Session Proposal Administrator Guide

28-November-2018
TABLE OF CONTENTS

Select an item in the table of contents to go to that topic in the document.

OVERVIEW OF SESSION PROPOSALS .............................................................................................................. 1
  Definition of Session Proposals .................................................................................................................. 1
  Set Up of Session Proposals ...................................................................................................................... 1
    Session Types ........................................................................................................................................ 1
    Roles ...................................................................................................................................................... 3
    Schedule ................................................................................................................................................. 4
  Session Proposal Proofs ............................................................................................................................ 4
  Accepted Session Proposal Points to Remember ....................................................................................... 6
  Editing a Session Proposal ......................................................................................................................... 7
MANAGING PROPOSALS AFTER SUBMISSION AND BEFORE SESSIONING ..................................................... 8
  Admin Review Center: Proposals .............................................................................................................. 8
MANAGING SESSION PROPOSALS DURING AND AFTER SESSIONING ..................................................... 10
  Session Center: Proposals ......................................................................................................................... 10
  Invitations and Emails: Proposals ........................................................................................................... 11
  Admin Center Searches: Proposals ........................................................................................................... 11
DATA EXPORT TOOL: SESSION PROPOSALS ................................................................................................. 12
SESSION PROPOSAL EMAIL TEMPLATES .................................................................................................... 13
OVERVIEW OF SESSION PROPOSALS

DEFINITION OF SESSION PROPOSALS

Session proposal submission(s) through ScholarOne Abstracts allow associations/societies to collect session ideas from their users. Collecting the proposals begins the submission process. There are two types of proposal submissions.

Inline proposal submission entails submitting the session overview and the linked abstracts within the single proposal submission.

Standard proposals require the individual abstract submitters to input their abstracts separately and tie them to a proposal via a selection dropdown. For more information on this type of proposal submission, contact your Client Implementation Manager.

This guide is written for the inline submission type.

SET UP OF SESSION PROPOSALS

A Summary of the Steps:

- Configure Session Types to appear in the Session Proposal drop-down menu
- Set the schedule
- Configure the proofs

Session Types

Proposal session types carry through to the Session Information tab on the Session & Events Grid. The proposal session types should be configured in Meeting Setup under Sessioning.
When setting up a Session Proposal Type, you will need to check that it is available for proposals. (View all non-proposal types to make sure the Available for Session Proposal is unchecked). If there are custom questions available, add them to each proposal type as needed. The custom questions can be marked to be required or non-required. The custom questions appear on the submission steps and on the proposal session in the Session & Events grid.

The next step is to enter a min/max for abstracts allowed. Enter a min/max for number of hosts allowed (participants in the submission process, many times called a moderator or a chair). Default session duration and default presentation duration may be entered. Both are optional, but highly recommended, as it will save time once sessions are accepted. If default session duration is entered, the figure will populate
automatically when the session is accepted. The same applies to the default presentation duration.

Roles

Roles refer to the participant’s function in the session; these are most commonly called Moderators or Chairs. If you have one host role, that role will automatically populate when the session is accepted. You will want to note what roles are available for session proposal participants. To edit a role, double click on the role name. Click Yes to Available for Session Proposals.
Schedule

Set the open and close dates for the session proposal roles. Schedules can be found under Admin > Client Configuration > Schedule.

<table>
<thead>
<tr>
<th>Role: Session Proposal</th>
<th>Open</th>
<th>Display Deadline</th>
<th>Actual Deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td>SESSION_PROPOSAL</td>
<td>9:00 PM</td>
<td>11:59 PM</td>
<td>11:59 PM</td>
</tr>
<tr>
<td></td>
<td>EDT 08/31/2018</td>
<td>EST 12/31/2018</td>
<td>EST 12/31/2018</td>
</tr>
<tr>
<td>Role: Session Proposal Review</td>
<td>Open</td>
<td>Display Deadline</td>
<td>Actual Deadline</td>
</tr>
<tr>
<td>REVIEWER_NEW</td>
<td>9:00 AM</td>
<td>11:59 PM</td>
<td>11:59 AM</td>
</tr>
<tr>
<td></td>
<td>EDT 08/31/2018</td>
<td>EST 12/31/2018</td>
<td>EST 12/31/2018</td>
</tr>
</tbody>
</table>

Session Proposal Proofs

Once your session proposal types have been configured, you are ready to create the proofs for the proposal roles. You will find the proofs under Admin > Client Configuration > Proofs > Session Proofs. In addition to the pertinent session information, all proofs have abstract information.

Be sure to update any proofs where the proposal or submissions associated with it will be viewed. This includes, but is not limited to Session and Abstract Proofs for Review, Review Admin, Admin, Session Admin. For the Session Proposal role, be sure to create the Abstract proof; this is what the user will view when clicking the control ID associated with an abstract within a session.
This is an example of a Session Proposal Review Proof. Not all session proposal details are included in the session and abstract proof sections; only those that are pertinent to a reviewer are included.

