



ScholarOne Abstracts™

# Data Export Tool User Guide

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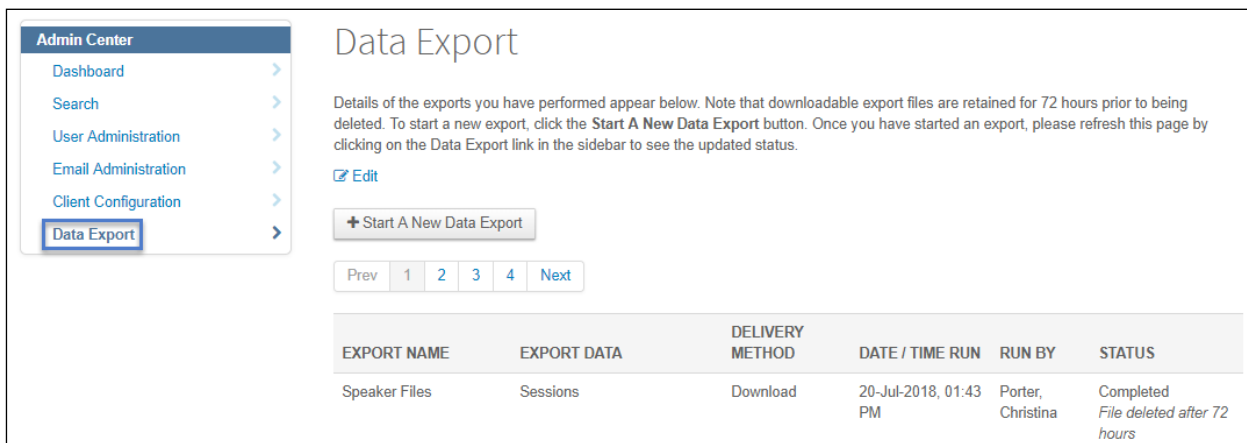
## DATA EXPORT OVERVIEW

With our Data Export tool, it is easier to connect and leverage ScholarOne™ Abstracts data to your meeting services by streamlining the work of busy meeting planners, and making meeting content available in a quickly accessible, easily reusable format.

Access to this Tool may be granted to Session Admins and Administrators.

## ACCESS THE DATA EXPORT TOOL

The Data Export tool is accessible through the Admin tab on your ScholarOne™ Abstracts site.



**Admin Center**

- Dashboard >
- Search >
- User Administration >
- Email Administration >
- Client Configuration >
- Data Export >**

### Data Export

Details of the exports you have performed appear below. Note that downloadable export files are retained for 72 hours prior to being deleted. To start a new export, click the **Start A New Data Export** button. Once you have started an export, please refresh this page by clicking on the Data Export link in the sidebar to see the updated status.

[Edit](#)

[+ Start A New Data Export](#)

Prev 1 2 3 4 Next

EXPORT NAME	EXPORT DATA	DELIVERY METHOD	DATE / TIME RUN	RUN BY	STATUS
Speaker Files	Sessions	Download	20-Jul-2018, 01:43 PM	Porter, Christina	Completed <i>File deleted after 72 hours</i>

The Data Export window displays a list of recently-run exports. The Status column shows the status of each export and contains a link to download the data where appropriate. Data files are automatically deleted 72 hours after they were created.

## Data Export

Details of the exports you have performed appear below. Note that downloadable export files are retained for 72 hours prior to being deleted. To start a new export, click the **Start A New Data Export** button. Once you have started an export, please refresh this page by clicking on the Data Export link in the sidebar to see the updated status.

[Edit](#)

**+ Start A New Data Export**

Prev 1 2 3 4 Next

EXPORT NAME	EXPORT DATA	DELIVERY METHOD	DATE / TIME RUN	RUN BY	STATUS
XML Abstracts Data	Abstracts	Download	N/A	Smith, Alex	Waiting to start <a href="#">Cancel Export</a>
XML Session Data	Sessions	Download	15-Aug-2018, 01:15 PM	Smith, Alex	Completed <a href="#">training_Sessions_15-Aug-2018-13-15-01.zip</a>
XML People Data	Abstracts	Download	15-Aug-2018, 01:15 PM	Smith, Alex	Completed <a href="#">training_Abstracts_15-Aug-2018-13-15-00.zip</a>

## START A NEW DATA EXPORT

Click **Start A New Data Export**.

