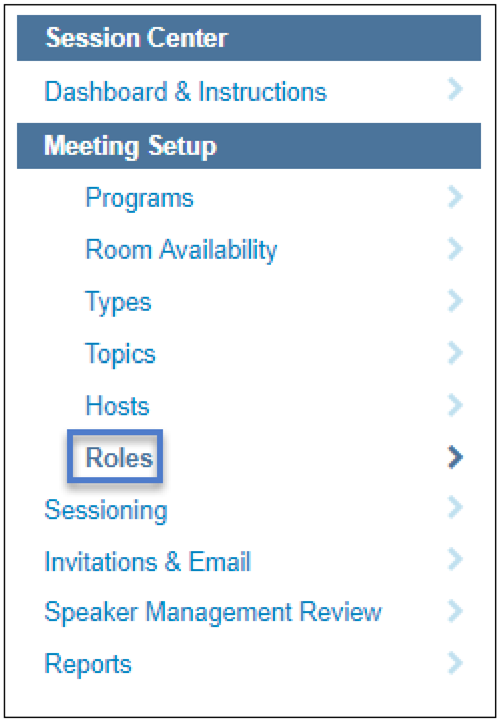


Selecting No will not include the session type in Review. Selecting Presenters Only will make files and other uploaded information viewable by Hosts. Selecting Presenters and Hosts will make uploaded information viewable to both Hosts (presenter files) and Owners (host files).

Note: You will want to check your other sessions to make sure the No button is toggled for session types that will not go through Speaker Management Review.

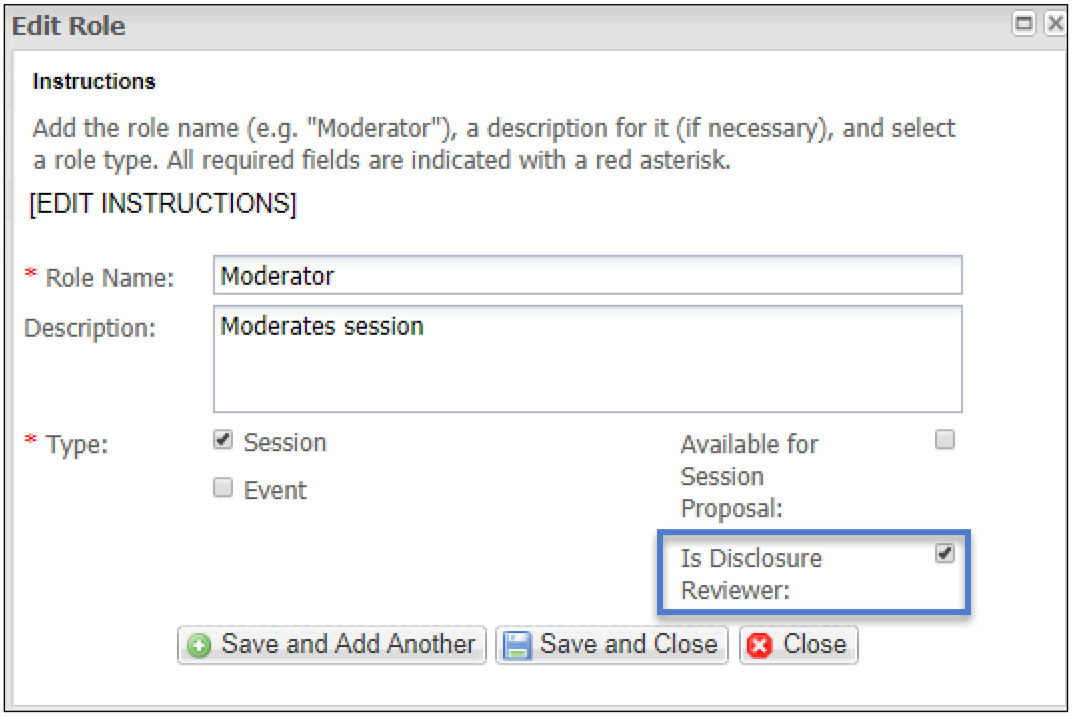
HOST ROLE SETUP

As a final setup step, designate the host role that will be used for Review. Select **Roles** under Meeting Setup in the main menu.



Right click on the role you want to edit to give Speaker Management Review responsiblity. In the pop-up field click **Is Disclosure Reviewer** to mark the role as a Speaker Management Reviewer role.

Owners are not configurable. The ability to add a host is on the session's Information tab in the Sessions & Events grid. Using owners is an optional step.

