



ScholarOne Abstracts™

Administrator User Guide

17-October-2018

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INTRODUCTION

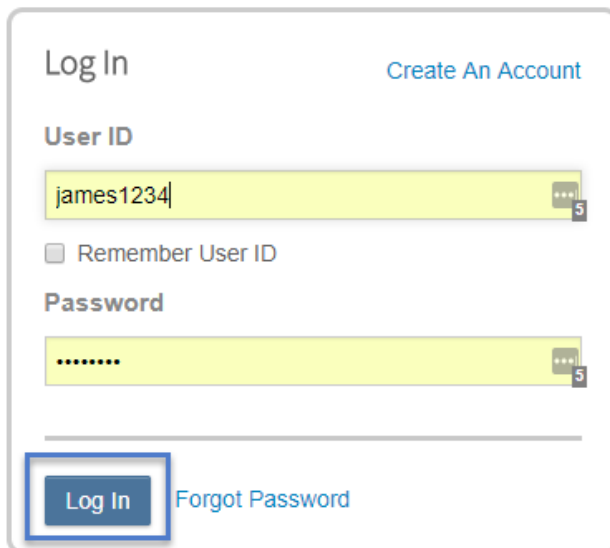
The Admin Center for ScholarOne Abstracts gives you flexibility in searches and emails, self-service tools, and an intuitive user interface. It has been designed around usability and convenience. The Admin center has been configured for responsive design. The system automatically identifies the device type (laptop, tablet, mobile phone, etc.) and adjusts the layout accordingly.

The following guide provides you, the Admin, with a reference tool for navigating the **Admin Center**.

ScholarOne Abstracts is configured for each Society's needs. For that reason, you may see features described in this guide that are not configured on your system.

LOGGING INTO YOUR SCHOLARONE ABSTRACTS SITE

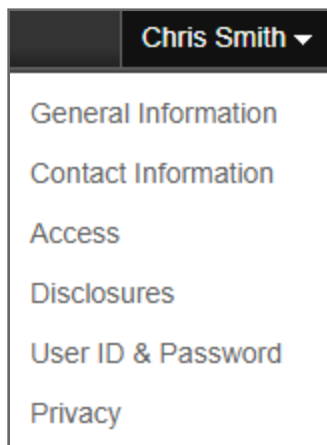
To access your meeting site, enter your site's URL in the browser address bar. You will land on the Login Page. From there, enter your **User ID** and **Password**. Click **Log In**.



If you have forgotten your password, use the **Forgot Password** link on the **Login** page. Click on the link, enter your email address and an email will be sent to you with your User Id and a link to change your password. All passwords are encrypted and are not viewable by any user of the system.

UPDATING YOUR ACCOUNT

Once you enter the system, you may update any of your account information by clicking on your name in the top right of the screen. Click on the dropdown options to access each portion of your account.



CUSTOM QUESTIONS

Some societies may include custom questions as part of the account creation process. If a user has already created an account, he or she will be prompted at the next login to answer the required questions. These custom questions can be configured to be completed by Admins only or to be completed by the users only.

Contact Points

* Phone 1	Phone 2
<input type="text" value="555-555-1245"/>	<input type="text" value="4349537445"/>
* Email	* Re-enter Email
<input type="text" value="christina.porter@123never.123send.com"/>	<input type="text" value="christina.porter@123never.123send.com"/>
Twitter Profile	LinkedIn Profile
<input type="text" value="@TwitterUsername"/>	<input type="text" value="www.linkedin.com/linkedinusername"/>

* Prior Attendance at Annual Meetings

Have you attended an Annual Conference in the past?

☐ Yes

☒ No

Note: To report on Custom Questions, select the Custom Question in the “Select Search Criteria” field for People Searches. The custom question selection will start with “Abstract Detail:”.

DISCLOSURES

There are two types of user disclosures. Those that rest on the account, **person-based disclosures**, and those that are submitted through the **Message** dropdown for review.

Person-Based Disclosures

Person-based disclosures can be found on Step 4 of the account. Users will complete society-specific disclosures when the user creates and account or updates the account information. Disclosures include conflict of interest statements or other society-specific disclosures.

*** Financial Disclosure - ScholarOne**

As a sponsor accredited by ScholarOne, the Company must ensure that its individually sponsored or jointly sponsored CME activities are independent and free of commercial bias. All in a position to control the content of an CME activity – speakers, authors, planning committee members, organizers, moderators and staff must disclose all relevant financial interest or other relationship occurring within the past 12 months with (1) with the manufacturer(s) of any commercial product(s) and/or provider(s) of commercial services discussed in an educational presentation and (2) with any commercial supporters of the activity. ("Relevant" financial interest or other relationships can include such things as grants or research support, employee, consultant, major stockholder, member of speakers' bureau, etc.). The intent of this disclosure is not to prevent anyone with a relevant financial or other relationship from participating, but rather to provide listeners with information on which they can make their own judgments. It remains for the audience to determine whether the speaker's or author's/contributor's interests or relationships may influence the presentation with regard to exposition or conclusion. **The Society will disqualify any individual who refuses to disclose relevant financial relationships.**

To submit an abstract for presentation at the Annual Meeting, the author must disclose for all authors all financial relationships by answering the following questions:

Does this author have any relevant financial interest/arrangement or affiliation within the past 12 months to disclose?

☒ No, I have no affiliations or financial interests in relation to this program.

☐ Yes, I have affiliations or financial interests in relation to this program.

If you answered Yes to the above question, please disclose, for all authors, all relevant financial interests or other relationships below:

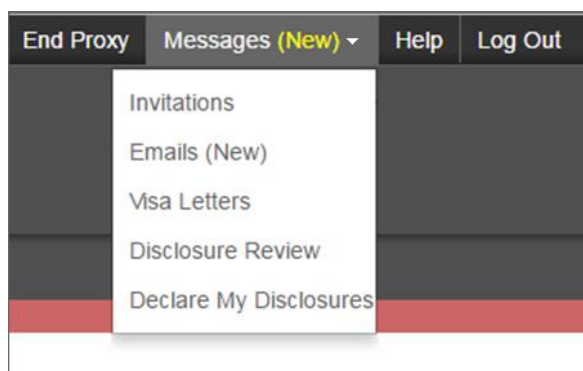
[Cancel](#) [Save Changes / Next Section >](#)

A user can update their disclosure at any time by clicking on their name and selecting **Disclosures**.

A screenshot of a user profile menu. The menu is open, showing options: General Information, Contact Information, Access, Disclosures (highlighted with a blue box), User ID & Password, and Privacy. The background shows a dark grey sidebar and a light blue header with the user's name 'Alex Smith', a 'Messages (New)' button, and 'Help' and 'Log Out' links.

Disclosures for Review

If configured, users can submit their **Conflicts of Interest** for review in the system. In some cases, Presenters and/or Hosts will have a disclosure that pertains to a specific activity or presentation, but that does not apply to all presentations in which they are involved. Presenters and hosts can declare their specific conflicts of interest through the **Message** tab at the top right of each screen. The user will select **Declare My Disclosures** if he or she is a presenter or host.



Presenter and Host Disclosure Declaration

If configured, once the presenter or session host has declared the disclosure's relevancy to his/her activities, an email will be triggered to the session host (for presenters) or the session owner (for session hosts) so that the information can be reviewed. Additionally, the session host and session owner will be able to see all the presenters and whether they have submitted their disclosures for review (see below). The email templates can be found under **Email Administration>System Emails**.

Declare My Disclosures

Role: Presenter, Co-Author

Session Title: General Duality (Excluding a Certain Notion of Anomaly Matching) Obtained From Divisors
Session Type: Educational Course
Day: 06-19-2017
Times: 10:30 - 11:30
Location: Greenbrier Ballroom B (Greenbrier Hotel)
Session Moderators: Toby Flenderson, Tom Haverford

ABSTRACT TITLE / TIMES	DISCLOSURE	CONFLICT OF INTEREST	OPTIONAL COMMENT FOR MODERATOR
The Solution of Heterotic String Theory Compactified on C^4 as an Unstable Analytic Continuation of Type IIB Strings Surrounded by a Surface Defect (Excluding Sheaf Cohomology) 10:30 - 11:00	[view]	<input checked="" type="radio"/> Yes <input type="radio"/> No	Note for moderator: <input type="text" value="Test, Test, Test 123"/>

Disclosure Review

If configured, this is the screen the host or session owner will see when reviewing the disclosures. They will review the data for a specific activity to ensure there will not be conflicts of interest with any presentation. Select **Disclosures Review** from the **Messages** drop-down.

Disclosure Review

Session Title: [General Duality \(Excluding a Certain Notion of Anomaly Matching\) Obtained From Divisors](#)
Session Type: Educational Course
Day: 06-19-2017
Times: 10:30 - 11:30
Location: Greenbrier Ballroom B (Greenbrier Hotel)

Session Moderators: Toby Flenderson, Tom Haverford

PRESENTER				
SPEAKER NAME	DISCLOSURE	ABSTRACT TITLE / TIMES	CONFLICT OF INTEREST	REVIEW
April Ludgate [contact person]	[view]	The Solution of Heterotic String Theory Compactified on C^4 as an Unstable Analytic Continuation of Type IIB Strings Surrounded by a Surface Defect (Excluding Sheaf Cohomology) 10:30 - 11:00	<input checked="" type="radio"/> Yes [view disclosure comment] <input type="radio"/> No	Select ... [view history/add comments]
Sandra Lantz [contact person]	[view]	The Inflationary Compactification of Quantum Mechanics and Trivial Vortices 11:00 - 11:30	<input type="radio"/> Yes <input type="radio"/> No	Select ... [view history/add comments]

ACCESSING THE ADMIN CENTER

Based on your role permissions, you will see the centers you have available to you. If you have more than one role on any of the centers you will use the dropdown to select the role you want to use. Click on the **Admin** link to access the **Admin Center**.

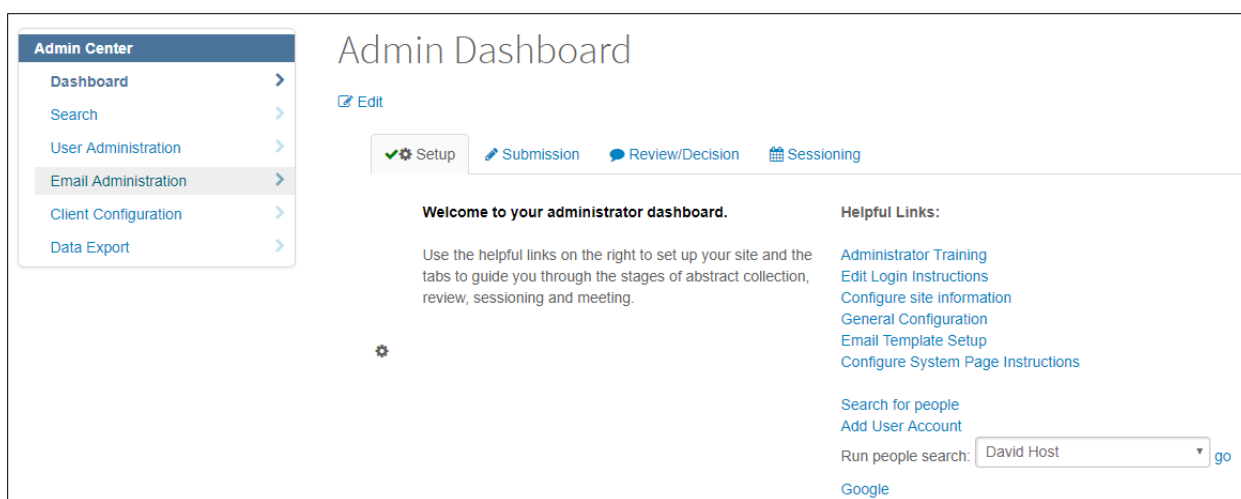


LOGGING OUT

You can log out at any time by clicking **Log Out** on the top right corner of the page.

DASHBOARD

The **Admin Dashboard** is designed to provide you with an at-a-glance insight into the meeting cycle. To access the **Dashboard**, log into your ScholarOne Abstracts site and click on the **Admin** tab at the top of the screen. This will take you to the **Admin Dashboard**. The dashboard provides quick access for drilling down to specific data, identifies outstanding tasks, and streamlines the resolution of these tasks.