The image shows a button labeled '+ Start A New Data Export' with a blue border, positioned above a pagination bar containing 'Prev', '1', '2', '3', '4', and 'Next'.

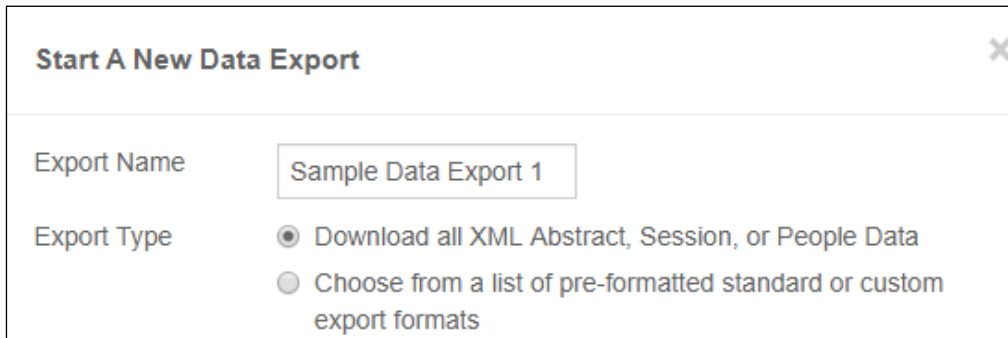
The Start a New Data Export screen displays.

- Enter a descriptive **Export Name**.
- Select an **Export Type**
  - Download all XML Abstract, Session, or People Data

or

- Choose from a list of pre-formatted standard or custom export formats

See the sections below for more information on the two types of exports.



**Start A New Data Export** ✕

Export Name

Export Type

- Download all XML Abstract, Session, or People Data
- Choose from a list of pre-formatted standard or custom export formats

## DOWNLOADING ABSTRACT, SESSION AND PEOPLE DATA IN XML FORMAT

The Data Export Tool allows you to download all your sessioned abstracts, session information, or people data in a standard XML format. XML is one of the most reusable data formats available. You can use this data to create reports or meeting deliverables such as Program or Abstract books. (You may also choose from a list of Pre-formatted reports. More information in the next example.)

### Export Type

Your first criteria to define is your **Export Type**. For XML output, select **Download all XML Abstract, Session, or People Data**.

**Start A New Data Export**

Export Name: Sample XML Report

Export Type:  Download all XML Abstract, Session, or People Data  
 Choose from a list of pre-formatted standard or custom export formats

Export Data:  Abstracts

Export by Submission Type: All  
Abstract Submission  
Case Study Submission

Export by Abstract Status: All  
Draft  
Returned To Draft  
Submitted

Export Images for Abstracts XML  
 Export Abstract Detail Files for Abstracts XML

Close Save

### Export Data: Select Abstracts

To begin creating your Abstracts export, complete the following search criteria.

- Select **Abstracts** from the menu. Choose an option in each of the following Data Types:
- **Export by Submission Type:** Select the types for which you want the data. You may have only one submission type.
- **Export by Abstract Status:** Narrow your search results by status or select All.
- **Export Images for Abstracts XML:** A folder of image files will be included in the export. This field is optional.

- **Export Abstract Detail Files for Abstract XML:** The report will include data submitted in custom questions. This field is optional.

**Start A New Data Export**

Export Name: Sample XML Report

Export Type:  Download all XML Abstract, Session, or People Data  
 Choose from a list of pre-formatted standard or custom export formats

Export Data:  Abstracts

Export by Submission Type: All, Abstract Submission, Case Study Submission

Export by Abstract Status: All, Draft, Returned To Draft, Submitted

Export Images for Abstracts XML  
 Export Abstract Detail Files for Abstracts XML

< Close Save >

### Delivery Method:

- Select **Download** to obtain the report in a file downloadable from the status chart.  
or
- Select **FTP**. Complete the following fields:
- **Destination URL:** The URL of the FTP site.

