



ScholarOne Abstracts™

Administrator Search Guide

01-October-2018

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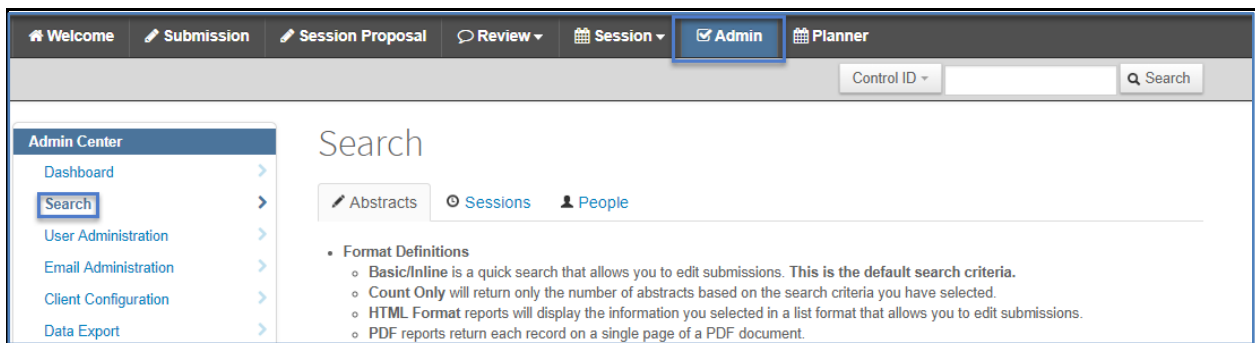
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SEARCH OVERVIEW

The Search feature of the Admin function provides a way for you to query your data using specific criteria. There are three search options available, with search criteria and display details applicable to that type of search. The types of searches are Abstracts, Sessions and People. Begin your search by selecting one of these types of searches. You will also designate what format you want the data returned in. For example, you can have your results returned in a comma delimited file. We will explore building reports for all three types of searches.

ACCESSING SEARCH

Log in to your site with your login credentials. Select the **Admin** tab and in the left-hand menu, select **Search**.



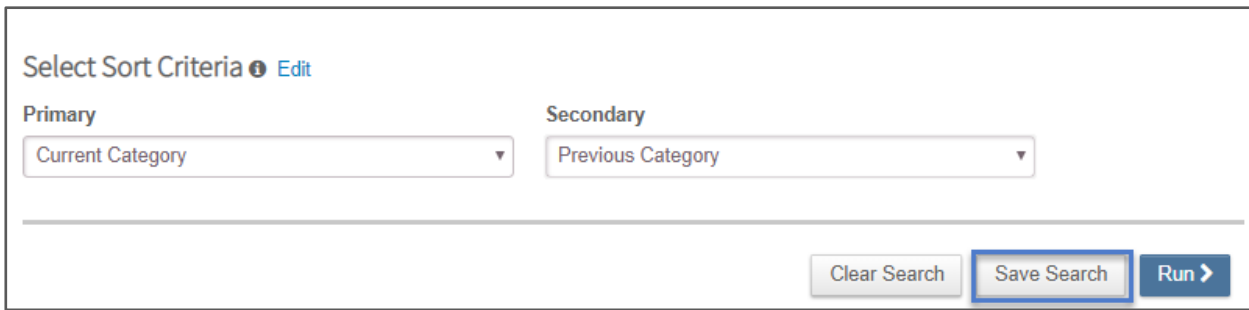
COMMON SEARCH OPTIONS

For each type of search, there are common options. A description of each option follows.

- Save Search
- Result Format
- Standard Search Criteria
- Full List of Search Criteria
- Display Items
- Sort Criteria
- Abstract and People also have Special Searches

SAVED SEARCHES

All three types of searches feature the ability to save searches for future use. To save a search, build your search and then click on the **Save Search** button at the bottom of the search options.

