

The Planner User Guide

February 2024

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Overview of the Planner

The Planner is an online application that allows you to review conference information and select those sessions and presentations you want to attend. Key features of the application are:

- Overview of full conference schedule by the entire conference or by day
- Viewing information on sessions, presenters, hosts and abstracts
- Selection of sessions, events and presentations for inclusion in your personalized itinerary
- Creation of notes on sessions, events, presentations
- Star selections to note those of special interest
- Download your schedule
- Export notes and stars
- Filter to:
 - a. Selected sessions in your itinerary
 - b. Starred sessions, events, hosts, presenters and abstracts
 - c. Notes
 - d. Topics
 - e. Session Types
 - f. Your full itinerary
 - g. Your itinerary by day
 - h. Downloading your itinerary details to your calendar
 - i. Viewing your itinerary on the conference mobile app

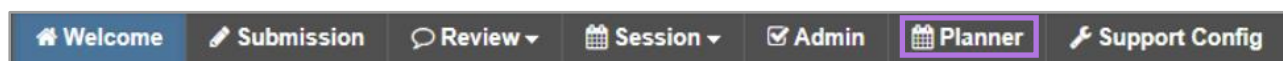
In addition, you can also access Exhibitor Information and General Info. The General Info tab includes information such as registration hours, special events, poster session instructions and more.

Note: The color scheme of your planner may vary in color, but the navigation remains the same.

Accessing The Planner

Create Account

During your initial visit to The Planner, you will create an Event Pilot account. To access The Planner, first log into your conference's submission website. Click the **Planner** tab.

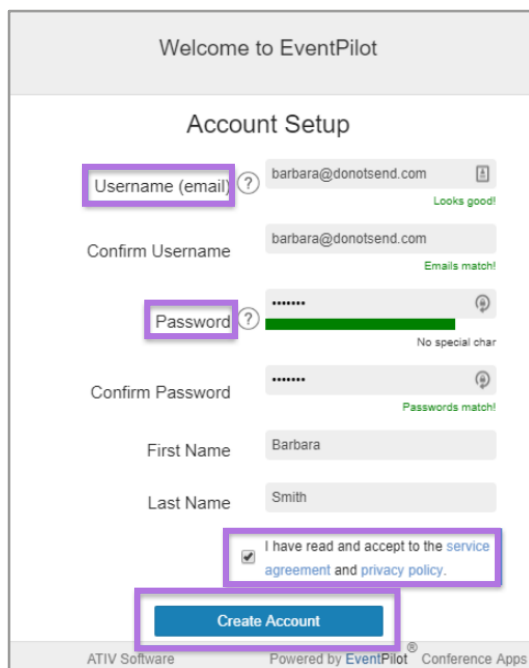


The Planner login page appears. Click **Create Account** on the top right corner of the login page.



Note: You will need to create an account through EventPilot to access your schedule. Your schedule will be saved across all devices (online and mobile). This account is separate from your society's submission site account.

Your society's EventPilot login page appears. Click **Create Account**. Complete all fields, accept the service and privacy agreement, and click **Create Account**.



Welcome to EventPilot

Account Setup

Username (email) Looks good!

Confirm Username Emails match!

Password No special char

Confirm Password Passwords match!

First Name

Last Name

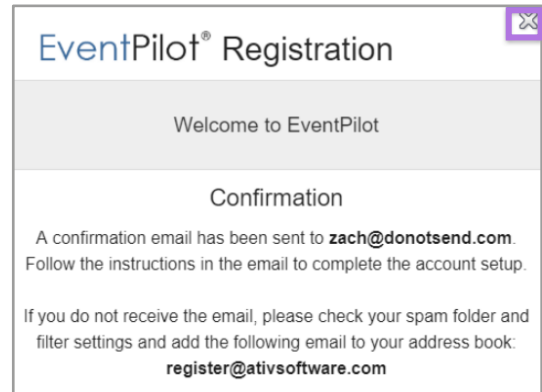
☒ I have read and accept to the [service agreement and privacy policy](#).

Create Account

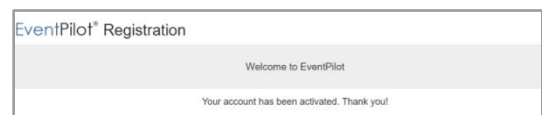
ATIV Software Powered by EventPilot Conference Apps

You will receive a confirmation page when the account creation is successful.

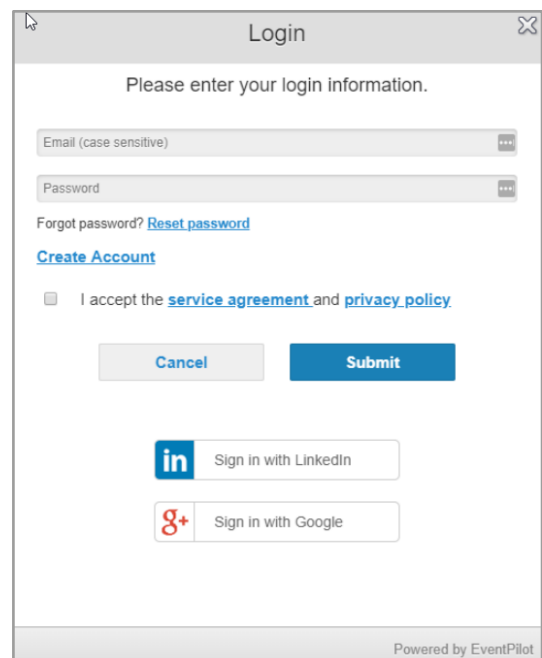
Click the **X** to move to The Planner's main page where you can login.



To login, you will be asked to first verify your account via an email sent to your username email address. Follow the prompts to verify your account. Once verified, you may login with your username and password.