- **Destination Directory:** Where to place the data on the FTP site.
- **FTP User Name:** Your username for the FTP site.
- **FTP Password:** Your password for the FTP site.
- **Metadata Only** or **Files and Metadata:** Select one.

Delivery Method	<input type="radio"/> Download
	<input checked="" type="radio"/> <b>FTP/SFTP</b>
Destination URL	<input type="text"/>
Destination directory	<input type="text"/>
FTP User Name	<input type="text"/>
FTP Password	<input type="text"/>
	<input checked="" type="radio"/> <b>Metadata only</b>
	<input type="radio"/> Files and Metadata

Click **Yes** to confirm you wish to have the data export executed.

---

**Note:** If you choose “Download”, the export contains only the XML file with links to other files. If you choose FTP, it contains all files including user images, supplemental files, and custom questions.

---

## Export Data: Select Sessions

To begin creating your Sessions export, complete the following search criteria.

- Select **Sessions** from the menu. Choose an option in each of the following Data Types:
- **Export Session Type:** select the specific session types or select All.
- **Export by Session Topics:** select the specific session topics or select All. If you not use Topics select All.



- **Export Images for Sessions XML:** This is an optional field.
- **Export Abstract Detail Files for Session XML:** This option will output data from custom questions. This is an optional field.
- **Export Speaker Management Files for Session XML:** This option will output files that were uploaded by presenters during the Invitation process.
- **Ignore Withdrawn Abstracts:** This is an optional field.

Export Data

Abstracts

Sessions

Export by Session Type

All  
Clinical Session  
Luncheon  
Meet the Expert  
...

Export by Session Topic

All  
Clinical Trials  
Genetics of Cancer  
Immunotherapy  
Medical Administration

Export Images for Sessions XML

Export Abstract Detail Files for Sessions XML

Export Speaker Management Files for Sessions XML

Ignore Withdrawn Abstracts

People

< Close

Save >

- Delivery Method: See *Export Data: Select Abstracts* for information on the different delivery methods.

Click **Yes** to confirm you wish to have the data export executed.

---

**Note:** The Session XML includes all Speaker Management data elements.

---

## Export Data: Select People

To begin creating your People export, complete the following search criteria.

- Select **People** from the menu.
- Select a **Delivery Method**. See *Export Data: Select Abstracts* for information on the two delivery methods.

**Start A New Data Export** [X]

Export Name:

Export Type:  
 Download all XML Abstract, Session, or People Data  
 Choose from a list of pre-formatted standard or custom export formats

Export Data:  
 Abstracts  
 Sessions  
 **People**

Delivery Method:  
 Download  
 FTP/SFTP

< Close [Save >

Click **Yes** to confirm you wish to have the data export executed.

## DOWNLOADING PRE-FORMATTED STANDARD REPORTS

Using the Data Export tool, you can download several pre-formatted reports and custom reports. The **Standard Reports** will reflect your data. You can use these standard reports in your program or abstract guides. **Custom Reports** are reports that are pre-programmed to your specific requirements. See your Client Implementation Manager for more information on having your customized report programmed (often the pre-formatted exports will include your program guide or abstract book). If you want to customize your indices, you can also work with your Client Implementation Manager to have these programmed.

When downloading an Abstract Book or Program Book it is necessary to have the **Client Session IDs** in place on all sessions and events in the **Session Center**. The **Client Session IDs** determine the order of session output. **Client Session IDs** are placed on the sessions in the **Session Center**. If **Client Session IDs** are not placed on sessions, the reports from the **Data Export** tool will not produce a properly ordered report.

### STANDARD REPORTS

There are several standard reports that when run will reflect your data. You can use these standard reports to build your program information. Click on **View Example** to review an example of each report type. Select the report you want to run, and the report will appear in the listing of all downloaded exports. Each report has option(s) for formatting specifications.

