ScholarOne Abstracts ™

Speaker Management Administrator Guide

6-December-2018



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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.

Find FAQs		
speaker management	*in All	Find FAQ
Browse Categories		
All / ScholarOne Abstracts / Admin Assignments People Role Approval Customizable Data Export - CDE Reports - Admin Center Special View Schedule	Abstract Proof Configuration Session Proof Configuration E-mail File Export Data Export - Admin Center Configuration Settings	

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**."

Session Center	
Dashboard & Instructions	>
Meeting Setup	>
Sessioning	>
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.



Manage Invitat	ions Mess	age Templates	Email Templates							
Invitations										
View 1	✓ Save	/Edit Delete				Search:		× Found In:	All Columns	✓ Clear Search ^{5,8} / _{2,9}
🐺 Send Email	🔡 Export to	Excel -								
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 Invit	ted		
Presenter	Grace	Donovan	Clinical 19	Clinical Session	Oral Presenter Invitat	Presenter Email	Not Yet Invit	ted		
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 Invit	ted		
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 Invit	ted		
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 Invit	ted		
Moderator	Ben	Host	Clinical # 19	Oral	none	none	Not Yet Invit	ted		
Choose Template	(s) to use: N	lessage Select	✓ Email	Select	🗸 🧭 Assign Ter	nplate(s)				
Set Invitation Close Date: Reset Date										
I4 4 Page1	of 1 ▶ ▶	50 V Records	per page 2						Displaying	1 - 12 of 12 Selected 0 of 12

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.

Alex Smith 🗸		Messages (New) -	Help	Log Out
	In	vitations		
STRACT	E	nails (New)		

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.

Manage Invitations		sage Templates	Email Templates			
Current Message	Current Message Templates					
Create New Tem	O Create New Template O Delete Selected Templates					
Template Name						
Host Invitation	Host Invitation					
Oral Presenter Invitation						
Owner Invite						

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.



Custom Question Group:	Speaker Management	×	
	Custom Question	Response Type	Include
	Full Paper	File Upload	
	Draviaua Attendance: CM	Dadia Buttons	

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.

Add Message Template				
Data Tags	* Namo:	Samala Drocontor Tamplata		-
Search: ×	Name.			
##abstract_body##	* Subject:	Presenter Invitation		
##abstract_decision_status##	* Body:	Times New Roman 🔻 🗛 👔 🖪 🗸 🖬 🖉 🖬 🗐 🗄 🚍 🔚 🏣 🔝 🗛 אין	(0
##abstract_doi##				
##authors(all)##				
##authors(all)_email##				
##category##				
##comment_to_author##				
##contact_author_address1##				
##contact_author_address2##				
##contact_author_city##				
##contact_author_country##				
##contact_author_degree##				
##contact_author_firstname##				
##contact_author_fullname##				
##contact_author_lastname##				
##contact_author_nefix##				
##contact_author_salutation##				
##contact author state##				
##contact author zip##				
##current_user_email##				
##current_user_full_name##				
##custom_field_1##			a	
##date_today##			•	
##DEADLINE_DATE##	Custom	Select one		
##final_id##	Ouestion	ouce on one		
##HOTEL##	Group:			
##id##				Υ.
		Save and Close	Car	ncel



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



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	Î
clarivate_letterhead_header.jpg	No	No	/societyimages/training/clarivate_letterhead_header.jpg	25-Oct-2018	Î
Institution_List.txt	No	No	/societyimages/training/Institution_List.txt	06-Sep-2018	Î
S1A_Training_Header_(002).gif	Yes	No	logos/S1A_Training_Header_(002).gif	08-May-2018	Î
signature.jpg	No	No	/societyimages/training/signature.jpg	25-Oct-2018	Î
Test.csv	No	No	/societyimages/training/Test.csv	30-Aug-2018	Î

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 🔻 🗚 🖌 B I U 臣 吾 ☰ 迂 듣 圖 🚣 • 🥙 •
	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_litle## Session Room: ##session_location## Date and time: ##session_location## 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 L. 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 Tel: Direct Number: +1 (434) 964-4100 / Toll Free N E- URL: http://mchelp.manuscriptcentra	375 Greenbrier Drive Charlottesville, Virginia 22901 umber (US Only): (888) 503-1050 Mail: ts.acsupport@clarivate.com al.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 pres	entation 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 £. Doe ScholarOne Annual Meeting



Questions & File Upload	
* Full Paper Please update the final version of your full paper.	
Select File	
FILE NAME	UPLOAD
No. 1. Select File	▲ 2. Upload Selected File
 * Previous Attendance: SM Previous Attendence: SM Yes No 	
Save	Occiine Invitation Accept Invitation

Note: When a presenter's abstract is moved within a session there is no need to reinvite 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**.