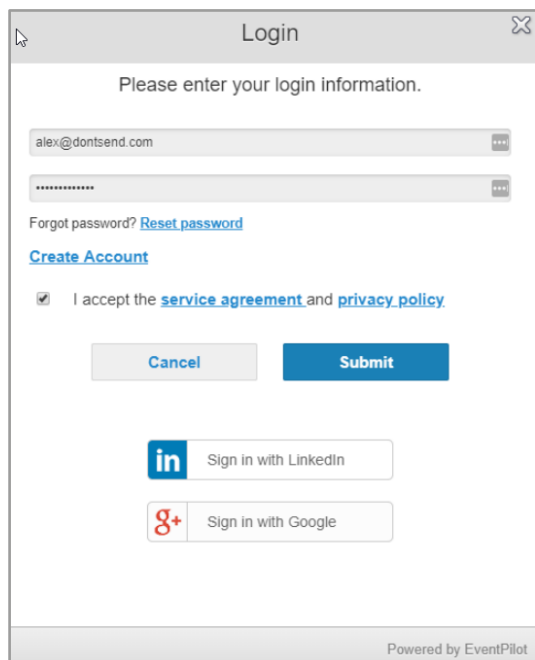


Input your username and password. As an alternate means of logging in, you can also use your LinkedIn or Google accounts. Facebook is also an optional login (if configured).



With Established Login Information

When you click “Login” from **The Planner’s Main Page**, you will have the option to input your Username (email) and Password (created through EventPilot) or sign in with your social media account credentials through LinkedIn, Google, or Facebook.



The screenshot shows a web browser window titled "Login". Inside the window, the text "Please enter your login information." is displayed. Below this, there are two input fields: the first contains the email "alex@dontsend.com" and the second contains a masked password "*****". To the right of each field is a small icon for showing or hiding the input. Below the password field, there is a link "Forgot password? [Reset password](#)". Below that is a link "[Create Account](#)". Further down, there is a checkbox that is checked, followed by the text "I accept the [service agreement](#) and [privacy policy](#)". At the bottom of the form area, there are two buttons: a grey "Cancel" button and a blue "Submit" button. Below the buttons, there are two social media login options: a LinkedIn button with the text "Sign in with LinkedIn" and a Google button with the text "Sign in with Google". At the very bottom of the window, there is a footer that says "Powered by EventPilot".

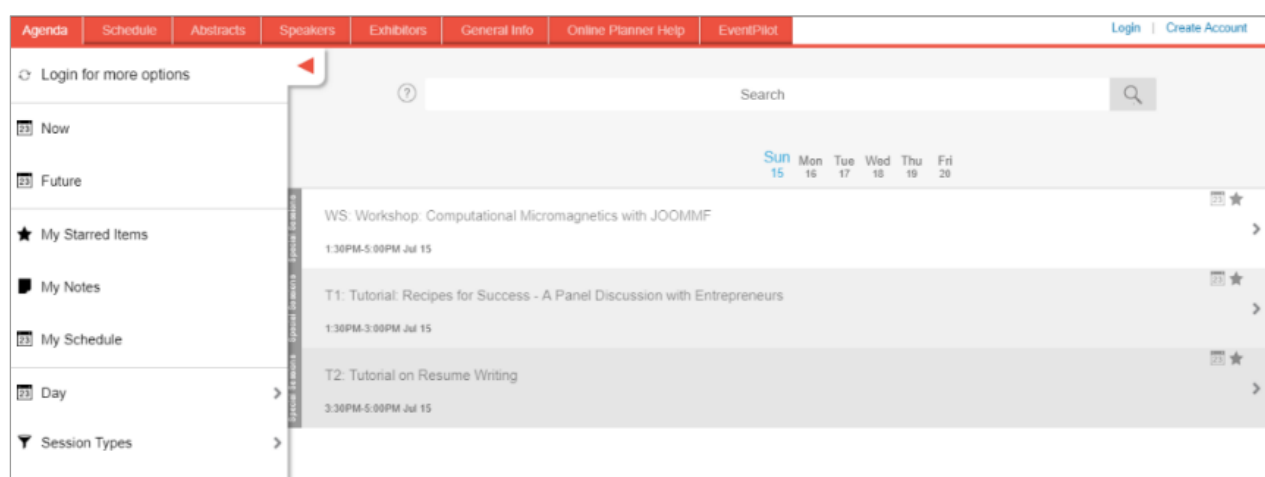
The Planner Centers

Agenda

The Agenda tab is the default tab that will appear once you have signed into The Planner.

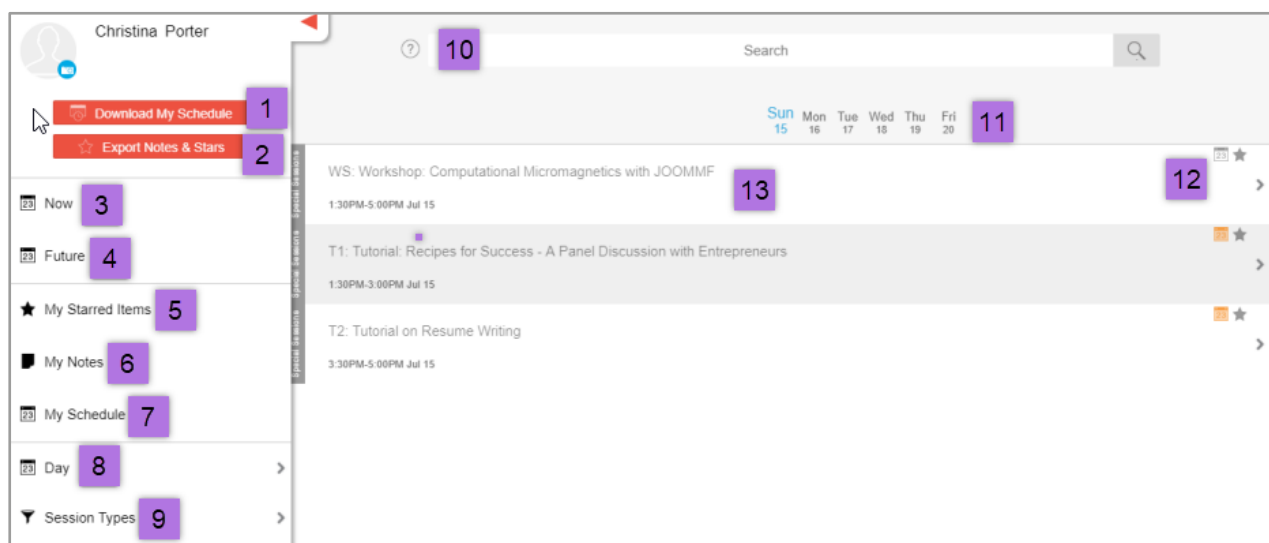


Within this tab you will find the **Main View**.