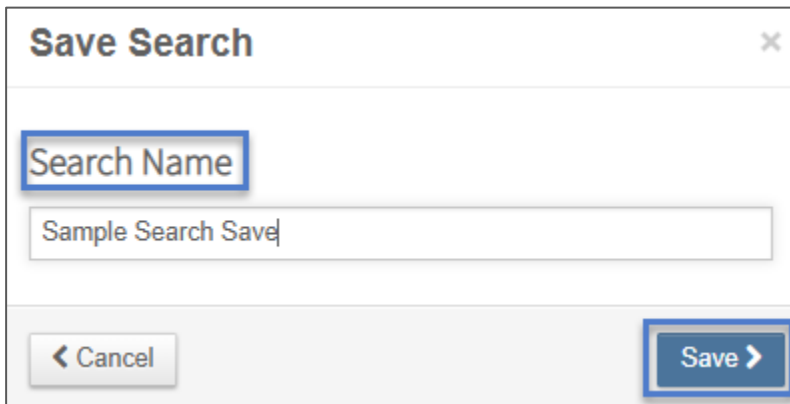


Select Sort Criteria [Edit](#)

Primary

Secondary

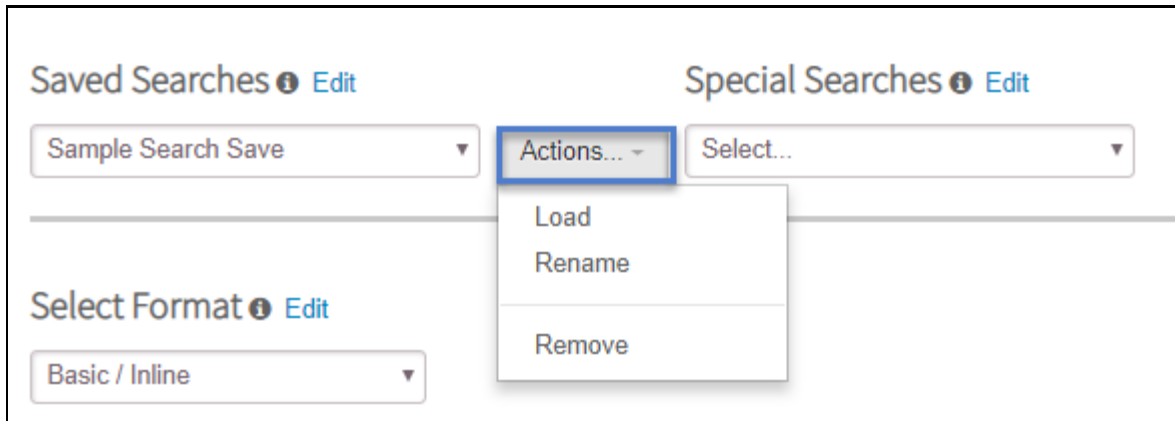
Name your search and click **Save**.



Save Search ×

When you want to run the report again, select your saved search name in the **Saved Searches** dropdown. Click the **Action** tab and select **Load**. You can also rename a saved search or remove a saved search from the dropdown menu.

Note: The Action dropdown will not appear until a saved search name has been selected from the dropdown menu.

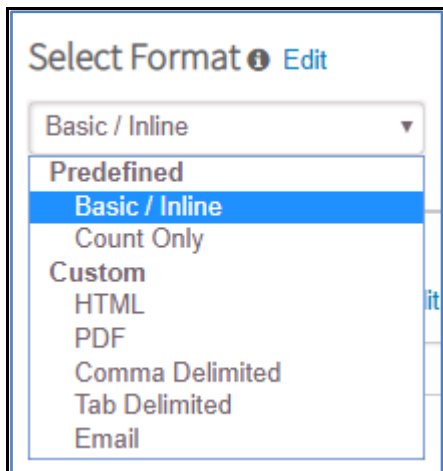


Once loaded, you can scroll to the bottom and select to run your saved search.

Tip: Saved searches can be added to the dashboard Help Links.

RESULTS FORMAT

There are two sets of results formats: Predefined Formats and Custom Formats.



Predefined Formats

- **Basic/Inline:** this is a quick option which returns your search criteria with set display items. These set display items are ID, Title, Contact Name and Status (for Abstracts and Sessions) and Name, Institution, Email and Role (for People). Using this format allows you to proxy as that user. Results for a Basic/Inline search appear at the bottom of the search options.
- **Count Only:** the number of results that meet your criteria. This returns a number only.

Custom Formats

The options allow for more customized result output styles.

- **HTML:** display item results will display on an HTML page within the site. For example, from an Abstracts based search you can view the contact author's profile, proxy in as the contact author, and edit the abstract if you have the default display items in the HTML results.
- **PDF:** each result will appear on a single page of a PDF document with the display items you have selected to appear.
- **Comma Delimited:** display results in a comma delimited .csv file which can be opened in Excel.
- **Tab Delimited:** display results in a tab delimited .txt file which can be opened in Excel.
- **Email:** used to send custom emails based on your specific search criteria.