Manage Invitations Message Templates Email Templates										
Current Email Templates										
Create New Template Delete Selected Templates										
🔲 Туре	Template Name									
Invitation	Host Email									
Invitation	Owner Email									
Invitation	Presenter Email									
Notification	Notification Email									
Reminder	Reminder Email									

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 <u>Special Tags chart</u>.

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 <u>Special Tags chart</u>.

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.

* Type:	Invitation
* Name:	Presenter Email Sample
* То:	##presenting_author_email##
* From:	##site_contact_email_address##
CC:	
BCC:	
* Subject:	Presenter Invitation
* Body:	Sample text
Select	Browse
Attachment:	
Attachmen	its
Attachment Nam	e 🔺 Take Action
Cover Page1.doc	

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 <u>Special Tags chart</u> 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
* То:	##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: ## <u>user(d</u> ## Password: ##person_forgot_password_link##
	Sincerely, ABC Program Committee



RECIPIENT VIEW

View E-mail	
I ∉ 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 you please accept or decline.	Ir scheduled presentation. Please log into the abstract submission site at https://training.abstractcentral.com. Once you view your invitation,
User Id: 1234 Password: Forgot Password Link	
All the best, Jane Doe janedoesmith@scholarone.com 888-888-888	



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. <i>The disadvantage is that the link may make the email fail due to the deep link.</i>
##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.

Ma	Manage Invitations Message Templates Email Templates											
Invitations												
View 1 Save/Edit Delete Search: Found In: All Columns Clear Search												
Send Email 🖶 Export to Excel -												
	Role	First Name	Last Name	Session	Session Type	Assigned Mess	Assigned Email 🦉	Status	Last Sent	Date Sent	Response Date	
	Presenter	Grace	Donovan	Clinical 19	Clinical Ses	Oral Presenter I	Presenter Email	Accepted	Invitation (1)	2018 May 7	2018 May 7	
	Presenter	David	Thompson	Clinical	Clinical Ses	Oral Presenter I	Presenter Email	Not Yet Inv	/i			
	Presenter	Grace	Donovan	Adminis	Symposium	Oral Presenter I	Presenter Email	Invited	Invitation (2)	2018 May 7		
	Presenter	Patrick	Chambers	Adminis	Symposium	Oral Presenter I	Presenter Email	Accepted	Invitation (3)	2018 May 7	2017 Jul 21	
	Presenter	Meetings	Support	Clinical	Oral	Oral Presenter I	Presenter Email	Invited	Invitation (1)	2018 May 7		
	Presenter	Christina	Porter	Clinical #3	Minisympos	Oral Presenter I	Presenter Email	Invited	Invitation (3)	2018 May 7		
	Moderator	David	Host	Clinical #3	Minisympos	Host Invitation	Reminder Email	Invited	Reminder	2017 De		
	Owner	Grace	Donovan	Adminis	Symposium	Host Invitation	Reminder Email	Not Yet Inv	/i			
	Moderator	Jami	Host	Adminis	Symposium	Host Invitation	Reminder Email	Invited	Reminder	2017 De		
	Moderator	Alexis	Host	Clinical 19	Clinical Ses	Host Invitation	Reminder Email	Invited	Reminder	2018 Jun		
	Moderator	Alexis	Host	Clinical	Clinical Ses	Host Invitation	Reminder Email	Invited	Reminder	2018 Jun		
	Moderator	Ben	Host	Clinical	Oral	Host Invitation	Reminder Email	Invited	Reminder	2018 Jun		

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.