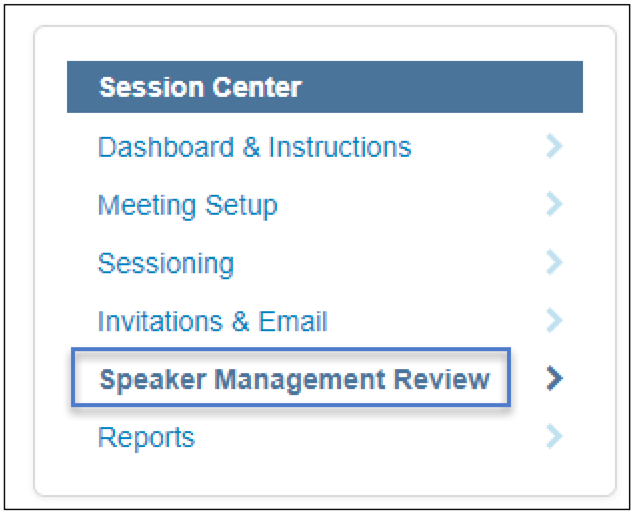


SEND OUT INVITATIONS

Once setup is complete, invitations can be sent so that the presenters can upload their files and answer any additional information.

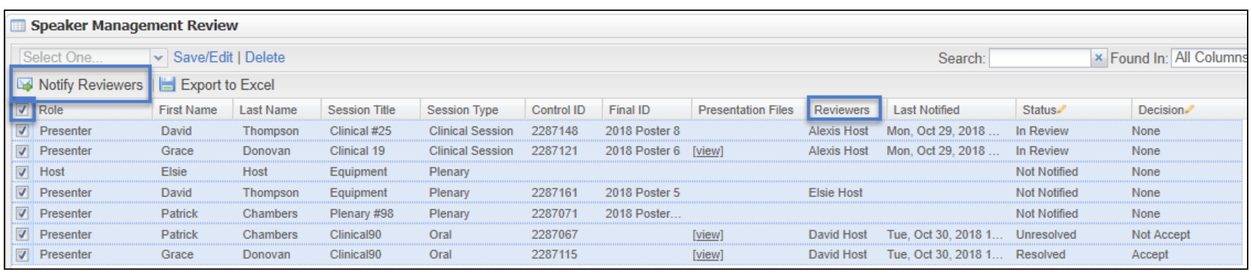
The Speaker Management Review Grid

The Speaker Management Review grid is available under the **Session Center** menu. Click on **Speaker Management Review** to access the grid.



This administrative grid is used to notify Reviewers that files are available in their **Message Center**. Records are populated in the grid as the presenters/hosts upload their information via their invitation. Best practice indicates that a file upload deadline be imposed so that all files for review appear in the Reviewer's Message Center all at once.

You will choose the **Select All Checkbox** at the top left and send out the notifications to the Reviewers. Each Reviewer will only get the initial notification of Reviews available in their Message Center.



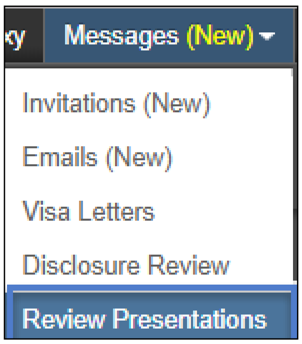
Role	First Name	Last Name	Session Title	Session Type	Control ID	Final ID	Presentation Files	Reviewers	Last Notified	Status	Decision
Presenter	David	Thompson	Clinical #25	Clinical Session	2287148	2018 Poster 8		Alexis Host	Mon, Oct 29, 2018 ...	In Review	None
Presenter	Grace	Donovan	Clinical 19	Clinical Session	2287121	2018 Poster 6	[view]	Alexis Host	Mon, Oct 29, 2018 ...	In Review	None
Host	Elsie	Host	Equipment	Plenary						Not Notified	None
Presenter	David	Thompson	Equipment	Plenary	2287161	2018 Poster 5		Elsie Host		Not Notified	None
Presenter	Patrick	Chambers	Plenary #98	Plenary	2287071	2018 Poster...				Not Notified	None
Presenter	Patrick	Chambers	Clinical90	Oral	2287067		[view]	David Host	Tue, Oct 30, 2018 1...	Unresolved	Not Accept
Presenter	Grace	Donovan	Clinical90	Oral	2287115		[view]	David Host	Tue, Oct 30, 2018 1...	Resolved	Accept

From the grid, you can view the presentation files and check status/decision. Not Notified indicates a file has not been sent to the Reviewer and should be triggered with the Notify button at the top left of the grid. In Review notes those presentations that are in the Reviewer's queue but have not been decided.