Sending Custom Emails

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 the custom email: by abstract, by session, or by person. Selecting one of these options will then take you to the correct **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

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 uses 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"/>	Remove
Abstract Title	<input type="text"/>	Remove
Submitter First Name	<input type="text"/>	Remove
Submitter Last Name	<input type="text"/>	Remove
Submission Role	<div style="border: 1px solid #ccc; padding: 2px;"> Abstract Submission Case Study Submission Session Proposal Abstract </div>	Remove
Current Category	Clinical Science	Remove

Email Output [Edit](#)

Email Template

Accept Notification Email [Preview](#)

Send up to 10 test emails to:

Clear Search
Save Search
Send Test Email

Session

Using the **Session Search Criteria** section, you can use session-related data options to create a template targeted for specific session data. Select the session format to begin. Again, using the variable tag list you can customize your template for use. A typical session email template that is used is a search for all sessions of a specific kind (plenary sessions, for example).

SEARCH CRITERIA

Session Search Criteria

Submitter First Name	<input type="text"/>	Remove
Submitter Last Name	<input type="text"/>	Remove
Session Title	<input type="text"/>	Remove
Session Type	<input type="text" value="Meet the Expert"/> Minisymposium Oral Plenary Poster	Remove

Email Output [Edit](#)

Email Template

Remind Decisioners of Deadline

Send up to 10 test emails to:

theodore@donotsend.com

People

Using the **People** 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 want to use. A typical search would be to find all users with the Reviewer role.

SEARCH CRITERIA

Standard Search Criteria

First Name	<input type="text"/>	Remove
Last Name	<input type="text"/>	Remove
User Type	<div style="border: 1px solid #ccc; padding: 2px;"> Session Admin Itinerary Planner Reviewer Admin General Reviewer Video Reviewer </div>	Remove

Email Output [Edit](#)

Email Template

Review Reminder [Preview](#)

Send up to 10 test emails to:

theodore@donotsend.com

Clear Search
Save Search
Send Test Email

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](#)

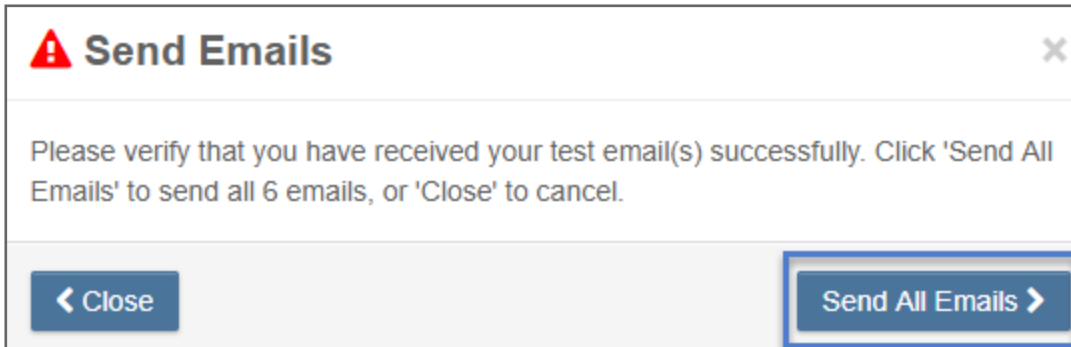
Email Template

Review Reminder [Preview](#)

Send up to 10 test emails to:

theodore@donotsend.com

A confirmation of the number of emails that will be sent will then appear. You will have the option of completing the send or to end the process by clicking **Close**. Finally, when ready, click on **Send All Emails** to complete the send.



SELECT SEARCH CRITERIA

Use the **Select Search** option to define specific search criteria to formulate your desired data output. Use **Show Full List** to display type-specific data points. Use the **Standard Search Criteria** already set for quick access to commonly used type-related data points. You can remove any search criteria you do not want to use for your search by clicking the **Remove** button at the end of that search criteria row.

Note: When using the **Full List**, you can use the type-ahead feature. This will populate with available selections when you enter the first few letters of that term.