	Sessions & Events											
T	raining		-	Save/Edit Delete		S	earch:	×	Found In:	All Colu	umns 💌	Clear Search
0	Create	New -		Delete Selected 📔 Finalize Se	lected Sessions 🚔 Print Se	elected	📙 Import / Expor	t • 🌌	Mass Upda	ate •		
	Abbrev	Clie	Edit	Title	Session Kind	Dur	Date	Start	End Time	# of	Session Type	Location
		180	[edit]	Lunch	Event	120	Sunday 10/16/2	11:30	1:30 PM	0	Luncheon	Barbour
	S102	170	[edit]	Poster Session #2	Session	60	Saturday 10/15/	10:00	11:00 AM	2	Poster	Barbour
		160	[edit]	Poster 45	Session	120	Saturday 10/15/	9:45 AM	11:45 AM	2	Poster 2	Fluvann
		150	[edit]	Plenary 2	Session	60				1	Plenary	
	S104	140	[edit]	Administration #2	Session	90	Saturday 10/15/	8:00 AM	9:30 AM	7	Symposium	Barbour
		130	[edit]	Plenary #98	Session	60	Friday 10/14/2016	1:00 PM	2:00 PM	1	Plenary	Barbour
	PL06	120	[edit]	Plenary 1	Session	60	Friday 10/14/2016	11:00	12:00 PM	2	Workshop	Barbour
	CL3	110	[edit]	Clinical #25	Session	60	Friday 10/14/2016	11:00	12:00 PM	1	Clinical Session	Ashlaw
	S105	100	[edit]	Session Title #3	Session	120	Friday 10/14/2016	10:00	12:00 PM	1	Technical Session	Blue Ri
	CL2	90	[edit]	Clinical #3	Session	60	Friday 10/14/2016	10:00	11:00 AM	1	Clinical Session	Ashlaw
	CL4	80	[edit]	Clinical 19	Session	60	Friday 10/14/2016	9:30 AM	10:30 AM	1	Clinical Session	Christina



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 refinalize after you update sessions and events.

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

Session Center						
Dashboard & Instructions	>					
Meeting Setup	>					
Sessioning						
Sessions & Events	>					
Sessions & Events Schedule Sessions	>					
Sessions & Events Schedule Sessions Abstracts	> > >					

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

	Sessions & Events											
Training 12 💌			Save/Edit De	elete		Search:		× Found I	n: All Columns	✓ Clear Search		
💿 Create New 🕶 🌾		New -	Delete Selected	🗎 Fina	alize Selected Session	ns 👌 Prin	s 🔒 Print Selected 블 I		Export 🗸 📝 Ma	ass Update -		
	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.

Session Title	 Session Type 	Assig	gned	Message 🥖	Assigned Email 🖉 🔺	Status 🦉	
Clinical #25	∱↓ Sort Ascend	ling	nvita	ation	Host Email	Invited	
Clinical #3	Z↓ Sort Descending			ation	Reminder Email	Invited	
Administration #2	Configure Sort	t	V	Role			
Clinical 19	Columns	-	✓				
Clinical # 19		-	✓	Last Nar	ne		
Administration #2	Filters	Þ		Person I	D		
Clinical # 19	Oral	none		Control 1	ID		
Clinical #25	Clinical Sess	Oral		Abstract	Status		
Clinical 19	Clinical Sess	Oral		Final ID			
Clinical #3	Minisymposi	Oral		Session	Title		
Administration #2	Symposium	Oral		Cossion	Turc		
Administration #2	Symposium	Oral		Session	туре		
				Session	Горіс		
				Assigned	l Message/		
			✓	Assigned	l Email/		
			✓	Status			
				Last Sen	t		
			V	Date Ser	nt		

Sorting

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



Column	Order
Assigned Email	Ascending
2 Assigned Message	Ascending
Session Type	Ascending

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.

Ma	Manage Invitations Message Templates Email Templates										
1	III Invitations										
View 1 Save/Edit Delete Search symposium × Found In: All Columns v Clear Search							r Search 🚰				
3	Send Email 💾 Export to Excel -										
	Role	First Na	Last Name	Session Title	Session Type	Assigned Mess	Assigned Email 🖉	Status	Last	Date Sent	Response
	Presenter	Grace	Donovan	Administration #2	Symposium	Oral Presenter I	Presenter Email	Invited	Invita	2018 May 7	
	Presenter	Patrick	Chambers	Administration #2	Symposium	Oral Presenter I	Presenter Email	Accepted	Invita	2018 May 7	2017 Jul 21
	Presenter	Christina	Porter	Clinical #3	Minisympos	Oral Presenter I	Presenter Email	Invited	Invita	2018 May 7	
	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 Inv			
	Moderator	Jami	Host	Administration #2	Symposium	Host Invitation	Reminder Email	Invited	Remi	2017 Dec	

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.

Manage Invita	tions Me	ssage Templates	Save Grid Configuration				
Invitations			[EDIT INSTRUCTIONS]				
View 3: moderators 🗸 Save/Edit Delete			Namo				
🥪 Send Email 🔚 Export to Excel -			Use as Default	view 5. mout			
Role	First Name	Last Name	Use as Default:			3	
Moderator	Elsie	Host	Added Filters:		×	vi	
Moderator	Ben	Host	Make available		Roles:	3	
Moderator	David	Host	to all users of		Session Center	▲ vi	
Moderator	Alexis	Host	this site:			vi	
Moderator	Alexis	Host			Exchange Bin-Sessioner		
Moderator	Alexis	Host			Session Admin	• v	
Moderator	Christina	Host				V	
Moderator	Elsie	Host				V	
Moderator	David	Host			Host Invitation		
					E Save	Ciose	



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.