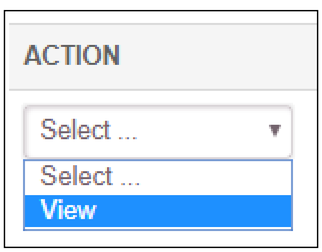
Note: A Resolved status indicates the file has been accepted and a Not Resolved indicates the file was not acceptable.

Host Review of Presentations

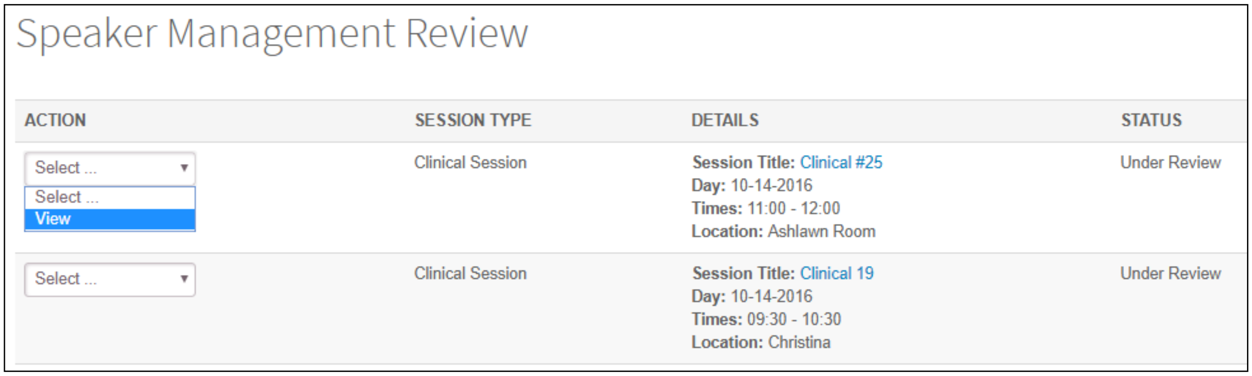
Once the Reviewer has been notified, the reviews will appear in the Message Center. They will click on **Review Presentations** in the Message Center dropdown.



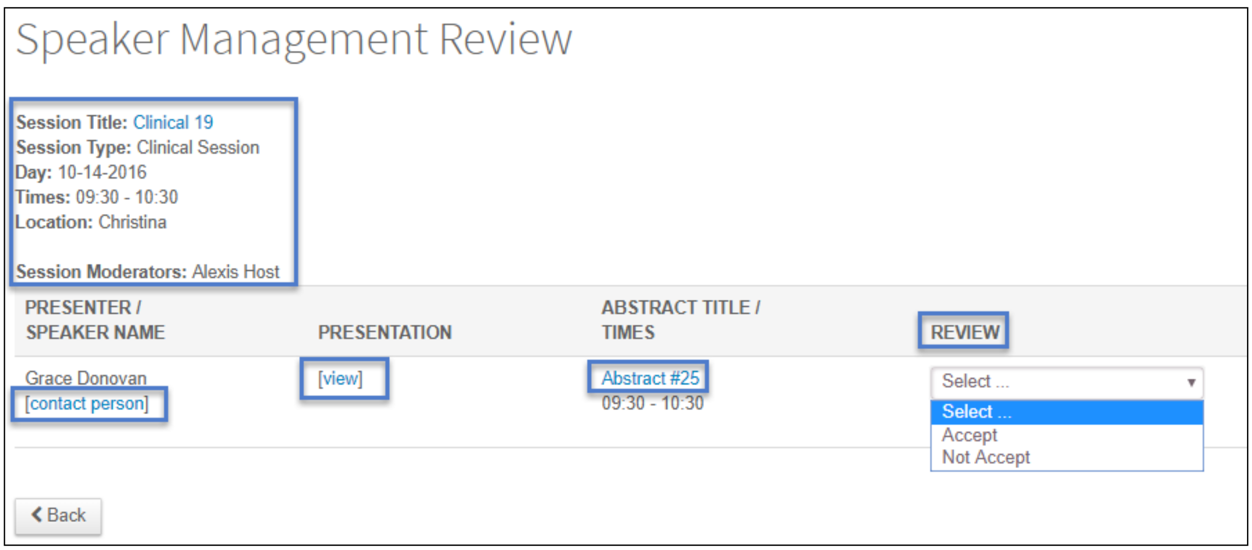
The Speaker Management Review page has four main features. The Action tab allows the reviewer to access the Review details and files by clicking **View** in the dropdown.