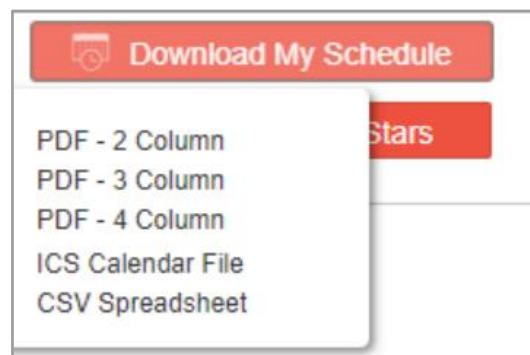
Once you have successfully signed in, you will find your first and last name in the upper right-hand corner of the page: you will also see your name and profile picture above the sidebar. To add your profile photo, click on the small blue dot by your name. You will be prompted to open the file and then upload it.

The **Main View** provides access to many of the features of The Planner. Navigation begins with the sidebar and extends to search and day selections. Below is an overview of each of the functions of The Planner's main page agenda view.



1. Download My Schedule:

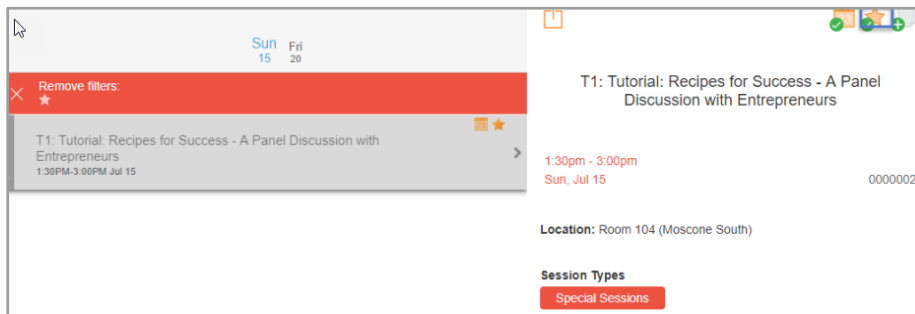
Here you have the option of downloading the created itinerary in a variety of formats: PDF, ICS (iCalendar file format that is compatible with Google Calendar, Microsoft Outlook, Apple iCal, and other calendar applications), or CSV (compatible with Microsoft Excel, Apple Numbers, and other spreadsheet applications).



2. **Export Notes & Stars:** A PDF file of the sessions which you starred or to which you added a note. Note details are available per session. You can access the Session detail by click View Session.

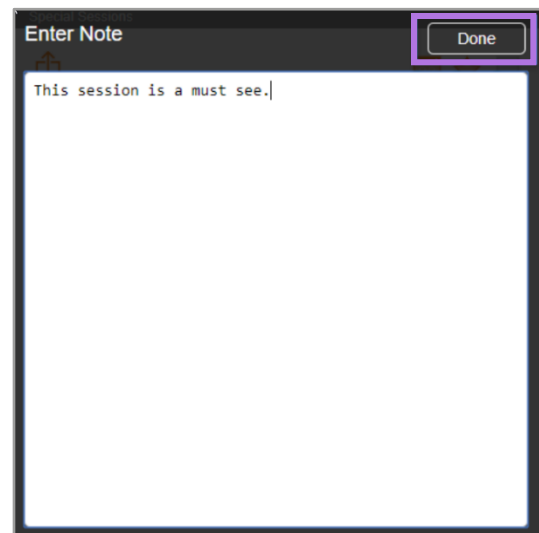
Sessions	
T1: Tutorial: Recipes for Success - A Panel Discussion with Entrepreneurs Location: Room 104 (Moscone South)	view session
WS: Workshop: Computational Micromagnetics with JOOMMF Location: Room 307/308 (Moscone South)	view session
T2: Tutorial on Resume Writing Location: Room 104 (Moscone South)	view session

3. **Now:** Current sessions or events.
4. **Future:** Sessions and events that have not yet happened.
5. **My Starred Items:** Results will return those sessions or events you selected for your schedule which you also starred. You can remove a star by clicking to expand the window and clicking on the star in the top right of the session details section. The star will change to orange and the green check mark appears when a star is placed on a session or event.