Select Search Criteria ⓘ [Edit](#)

[+ Add](#)

[+ Show Full List](#)

SEARCH CRITERIA

[Standard Search Criteria](#)

Control ID	<input type="text"/>	Remove
Final ID	<input type="text"/>	Remove
Abstract Title	<input type="text"/>	Remove
Submitter First Name	<input type="text"/>	Remove
Submitter Last Name	<input type="text"/>	Remove
Submission Role	<input type="text" value="Abstract Submission"/> <input type="text" value="Case Study Submission"/> <input type="text" value="Session Proposal Abstract"/>	Remove
Abstract Status	<input type="text" value="Select"/>	Remove

DISPLAY ITEMS

Once you have defined your search criteria, you can select the display data you want to see in the output. Choose the data from **Show Full List**. This list is specific to the type of report you are creating. As an example, if you have your format set to Basic/Inline, no display items will show as only the predefined defaults can display. You can reorder display items using the number dropdowns available in the far left of the screen or remove display items if needed.

Select Display Items [Edit](#)

[+ Add](#)

- Hide [Full List](#)

- IMAGE CAPTION
- INSTITUTIONS (ALL)
- KEYWORDS
- MEMBER ID
- PRESENTATION TYPE
- PRESENTATION TYPE IP SHARED DETAILS PAGE URL
- PRESENTER
- PRESENTER (ADDRESS 1 ONLY)
- PRESENTER (ADDRESS 2 ONLY)
- PRESENTER (CITY ONLY)
- PRESENTER (COUNTRY ONLY)

[+ Add](#)

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

<input type="text" value="1"/>	CONTROL ID	Remove
<input type="text" value="2"/>	TITLE	Remove
<input type="text" value="3"/>	CONTACT (NAME ONLY)	Remove
<input type="text" value="4"/>	ABSTRACT STATUS	Remove

SORT CRITERIA

Use the sort criteria to have your results populate in a manner that makes it easy to access the search results. When you choose the Primary sort, the Secondary sort option will appear. Sort criteria are specific to the type of search you are performing.

Select Sort Criteria [Edit](#)

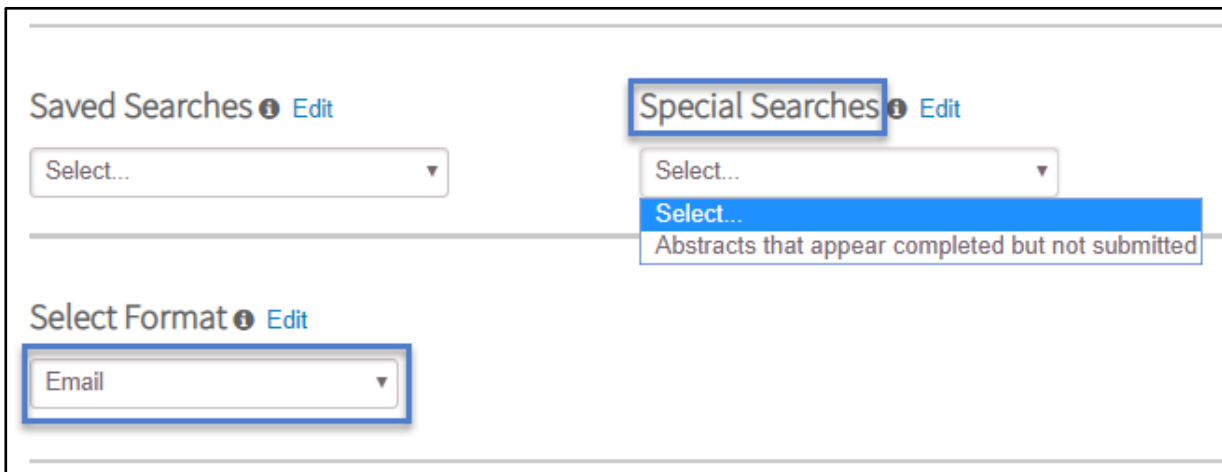
[Primary](#) [Secondary](#)