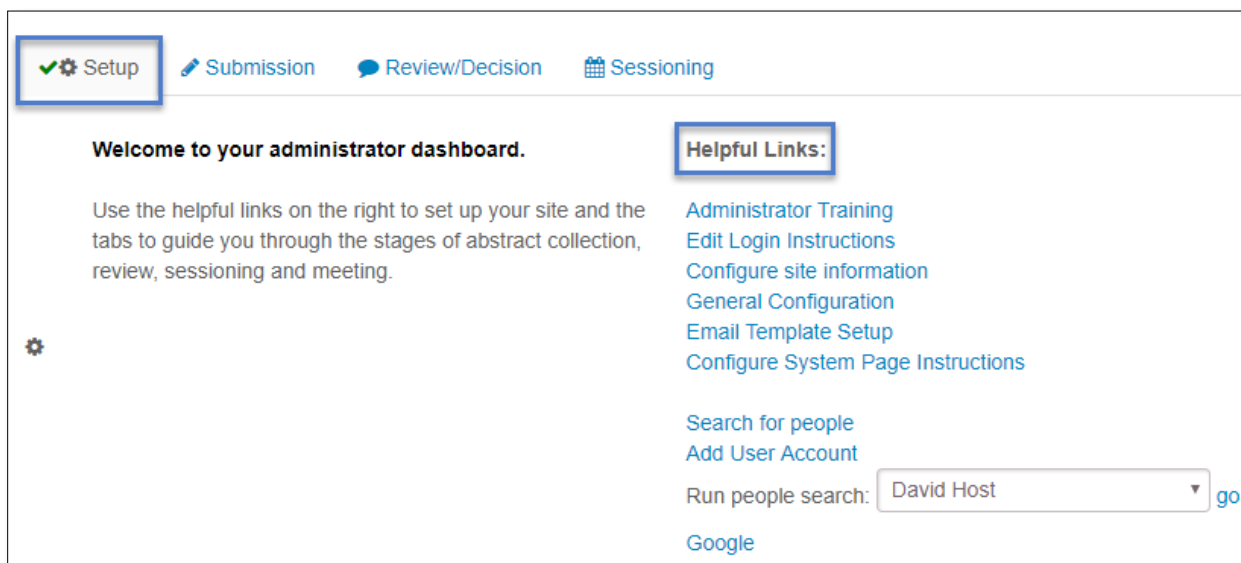


In conjunction with your Client Implementation Manager, you can configure the **Dashboard** for your specific needs. There are five dashboards that can be configured: Setup, Submission, Review/Decision, Sessioning, and Meeting. In addition to the separate tabs, you can configure the **Helpful Links** which appear to the right of the tab contents. This may include links to training materials from the **Get Help Now** pages of the ScholarOne website.

A green checkmark will appear beside each tab once that part of the meeting cycle is complete. Completion is based on the site's workflow schedule.

SETUP

Under **Setup**, you will find a welcome message and the configurable **Helpful Links**. Below is an example of some of the **Helpful Links** that are applicable to **Setup**. The options also include links to saved searches and a customizable link to a site such as your society website.



SUBMISSION

The **Submission Dashboard** tab includes the submission dates for your various submission roles. Again, example **Helpful Links** that are applicable to the **Submission** tab are displayed in the image below. All links are configurable so that you can add the links that are most useful to your site.

Included in all **Helpful Links** for the Submission dashboard are the Statistics Report, Date Submitted Report and the Incomplete Submitted Abstracts Report.

The **Statistics Report** includes such information as Submission Status for all submitted and all draft abstracts, decision statistics, countries of submissions, abstract category totals, and presentation types. You can export the Statistics Report.

The **Date Submitted Report** contains a summary of how many abstracts were received during the submission period by day.

The **Incomplete Submitted Abstract Report** includes abstracts which were successfully submitted, but now may have incomplete information due to Admin changes through proxy.

✓ Setup
✓ Submission
Review/Decision
✓ Sessioning
Meeting

Submission Period (Closed)

- Jan 15 2018 - Mar 26 2018 - [PRES] Presidential Events
15 Draft, 32 Submitted, 1 Author Withdrawn
- Jan 15 2018 - Apr 09 2018 - [MPPG] Multidisciplinary Program Planning Group
400 Draft, 136 Submitted, 10 Withdrawn, 2 Author Withdrawn
- Jan 15 2018 - Jan 15 2018 - [AEI] Academic Employment Initiative INACTIVE
0 Draft, 0 Submitted
- Jan 15 2018 - Mar 22 2018 - [AGFD] Division of Agricultural and Food Chemistry
64 Draft, 328 Submitted, 28 Withdrawn, 1 Author Withdrawn

Helpful Links:

Run abstract search: go

Search for abstracts
List draft abstracts which appear complete
List draft abstracts

Run people search: go

Search for people
Add User Account
List people missing disclosures

Statistics Report
Date Submitted Report
Incomplete Submitted Abstracts

REVIEW / DECISION

The Review/Decision Dashboard tab includes the dates of review and chair roles and gives summary statistics. Recommended **Helpful Links** are in the image below. You may also download the Score Report from this dashboard tab.

[Setup](#) [Submission](#) [Review/Decision](#) [Sessioning](#)

Review/Decision Period (In Process) [refresh](#)
Feb 01 2016 - Nov 30 2019 - Reviewer Admin [\[assign\]](#) [\[make decisions\]](#)
3 assigned
1 accepted/sessioned, 0 rejected

Feb 01 2016 - Oct 01 2019 - General Reviewer [\[my reviews\]](#)
24 assigned
14 accepted/sessioned, 1 rejected

Feb 01 2016 - Oct 01 2019 - Video Reviewer [\[my reviews\]](#)
3 assigned
2 accepted/sessioned, 1 rejected

Exchange Bin:
0 abstracts in bin

[Download Score Report](#)

Helpful Links:
[Reviewer Training](#)
[Assign reviewers](#)

Run abstract search:

Abstract Report [go](#)

[Search for abstracts](#)
[List draft abstracts](#)

Run people search:

David Host [go](#)

[Search for people](#)
[Add User Account](#)
[Google](#)

SESSIONING

The **Sessioning Dashboard** provides statistics and applicable dates of the Sessioning roles. It also includes information regarding Speaker Management if this is configured for your site. The **Helpful Links** may include standard reports such as an Abstract Status Report and other saved reports.

Sessioning Period (In Process)

14 abstracts sessioned, 34 abstracts unassigned

Speaker management:
5 sessions finalized, 8 invitations sent - 2 accepted, 0 declined

Feb 01 2016 - Dec 01 2019 - Session Center [\[assign abstracts\]](#) [\[schedule sessions\]](#)

Jan 01 2016 - Mar 31 2019 - Session Admin [\[assign abstracts\]](#) [\[schedule sessions\]](#) [\[invitations\]](#)

Exchange Bin:
0 abstracts in bin

Helpful Links:
[Sessioner Training](#)
[Assign sessioners](#)

Run session search:
 [go](#)
[Search for sessions](#)

Run abstract search:
 [go](#)
[Search for abstracts](#)

Run people search:
 [go](#)
[Search for people](#)
[Add User Account](#)

MEETING

The Meeting Dashboard displays information on the Itinerary Planner if it is configured for your site. A useful Helpful Link is the link to the **Data Export Tool**.

Admin Dashboard

[Edit](#)

[Setup](#) [Submission](#) [Review/Decision](#) [Sessioning](#) **[Meeting](#)**

Itinerary Planner Period (Waiting To Open)
Jan 01 2017 - Sep 30 2017 - Itinerary Planner [\[view itinerary planner\]](#)

Helpful Links:
[Data export](#)

SEARCH

Search combines standard and customized searches across three data sets: Abstracts, Sessions, and People. This combined approach maximizes consistency of reporting and provides you with a one stop reporting tool.

Saved searches can be added as **Helpful Links** to any **Dashboard**.

[Setup](#) [Submission](#) [Review/Decision](#) [Sessioning](#)

Submission Period (In Process) [Refresh](#)
Mar 01 2016 - Dec 31 2019 - Abstract Submission
10 Draft, 19 Submitted
Dec 31 2017 - Dec 31 2019 - Case Study Submission
4 Draft, 16 Submitted, 1 Withdrawn
 Aug 17 2018 - Dec 31 2019 - Session Proposal Abstract
0 Draft, 6 Submitted
Session Proposal
0 Draft, 6 Submitted

Helpful Links:

[Run abstract search](#) Abstract Report [go](#)
Search for abstracts
List draft abstracts which appear complete
List draft abstracts

[Run people search](#) David Host [go](#)
Search for people
Add User Account
List people missing disclosures

Some features are common across all three search options. These include saved searches, results format, search criteria, display items and sort criteria.

The screenshot displays a user interface for configuring search options. It is divided into four main sections, each with a title, an information icon, and an 'Edit' link:

- Saved Searches**: Features a dropdown menu labeled 'Select...'.
- Special Searches**: Features a dropdown menu labeled 'Select...'.
- Select Format**: Features a dropdown menu currently showing 'Basic / Inline'.
- Select Search Criteria**: Includes a text input field, a '+ Add' button, and a '+ Show Full List' link below the input field.

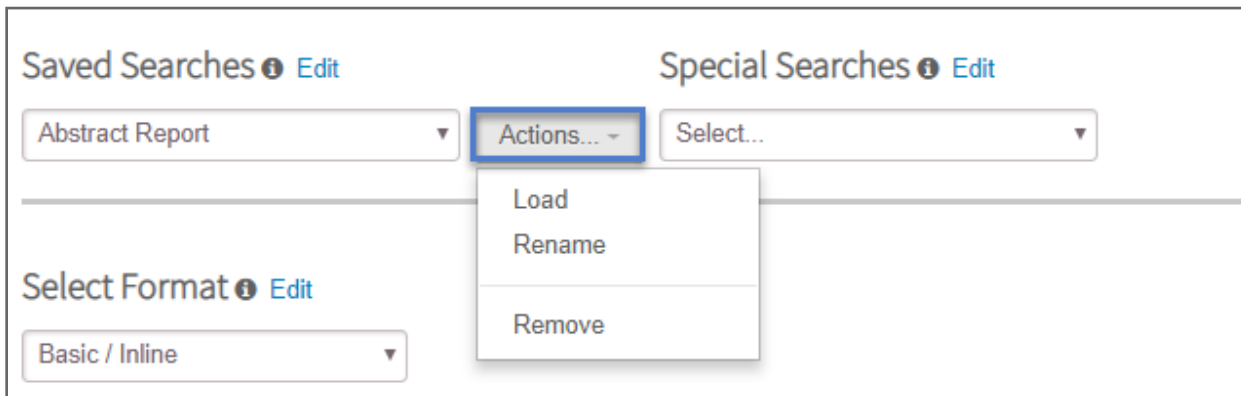
The screenshot shows a web interface for configuring search results. At the top, there is a section titled 'Select Display Items' with an information icon and an 'Edit' link. Below this is a text input field and a '+ Add' button. A link '+ Show Full List' is also present. Below the input field is a section titled '(RE-ORDER)' containing a list of four items, each with a dropdown menu for re-ordering: 1 CONTROL ID, 2 TITLE, 3 CONTACT (NAME ONLY), and 4 ABSTRACT STATUS. Below this list is a section titled 'Select Sort Criteria' with an information icon and an 'Edit' link. Under 'Select Sort Criteria', there is a 'Primary' label and a dropdown menu currently showing 'Select...'.

SAVED SEARCHES

Each type of search also includes a dropdown for **Saved Searches**. To save a search, scroll to the bottom of the search, give your search and name, and then click Save Search.

The screenshot shows three buttons in a row: 'Clear Search', 'Save Search', and 'Run >'. The 'Save Search' button is highlighted with a blue border.

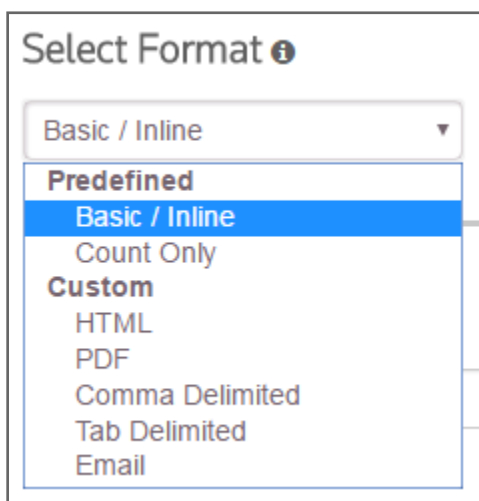
The search will be available when configured on any of the **Dashboards**. When you select the **Saved Searches**, you can load the search, rename the search, or delete it by clicking on the **Actions** dropdown.



The screenshot shows a web interface with two main sections: "Saved Searches" and "Special Searches". Each section has an "Edit" link. Below "Saved Searches", there is a dropdown menu currently showing "Abstract Report". To its right is a button labeled "Actions..." which has a dropdown menu open, listing "Load", "Rename", and "Remove". Below "Special Searches", there is a dropdown menu currently showing "Select...". Below the "Saved Searches" section, there is a "Select Format" dropdown menu currently showing "Basic / Inline".

RESULT FORMATS

For each type of search, there are several different format options. The formats are divided into two sections: Predefined and Custom. Predefined formats will provide the results in a predetermined format and Custom formats allow you to define the output fields for the search results. You can also send a custom email through the format selection process.



The screenshot shows a "Select Format" dropdown menu. The menu is open, displaying a list of options. The first section is "Predefined", which includes "Basic / Inline" (highlighted in blue), "Count Only", and "Custom". The "Custom" section includes "HTML", "PDF", "Comma Delimited", "Tab Delimited", and "Email".

- **Basic/Inline:** a quick search that allows you to edit submissions from the search results. You also can perform specific tasks right from the results, such as proxying as the user and accessing their person data.
- **Count Only:** returns the number of results based on the search criteria.

- **HTML:** displays results based on the search criteria in HTML format. You can also edit submissions from this format if doing an Abstracts search.
- **PDF:** displays each result on a separate page of a PDF document.
- **Comma Delimited:** allows you to export results as a comma delimited file that can be opened in Excel.
- **Tab Delimited:** allows you to export the data in a tab delimited text file which can be opened in Excel.
- **Email:** allows you to use your search results to send custom emails based on the search criteria.

SEARCH CRITERIA

Each search type has a listing of **Search Criteria**. Using the **Show Full List** link and the pre-populated **Standard Search Criteria** section, you can refine your search selections so that your report will be based on your specific criteria. You may also use a “type ahead” to populate the report’s search criteria. The **Standard Search Criteria** are suggested criteria and may be removed if not applicable to your search.