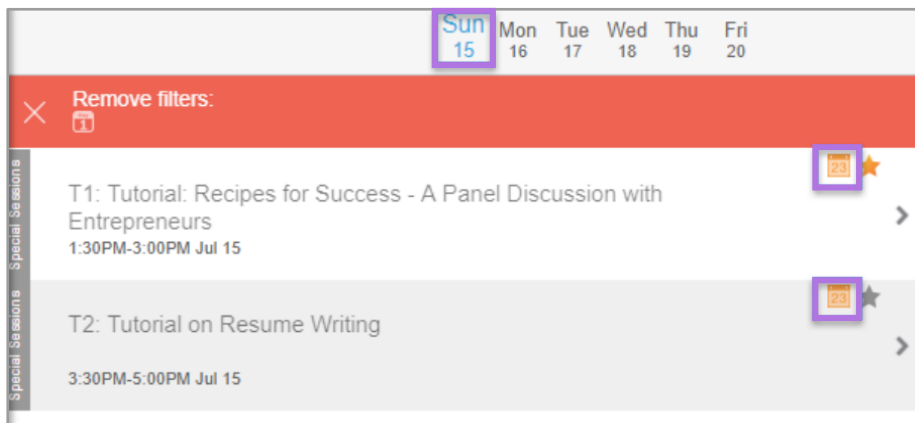


6. **My Notes:**

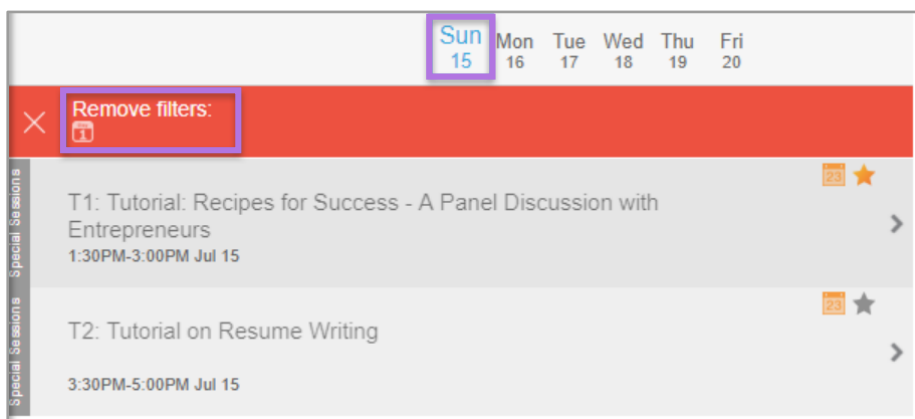
Results display all sessions or events on which you placed a note. Expand each session to view the notes. In the session detail window, click on the yellow and green note icon to open the note for viewing or editing. When done with the note review, collapse the window to show the schedule view again. The note icon will now turn orange and with a green check mark. To delete a note, open the note and remove any text. Click Done when finished.



7. **My Schedule:** The results display your selected sessions and events by day. You can navigate through the sessions and events by clicking on the date you want to see. Expand the view to see session details. You can also star a session and/or add notes using the top right icons for starring and notes. To see all sessions and events available on a given day, remove the filters. Click on My Schedule again to see only your selected sessions and events.



8. **Day:** Results display your selected sessions and events by day and time of day. You can filter to your selected sessions or you may clear the filters to see all available sessions. You can add sessions to your schedule by clicking on the calendar icon to the right of the session information. You can also add notes or star a session.



9. Session Types, Tracks or Topics:

In the last menu option, you may see one of several types of searches (depending on society-specific configuration). If Clarivate Analytics | ScholarOne Abstracts™ The Planner User Guide Page 13 Effective Date: 02-August-2018 Document Version: 1.0 Session Types appears, you will have the ability to filter to all session types. These types can be sessions such as oral, poster, plenary, or special session, for example. If Tracks or Topics are used, you can filter to the specific topic or track to easily select sessions to add to your schedule.

Session Types

Clear

Done

●

Oral

●

Poster

●

Special Sessions

●

Symposium

10. Search Bar:

Use this feature to quickly find specific session and events you want to add to your schedule or sessions you want to modify with notes and/or stars. Search tips are provided by clicking on the gray question mark icon next to the search field. When your search criteria are set, click on the magnifying glass to start the search. Searching can also be used in conjunction with filters.

Search Tips

Multiple terms: term1 term2

red apples

returns results with all terms like:

Fructose levels in red and green apples

Precise match in quotes: "term1 term2"

"red apples"

returns results matching exactly like:

Anthocyanin biosynthesis in red apples

Exclude a term with -: term1 -term2

apples -red

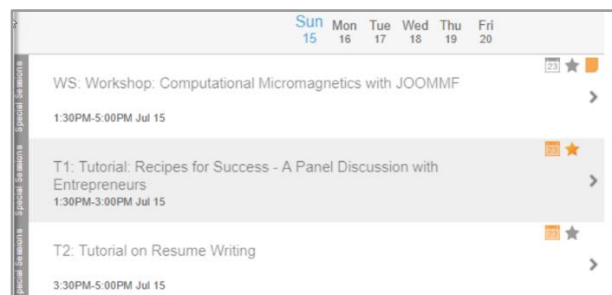
returns results containing apples but not red:

Malic acid in green apples

Note: When selecting an option from the sidebar, you may find that not all expected sessions will show. This is likely a case where a previous filter is still being applied. Either click on the sidebar option again to clear the filter or select Remove Filters in the red bar across the search results.

11. **Date:**

Dates of the conference schedule. Use this view of sessions and events by day to select your sessions for your itinerary.



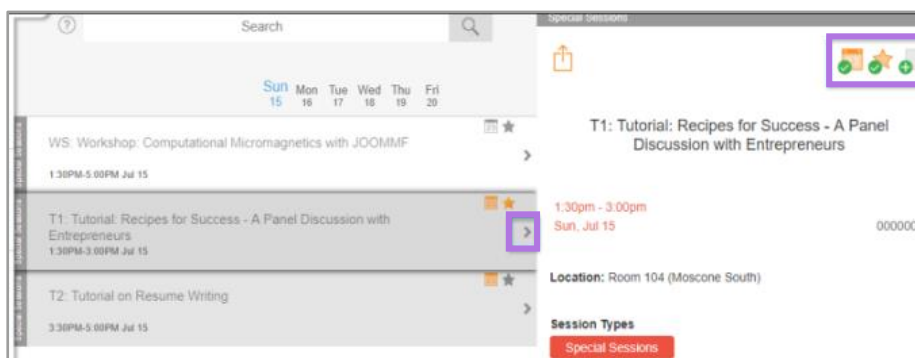
12. **Icon Selection:**

There are three icons available for use: add to calendar (small calendar) **icon**, **star icon** and **the notes icon** (piece of paper icon). Click on these icons during any session results to modify your starred items or notes applied to the session. Using the calendar icon will add that session to your itinerary.

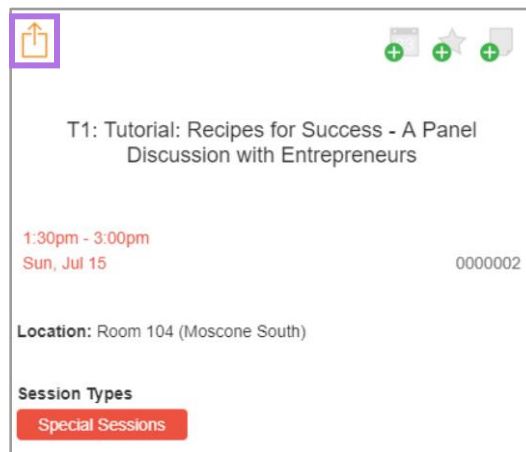


13. **Session Overview:**

This section displays the results of filters applied to sessions and events. It provides the basic information on a session or event: Title and Day/Time. It is from here that you can add the session or event to your schedule, add a note, and add a star. When you have added the session to your calendar, the calendar icon will change to orange with a green check mark. This is also true of the star and notes icons.