SPECIAL SEARCHES

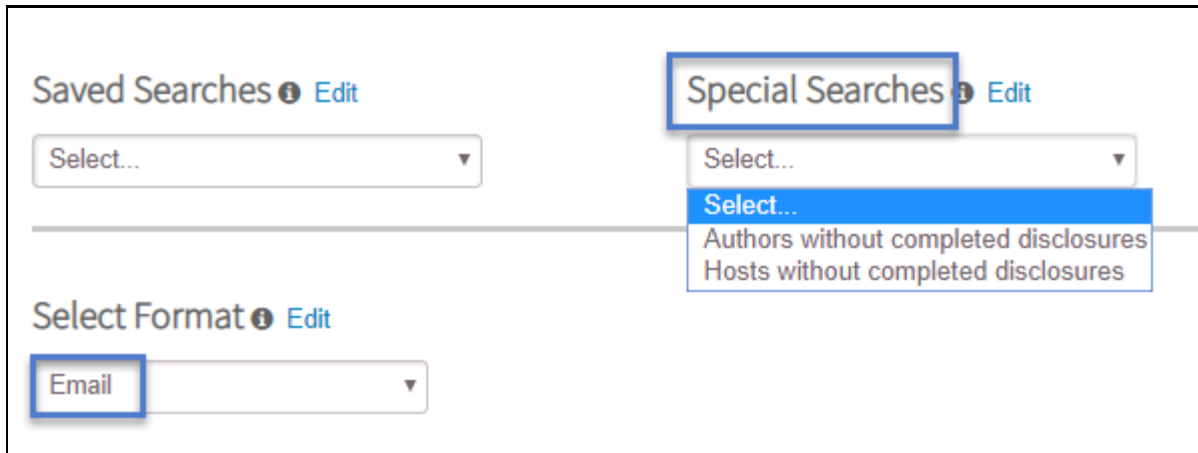
The pre-defined searches are available in both the Abstracts and People search types.

1. Abstract Special Search

- a. The Special Search on the Abstracts search type is called “**Abstracts that appear completed but not yet submitted**”. The report outputs abstracts that have the required fields completed but are still in draft status.
- b. If you wish to email these potential submitters, you can use the Email format to send them a custom email. Create the custom email in Administration>Email Administration>Send Emails. For more information on sending custom emails, please see [Sending Custom Emails](#) above.



2. There are two People Special Searches. Note the searches will only appear if your site is configured for person-based disclosures.
 - a. The first Special Search in People is the “**Authors without completed disclosures**”. This search identifies users with incomplete disclosures on their account. You can email these users using the email format and a custom email template. For more information on sending custom emails, please see [Sending Custom Emails](#) above.
3. The second special search is the “**Hosts without completed disclosures**”. Like the first People Special Search, this report identifies hosts with incomplete disclosures on their account. You can also send an email to the users that appear in the list.



The screenshot shows a user interface with two main sections: 'Saved Searches' and 'Special Searches'. Each section has a dropdown menu with 'Select...' as the placeholder text. Below these is a 'Select Format' dropdown menu with 'Email' selected. The 'Special Searches' dropdown menu is open, showing two options: 'Authors without completed disclosures' and 'Hosts without completed disclosures'.

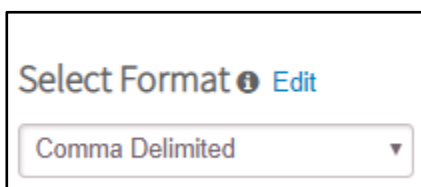
SAMPLE REPORTS

In this section, we will create sample reports in each of the three search options. Admins are free to recreate these reports and save them as needed. Society reporting needs vary widely, as such these sample reports may not fully address your reporting requirements. We encourage you to explore the many facets of our search capabilities.

ABSTRACT SEARCH

In this sample Abstracts search, we will use the following requirements:

1. Format: Comma Delimited



The screenshot shows a 'Select Format' dropdown menu with 'Comma Delimited' selected. The menu is titled 'Select Format' with an 'Edit' link next to it.

2. Search Criteria

- a. Abstracts in the Clinical Category.
- b. Clinical Category abstracts with the Decision status of Accepted for Plenary.
- c. Submission Roles: Abstract and Case Study

3. Display Items

- a. Control ID
- b. Title
- c. Contact Name
- d. Presentation Type
- e. Average Score

4. Sort Criteria: By Control ID

Select Search Criteria [Edit](#)

+ Add

[+ Show Full List](#)

SEARCH CRITERIA

Standard Search Criteria

Decision Status	Accept for Plenary	Remove
Submission Role	<div style="border: 1px solid #ccc; padding: 2px;"> Abstract Submission Case Study Submission Session Proposal Abstract </div>	Remove
Current Category	Clinical Science	Remove

Select Display Items [Edit](#)

+ Add

[+ Show Full List](#)

(RE-ORDER)

1	CONTROL ID	Remove
2	TITLE	Remove
3	CONTACT (NAME ONLY)	Remove
4	PRESENTATION TYPE	Remove
5	AVERAGE SCORE	Remove

Select Sort Criteria ⓘ [Edit](#)

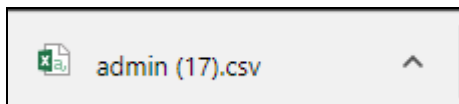
Primary Secondary

Control ID No Secondary Sort

Run the report.