Note: For the type-specific criteria to show in the full and in the standard criteria, you must first select the correct type of search: abstract, session or people. This is the most important step in creating a report.

Select Search Criteria ⓘ [Edit](#)

SEARCH CRITERIA		
Standard Search Criteria		
Control ID	<input type="text"/>	<input type="button" value="Remove"/>
Final ID	<input type="text"/>	<input type="button" value="Remove"/>
Abstract Title	<input type="text"/>	<input type="button" value="Remove"/>
Submitter First Name	<input type="text"/>	<input type="button" value="Remove"/>
Submitter Last Name	<input type="text"/>	<input type="button" value="Remove"/>
Submission Role	<div> Abstract Submission Case Study Submission Session Proposal Abstract </div>	<input type="button" value="Remove"/>
Abstract Status	<input type="text" value="Select"/>	<input type="button" value="Remove"/>

Note: Use the **Session Status** search criteria to ensure only Session Proposals are returned in Session Proposal types of searches. The **Session Search** includes all sessions in the **Session Center**. Sessions created directly in the **Session Center** will have a session status equal to Admin Created. To perform a search that will only return session proposals, you will need to exclude sessions with a Session status equal to Admin Created.

DISPLAY ITEMS

To set your output data, use the Display Items fields to designate what information you want to display. The display items are search-specific lists and may be reordered. Use the Show Full List option to view all available display items. The Display Items are used for the custom search formats.

Select Display Items ⓘ [Edit](#)

[+ Add](#)

[+ Show Full List](#)

[\(RE-ORDER\)](#)

1 ▼	CONTROL ID
2 ▼	TITLE
3 ▼	CONTACT (NAME ONLY)
4 ▼	ABSTRACT STATUS

SORT ORDER

In addition to designating your search criteria, you will also want to use the **Select Sort Criteria** dropdown to specify the order of the search results. For Abstract and Session searches, primary and secondary sorts are available.

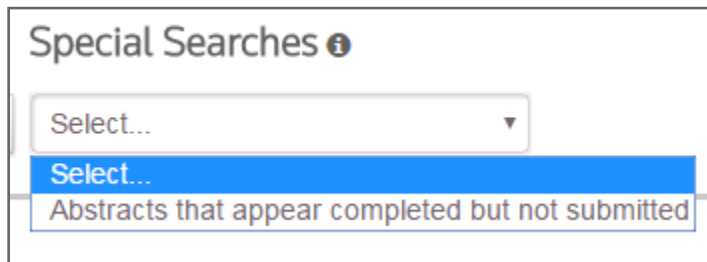
Select Sort Criteria ⓘ [Edit](#)

Primary
 ▼

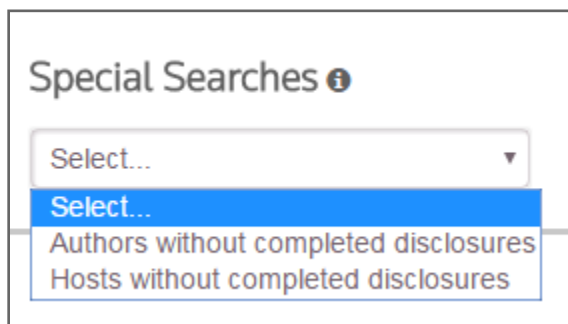
Secondary
 ▼

SEARCH TYPE-SPECIFIC OPTIONS: SPECIAL SEARCHES

Abstract Special Searches include the search for abstracts that appear completed but are not yet submitted. This gives you information on draft submissions and you may email authors right from the search using the **Email** format.



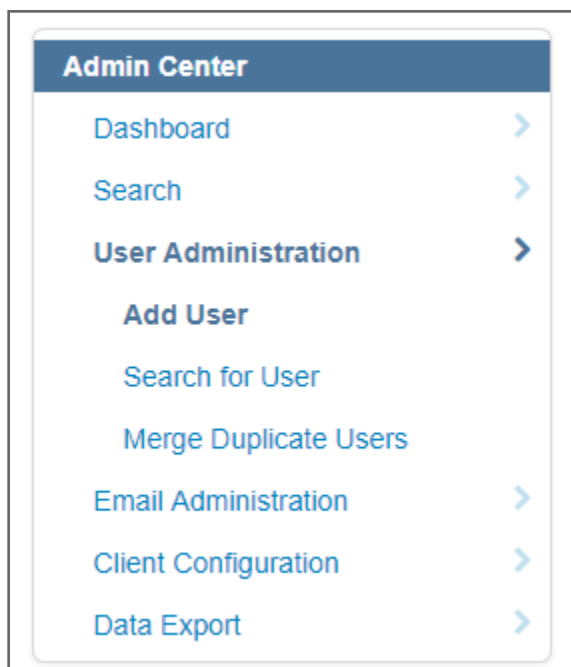
People Special Searches includes two pre-formatted reports. The **Authors without Completed Disclosures** report allows you to query the system for missing disclosures. You also can send emails to those authors straight from the search by using the **Email** format. There is second special report called **Hosts Without Completed Disclosures**. You may email the hosts using the same procedure as emailing the authors.



Note: Special searches can be modified but will then need to be saved as a Saved Search to retain them for future use.

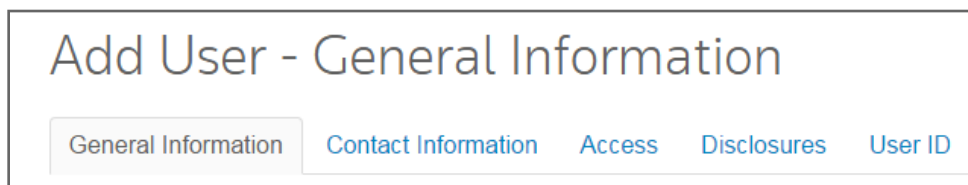
USER ADMINISTRATION

The **User Administration** section of the **Admin Center** allows you to add users, search for users, and merge users.



ADD USER

The **Add User** process mirrors the **Account Create** function of the site. The common sections are Name and Professional Information, Contact Information (including optional Twitter and LinkedIn profiles), Access (role selection), Disclosure (conflict of interest), and User ID setup. It should be noted that passwords are encrypted and not visible to any user.



As an admin, you can create an account with just the first name, last name, and email address. You will also designate the roles a user should have. The last step is to create a User ID for the new account (this must be a unique id and not one already in use in your site data). Submission and Proposal roles can be configured to automatically be given to a user at account creation. Once the account is created, the Account Creation email is sent to the user. In the email, there is a link to update their password. This email will be a pop-up email and may be edited as necessary before sending. The email template is in **Admin>Email Administration>System Emails>Account Creation**.

Account Creation

[Variable Tags](#)

Name:

To:

From:

Cc:

Bcc:

Subject:

Body:

##date_today##

Dear ##user_salutation## ##user_firstname## ##user_lastname##,

Your account has been successfully created. You are responsible for continuing to keep your contact information up-to-date. You can update your contact information on-line by clicking on your name at the top of each screen. In the future, you will need to log in using your user ID and password.

Your User ID is: ##userid##
Your Password is: ##person_forgot_password_link##

If you have any questions, please contact the support team.

Sincerely,

##site_contact_name##
##site_contact_email_address##

SEARCH FOR USER

By clicking **Search for User** under **User Administration**, you are taken to the **People Search** tab in the **Search** section. Here you may search for a user or user type. See the **SEARCH** section of the guide for details on how to use the search functionality.

Search

Abstracts

Sessions

People

When running a People search, you can use the standard search criteria to query your site's data. Common searches are by contact information (first name, last name, email address) or by User Type. Individual results display below the Sort Criteria.

Select Search Criteria [Edit](#)

+ Add

[+ Show Full List](#)

SEARCH CRITERIA

Standard Search Criteria

First Name

 Remove

Last Name

 Remove

Email Address

 Remove

User Type

Session Admin
Itinerary Planner
Reviewer Admin
General Reviewer
Video Reviewer

 Remove

Uses of the search results are below.

Person Search Results (1 Records Found)			
NAME	INSTITUTION (DEPARTMENT)	EMAIL	ROLE
Donovan, Grace Proxy Edit (Last in: Never)	ScholarOne	gdoovovan@donotsend.demo	Reviewer Admin, Session Admin , Case Study Submission, General Reviewer, Session Center + More

Name

Click on the User's **name** in the search results to view profile information. Using this option, you can perform several tasks on the account. There are several sections to the search result as detailed below.

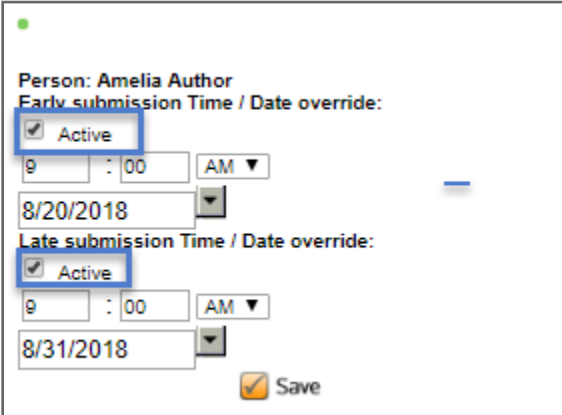
Person Information

Early/Late Access

To give a user early/late access to a role, click on **Early/Late Access** next to the role you want to individually adjust access dates.

Person Information	
User ID	amelia126
Name	Amelia Author
Department	
Institution	
User Permissions	Session Center (Early/Late Access) Session Admin (Early/Late Access) Reviewer Admin (Early/Late Access) General Reviewer (Early/Late Access) Video Reviewer (Early/Late Access) Abstract Submission (Early/Late Access) Case Study Submission (Early/Late Access) Admin (Early/Late Access)

On the pop-up, enter the appropriate dates for access and mark the early and/or late dates as active



Person: Amelia Author

Early submission Time / Date override:

☒ Active

9 : 00 AM ▼


8/20/2018 ▼

Late submission Time / Date override:

☒ Active

9 : 00 AM ▼

8/31/2018 ▼

 Save

Account Info

If necessary, you can send a user their **Account Info** and/or generate a temporary password. The template for this email is in **Admin>Email Administration>System Email>Send Account Information**. Generate a temporary password which will allow the user quick access to the account where they can then update their password.

Person Information	
Address	
Country / Region	United States
Phone	
Fax	
Email	amyauthor11@donotsend.demo
Send Account Information Email	Send Account Info
Temporary Password	GNmjdMdt (EXPIRED)
Generate Password	Generate

[< Close](#)

This section displays the user's answers to custom questions on the account, if configured.

Person Information	
Person Details	
Prior Attendance at Annual Meetings	Yes

Account Creation Information


This section is for reference only.

Account Creation Information

Creation Date/Time	10/13/2015 2:19 PM EDT
Created By	Meetings Support (43903)
Site Short Name	training
IP Address	10.214.19.5

Proxy


Click on **Proxy** to view the site the way the user does. This is helpful for resolving issues and answering questions from the user.

NAME	INSTITUTION (DEPARTMENT)	EMAIL	ROLE
Author, Amelia  Proxy Edit (Last in: Never)		amyauthor11@donotsend.demo	Case Study Submission, Session Admin , Reviewer Admin, Admin, Session Center + More

Edit



From the Search results, you can edit a user's account by clicking **Edit**. This will take you into the account information beginning with General Information. You can edit information such email address, User ID or Roles.

Note: The system does not allow admins to remove roles from accounts if those roles are linked to abstract assignments for reviewers, chairs, or sessioners.

Person Search Results (7 Records Found)			
NAME	INSTITUTION (DEPARTMENT)	EMAIL	ROLE
Author, Amelia  Proxy Edit (Last in: Never)		amyauthor11@donotsend.demo	Case Study Submission, Session Admin , Reviewer Admin, Admin, Session Center + More


Institution (Department)

Institution (Department) is listed for reference.

Person Search Results (7 Records Found)			
NAME	INSTITUTION (DEPARTMENT)	EMAIL	ROLE
Author, Amelia  Proxy Edit (Last in: Never)	Clarivate Analytics	amyauthor11@donotsend.demo	Session Admin , Case Study Submission, Session Center, Reviewer Admin, Admin + More
Donovan, Grace  Proxy Edit (Last in: Never)	ScholarOne	gdoovovan@donotsend.demo	General Reviewer, Session Admin , Reviewer Admin, Session Center, Case Study Submission + More

Email


Email the user from the results by clicking on their email address. This will use the site's hyperlink email which pre-populates the To: and From: fields, as well as the Subject line and Body fields as configured. The email is located at Admin>Email Administration>System Emails>Hyperlink Email (Person).

NAME	INSTITUTION (DEPARTMENT)	EMAIL	ROLE
Author, Amelia  Proxy Edit (Last in: Never)		amyauthor11@donotsend.demo	Case Study Submission, Session Admin , Reviewer Admin, Admin, Session Center + More

Role

The user's current roles are listed in the far-right column for reference. This column can be viewed to verify proper roles on an account. Click **More** to view all roles on the account.

Roles cannot be removed if the user is associated with a reviewer or sessioner task.