You can click on the orange square with the arrow to share the session information on social media or by email.



T1: Tutorial: Recipes for Success - A Panel Discussion with Entrepreneurs

1:30pm - 3:00pm
Sun, Jul 15

0000002

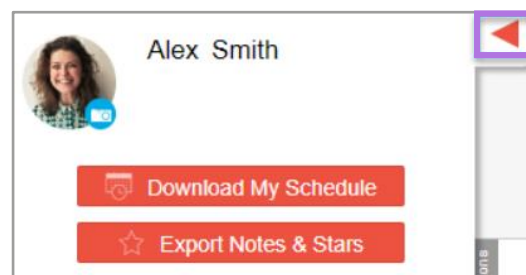
Location: Room 104 (Moscone South)

Session Types
Special Sessions

Collapsing and Expanding Views

Sidebar

To expand and collapse the sidebar, click on the red arrow in the top right corner of the bar.



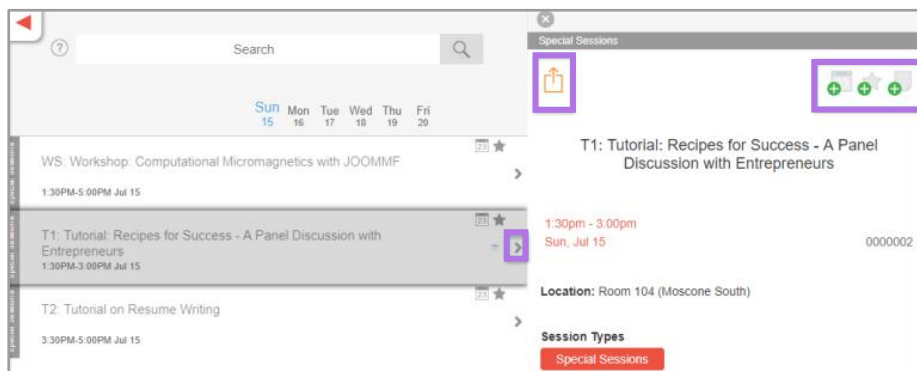
Alex Smith

Download My Schedule

Export Notes & Stars

Session Results

By default, the session title and day/time will appear for the session results view. Drill down to more session information by clicking on the gray forward arrow at the far right of each result. From the expanded view, you can also add a session to your schedule, add a note, or star a session.



Search

Sun 15 Mon 16 Tue 17 Wed 18 Thu 19 Fri 20

WS: Workshop: Computational Micromagnetics with JOOMMF
1:30PM-5:00PM Jul 15

T1: Tutorial: Recipes for Success - A Panel Discussion with Entrepreneurs
1:30PM-3:00PM Jul 15

T2: Tutorial on Resume Writing
3:30PM-5:00PM Jul 15

T1: Tutorial: Recipes for Success - A Panel Discussion with Entrepreneurs

1:30pm - 3:00pm
Sun, Jul 15

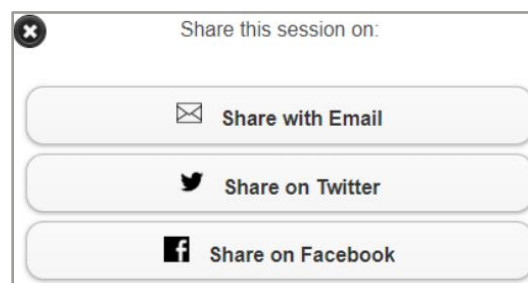
0000002

Location: Room 104 (Moscone South)