The type of session is indicated along with the session details. The session title is hyperlinked allowing the Reviewer to view the entire session proof. The status of the review is also indicated.

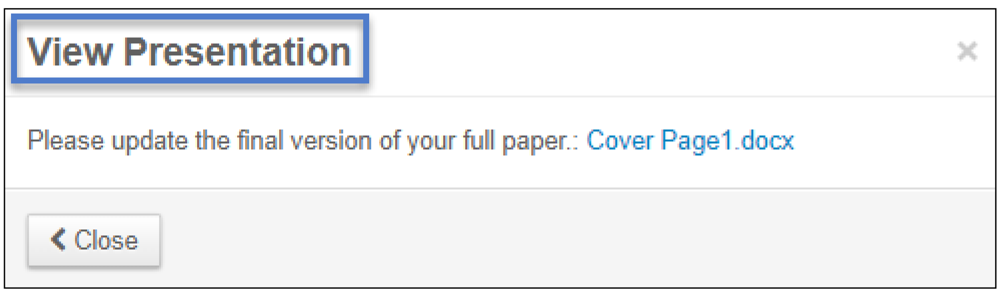


By clicking on **View**, the Reviewer can then see the presentation details.

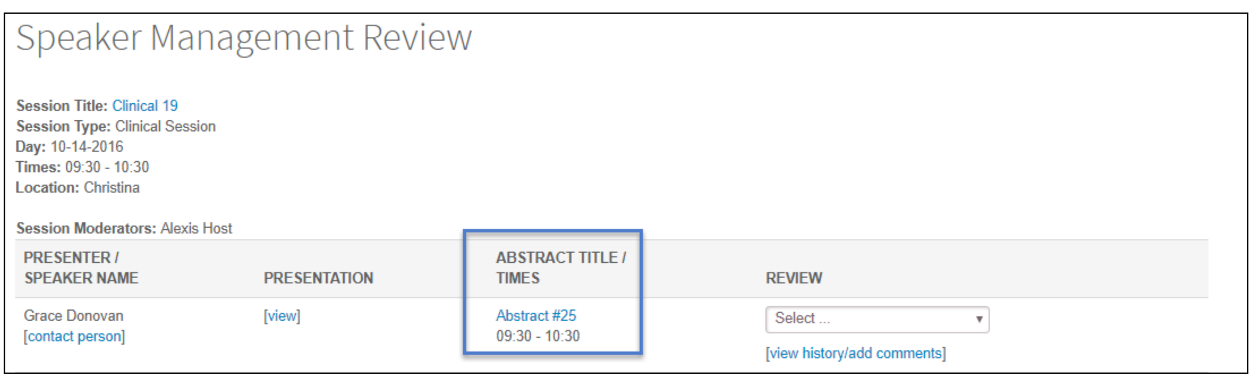


Session information is included in the top left. Below this section is the contact's information. By clicking **Contact Person**, the Reviewer can leave comments to the presenter which are then emailed to the presenter. They will click **Send Notification Email** when done with their comments.

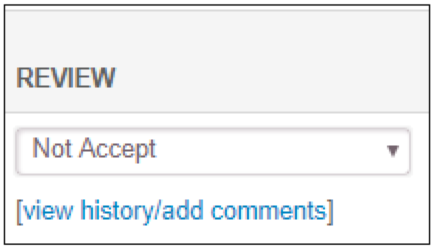
Under **Presentation** is a link to View the uploaded file.



Under Abstract Title/Time, the Reviewer can access the original Abstract proof and note the session time of the presentation.



Under Review, the Reviewer will either mark the review as accepted or not accepted. Under the dropdown is the option to leave internal comments and view historical comments.



If two Reviewers are assigned the same presentation to review, the latter Decision prevails.

Note: If the presenter updates a file, ensure they email the reviewer to let them know. There is no automatic notification back to the reviewer.

Email for Speaker Management Review

The email templates used for the **Notify Reviewer** action and **Comments for Presenter** are located under the Admin tab. Select **Admin >Email Administration>Templates > System Emails**. The first email template below is to let the presenter/host know the reviewer's comments. The second one is to notify the reviewer that files are ready for their review.

Deep Links

There are two email site tags available for use in the two Speaker Management Review email templates.

##host_speaker_management_review_deep_link##

This site tag takes the Reviewer straight to their Review Page in the Message Center.

##speaker_management_presentation_comment##

This tag pulls in the host's comments to the presenter in their comment notification email.

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: 6-December-2018
Document Version: 3.0