Person Search Results (7 Records Found)			
NAME	INSTITUTION (DEPARTMENT)	EMAIL	ROLE
Author, Amelia  Proxy Edit (Last in: Never)		amyauthor11@donotsend.demo	Case Study Submission, Session Admin , Reviewer Admin, Admin, Session Center + More

MERGE DUPLICATE USERS

Many times, instead of using the **Forgot Password** feature, users will create a second account. It then becomes necessary to merge their accounts so that abstracts and account information is all on one account.

Key Points:

- Once a merge takes place it cannot be undone.
- When selecting users to merge, all selected accounts will be merged into one account. For that reason, only merge accounts for one user at a time.

Using the various search options, you can easily find duplicate accounts.

Note: You can use wildcard searches if full information is not known. Use the * (asterisk) placed at the end of the search name or word to denote a wildcard.

☐ Search for users with inverted first and last names (Thomas Rose and Rose Thomas)
☐ Search for users with the same last name and first initial
☐ Search for users with the same first and last name
☐ Search for users with the same email address
☐ Search for users with the same member ID
☒ Perform the search below (use wildcards (*) where necessary)

First/Given Name

Last/Family Name

Author

Member ID

E-mail

Person Search Results (3 Records Found) [Export List to CSV](#)

NAME	USER ID / EMAIL	INSTITUTION	ROLES	MARK FOR MERGE	PRIMARY ACCOUNT
Author, Amelia More Info Proxy Last in: Never	amelia126 / amyauthor11@donotsend.demo	N/A	Session Center, Session Admin , Reviewer Admin, General Reviewer, Video Reviewer + More	<input type="checkbox"/>	<input type="radio"/>
author, amy More Info Proxy Last in: Never	amy133 / amy132@donotsend.com	N/A	Abstract Submission, Case Study Submission	<input type="checkbox"/>	<input type="radio"/>

In the results, you can click to view full account information or proxy in as the user. Once you have determined the two accounts should be merged, you would select

Mark for Merge for each account to merge and select the **Primary Account**. End the process by clicking **Merge Users** at the bottom of the screen.

Person Search Results (2 Records Found)
[Export List to CSV](#)

NAME	USER ID / EMAIL	INSTITUTION	ROLES	MARK FOR MERGE	PRIMARY ACCOUNT
Reviewer, Fred More Info Proxy Last in: Never	freviewer / freviewer@donotsend.demo	N/A	Reviewer Admin, General Reviewer	<input checked="" type="checkbox"/>	<input type="radio"/>
Reviewer, Frederick More Info Proxy Last in: Never	Fred123456 / frederick@donotsend.com	Clarivate Analytics	Abstract Submission, Case Study Submission, Session Proposal Abstract, Session Proposal	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>

Merge Users >

All account fields are merged in to the primary account. This includes any abstracts, roles and review/session assignments.

LOCKED ACCOUNTS

If a user has made multiple unsuccessful sign-on attempts, their account will be locked. You can unlock an account by unchecking the **Account Locked** box on the General Information page of their account information.

Member ID

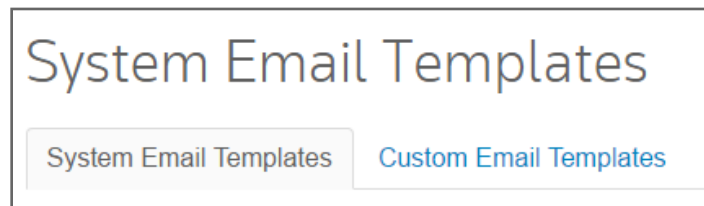
☐ Account Locked

ADMIN SUPER USER

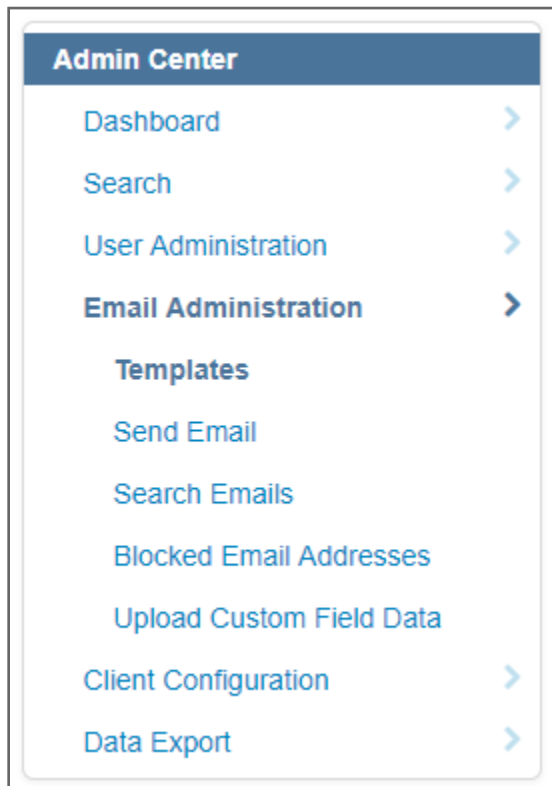
A Configuration Permission exists for a “Super User” Administrator Role. Super User Permission allows a site with multiple levels of admin roles to limit which roles the lower level admin can grant when editing a user account. This will allow sites to prevent those admins from granting access to roles that are higher than their own. The configuration setting must be completed by the Client Implementation Manager to grant the Super User role.

EMAIL ADMINISTRATION

Under Email Administration you will find both system emails (those that are triggered by events such as submission or return to draft) and custom emails (emails you send to specific groups of users).




There are five sections under Email Administration: Templates, Send Email, Search for Emails, Blocked Email Addresses, and Upload Custom Field Data.



TEMPLATES

System Email and **Custom Email** templates are available for customization. Both types of emails have multiple tags to use. The tags are available via a link called **Site Tags** on the top right corner of each template. The list opens in a separate window allowing you to cut and paste tags. The tags can then be placed directly in the email.

Abstract Submitted

 Site Tags

Name:

To:









From:

Cc:

Bcc:

Subject:

System emails can be turned on or off and some can be designated to be edited before sending. You will work with your Client Implementation Manager to assure that the proper system emails are selected. Simply click in the **Activate** column to use the system template.

NAME	STATUS	ACTIVATE	EDIT BEFORE SENDING (ADMINS ONLY)	VIEW SENT
Abstract placed in Exchange Bin	Inactive	<input type="checkbox"/>	<input type="checkbox"/>	
Abstract Re-assigned from Review Exchange Bin	Active	<input checked="" type="checkbox"/>		
Abstract Re-assigned from Session Exchange Bin	Active	<input checked="" type="checkbox"/>		
Abstract Returned to Draft	Active	<input checked="" type="checkbox"/>		
Abstract Submitted	Active	<input checked="" type="checkbox"/>		
Abstract Withdrawn	Active	<input checked="" type="checkbox"/>		
Account Creation *	Always active		<input checked="" type="checkbox"/>	
Account Modification	Active	<input checked="" type="checkbox"/>		

Custom email templates are created by you. These emails are targeted to specific sets of users and are sent out individually or in batches. When you select the **Custom Emails** tab, you will give your template a title and then click **Add** at the bottom of the screen.

Template Name:

The Site Tag list is available to make your email pull in individual data. Tags that are in all capital letters are the **Variable Tags** you create in **Configuration Settings**. The full list of tags is available at the top right of the template as a reference.

Site Tags	
Edit	
##DEADLINE_DATE##	Deadline Date
##HOTEL##	Hotel
##LOCATION##	Location
##NOTIFICATION##	Notification
##REVIEW_DEADLINE##	Review Deadline
##SITE_URL##	Site URL

Templates can be previewed so that you may assure that the tags are pulling in the appropriate data. The preview button is located at the bottom left corner of the template.

Note: Using the **View Sent** column to the right of the template list, you can view all emails sent using that template.

Copy Function for Custom Emails

New custom emails can be created from existing custom emails. This helps you create similar emails and then make minor changes to the new email template. There are two fields to create the copy: a field for naming the new template and a second for specifying which template the new email should be copied from.

Custom Email Templates

[System Email Templates](#)
[Custom Email Templates](#)

- To **Add** a new custom email template, type a name into the box at the bottom of the page and click **+Add**.
- To **Edit** a template click the hyperlinked email name.

[Edit](#)

Template Name:

Copy From:

Review Reminder 2


Review Reminder

+ Add



NAME	MODIFIED DATE	VIEW SENT	DELETE
Accept Notification Email	02-15-2017 15:37:23	Q	X
Remind Decisioners of Deadline	12-09-2016 13:43:42	Q	X
Remind Draft Abstracts of Deadline	12-09-2016 13:45:04	Q	X

Email Attachments


Admins can attach files to system emails, custom emails, and speaker management emails. It is possible to remove an attachment when using the “**Edit Before Sending Email**”. Attachment must be 6 megabytes or less in size.

 **Attachments**

Select Attachment

ATTACHMENT NAME	
<div> C:\fakepath\Test main  </div>	<div>  Upload Selected Attachment </div>
Allowed file types - doc; docx; xls; xlsx; ppt; pptx; pdf. Maximum file size - 6 megabytes	

Selected Attachment(s)

ATTACHMENT	REMOVE
Test main document.docx	 Remove

SEND EMAIL

Click **Send Email** under **Email Administration** to begin the process of sending your custom email. When you click **Send Email**, you will be given three choices for sending out the custom emails: by abstract, by session, or by people. Selecting one of these options will then take you to the **Search** functionality.

Send Email

In order to send email, please click one of the links below which will take you to the relevant search page where you can select your criteria and email template to send the email(s) out.

[Edit](#)

[Send Emails by Abstract](#)

[Send Emails by Session](#)

[Send Emails by Person](#)

Abstract-based Emails

Select the Abstract format to begin. Using the Abstract selection, you can create your targeted set of data using the **Standard Search Criteria** and other select criteria. Select the **Email Format** to begin. The Abstract Search is abstract-based data. A typical **Abstract Custom Email** would be to search for all abstracts in a specific category.

SEARCH CRITERIA	
Standard Search Criteria	
Control ID	<input type="text"/>
Submission Role	<div>Abstract Submission Case Study Submission Session Proposal Abstract</div>
Abstract Status	Select ▼
<div>Current Category</div>	Clinical Science ▼

Session-based Emails

Using the **Session Search Criteria** section, you can create your targeted set of data using the **Standard Search Criteria** and other select criteria. Select the **Email Format** to begin. The Session Search is session-based data. A typical **Session Custom Email** would be to search for all sessions of a specific kind (poster sessions, for example).

Select Format ⓘ [Edit](#)

Email

Select Search Criteria ⓘ [Edit](#)

[+ Add](#)

[+ Show Full List](#)

SEARCH CRITERIA

Session Search Criteria

Session ID	<input type="text"/>	Remove
Submitter First Name	<input type="text"/>	Remove
Submitter Last Name	<input type="text"/>	Remove
Session Kind	<div>Select</div>	Remove
Session Title	<input type="text"/>	Remove
<div>Session Type</div>	<div>Minisymposium Oral Plenary Poster Poster 1</div>	Remove

People-based Emails

Using the **People Search Criteria** selection, you can target emails to specific groups of users. To begin, select the **Email** format. Then using your template, select the search criteria you wish to use. A typical search would be to find all users with the Reviewer role.

Select Format ⓘ [Edit](#)

Email

Select Search Criteria ⓘ [Edit](#)

[+ Add](#)

[+ Show Full List](#)

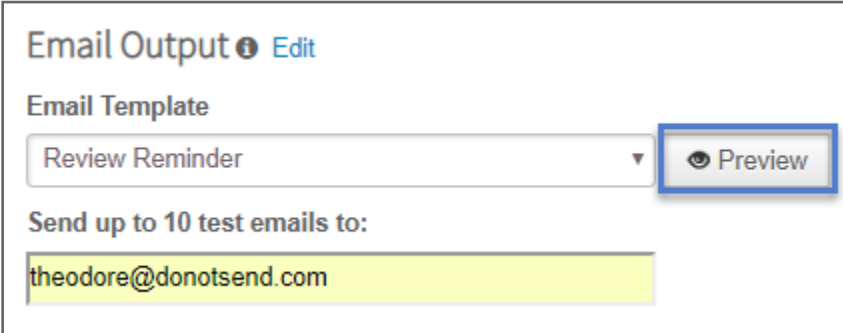
SEARCH CRITERIA

Standard Search Criteria

First Name	<div></div>
Last Name	<div></div>
Email Address	<div></div>
<div>User Type</div>	<div>Session Admin Itinerary Planner Reviewer Admin General Reviewer Video Reviewer</div>

Sending Emails

Whether you are using abstract, session, or people data for your Email creation/send, your next step is to choose your template. You will also be asked to test your custom email by having ten sample emails sent to your email address. You can also preview the template to assure your tagging is correct. Your test emails will pull in the data the tags represent.



Email Output ⓘ Edit

Email Template

Review Reminder ▼ Preview

Send up to 10 test emails to:

theodore@donotsend.com

After inputting the email and template data, click **Send Test Emails**.