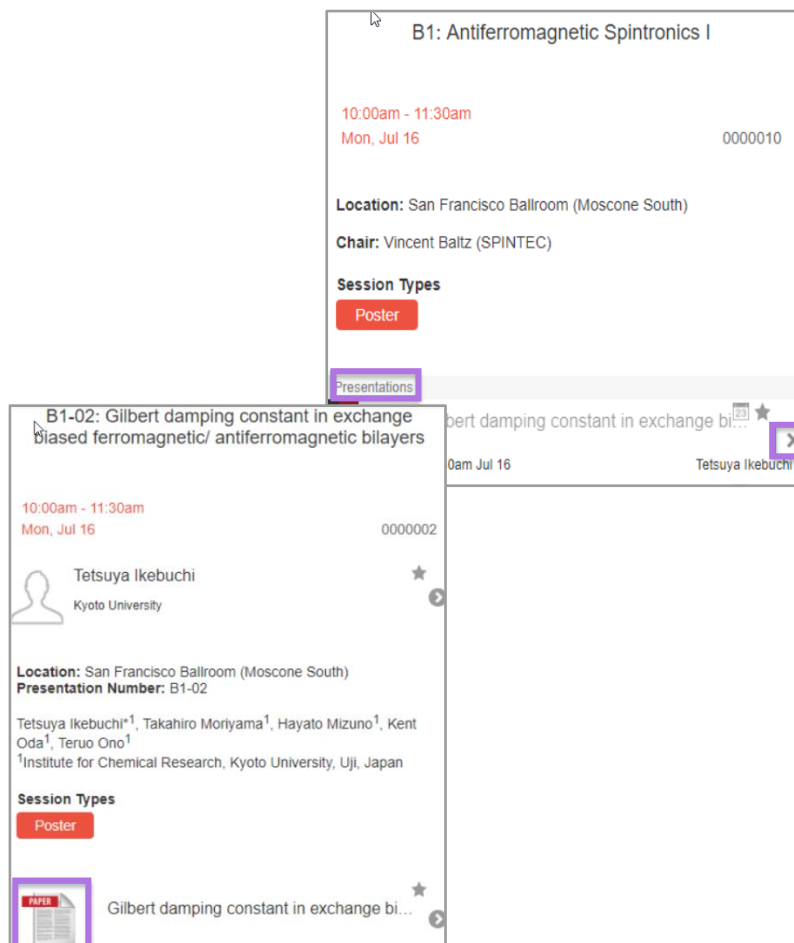
Session Types
Special Sessions

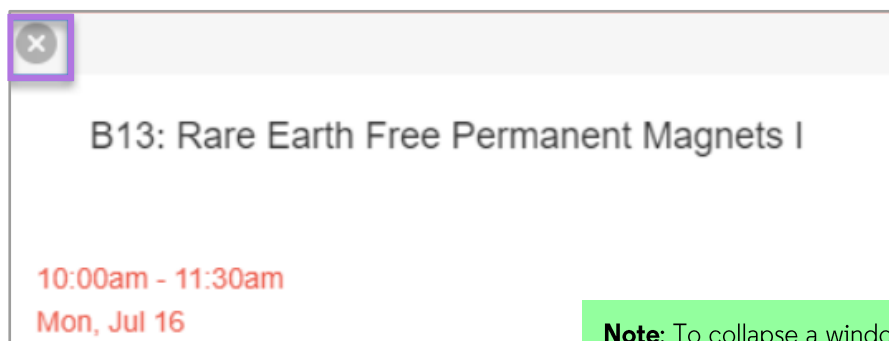
Below the session information at the right, you can also access the individual presentations, if applicable. Expand the presentation to make the abstracts available for review.

Clicking on **the orange box and arrow** will allow you to share a session or event via email or via social media.



Below the session information at the right, you can also access the individual presentations, if applicable. Click on the gray forward arrow to access the abstract for that presentation.





Note: To collapse a window, click on the gray X at the top left corner of the results.

Schedule

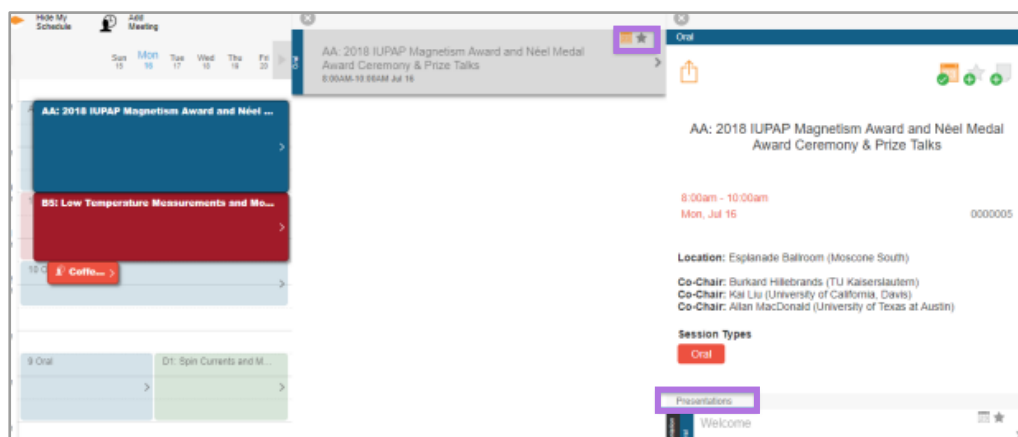
Navigate to the Schedule tab at the top of the screen.



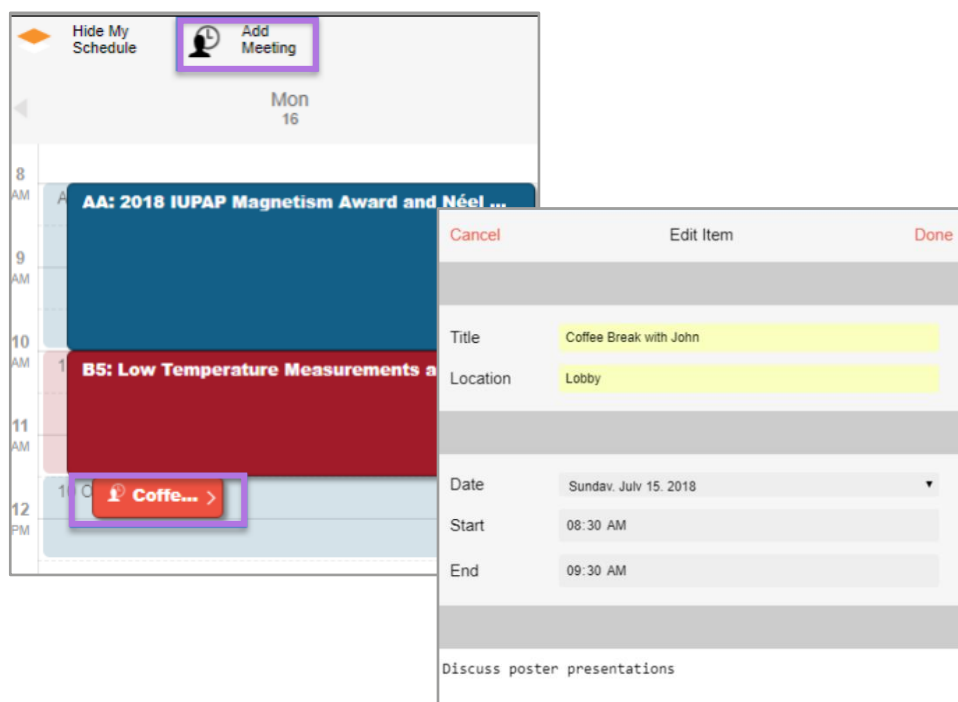
The Schedule tab features many ways to access session, presentation and event information.

The default screen displays calendars for each day of the conference. You can choose to overlay your selected sessions or to hide your personal itinerary. Using the arrow navigation, you can drill down to sessions and presentation information.

Your schedule can be viewed over the conference schedule. You can expand a session to add notes or to star the session. By toggling the calendar icon, you can remove or add displayed sessions. In the session details, you have access to the individual session presentations.