- 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)

### Start A New Data Export ✕

Export Name

Export Type

- Download all XML Abstract, Session, or People Data
- Choose from a list of pre-formatted standard or custom export formats

NAME	FORMAT	DESCRIPTION	
<input type="radio"/> Standard - Abstract Book	HTML	Details of all sessioned abstracts (excluding withdrawn abstracts), and the authors / institutions affiliated with each.	<a href="#">View a Sample</a>
<input type="radio"/> Standard - Author Index	HTML	All authors on sessioned abstracts, sorted and organized by author last name and the final IDs of their abstracts (excluding withdrawn abstracts).	<a href="#">View a Sample</a>
<input type="radio"/> Standard - Category Index	HTML	All categories with associated final IDs.	<a href="#">View a Sample</a>
<input type="radio"/> Standard - Institution Index	HTML	Institution Index based on Department and Institution	<a href="#">View a Sample</a>

### Export Standard Abstract Book: Options

- Author name format: chose the desired format.
- Institution Format: specify the formats you prefer.
  - Display the Institution as: department, institution, city, state, country.
  - or
  - Display the Institution name only
- Underline the presenter's name: optional field.
- Include Images: optional field.

- Include tables optional field.
- Abstract Sort Order and Format.
  - Alphabetically by Session Type
  - or
  - By Client Session ID
- Add Page Break after Each Abstract: optional field

### Start A New Data Export ✕

Export Type

Download all XML Abstract, Session, or People Data

Choose from a list of pre-formatted standard or custom export formats

NAME	FORMAT	DESCRIPTION	
<input checked="" type="radio"/> Standard - Abstract Book	HTML	Details of all sessioned abstracts (excluding withdrawn abstracts), and the authors / institutions affiliated with each.	<a href="#">View a Sample</a>

**Author Name Format**

John Q. Public<sup>1,2</sup>, Jane Doe<sup>2,3</sup>

J. Q. Public<sup>1,2</sup>, J. Doe<sup>2,3</sup>

Public, John Q.<sup>1,2</sup>, Doe, Jane<sup>2,3</sup>

Public, J. Q.<sup>1,2</sup>, Doe, J.<sup>2,3</sup>

**Institution Format**

Display the institution as: department, institution, city, state, country

Display the institution name only

< Close
Save >

Display the institution as: department, institution, city, state, country

Display the institution name only

Underline the presenter's name

Include Images

Include tables

Abstract Sort Order

Alphabetically by Session Type

Client Session ID

Add ##PAGE\_BREAK## after each abstract

Select **Save** and then confirm the export by clicking **Yes**. Status of the export will appear on the main summary page.

### Export Standard Program Book: Options

- Author Name Format: Chose a format for the author names.
- Institution Format
  - Display the Institution as: department, institution, city, state, country.
  - or
  - Display the Institution name only
- Session Times
  - Show session times based on whether the individual presentation times are displayed in the Itinerary Planner: optional field

### Start A New Data Export

---

**Author Name Format**

John Q. Public<sup>1,2</sup>, Jane Doe<sup>2,3</sup>

J. Q. Public<sup>1,2</sup>, J. Doe<sup>2,3</sup>

Public, John Q.<sup>1,2</sup>, Doe, Jane<sup>2,3</sup>

Public, J. Q.<sup>1,2</sup>, Doe, J.<sup>2,3</sup>

**Institution Format**

Display the institution as: department, institution, city, state, country

Display the institution name only

Include abstract body

Include Images

Include tables

Underline the presenter's name

Show session times based on whether the individual presentation times are displayed in the Itinerary Planner

Select **Save** and then confirm the export by clicking **Yes**. Status of the export will appear on the main summary page.

### Export Standard Institution Index: Options

- Delimiter: Select a format for the display of the Institution and Final ID. The delimiter can be a space, a dash, a colon, or a comma.
- Select **Save** and then confirm the export by clicking **Yes**. Status of the export will appear on the main summary page.

<input checked="" type="radio"/>	Standard - Institution Index	HTML	Institution Index based on Department and Institution	<a href="#">View a Sample</a>
Delimiter option between Institution and final ID				
<input checked="" type="radio"/>	Cincinnati Children's Hospital, Department of Pediatrics 168, 256, 674			
<input type="radio"/>	Cincinnati Children's Hospital, Department of Pediatrics - 168, 256, 674			
<input type="radio"/>	Cincinnati Children's Hospital, Department of Pediatrics: 168, 256, 674			
<input type="radio"/>	Cincinnati Children's Hospital, Department of Pediatrics, 168, 256, 674			

## Export Standard Keyword Index: Options

This export has no formatting options.