Email Output ⓘ Edit

Email Template

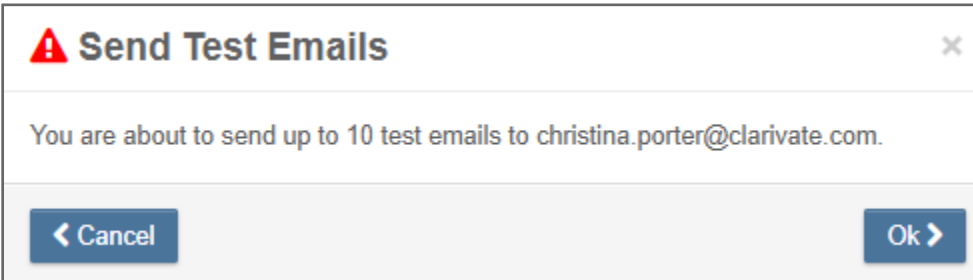
Review Reminder ▼ Preview

Send up to 10 test emails to:

christina.porter@clarivate.com

Clear Search Save Search Send Test Email

You will get a confirmation of the emails being sent to you. Click **Cancel** if you know you have an error before sending the test email. Sending test emails is first step of sending an email. Click **Ok** to send the test emails.



Send Test Emails ✕

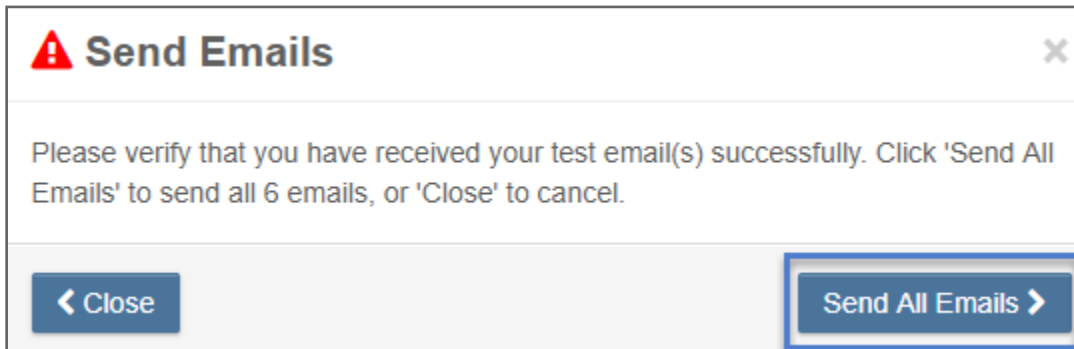
You are about to send up to 10 test emails to christina.porter@clarivate.com.

◀ Cancel Ok ▶

The emails will be sent to the email address specified. Preview your emails to assure your tags are displaying correctly and that formatting is correct. If you have an error in

the email template that you want to fix, click on **Close** to return to the beginning of the email send process. Fix your template and begin by sending yourself 10 emails.

Click **Send All Emails** after you verify the template is correct. Your email send will then be complete. You will see a confirmation of each email that was sent.




SEARCH FOR EMAILS

You can search for previously sent emails using the **Search Emails** function. There are several criteria to use to search for specific emails - From: email address and To: email address, Abstract ID, Session ID, or Batch ID. You may also search for all emails that used a specific template, for emails based on a time frame, as well emails based on CC: and BCC: fields or the email status.

Email Templates are grouped by type, custom and system email templates. Under each group, the templates are then ordered alphabetically by name. If you use Speaker Management, there will also be a section for Invitation emails.

In the search results, the date and time each email was delivered is available. In conjunction, you may download a .csv file of the search results for further manipulation in Excel. You can also order the search results by clicking on any column in the search results returned.

From the search results, you can view and manually resend emails. You can preview and edit recipients and contents prior to re-sending the email.

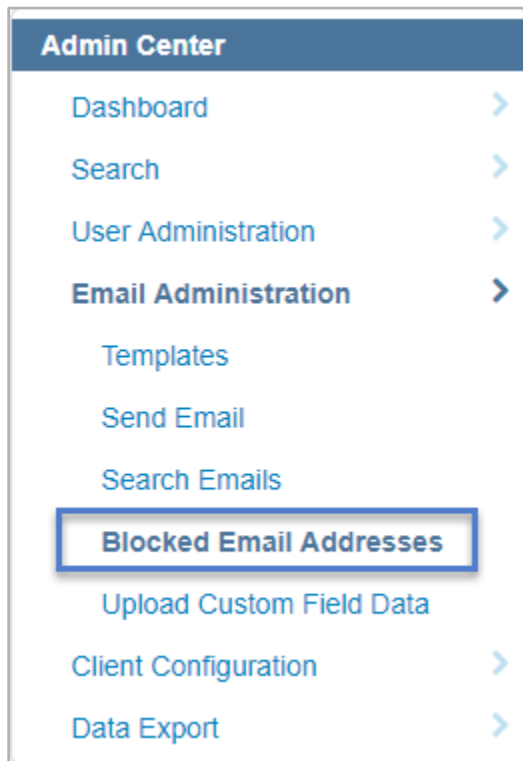
Search Results (1007 Records Found) Export List to CSV					
TO	SUBJECT	RESULT	TEMPLATE NAME	BATCH ID	DATE SENT 
*****	2017 Reviewer Invitation View Re-send	sent	Reviewer Invitation	169033	Jan 2, 2018 9:28 AM
gwen@clarivate.com	2017 Reviewer Invitation View Re-send	sent	Reviewer Invitation	169033	Jan 2, 2018 9:28 AM
s1ahost5@gmail.com	2017 Reviewer Invitation View Re-send	sent	Reviewer Invitation	169033	Jan 2, 2018 9:28 AM
christina.porter@tr.com	2017 Reviewer Invitation View Re-send	sent	Reviewer Invitation	169033	Jan 2, 2018 9:28 AM

SYSTEM BLOCKED EMAILS

There are two types of email blocks:

- Bounce emails: email addresses that have expired, email addresses that are misspelled, or emails that go to inboxes which are full.
- Complaints: user has flagged the system email address as spam.

To monitor blocked addresses, view the **Blocked Email Addresses** report under **Admin>Email Administration>Blocked Email Addresses**. This report will include bounced email addresses and complaint email addresses.



The report can be sorted by any column and can be exported to a .CSV file. Click the **Learn More About Email Blocking** link to access the full email guidelines. The link is available in the instructions above the report results. The report also shows the number of days remaining before another email will be attempted on a bounced email.

Blocked Email Addresses

The report below lists email addresses which are currently blocked by the system. We cannot send email to blocked addresses. Email addresses are blocked due to a recent bounced attempt or because the recipient has marked similar emails from ScholarOne as spam. The 'Block Type' column denotes the reason for each email block. [Learn more about email blocking.](#)

[Edit](#)

Search Results (5 Records Found) [Export List to CSV](#)

EMAIL ADDRESS 	FIRST NAME	LAST NAME	BLOCK TYPE	DAYS REMAINING
aminter@donotsend.com	Andrew	Minter	Bounce	13
amyauthor11@donotsend.demo	Amelia	Author	Bounce	13
cporter032766@yahoo.com			Bounce	13
freviewer@donotsend.demo	Fred	Reviewer	Bounce	13
gdovovan@donotsend.demo	Grace	Donovan	Bounce	13

When a user has a blocked address (bounce or complaint), they will be alerted when they login.

 We are unable to deliver emails to alex0623@donotsend.com

[Go to Your Profile and Learn More >](#)

[Continue to not receive emails](#)

Choosing to not receive emails from this site may affect your ability to receive emails regarding your account, submissions, confirmations and more.

Blocked Emails: Bounces

When an email is marked as a bounce, the system will not attempt to send another email to that address for 14 days. A user can access the account after 14 days to verify the email address and to resume receiving emails. At any time, a user can update the account's email address to immediately resolve the email issue.

Blocked Emails: Complaints

For complaint bounces, the system will not attempt another email send until the user confirms they wish to receive emails again. Users can restart emails to their address at any time but must first unmark the email as spam in their email client. Holds on complaint bounces do not carry the 14-day suppression.

UPLOAD CUSTOM FIELD DATA

A Society may wish to send out emails including data not part of the system and therefore not readily obtainable via a variable tag. This section in **Emails** allows you to populate a special field in the database with your unique data. A tag can then be created to house this data. The tag used is called **##custom_field_1##**. A template is provided for the input file. Here is a sample template:

	A	B	C	D
1	Control ID	Value		
2	123456	CE Applicable		
3	234567	CE Applicable		
4	345678	CE Applicable		
5	456789	CE Applicable		
6				
7				
8				
9				
10				

Once the template is complete, save it as a .csv file and upload it using the file upload.

Upload Custom Field Data

Use this [template](#) to create the custom field import file. Save as a .csv file when done and import in the area below.

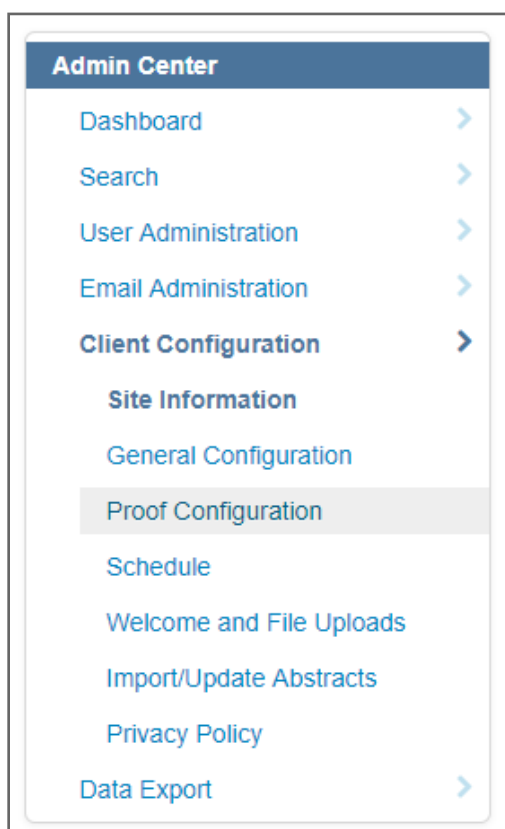
Only one data set can be imported at a time. To remove previous data, insert “**blank**” in the value column of the template and upload it as a new template.

A Custom Field Data Log is available for reference.

Custom Field Data Log					
JOB ID	JOB TYPE	STATUS	START DATE	COMPLETED DATE	MESSAGE
14368	Update Custom Fields	Waiting to start			

CLIENT CONFIGURATION

This section of Administration gives you the flexibility to configure certain parts of the system including some sections previously inaccessible to an Admin.



SITE INFORMATION AND SITE TAGS

Site information tags are applicable to every site. There are five tags that must be configured for use in emails and instruction pages. They are: Site Contact Name, Site Contact Email Address, Site Contact Phone Number, Meeting Long Name and Meeting Short Name. These tags are useful in setting up signatures in emails, creating the Welcome Page message, and all instructions throughout the site.

Site Information

Site Contact Name:	<input type="text" value="Jane Administrator"/>
Site Contact Email Address:	<input type="text" value="janeadmin@scholarone.com"/>
Site Contact Phone Number:	<input type="text" value="434-964-4100"/>
Meeting Long Name:	<input type="text" value="ScholarOne Annual Meeting"/>
Meeting Short Name:	<input type="text" value="S1A AM 2016"/>

Site Tags are unique tags that you can create to use in emails and instruction pages. You may wish to have a tag for Notification Date, for example. This lets you change the tag value at any time and emails and instructions will all be automatically updated. Site tags will appear in all capital letters at the top of the tag list.

To add a new tag, click **Add New Tag** at the bottom of the tag list. If you change a tag value, update the list by clicking on **Save Tag Changes**.

Site Tags [Edit](#)

Search Criteria

Site Tag Name ▼

Q Search

SITE TAG NAME	SITE TAG VALUE	ACTION
<div>Deadline Date ⓘ</div>	<div>December 20, 2017</div>	<div>🗑 Delete</div>
<div>Hotel</div>	<div>Marriott</div>	<div>🗑 Delete</div>
<div>Location</div>	<div>New Orleans</div>	<div>🗑 Delete</div>
<div>Notification</div>	<div>Dec. 15, 2017</div>	<div>🗑 Delete</div>
<div>Review Deadline</div>	<div>March 15, 2017</div>	<div>🗑 Delete</div>
<div>Site URL</div>	<div>s1a.abstractcentral.com</div>	<div>🗑 Delete</div>

+ Save Tag Changes

+ Add New Tag

GENERAL CONFIGURATION

There are several items under **General Configuration**. This section provides control of key user functionality available within the **Submission** and **Session Proposal** centers.