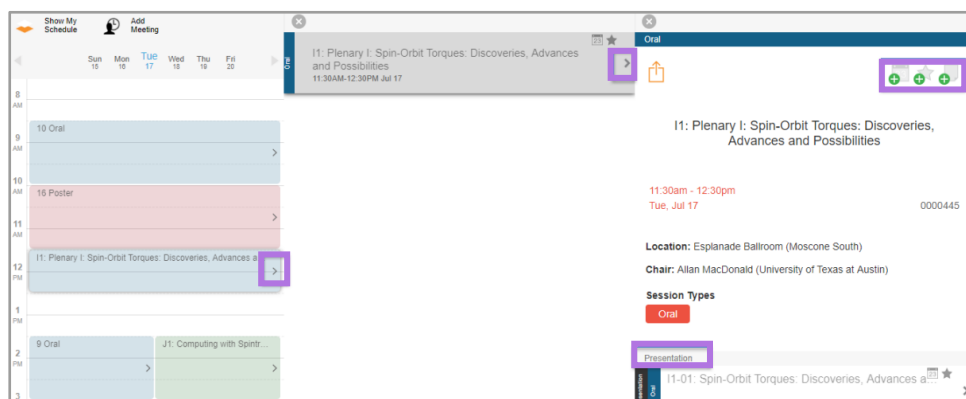


If you want to add personal meetings to your schedule, such as a coffee break with a colleague, use the **Add Meeting** feature. Click on **Add Meeting** and complete the popup information. The meeting will then appear on your itinerary.



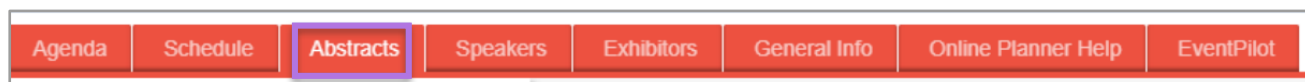
Hide your schedule to browse through each day's session and events. Expand a session view to see details and to add a session to your schedule. Notes and stars may also be added.

Using the gray arrows, you can drill down to the presentation level. You have the option of adding the session to your schedule or to add notes and stars at each level of the drill down.

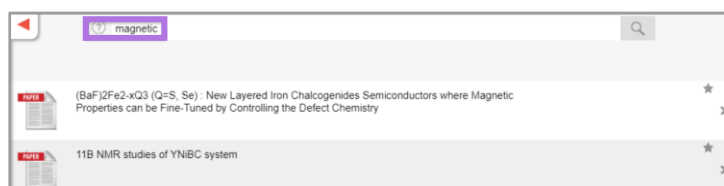


Abstracts

Navigate to the Abstracts tab.

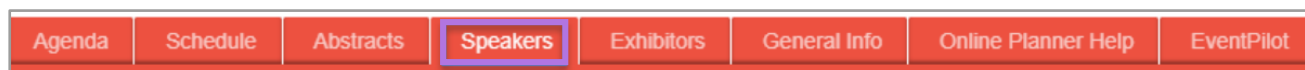


The Abstracts tab provides a way to search for abstracts based on the criteria you enter in the search field. You might search for all abstracts with a certain word in the title or search for abstracts by a specific presenter. Expand the windows of the search results to view an abstract.

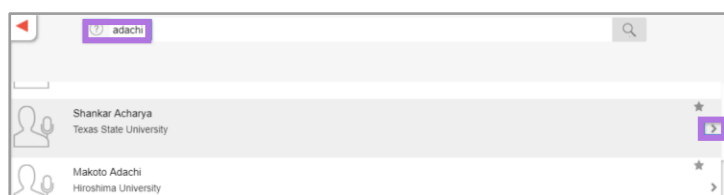


Speakers

Navigate to the Speakers tab.

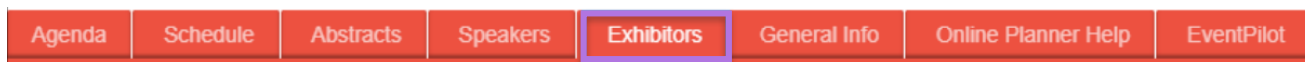


The Speakers tab displays all speaker in the conference. You can expand the speaker's name to see their presentation details as well as their abstract. You may download the abstract. Search for specific presenters by using the search at the top of the screen.

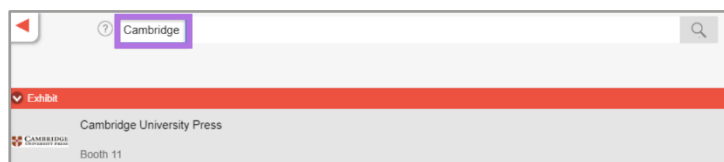


Exhibitors

Navigate to the Exhibitors tab.

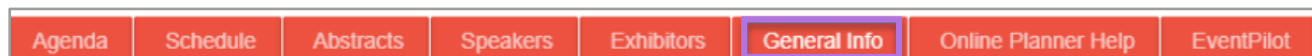


Use the Exhibitor tab to view all exhibitors at the conference. Specific exhibitors may be identified in this listing. Use the Search feature at the top of the screen to search for exhibitor information for those of interest.



General Info

Navigate to the General Info tab.

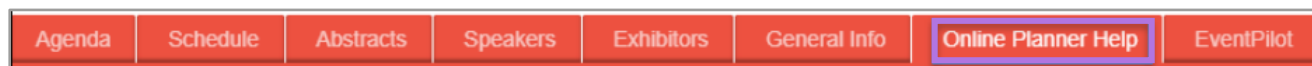


The General Info tab provides information on topics such as poster presentation instructions, connect to Wi-Fi and Special Events. This guide is also available for your reference under the General Info tab.

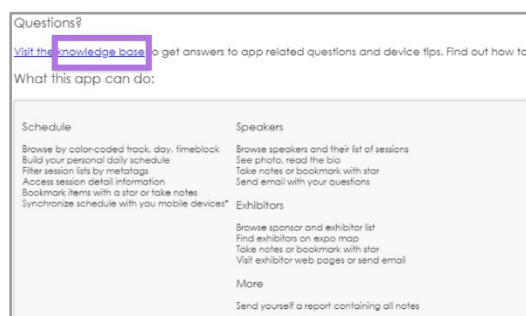
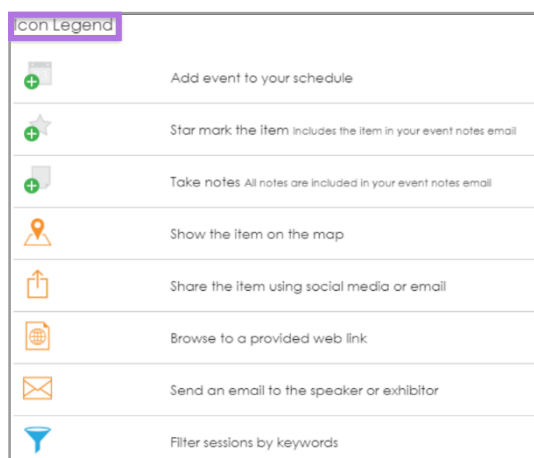


Online Planner Help

Navigate to Online Help.