Clear Search Save Search Run >

The results produce a .csv file that can then be opened in Excel.



A	B	C	D	E	F	G	H	I	J
CONTROL ID	TITLE	CONTACT (NAME ONLY)	PRESENTATION TYPE	AVERAGE SCORE					
2287142	Abstract #34	David Thompson	Video	2					

SESSION SEARCH

In this sample Session search, we will use the following requirements:

1. Format: HTML
2. Search Criteria
 - a. Session Type: Clinical
 - b. Session Topic: Immunotherapy
3. Display Items
 - a. Session ID

- b. Session Title
 - c. Session Abbreviation
 - d. Session Day and Time
 - e. Session Duration
4. Sort Criteria: Primary by Session Title and Secondary by Session ID

SEARCH CRITERIA

Session Search Criteria

Session Type	<div style="border: 1px solid #ccc; padding: 2px;"> Clinical Session Luncheon Meet the Expert Minisymposium Oral </div>	Remove
Session Topic	<div style="border: 1px solid #ccc; padding: 2px;"> Immunotherapy </div>	Remove

Select Display Items [Edit](#)

+ Add

[+ Show Full List](#)

(RE-ORDER)

1	SESSION ID	Remove
2	SESSION TITLE	Remove
3	SESSION ABBREVIATION	Remove
4	SESSION DAY & DATE	Remove
5	SESSION DURATION	Remove

Select Sort Criteria

Primary	Secondary
<div style="border: 1px solid #ccc; padding: 2px;"> Session Title </div>	<div style="border: 1px solid #ccc; padding: 2px;"> Session ID </div>

Run the report. Results appear on an HTML page.

Found 6 Records SESSION ID: 264349 SESSION TITLE: Clinical #3 SESSION ABBREVIATION: CL2 SESSION DAY & DATE: Friday 10/14/2016 10:00 AM SESSION DURATION: 60
SESSION ID: 270533 SESSION TITLE: Clinical #25 SESSION ABBREVIATION: CL3 SESSION DAY & DATE: Friday 10/14/2016 11:00 AM SESSION DURATION: 60
SESSION ID: 273774 SESSION TITLE: Clinical Session 25 SESSION ABBREVIATION: CL8 SESSION DAY & DATE: Friday 10/14/2016 8:15 AM SESSION DURATION: 75

Note: When selecting your display items, you may find it helpful to include your search criteria in the display options. This serves as a validation of your search. For example, you would select Session Type and Session Topic to display in the Session search above.

PEOPLE SEARCH

1. Format: Basic/Inline
2. Search Criteria
 - a. Person Type: General Reviewer
 - b. Area of Expertise: Basic Science

3. Display items are predetermined for a Basic/Inline format.
4. Sort: Primary is First name/Last name. No secondary required.

SEARCH CRITERIA

Standard Search Criteria

First Name	<input type="text"/>	Remove
Last Name	<input type="text"/>	Remove
Email Address	<input type="text"/>	Remove
User Type	<div style="border: 1px solid gray; padding: 2px;"> Exchange Admin Session Admin Itinerary Planner Reviewer Admin General Reviewer </div>	Remove
Areas of Expertise	<div style="border: 1px solid gray; padding: 2px;"> Administration Administration: Admin: Other Basic Science Clinical Science </div>	Remove

Select Sort Criteria [Edit](#)







Sort Results By

First Name, Last Name ▼

Clear Search
Save Search
Run ▶

5. Run the report. Results are displayed at the bottom of the sort criteria.

Person Search Results (3 Records Found)

NAME	INSTITUTION (DEPARTMENT)	EMAIL	ROLE
Minter, Andrew  Proxy  Edit (Last in: Never)		aminter@donotsend.com	Video Reviewer, General Reviewer, Abstract Submission, Reviewer Admin, Admin + More
Reviewer, Fred  Proxy  Edit (Last in: Never)		freviewer@donotsend.demo	General Reviewer, Reviewer Admin
Donovan, Grace  Proxy  Edit (Last in: Never)	ScholarOne	gdovovan@donotsend.demo	Case Study Submission, General Reviewer, Session Admin , Reviewer Admin, Session Center + More

Note: From the Basic/Inline results above, you can use the proxy link to proxy as the user or use the edit link to make account changes. You can also email the user directly from the results.

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