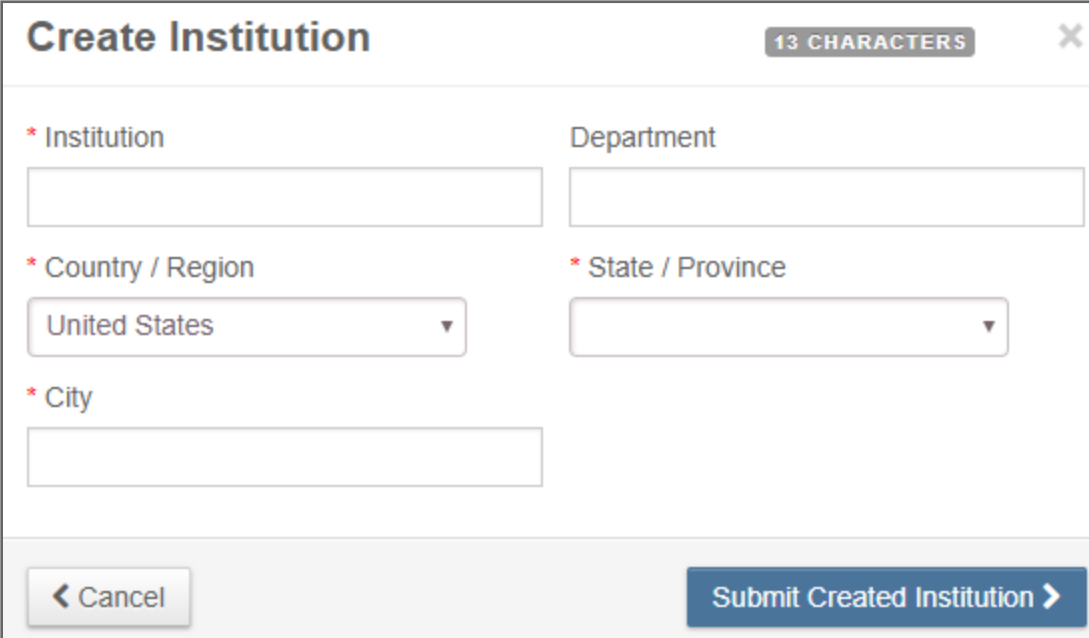
General Options

- | | | |
|--------------------------------------|-------------------------------------|--|
| <input checked="" type="radio"/> Yes | <input type="radio"/> No | Show the instructions link? |
| <input checked="" type="radio"/> Yes | <input type="radio"/> No | Show the help popovers? |
| <input type="radio"/> Yes | <input checked="" type="radio"/> No | Show submission status column on view submissions page? |
| <input checked="" type="radio"/> Yes | <input type="radio"/> No | Allow author to delete abstracts? |
| <input type="radio"/> Yes | <input checked="" type="radio"/> No | Allow author to withdraw abstracts? |
| <input type="radio"/> Yes | <input checked="" type="radio"/> No | Do you want author withdrawn submissions to stay in the session? |
| <input checked="" type="radio"/> Yes | <input type="radio"/> No | Allow proposer to delete session proposals? |

- Show the instructions link: this option allows you to control whether the “Full Instructions” link displays to users in the Submission and Session Proposals centers.
- Show the help popover: this option allows you to determine whether the help pop-overs appear for the user.
- Show submission status column on view submission page: this allows an author to see what status an abstract is in at that moment. The decision status would show here.
- Allow authors to delete abstracts: this prevents an author from accidentally deleting an abstract during the submission period.
- Allow authors to withdraw abstracts: this prevents an author from accidentally withdrawing a submission. This makes the admin the only one with the ability to withdraw abstracts.
- Do you want author withdraw submissions to stay in the session: this prevents an author from withdrawing an abstract that has already been sessioned. It also allows you to control what abstracts are in each session, especially when sessioning is final.
- Allow proposer to delete session proposals: if configured for proposals, this allows you to maintain the integrity of a session that has already been sessioned in the Session Center.

Institution List

Next is the **Institution List** feature. Upload a set of common institutions so that when an author creates an account or adds co-authors, the institution field will automatically populate once the first few letters are typed in by the user.



The 'Create Institution' form is a modal window with a title bar containing the text 'Create Institution', a character count '13 CHARACTERS', and a close button 'X'. The form contains five required fields, each marked with an asterisk: 'Institution' (text input), 'Department' (text input), 'Country / Region' (dropdown menu with 'United States' selected), 'State / Province' (dropdown menu), and 'City' (text input). At the bottom, there are two buttons: 'Cancel' with a left arrow and 'Submit Created Institution' with a right arrow.

There is a 300-entry limit to the institution list. You can cut and paste the list into the text block or use a file upload link. To obtain the file upload link; upload a .txt file in the **Welcome and File Upload** section of **Client Configuration**. Insert the link in the **Institution List** box.



The 'Institutions List' box is a rectangular area with a title 'Institutions List' and an 'Edit' link. Below the title is a text input field containing the file path '/societyimages/training/Institution_List.txt'. A green circular icon with a white 'G' is located in the bottom right corner of the box.

Submission and Session Proposal Text Editor Functions

Submission Text Editor Functions limit the types of formatting an author can use in the title, body, and images sections of the submission. To turn off bolding of a title for example, uncheck the **Bold** option under the **Title** section. The items that can be turned off are Bold, Italicize, Underline, Subscript, Superscript, and Capitalize. The Capitalize function converts the first letter of each word to a capital letter. For example: This Is An Example Of A Capitalized Title. This is a common editor option to turn off.

Submission Text Editor Options ⓘ		
TEXT EDITOR OPTIONS	TITLE	BODY & IMAGES
Bold	<input type="checkbox"/>	<input type="checkbox"/>
Italics	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Underline	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Subscript	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Superscript	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Capitalize	<input type="checkbox"/>	<input type="checkbox"/>

System Page Instructions

System Page Instructions gives you quick access to some instructional pages that are difficult to navigate to normally. By clicking Edit, you can update any of these pages with your society specific language. **Login** is one page that is commonly updated via the **System Page Instructions**.

System Page Instructions ⓘ

Please report all login screen deadline extensions to your Client Manager so they can update the site's schedule and inform Technical Support of the change.

PAGE	EDIT INSTRUCTIONS
Create New Password	✎ Edit
Multiple Role Selection	✎ Edit
Login	✎ Edit
Forgot Password	✎ Edit
Access	✎ Edit
Disclosures	✎ Edit
Itinerary Planner Shared Session/Event Details	✎ Edit
Itinerary Planner Shared Presentation Details	✎ Edit
Popup for session proposal details	✎ Edit

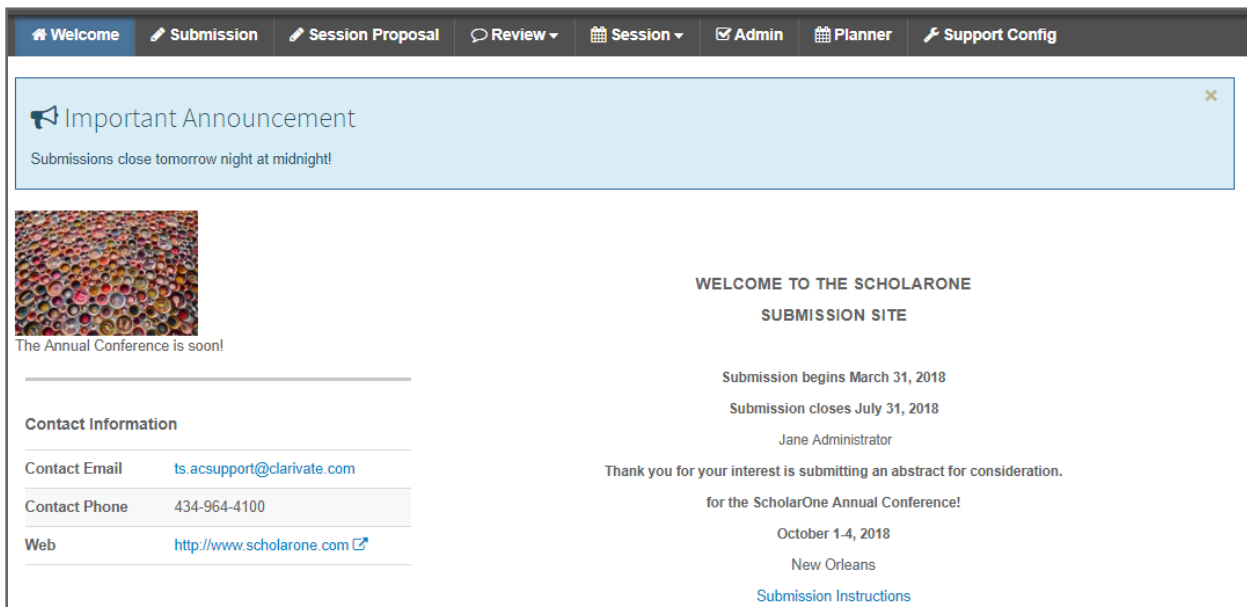
Announcement Message

The Announcement Message is available for configuring the **Announcement Box** that appears on the Login page and Welcome Page (single-sign-on users only). The announcement box is often used to announce an important message to the authors, such as a change in a submission deadline or when notifications are due to be distributed. ScholarOne may also use this message box to announce events such as downtimes and system upgrades. The message can be configured using HTML or plain text.

Announcements Message ⓘ

This highlighted banner can be configured to display any text you wish to communicate with your members. |

An example of an Announcement Message is below.



The screenshot shows the ScholarOne Abstracts submission site interface. At the top is a navigation bar with links: Welcome, Submission, Session Proposal, Review, Session, Admin, Planner, and Support Config. Below the navigation bar is a light blue announcement banner with a megaphone icon and the text "Important Announcement" and "Submissions close tomorrow night at midnight!". Below the banner is a section titled "The Annual Conference is soon!" with a colorful abstract image. To the right of this image is a "Contact Information" table. To the right of the contact information is a "WELCOME TO THE SCHOLARONE SUBMISSION SITE" section with submission dates and contact information.

Contact Information	
Contact Email	ts.acsupport@clarivate.com
Contact Phone	434-964-4100
Web	http://www.scholarone.com

WELCOME TO THE SCHOLARONE SUBMISSION SITE

Submission begins March 31, 2018
 Submission closes July 31, 2018
 Jane Administrator

Thank you for your interest in submitting an abstract for consideration.
 for the ScholarOne Annual Conference!
 October 1-4, 2018
 New Orleans
[Submission Instructions](#)

PROOF CONFIGURATION


Abstract Proof












Abstract Proof configuration is a necessary step for each role on your site. By clicking on an abstract's Control ID, a user should see a fully configured proof. It is very helpful to have role-specific proofs. For example, a submission role proof will have all the data entered by the author, including custom questions. A Reviewer proof may have other data elements including Average Score or Reviewer Comments.

Using the dropdowns, select each data elements you wish to include on each specific proof. To group data elements, select the **Heading** option in the proof items dropdown and then input your label in the field to the right. Some items that are often grouped are table and image information. The **Order** column allows you to reorder proof items as needed. To add additional proof items, click **+Add Proof Item** and select the new item from the dropdown to add it to the proof.

Abstract Proof Configuration

Selected Role : Abstract Submission

Copy From : Case Study Submission  Copy

ORDER	PROOF	PROOF TEXT	ACTION
1	CONTROL ID		 Delete
2	TITLE		 Delete
3	AUTHORS (FIRST NAME, LAST NAME)		 Delete
4	INSTITUTIONS (ALL)		 Delete
5	HEADING <div> CONTACT (SALUTATION ONLY) CONTACT (STATE/PROVINCE ONLY) CONTACT (SUFFIX) CONTACT (TELEPHONE ONLY) CONTACT (TWITTER) CONTACT (ZIP/POSTAL CODE ONLY) CONTACT PERSON INFORMATION CONTROL ID CURRENT CATEGORY CURRENT SUBCATEGORY CUSTOM FIELD DATA DATE/TIME CREATED DATE/TIME LAST MODIFIED DATE/TIME SUBMITTED DECISION HISTORY DECISION STATUS DIGITAL OBJECT IDENTIFIER (DOI) EVENT LOG FINAL ID HEADING </div>	DETAILS	 Delete
6			 Delete
7			 Delete
8			 Delete
9			 Delete
10		IMAGES	 Delete
11			 Delete


If you have a proof configured that will be the same for another role (or similar), you can copy the proof to the second role. Select the role for which you would like to create a new proof for in the Selected Role field. Then select the role to copy a proof from in the **Copy From:** field at the top of the proof configuration. Then select **Copy**. Once copied, the second role's proof can be updated or modified so that it is specific to that role.

Note: Any role specific questions cannot be copied between roles. These fields will show as Blank on the resulting new role proof.

Abstract Proof Configuration

Selected Role : General Reviewer

Copy From : Video Reviewer

 Copy

In the Proof text column, you can re-word the data element to customize it for your site.

ORDER	PROOF	PROOF TEXT
1	CONTROL ID	CID

Session Proof

As with abstracts, you will need to configure **Session Proofs** for viewing sessions. For example, you will have a **Session Admin Proof** that will likely include all the applicable data elements for a session, but you may have a **Sessioner Proof** that has only a subset of data elements pertinent to a **Sessioner**. For the **Session Proof**, you may use the **Order** column to reorder the data elements and use the **Delete** button to remove unwanted data points. Session proofs, like abstract proofs, can be copied from one role to another using the **Copy** function. Use the **Proof** text column to alter a proof item's wording. To add additional proof items, click +Add Proof Item and select the new item from the dropdown to add it to the proof.

Session Proof Configuration

Selected Role : Session Admin

Copy From : Session Center Copy

Session Proof Fields

Note proof text is used for both Event and Session. So be sure the text will be correct for both variants.

ORDER	PROOF	PROOF TEXT	ACTION
1	SESSION TITLE	Session Title	Delete
2	SESSION TYPE	Session Type	Delete
3	SESSION START TIME	Session Start Time	Delete
4	SESSION DURATION	Duration	Delete
5	SESSION LOCATION	Session Location	Delete
6	SESSION HOST	Session Host	Delete

[+ Add Proof Item](#)

Abstract Proof Fields [Edit](#)

ORDER	PROOF	PROOF TEXT	ACTION
1	SESSION ABSTRACT SORT ORDER	Order	Delete
2	CONTROL ID	Control ID	Delete

The abstract proof fields are at the bottom of the **Session Proof**. To make a complete **Session Proof**, include both session details and abstract details. The label for a session or abstract data point can be customized in the **Proof Text** field. Use the **Order** column to change the order of the proof elements. Standard proof elements can be removed with the **Delete** button. To add or change a proof option, select the dropdown to see a listing of the proof options.