![Session Proof Configuration](image)

<table>
<thead>
<tr>
<th>ORDER</th>
<th>PROOF</th>
<th>PROOF TEXT</th>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>SESSION TITLE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>SESSION TOPIC</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>SESSION TYPE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>SESSION CREATOR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>SESSION DURATION</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>SESSION DETAIL: How many attendees do you expect?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>SESSION DETAIL: Please select your Audio-Visual Equipment</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: proof text is used for both Event and Session. So be sure the text will be correct for both variants.
ACCEPTED SESSION PROPOSAL POINTS TO REMEMBER

- The session proposal title becomes the session title in the Sessions & Events grid.

- The proposal summary field carries over to the Session Information tab as well. It will populate in the Session Notes field. Configurable items such as learning objectives (if configured) will also carry over to the Session Information tab.

- Proposals include a step for adding participants. Participants become host records in Sessioning. The hosts are viewable under the Add/Edit Hosts tab.

- Any linked abstracts to the proposal are available under the Manage Abstracts tab in the Session Admin Center.

- Once the proposal sessions are complete, they are available through the scheduling menu option under Sessioning.
EDITING A SESSION PROPOSAL

To edit a proposal submission during open submission, you can proxy in as the submitter, return the submission to draft status, fix the error, and then resubmit.

As an alternate option, using the Admin Quick Search, search for the proposal by ID, Title or the contact author’s first or last name. Use the Edit column to edit the proposal if it is in any status other than Accepted. If it has an accepted status, the edits must be made through the Session Center.

Proposals are also viewable on the Review Admin > Session Proposals > Assign Reviewers grid. The proposals are editable from the grid.

It is important to note that the Data Export Tool can be used for reporting on proposals (see the Data Export Tool section below).
MANAGING PROPOSALS AFTER SUBMISSION AND BEFORE SESSIONING

ADMIN REVIEW CENTER: PROPOSALS

The Admin Review Center can be used for assigning proposals to reviewers, monitoring review progress via the Status Report, and finally using the Score Report to place decisions on proposals.

<table>
<thead>
<tr>
<th>Abstracts</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Session Proposals</strong></td>
<td></td>
</tr>
<tr>
<td>Review Session Proposals</td>
<td></td>
</tr>
<tr>
<td>Assign Reviewer</td>
<td></td>
</tr>
<tr>
<td>Assign Sessioner</td>
<td></td>
</tr>
<tr>
<td>Reviewer Score Report</td>
<td></td>
</tr>
<tr>
<td>Reviewer Status Report</td>
<td></td>
</tr>
</tbody>
</table>

All proposals are viewable in the Assignment Grid. Click on the Proposal ID to view the Session Proposal Proof. View both the configured session information and the configured abstract information.
In the **Role to Work With** drop down, select the role that is configured for Proposal Review. This populates the grid so that you may assign proposals in the same way you assign regular abstracts. You can assign proposals one at a time, several at a time, or by Proposal IDs. For more information on assigning proposals and abstracts, please refer to the [Reviewer Admin Guide](#).

Proposal assignment information can be obtained by expanding the proposal ID.
MANAGING SESSION PROPOSALS DURING AND AFTER SESSIONING

SESSION CENTER: PROPOSALS

Using the Session Center for proposal management is an effective option. A proposal will have a decision placed on it in the Review Center. Once accepted, the proposal session appears in the Session & Events grid.

When editing a session on the Add/Edit Hosts tab, you will see the Participants which were added during the submission process.

Proposal Linked Abstracts appear on the proposal session the same way a normal session’s abstracts would appear.

For more information on the Session Center, refer to the Session Admin Guide.
INVITATIONS AND EMAILS: PROPOSALS

If you use Speaker Management, once a proposal session has been finalized, the abstract presenters and the hosts (participants) appear in the Invitations and Emails section of Session Center.

Select the proper message and email templates for the proposal session and perform the normal tasks for sending out invitations. See the Speaker Management Guide for more information on managing invitations.

The invitations will appear in the presenters’ and hosts’ Message Centers.

ADMIN CENTER SEARCHES: PROPOSALS

Use the Search function of the Admin Center to query real time data on session proposals. Both the Abstract and Session search types offer proposal-related data elements in their Full List for search criteria and display items. See The Administrator Search Guide for more information on using the Search tool.
DATA EXPORT TOOL: SESSION PROPOSALS

You can also obtain data on proposals via the Data Export Tool (Admin > Data Export). A standard report entitled Session Proposal Report has been created to show all proposal data including drafts, types, and topics. Click on Start a New Data Export.

For Export Type, select the second option, Choose from a list of pre-formatted standard or custom export formats. Give your report a name (for internal use only).

On the following page, scroll down to Session Proposal Report and click Go.
SESSION PROPOSAL EMAIL TEMPLATES

There are two system email templates pertaining to Session Proposals:

- Session Proposal Submitted (should always be active)
- Session Proposal Returned to Draft (should always be active).

The templates can be reviewed for accuracy on your site in Admin > Email Administration > System Templates.

Note: If you need a modification to the report or you need a custom report, contact your Client Implementation Manager for assistance. (Charges may apply.)
<table>
<thead>
<tr>
<th>Session Proposal</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Returned to Draft</td>
<td>Active</td>
</tr>
<tr>
<td>Submitted</td>
<td>Active</td>
</tr>
</tbody>
</table>
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