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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.

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.
START A NEW DATA EXPORT

Click **Start A New Data Export**.

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
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.

**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**.
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.

**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.

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

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**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.

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**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.

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

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**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.
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.

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)
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.
  - 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.
  o Alphabetically by Session Type
  or
  o By Client Session ID

• Add Page Break after Each Abstract: optional field

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**Start A New Data Export**

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

<table>
<thead>
<tr>
<th>NAME</th>
<th>FORMAT</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Abstract Book</td>
<td>HTML</td>
<td>Details of all sessioned abstracts (excluding withdrawn abstracts), and the authors / institutions affiliated with each.</td>
</tr>
</tbody>
</table>

**Author Name Format**
- John Q. Public\textsuperscript{1,2}, Jane Doe\textsuperscript{2,3}
- J. Q. Public\textsuperscript{1,2}, J. Doe\textsuperscript{2,3}
- Public, John Q.\textsuperscript{1,2}, Doe, Jane\textsuperscript{2,3}
- Public, J. Q.\textsuperscript{1,2}, Doe, J.\textsuperscript{2,3}

**Institution Format**
- Display the institution as: department, institution, city, state, country
- Display the institution name only
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
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.
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.
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.
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.
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.

<table>
<thead>
<tr>
<th>EXPORT NAME</th>
<th>EXPORT DATA</th>
<th>DELIVERY METHOD</th>
<th>DATE / TIME RUN</th>
<th>RUN BY</th>
<th>STATUS</th>
</tr>
</thead>
</table>

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