Note: There is a limit of 8 items that can be added for abstract proof fields on the session proof. Once you have reached 8 fields, the **ADD PROOF ITEM** will be grayed out.

Symposia Proof

If your site is configured to use Symposia, you will also see a tab for **Symposium Proofs**. For the **Symposium Proof**, you may use the **Order** column to reorder the data elements and use the **Delete** button to remove unwanted data points. Symposium proofs, like abstract proofs, can be copied from one role to another using the **Copy** function. Use the **Proof** text column to alter a proof item's wording. To add additional proof items, click **+Add Proof Item** and select the new item from the dropdown to add it to the proof.

The abstract proof fields are at the bottom of the **Symposium Proof**. To make a complete **Symposium Proof**, include both symposium details and abstract details. When viewing the proof, Admins will see the Symposium details at the top, then unassigned abstracts (those not assigned to a session) under the symposium details. They will then be followed by the session proofs for those sessions tied to the symposium.

The label for a symposium or abstract data point can be customized in the **Proof Text** field. Use the **Order** column to change the order of the proof elements. Standard proof elements can be removed with the **Delete** button. To add or change a proof option, select the dropdown to see a listing of the proof options.

Note: There is a limit of 8 items that can be added for abstract proof fields on the symposium proof. Once you have reached 8 fields, **ADD PROOF ITEM** will be grayed out.

Symposium Proof Configuration

Selected Role : Symposia Example

Copy From : Session Center Copy

Symposium Proof Fields

ORDER	PROOF	PROOF TEXT	ACTION
1	SYMPOSIUM TYPE		Delete
2	SYMPOSIUM TITLE		Delete
3	SYMPOSIUM DETAIL: Available for CE Credit	Custom Question	Delete
4	SYMPOSIUM TOPIC		Delete

+ Add Proof Item

Abstract Symposia Proof Fields:

Abstract Proof Fields Edit

ORDER	PROOF	PROOF TEXT	ACTION
1	CONTROL ID		Delete
2	PRESENTER	Speaker	Delete
3	AVERAGE SCORE		Delete
4	CURRENT CATEGORY		Delete

+ Add Proof Item

Note: If a symposium has abstracts which are not assigned to a session, the abstracts will appear at the top of the proof under the symposium header. Assigned abstracts will appear in the Abstract section below the symposium proof.

SCHEDULE

The Schedule governs the opening and closing of all roles on your site. There are three dates for each role: **Open**, **Display Deadline**, and **Actual Deadline**. Your open dates should reflect the earliest date that role will become live. For example, a submission role open date and time should be the earliest you would allow a submission. The **Display Date** is used if you wish to advertise a close date and time, but in the background keep the role open until the **Actual Deadline**. The display date appears on the author's abstract list. This strategy works well with submission roles where you want to advertise an end date/time, but really will allow final submissions to go through up until the **Actual Deadline**. This also works well with Reviewer and Sessioner roles.

ADMIN Center (Role: Admin)			
Open	11 : 00 AM	EST	12/31/2017
Display Deadline	11 : 59 PM	EDT	03/31/2019
Actual Deadline	11 : 59 PM	EDT	03/31/2019

It is your responsibility to assure the dates and times on the Schedule are correct. You can make updates to your schedule directly on this page. If there is a role that is configured to not be editable (like an Admin role or export date) please contact your Client Implementation Manager to make the change.

Note: The Schedule is in Eastern Time (US). The system automatically accounts for Daylight and Standard Time as indicated above. It is not possible to change the time zone.

Open Editing Schedules

If a role has reached its Actual Close Date, the user will get a message stating the role access has expired.

If configured, your site may use Open Editing. The opening editing period is when a submitter can access their abstract for additional editing after the decision has been made. The Opening and Closing dates are configured below the original submission open and close dates.


AUTHOR Center (Role: Abstract Submission)			
Open	11 : 00 AM ▼	EST	03/01/2016
Display Deadline	11 : 59 PM ▼	EDT	04/30/2019
Actual Deadline	11 : 59 PM ▼	EST	12/31/2019
Open Editing Start Date	11 : 00 AM ▼	EDT	08/01/2019
Open Editing End Date	11 : 59 PM ▼	EDT	08/31/2019

WELCOME AND FILE UPLOADS

There are several options under Welcome Page and File Uploads.

The Welcome Message

To configure additional text on your Welcome page, you can add text to the Splash Message and Additional Information text boxes. The Splash Message text will appear below your Welcome page text and cannot be edited from the Edit Instructions link on the Welcome page. It is not often used for this reason.



The Annual Conference is soon!

WELCOME TO THE SCHOLARONE SUBMISSION SITE

Submission begins March 31, 2018
Submission closes July 31, 2018
Jane Administrator

Thank you for your interest in submitting an abstract for consideration.
for the ScholarOne Annual Conference!

October 1-4, 2018
New Orleans
[Submission Instructions](#)

Contact Information

Contact Email	ts.acsupport@clarivate.com
Contact Phone	434-964-4100
Web	http://www.scholarone.com

[Edit](#)
This is the splash message.

The **Welcome Message** also uses the **Edit** feature found at the bottom of the **Welcome Page** screen.

**WELCOME TO THE SCHOLARONE
SUBMISSION SITE**

Submission begins March 31, 2018

Submission closes July 31, 2018


Jane Administrator

Thank you for your interest in submitting an abstract for consideration.
for the ScholarOne Annual Conference!

October 1-4, 2018

New Orleans

[Submission Instructions](#)

 Edit

When **Edit** is clicked, a dialogue box appears; click on the header.

Instructions

#	Role	Header
1	Default Role	-

Select role:

After this step, a WYSIWIG editor appears. Using this feature, you can edit the contents of the message directly in the body text.

Instruction Text:

B *I* U ABC Paragraph Font Family Font Size A ab

WELCOME TO THE SCHOLARONE SUBMISSION SITE

Thank you for your interest is submitting an abstract for consideration
for the ScholarOne Annual Conference!
December 15-18, 2016

Submission begins August 31, 2016
Submission closes September 30, 2016

375 Greenbrier Dr.
Charlottesville, VA 22902
434-964-4100

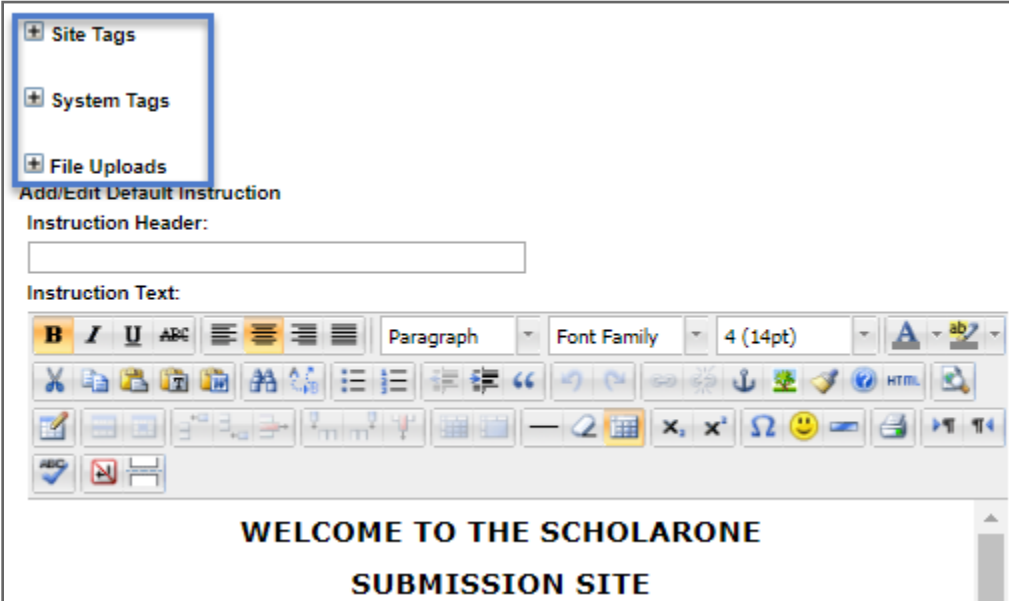
Path: p

In addition to using body text, you can add information to the page contents using **System Tags**, **Variable Tags**, and **File Uploads**. Tags are preceded and ended with two pound signs (##notification_date##).

The system tags list contains the Society specific tags configured in **Configuration Settings**. They include tags for Society Contact Name, Society Contact Email Address, and Society Contact Phone Number. Simply copy the tag and paste it into the body section.

Variable tags are Society created. The tags can represent data that is used repeatedly in emails and instructions. Some examples are tags for notification date and conference location. Again, simply copy the tag and paste into the message body.

The last way to edit the **Welcome Message** is by including links to documents and/or images. Use the **File Uploads** section to choose a file, upload the file or image to the grid. Mark images if it applies. The file tag then appears for adding to the body text.



Site Tags

System Tags

File Uploads

Add/Edit Default Instruction

Instruction Header:

Instruction Text:

**WELCOME TO THE SCHOLARONE
SUBMISSION SITE**

Logo above the Society Contact Information



You can configure an image and text to appear on the top left of the Welcome Page (above the client information section). The text and image link will need to be placed in the **Additional Information** box above the **Welcome** Fields section. HTML may be used to format the text and to upload the image.



Additional Information


What additional information would you like to display?

The Annual Conference is soon!

 The Annual Conference is soon!	WELCOME TO THE SCHOLARONE SUBMISSION SITE Submission begins March 31, 2018 Submission closes July 31, 2018 Jane Administrator Thank you for your interest in submitting an abstract for consideration. for the ScholarOne Annual Conference! October 1-4, 2018 New Orleans Submission Instructions
Contact Information	
Contact Email	ts.acsupport@clarivate.com
Contact Phone	434-964-4100
Web	http://www.scholarone.com 

Welcome Fields

On the left of the Welcome Page is a section for including **Contact Information**. The information for each item is configured in **Welcome Fields** in **Client Configuration**. The information included for **Society Name** will display on the top of proof pages.

Contact Information	
Contact Email	ts.acsupport@clarivate.com
Contact Phone	434-964-4100
Web	http://www.scholarone.com 

Site Wide Banner and File Uploads

You will upload your site banner under **Site Wide Banner and File Uploads**. We recommend that banner images be approximately 650X65 pixels in size. Click **Add File** and browse to your banner file, mark it as a banner and click **Upload**. The banner will appear across the top of each page of your site. If the banner needs to be

replaced, simply delete the current banner file and upload the new file. The **Delete** button is at the far right of the file summary box.

Site Wide Banner & File Uploads ⓘ Edit

FILE NAME	BANNER?	LOGO?	FILE PATH	UPLOADED ON	
S1A_Training_Header_(002).gif	<input checked="" type="checkbox"/>	No	logos/S1A_Training_Header_(002).gif	08-May-2018	
stock-photo-mexican-baskets-75110307.jpg	No	Yes	/societyimages/training/stock-photo-mexican-baskets-75110307.jpg	17-Oct-2017	

+ Add File

If you are uploading a logo for the **Welcome Page**, use the **File Uploads** functionality. When you upload the file, mark it as a logo. The logo will automatically appear to the left of the **Welcome Page** above the **Contact Information** section.

You can also upload files that can be used in instructions throughout your site. Once uploaded, the file path can be added to the end of your URL for the full link. The full link can then be included in your instructions and will reference the uploaded file.

Site Wide Banner & File Uploads ⓘ Edit

FILE NAME	BANNER?	LOGO?	FILE PATH	UPLOADED ON	
S1A_Training_Header_(002).gif	Yes	No	logos/S1A_Training_Header_(002).gif	08-May-2018	
stock-photo-mexican-baskets-75110307.jpg	No	Yes	/societyimages/training/stock-photo-mexican-baskets-75110307.jpg	17-Oct-2017	

+ Add File

FILE NAME	LOGO?	BANNER?
C:\fakepath\Screensh	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Upload

VISA LETTER

If configured for your site, the **Visa Letter** section of **Client Configuration** allows you to create a Visa Letter template that can then be configured to appear under each user's **Message** dropdown. (The **Messages** section also contains user **Invitations** and **Emails** and is located on the top right corner of each page).

There are two **General Options for Visa Letters**. You may show the **Visa Letter** to presenters when the abstract is accepted or when the abstract is sessioned.

Note: This must be set at the time of acceptance or sessioning. For example: if it is changed to Yes after an abstract is accepted or sessioned, the letter will not appear for abstracts previously accepted or sessioned prior to the configuration change.

General Options ⓘ

- ☒ Yes ☐ No Show visa letter in submission center for presenter(s) when abstract is accepted?
- ☒ Yes ☐ No Show visa letter in submission center for presenter(s) when abstract is sessioned?

The **Visa Letter Body Text** can be created using the special Formatting and the Email Tags link on the top right. Only those tags and formatting options displayed can be used in visa letters.

Visa Letter Body Text ⓘ

Formatting & Email Tags

This is a sample Visa Letter.

Preview

(Must save before preview)

IMPORT/UPDATE ABSTRACTS

You can also create draft submissions or update existing submissions by uploading a template. The image below details the instructions and notes to perform the upload. You will need to first select a role and then create your import template. Once your template is complete, you will select the file from your drive and select **Start Import/Update Job**. Only one template can be used per role, however you may do multiple imports. You are required to perform a test before the full import will execute.