The Online Planner Help link offers access to technical help provided by EventPilot. EventPilot hosts a Knowledge Base link to FAQs related to all aspects of The Planner. There is also an icon legend for quick reference.



Event Pilot

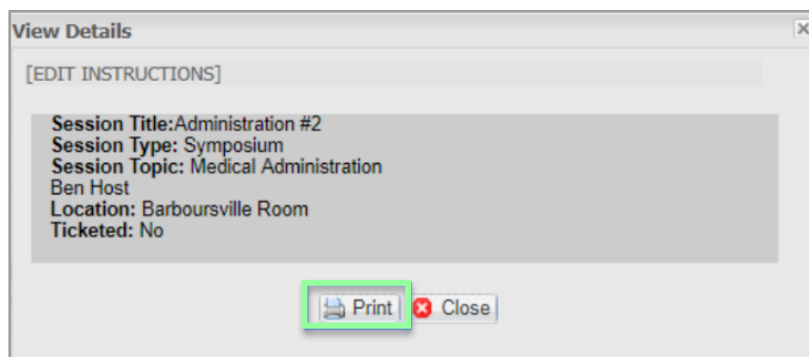
Navigate to the Event Pilot tab.

View Session Details

Click **View Session Details** to see session information.

<div><div></div><div>S104. Administration #2</div><div>Ben Host (ScholarOne)</div><div>8:00 AM - 9:30 AM, Barboursville Room</div></div>	<div><div>View Session Details</div><div><input checked="" type="checkbox"/> Include All in Itinerary</div></div>
--	---

The session information will then appear in a pop-up box, with the options to **Print** or **Close**.



View presentation details

To view individual presentation information, click on the **View Presentation** link. The abstract proof appears.

S104. Administration #2 Ben Host (ScholarOne) 8:00 AM - 9:30 AM, Barboursville Room		View Session Details <input checked="" type="checkbox"/> Include All in Itinerary
8:00 AM - 8:18 AM Abstract #1		<input checked="" type="checkbox"/> Include in Itinerary
View Presentation <i>Meetings R. Support</i>		
8:18 AM - 8:36 AM Abstract #3		<input checked="" type="checkbox"/> Include in Itinerary
View Presentation <i>Meetings R. Support</i>		
8:36 AM - 8:54 AM Abstract #5		<input checked="" type="checkbox"/> Include in Itinerary
View Presentation <i>Meetings R. Support</i>		
 8:54 AM - 9:12 AM Abstract #6 AM		<input checked="" type="checkbox"/> Include in Itinerary
View Presentation <i>Meetings R. Support</i>		
9:12 AM - 9:30 AM Abstract #7		<input checked="" type="checkbox"/> Include in Itinerary
View Presentation <i>Meetings R. Support</i>		

View Presentation Details

CONTROL ID: 2082947
TITLE: Abstract #1
AUTHORS (FIRST NAME, LAST NAME): Meetings R. Support¹
INSTITUTIONS (ALL): 1. ScholarOne, Charlottesville, VA, United States.
DETAILS
CURRENT CATEGORY: Basic Science
CURRENT SUB-CATEGORY: None
KEYWORDS: aerospace, ADSA, anatomy.
ABSTRACT BODY:
Materials:: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Integer nec odio. Praesent libero. Sed cursus ante dapibus diam. Sed nisi. Nulla quis sem at nibh elementum imperdiet. Duis sagittis ipsum. Praesent mauris. Fusce nec tellus sed augue semper porta. Mauris massa. Vestibulum lacinia arcu eget nulla. Class aptent taciti sociosq.
Conclusions:: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Integer nec odio. Praesent libero. Sed cursus ante dapibus diam. Sed nisi. Nulla quis sem at nibh elementum imperdiet. Duis sagittis ipsum. Praesent mauris. Fusce nec tellus sed augue semper porta. Mauris massa. Vestibulum lacinia arcu eget nulla. Class aptent taciti sociosq.
Methods:: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Integer nec odio. Praesent libero. Sed cursus ante dapibus diam. Sed nisi. Nulla quis sem at nibh elementum imperdiet. Duis sagittis ipsum. Praesent mauris. Fusce nec tellus sed augue semper porta. Mauris massa. Vestibulum lacinia arcu eget nulla. Class aptent taciti sociosq.
Results:: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Integer nec odio. Praesent libero. Sed cursus ante dapibus diam. Sed nisi. Nulla quis sem at nibh elementum imperdiet. Duis sagittis ipsum. Praesent mauris. Fusce nec tellus sed augue semper porta. Mauris massa. Vestibulum lacinia arcu eget nulla. Class aptent taciti sociosq.
IMAGES
(No Image Selected)
TABLES
TABLE TITLE:
Test Table

Itinerary Export Options

With the export options, you can export in several formats. Select the button for the format you wish to use. The calendar options will return a .ics file which may then be used to import itinerary information to your calendar tool.

Instructions

- Your personalized itinerary is below. To remove items from your itinerary, uncheck the associated box.
- Scheduling conflicts are denoted with a red "I" icon.
- Withdrawn presentations are denoted with a purple "w" icon.

 Itinerary Only (PDF)

 Itinerary Only (Calendar)

 Itinerary Only (Excel)

 Itinerary + Abstracts (PDF)

 Itinerary + Abstracts (Calendar)

 Itinerary + Abstracts (Excel)

About Clarivate

Clarivate™ is a leading global information services provider. We connect people and organizations to intelligence they can trust to transform their perspective, their work and our world. Our subscription and technology-based solutions are coupled with deep domain expertise and cover the areas of Academia & Government, Life Sciences & Healthcare and Intellectual Property. For more information, please visit clarivate.com.

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