Manage Invit	ations	Message Tem	plates Email Te	mplates						
Invitations										
View 1 Save/Edit Delete			S	earch:	× Found In:	All Colum	าร	✓ Clear S	✓ Clear Search	
🐺 Send Email 🔚 Export to Excel -										
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 Inv			
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 Inv			
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.

Choose Template(s) to use: Message Host Invitation	✓ Email Host Email	🗸 Assign Template(s)
--	--------------------	----------------------

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.



×

Set Invitation Close Date:	2015-06-30	12:00 PM	🗸 🖉 Update Date 🛛 🧭 Reset Date

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

The current invitation expired on Mon, Sep 07, 2015 2:00 PM. Please contact your society administrator if you have any questions.

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.

1	Invitations										
V	iew 1	~	Save/Edit De	elete	S	earch:	× Found In:	All Colum	าร	✓ Clear S	Search
	Send Emai	I 📔 Expo	ort to Excel -								
	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 Inv	i		
	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 Inv	i		
	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**.



Confir **[EDIT**

Test Email 3:

Test Email 4: Test Email 5:

Selid Review • 1			un 🔛	g Planner				
DIT INSTRUCTIONS]								
🛛 🖣 Group 1of 2 🕨 🔰 🍣	Recip	pients	Message	Preview	Email Preview			
essage Used: Host Invitation mail Used: Host Email		1.						15. a 18. 5
roup Recipients: 5 locked Email Addresses: 0		Page 1	of 1	▶ ▶∥ 50	✓ Records per	page 🍣	Displaying 1	5 of 5 »
ocked Email Addresses. 0	v	First	Last	Email	Session Title	Session T	Session T	Role
		Alexis	Host	host21@do	Clinical #25		Clinical Se	Modera
Send This Group Send All Groups		Alexis	Host	host21@do	Clinical 19		Clinical Se	Modera
		Ben	Host	host7@don	Clinical # 19		Oral	Modera
		David	Host	s1ahost5@.	Clinical #3		Minisymp	Modera
		Jami	Host	host22@do	Administratio	Medical A	Symposium	Modera

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

× ×

×

Send Test Email

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).



Manage	Invitations	Message Tem	plates Email Te	mplates						
💷 Invita	III Invitations									
View 1 Save/Edit Delete			S	earch:	× Found In:	All Columr	ıs	✓ Clear \$	Search	
Send Email 🔚 Export to Excel -										
Role	First Na	. Last Name	Session Title	Session Type	Assigned Message/	Assigned Email	Status /	Last	Date Sent	Response
Moder	ator David	Host	Clinical #3	Minisympos	Host Invitation	Reminder Email	Invited	Remi	2017 Dec	
Owner	r Grace	Donovan	Administration #2	Symposium	Host Invitation	Reminder Email	Not Yet Invi			
Moder	ator Jami	Host	Administration #2	Symposium	Host Invitation	Reminder Email	Invited	Remi	2017 Dec	
Moder	ator Alexis	Host	Clinical 19	Clinical Ses	Host Invitation	Reminder Email	Invited	Remi	2018 Jun	
Moder	ator Alexis	Host	Clinical #25	Clinical Ses	Host Invitation	Reminder Email	Invited	Remi	2018 Jun	
Moder	ator Ben	Host	Clinical # 19	Oral	Host Invitation	Reminder Email	Invited	Remi	2018 Jun	
Prese	nter Grace	Donovan	Clinical 19	Clinical Ses	Oral Presenter Inv	Presenter Email	Accepted	Invita	2018 May 7	2018 May 7
Prese	nter David	Thompson	Clinical #25	Clinical Ses	Oral Presenter Inv	Presenter Email	Not Yet Invi			
Prese	nter Grace	Donovan	Administration #2	Symposium	Oral Presenter Inv	Presenter Email	Invited	Invita	2018 May 7	
Prese	nter Patrick	Chambers	Administration #2	Symposium	Oral Presenter Inv	Presenter Email	Accepted	Invita	2018 May 7	2017 Jul 21
Prese	nter Meetings	Support	Clinical # 19	Oral	Oral Presenter Inv	Presenter Email	Invited	Invita	2018 May 7	
Prese	nter 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 <u>Admin Guide</u> 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.