Admin Center

Dashboard
Search
User Administration
Email Administration
Client Configuration
Site Information
General Configuration
Proof Configuration
Schedule
Welcome and File Uploads
Import/Update Abstracts
Privacy Policy
Data Export

Import/Update Abstracts

- This page can be used to create new draft submissions or to update existing submissions.
- To begin, select the submission role you will be working with. Only one role can be selected at a time. The import template and resource files you will be using will be specific to that role.
- Use the template provided below to create the import or update file. Save as a .csv when done, and import in the area below. A fully successful test must be run before an import job can be run.
- When creating new submissions, they will be imported as drafts. Stub submissions will be imported as sessioned abstracts and placed in to the session ID noted in the import file.
- Some helpful tips on using the import tool:**
 - Leave the control ID field blank if you are creating a new submission; include the control ID if you are updating an existing submission.
 - To remove previous data, insert ****blank**** in the value column of the template. **Control ID** and **Submitter Person ID** cannot be removed or changed from existing submissions.
 - Any submitted abstracts left in an incomplete state due to an update will need to be corrected by the society.
- This is not reversible.** Please ensure that any updates to existing submissions (title, category changes, etc.) are fully reviewed and correct before overriding data.

[Edit](#)

Import/Update Abstracts Actions

Selected Role:

Abstract Submission

Download Template & Resources

C:\fakepath\Test main

Select file...

Start Import/Update Job

Abstract Import Log

There are no import log records yet.

When creating new submissions, they will be imported as drafts. Stub submissions will be imported as sessioned abstracts and placed in to the session ID noted in the import file. Your first step is to select the template and resource files. The templates and resource files are based on the submission role you choose.

Import/Update Abstracts Actions

Selected Role:

Abstract Submission ▼

ⓘ Download Template & Resources ▼

- ⓘ Download Import Template
- ⓘ Download Categories
- ⓘ Download Presentation Types

ⓘ Start Import/Update Job ▼

Abstract Import Log

There are no import log records yet.

Below is a sample of a template used for an import. This template can be used for both full imports or for updates. Careful attention needs to be paid to the **Submission Role** as this determines which submission template is used.

Control ID										
A	B	C	D	E	F	G	H	I	J	K
Control ID	Submitter Person ID	Title	Methods:	Materials:	Results:	Conclusions:	Presentat	Category ID	Presenter Person ID	Author Person

To remove earlier data, place ****blank**** in the value for that column. Control ID and Submitter Person ID cannot be removed or changed in existing submissions.

Any submitted abstracts left in an incomplete state due to an update will need to be corrected by the society. The incomplete abstracts can be found using the **Incomplete Submitted Abstracts** report found on the Submission Dashboard (referenced earlier).

This is not reversible. Please ensure that any updates to existing submissions (title, category changes, etc.) are fully reviewed and correct before overriding data.

PRIVACY POLICY

To configure the Privacy step for account creation and account edit, complete the following steps:

- Enter your society name in the **Privacy Acknowledgement Link** text field.
Suggested format is *[Society Name] Privacy Policy*.
- Enter the **Privacy Policy URL** in the **Privacy Acknowledgement URL** field.
- Enter the **Privacy Policy Update Date**. You may update your **Privacy Policy** as often as needed. Edit the **Privacy Policy Update Date** field to activate the new policy.
 - When a user comes to the system for the first time after the **Privacy Policy Update Date**, they will be prompted to review the updated Privacy Policy upon login.
- Click **Save** and your **Privacy Policy** is active on your site.

The screenshot shows the 'Privacy Policy' configuration page within the 'Admin Center'. The left sidebar lists various administrative options, with 'Privacy Policy' highlighted. The main content area provides instructions for setting up the privacy policy, including a numbered list of steps and a bulleted list of user prompts. Below the instructions is an 'Edit' link and three input fields: 'Privacy Acknowledgment Link Text' (containing 'Society Privacy Policy'), 'Privacy Acknowledgment URL' (containing a URL to a PDF file), and 'Privacy Policy Update Date' (containing '06/15/2018' with a calendar icon). A 'Save' button is located at the bottom right of the form.

Admin Center

- Dashboard
- Search
- User Administration
- Email Administration
- Client Configuration**
- Site Information
- General Configuration
- Proof Configuration
- Schedule
- Welcome and File Uploads
- Import/Update Abstracts
- Privacy Policy**
- Data Export

Privacy Policy

1. Enter the society name in Privacy Acknowledgement Link text area. Suggested format is Society Name Privacy Policy.
2. Enter the Privacy Policy URL in Privacy Acknowledgement URL text area.
3. Enter the Privacy Policy Update Date.
 - When a user comes to the system for the first time post the Privacy Policy Update Date, they will be prompted to review the updated Privacy Policy upon login.
4. Click Save and your Privacy Policy is active on the site!
 - You may update the Privacy Policy as often as needed, just be sure to update the Privacy Policy Update Date.

[Edit](#)

Privacy Acknowledgment Link Text:

Privacy Acknowledgment URL:

Privacy Policy Update Date:

[Save](#)

Key points about the Privacy Policy:

- Society staff roles are not required to acknowledge the privacy policy as they are employees.
- Proxy users cannot change the privacy policy acknowledgement on behalf of another user.
- Admins cannot acknowledge the privacy policy when creating a new user account.
- If a user does not wish to agree to the privacy policies and chooses to remove their account, they will only be able to do so if they have no assignments within the system. The user may contact the Admin to remove those assignments, so they may be able to remove their account.

Removal of Accounts

During account creation and account updates, a user can decline their acceptance of the privacy policies. They will then indicate they are requesting the removal of their account. If their account is not tied to any abstracts, review tasks, or sessioning tasks it will be deleted, and they will get a confirmation of the deletion.

In the case that their account is tied to abstract(s), review tasks, or sessioning tasks, they will receive a message stating they must contact the society admin to remove the account.

Privacy Acknowledgment

To ensure you are properly informed of your privacy rights while using this website, we ask that you review and acknowledge the relevant privacy policies linked below.

Clarivate Analytics/ScholarOne, owners of this site

☒ * Yes, I have read and now acknowledge the linked privacy policies

☐ No, please remove my account

We cannot automatically remove your account at this time. Please contact the society at janeadmin@scholarone.com and reference Abstract Control IDs: 2082947, 2156657, 2280347, 2280387, 2280391, 2280392, 2280414, 2280416, 2280419, 2280423, 2287061, 2287067, 2287071, 2287074, 2287075, 2287076, 2287079, 2287111, 2287115, 2287117, 2287123, 2287127, 2287130, 2287132, 2287135, 2287140, 2287142, 2287152, 2287153, 2287155, 2287161, 2287170, 2287190, 2487760, 2659922, 3016119, 3043175, 3053643, 3053646, 3053647, 3056696, 3059132, 3060121, 3060122 and Session IDs: 264349, 266116, 299270, 303615, 305479, 305481, 306958, 310462, 311114, 311116 for assistance.

< Cancel
Save Changes >

To remove an account, you must update the user's information by removing the user from any abstracts, reviewer tasks, and/or sessioning tasks.

To remove them as an author on an abstract, perform an Abstract Search using the HTML format. In the results, you will find titles as a hyperlinks. Click on the title to be taken into a submission. From there, you can remove the user as an author.

Found 2 Records

CONTROL ID: 3060121

TITLE: [Abstract sample](#)

CONTACT (NAME ONLY): [Alex Smith](#)

ABSTRACT STATUS: Sessioned

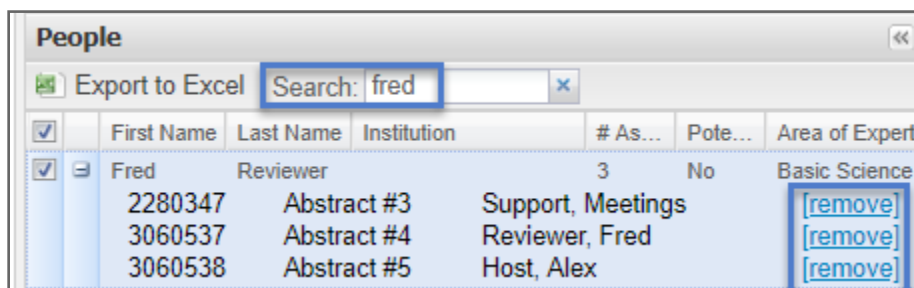
CONTROL ID: 3060122

TITLE: [Abstract Example 2](#)

CONTACT (NAME ONLY): [Alex Smith](#)

ABSTRACT STATUS: Sessioned

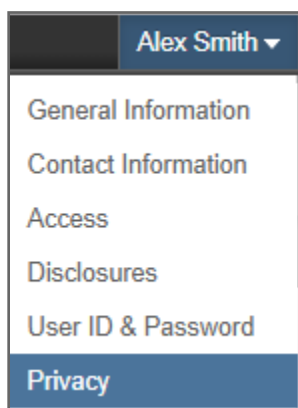
To remove reviewer tasks (if they have reviewed), access the Review Center. Search for their name in the Assign Reviewers People Grid (select the reviewer role they were assigned to). Click on the + sign to expand their assignments. Remove the abstracts assigned to the user using the Remove options to the right of each Control ID.



	First Name	Last Name	Institution	# As...	Pote...	Area of Expert
<input checked="" type="checkbox"/>	Fred	Reviewer		3	No	Basic Science
	2280347	Abstract #3	Support, Meetings			[remove]
	3060537	Abstract #4	Reviewer, Fred			[remove]
	3060538	Abstract #5	Host, Alex			[remove]

For session tasks, choose Assign Sessioner from the left menu in the Review Center. Choose the applicable session role and search for their name. Follow the same procedures as for removing review tasks.

When all abstracts, review tasks, and sessioner tasks have been removed, you can notify the user that they can remove their account by accessing the Privacy step on their account.



QUICK SEARCH

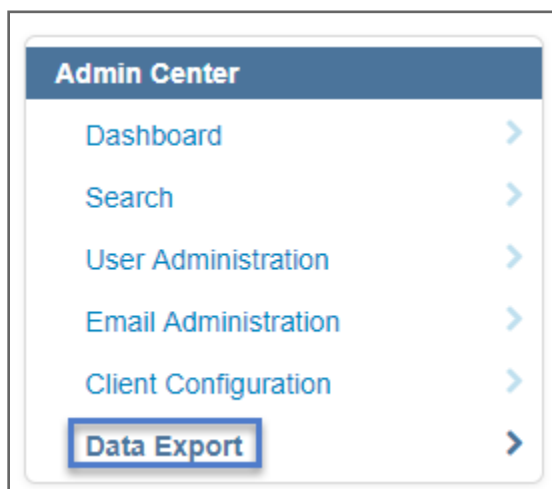
The Admin tab includes a Quick Search Feature. It can be used to search for abstracts, sessions, or persons. You can use a wild card search if you do not have complete information. Enter a partial search term and add an * to the end of the term.

The screenshot shows the 'Admin' tab selected in the top navigation bar. Below the navigation bar, there is a search section with a 'Control ID' dropdown menu and a text input field containing '1234*'. A 'Search' button with a magnifying glass icon is to the right of the input field. Below the search section, there is a table with two columns. The first column lists search criteria, and the second column is empty. The search criteria are grouped into four sections: Abstracts, Sessions, and Persons. Each section has a header row and two data rows.

Control ID	Search
Abstract Title	
Abstract Submitter First or Last Name	
Session ID	
Session Title	
Session Submitter First or Last Name	
Person Email Address	
Person First or Last Name	

DATA EXPORT

The **Data Export Tool** provides a way to access standard and custom reports which are programmed specifically for your data exports.



The Data Export Tool has several standard reports. If you have a custom report, you can also download the data from the tool.

Standard Reports include:

- Standard Abstract Book (html)
- Standard Program Book (html)
- Author Index (html)
- Category Index (html)
- Institution Index (html)
- Keyword Index (html)
- Standard Session Proposal Report (csv)
- Standard eCommerce Report (csv)

For detailed information on the tool, see the **Data Export Tool Guide** on **Get Help Now**.

APPENDIX

When using HTML to update instruction text or create your Welcome Message, the following entities and attributes below are allowed. Other HTML is prevented from being used. The previous unrestricted use of HTML in instructions posed a security risk and was therefore modified.

Formatting elements: "b", "i", "font", "s", "u", "o", "sup", "sub", "ins", "del", "strong", "strike", "tt", "code", "big", "small", "br", "span", "p", "div", "h1", "h2", "h3", "h4", "h5", "h6", "ul", "ol", "li", "blockquote", "hr", "em", "center"

Formatting attributes: "accesskey", "class", "contenteditable", "contextmenu", "draggable", "id", "lang", "spellcheck", "style", "tabindex", "title", "translate", "color", "background-color", "size", "target", "noshade"

Table elements: "table", "th", "tr", "td", "caption", "colgroup", "col", "thead", "tbody", "tfoot"

Table attributes: "align", "bgcolor", "border", "cellpadding", "cellspacing", "sortable", "summary", "width", "accesskey", "class", "contenteditable", "contextmenu", "draggable", "id", "lang", "spellcheck", "style", "tabindex", "title", "translate", "valign", "rowspan", "colspan"

Video elements: "video", "source"

Video attributes: "autoplay", "controls", "height", "loop", "muted", "poster", "preload", "src", "width", "accesskey", "class", "contenteditable", "contextmenu", "draggable", "id", "lang", "spellcheck", "style", "tabindex", "title", "translate"

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