Select **Save** and then confirm the export by clicking **Yes**. Status of the export will appear on the main summary page.

## Export Standard Category Index: Options

- Delimiter: Select a format for the display of the Category and Final ID. The delimiter can be a space, a dash, a colon, or a comma.



Standard - HTML [View a Sample](#)  
Category Index

Delimiter option between Category and final ID

- Diabetes 1, 56, 89
- Diabetes - 1, 56, 89
- Diabetes: 1, 56, 89
- Diabetes, 1, 56, 89

Select **Save** and then confirm the export by clicking **Yes**. Status of the export will appear on the main summary page.

### Export Standard Session Proposal Report: Options

The export output will be in a .csv file. Please note, you may not have session proposals configured for your site. This export has no formatting options.

Select **Save** and then confirm the export by clicking **Yes**. Status of the export will appear on the main summary page.

### Export Standard eCommerce Report: Options

This report is available for societies that use eCommerce on their site. The output of the export is a csv. file.

- Choose between All Transactions or Successful Transactions.

### Start A New Data Export ✕

withdrawn abstracts), and the authors / institutions affiliated with each.

<input type="radio"/>	Standard - Session Proposal Report	CSV	Details surrounding sessions including ID, status, type, and hosts.	<a href="#">View a Sample</a>
<input checked="" type="radio"/>	Standard - eCommerce Report	CSV	Control ID, Submission Role, Abstract Status, Date Submitted, Contact First Name, Contact Middle Name, Contact Last Name, Contact Email, PNREF, Auth Code, Payment Status, Amount	<a href="#">View a Sample</a>

Report options

Successful Transactions  
 All Transactions

Delivery Method  Download  
 FTP/SFTP

← Close Save →

Select **Save** and then confirm the export by clicking **Yes**. Status of the export will appear on the main summary page.

## DOWNLOADING CUSTOM EXPORTS

In addition to the standard export formats, you may choose to contract for custom meeting deliverables that ScholarOne™ can create specifically for your society. When complete, these exports provide you with anytime-access, allowing you to generate these custom exports and re-run them any time you need an updated file.

### Start A New Data Export ✕

Export Name

Export Type  Download all XML Abstract, Session, or People Data  
 Choose from a list of pre-formatted standard or custom export formats

NAME	FORMAT	DESCRIPTION	
<input checked="" type="radio"/> APS - Speaker Report	CSV	Speaker Report (Nomination and Selection roles)	
<input type="radio"/> Standard - Abstract Book	HTML	Details of all sessioned abstracts (excluding withdrawn abstracts), and the authors / institutions affiliated with each.	<a href="#">View a Sample</a>
<input type="radio"/> Standard - Author Index	HTML	All authors on sessioned abstracts, sorted and organized by author last name and the final IDs of their abstracts (excluding withdrawn abstracts).	<a href="#">View a Sample</a>
<input type="radio"/> Standard -	HTML	Category Index based on categories selected for sessioned abstracts	<a href="#">View a Sample</a>

## IMPORTANT EXPORT TOOL INFORMATION

Please note the following key points:

- Depending on the amount of data, it may take up several hours to process and spool your export.
- You must refresh the **Data Export** screen to see changes in export status (simply click **Data Export** on the left menu to do this).
- Exports are run against a copy of the site, so they will not affect site performance.

- The name of your export when completed will be in the following format: <export name><site short name><date><time>. This will make for easy identification of exports when several are run.

EXPORT NAME	EXPORT DATA	DELIVERY METHOD	DATE / TIME RUN	RUN BY	STATUS
Fall_2018	Abstracts	Download	04-Oct-2018, 07:26 AM	Molter, Sven	Completed <a href="#">Fall_2018_pmdemo_04-Oct-2018-07-26-05.zip</a>

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