Manage Invita	Manage Invitations Message Templates Email Templates								
Invitations									
View 1 Save/Edit Delete Search:									
Send Email	Send Email 🔚 Export to Excel -								
Role 🔺	Export to Excel (All Columns)	Sess							
Moderator	Export to Excel (Displayed Co	lumns) Minis							
Moderator	ami Host Administra	tion #2 Sym							

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 <u>Questions & File Upload</u>, 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.

Session Center		Instructions						
Dashboard & Instructions	>	MANAGE SESSION & EVENT TYPES Session Types are a way of categorizing sessions into related groups sur elicities or a fuell allevance of the paged	ch as "Oral" or "Poster" sessions. To create your list of available types, click the Add Type button bel					
Meeting Setup		cloking on it will allow you to edit the record.						
Programs	>	Types						
Room Availability	>							
Types	>	Add Type O Delete Types Export to Excel I mport Session/Event Types						
Tantas		Session / Event Type Name	Туре					
Topics	1	Clinical Session	Session					
Hosts	>	Luncheon	Event					
Roles	>	Meet the Expert	Event					
		Minisymposium	Session					
Sessioning	~	Cral Oral	Session					
Invitations & Email	>	Plenary	Session					
Speaker Management Deview		Poster	Session					
Speaker Management Review	1	Poster 1	Session					
Reports	>	Poster 2	Session					
		Proposal Clinical	Session					

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

	Types								
◎ Add Type									
	Session / Event Type Name								
V	Clinical Session			H	٦				
	Luncheon		Edit Type						
	Meet the Expert	9	Delete Type	е					
	Minisymposium				_				
	Oral								
	Plenary								

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



Speaker ma	nagement review on finalize:	No	○ Yes (Presenters and	Hosts)
	Session Detail Type: Select.	🗸 🕑 Add Sessio	n Detail Type	
1 👻	Previous Attendance	Show in session only?	Required?	remove
2 👻	Available for CE Credit	Show in session only?	Required?	remove
	Save and Add Another	E Save and Close Save	😢 Close	

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 responsibility. 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.



Edit Role					
Instructions					
Add the role name (e.g. "Moderator"), a description for it (if necessary), and select a role type. All required fields are indicated with a red asterisk.					
[EDIT INSTRU	ICTIONS]				
* Role Name:	Moderator				
Description:	Description: Moderates session				
* Type:	Session	Available for			
	Event	Session Proposal:			
		Is Disclosure Reviewer:			
	Save and Add Another Sav	e and Close 🛛 😢 Close			

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.

	🔲 Speaker Management Review											
	Select One Save/Edit Delete Search: Found In: All Colur									Found In: All Columns		
6	Notify Reviewers	🔚 Export f	o Excel						_			
	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.

ACTION	
Select	
Select	
View	

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.



Speaker Manage	ement Review		
ACTION	SESSION TYPE	DETAILS	STATUS
Select View	Clinical Session	Session Title: Clinical #25 Day: 10-14-2016 Times: 11:00 - 12:00 Location: Ashlawn Room	Under Review
Select	Clinical Session	Session Title: Clinical 19 Day: 10-14-2016 Times: 09:30 - 10:30 Location: Christina	Under Review

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

Speaker Management Review						
Session Title: Clinical 19 Session Type: Clinical Session Day: 10-14-2016 Times: 09:30 - 10:30 Location: Christina Session Moderators: Alexis Host						
PRESENTER / SPEAKER NAME	PRESENTATION	ABSTRACT TITLE / TIMES	REVIEW			
Grace Donovan [contact person]	[view]	Abstract #25 09:30 - 10:30	Select Select Accept Not Accept			

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.



Contact Person	×
Comment to send to person:	
< Close	Send Notification Email

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

View Presentation	×
Please update the final version of your full paper.: Cover Page1.docx	
< Close	

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

Speaker Mar	nagement Revi	ew	
Session Title: Clinical 19 Session Type: Clinical Sessic Day: 10-14-2016 Times: 09:30 - 10:30 Location: Christina Session Moderators: Alexis I	on Host		
PRESENTER / SPEAKER NAME	PRESENTATION	ABSTRACT TITLE / TIMES	REVIEW
Grace Donovan [contact person]	[view]	Abstract #25 09:30 - 10:30	Select v [view history/add comments]



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.

REVIEW	
Not Accept	Ŧ
[view history/add 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.

Speaker Management Review: Presentation Comment (Author/Moderator) *

Speaker Management Review: Reviewer Notification (Moderator/Owner) *



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.



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