



ScholarOne Abstracts

Session Administrator Guide

18-October-2018

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USE GET HELP NOW AND FAQs

As a ScholarOne Abstracts Admin, one of your greatest help tools is ScholarOne's Frequently Asked Questions tab on our help site, [Get Help Now](#). Our **FAQs** provide immediate answers to common user questions.

In addition, Get Help Now offers downloadable guides (such as this one), video tutorials, and the ability to **Submit a Question/Create a Case** to get assistance from our Customer Support Team. You can also submit suggestions on how you think we can enhance the system through the **Make Suggestion** tab. We recommend that you bookmark our help site and visit often.


GET HELP NOW

TRAINING:

- Author
- Reviewer/Decisioner
- Sessioner
- Administrator

RELEASE NOTES

SUPPORT ALERTS



Contact SCHOLARONE Customer Care

Monday 12:00am ET until Friday 8:30pm ET

+1 434 964 4100 (US)

+1 888 503 1050 (US toll free)

+44 800 328 8044 (UK)

0800 328 8044 (UK toll free)

ts.acsupport@clarivate.com

[Chat with a Support Expert](#)

For Administrators of *ScholarOne Abstracts* sites, we offer downloadable guides, video tutorials, and relevant FAQs for your training needs. In addition, you can submit a question/create a case, view your cases, or make a suggestion using the Support portal below.

ADMINISTRATOR TRAINING

Attend our instructor-led ScholarOne Abstracts Administrator training courses.

These courses are designed to coordinate with the three major phases in the meeting process in ScholarOne Abstracts. For the greatest effectiveness, we recommend you attend the individual courses at the start of the coordinating phase of the meeting cycle.

- Administrator Basics
- Reviewer Admin Basics
- Session Admin Basics
- Speaker Management Basics

Pre-requisite: You **MUST** attend Session Admin Basics before attending Speaker Management Basics.


[Register](#)

ADMINISTRATOR GUIDES

- Administrator Guide PDF July 2018
- Reviewer Admin Guide PDF April 2018
- Session Center Admin Guide PDF June 2018**
- Speaker Management Admin Guide PDF May 2018
- Session Proposal Admin Guide PDF May 2017
- Data Export Tool Guide PDF May 2018
- The Planner PDF August 2018
- Glossary of Terms PDF August 2017

ADMINISTRATOR VIDEO TUTORIALS

- Speaker Management Tutorial (19:23) August 2017

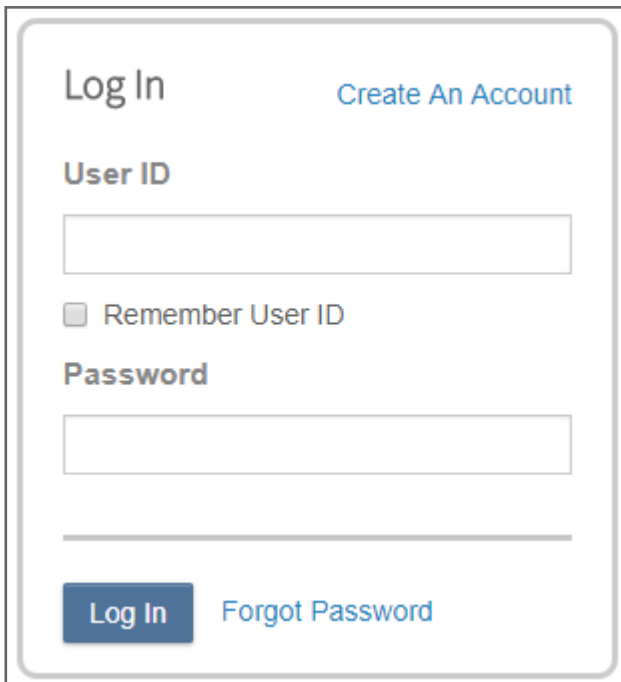


OVERVIEW OF THE SESSION CENTER

The ScholarOne Abstracts Session Center uses a set of cutting-edge Web 2.0 tools designed for usability, flexibility, and performance when managing the sessioning process for meetings.

ACCESSING THE SESSION CENTER

On the ScholarOne Abstracts homepage, log in using your ScholarOne Abstracts **User ID** and **Password**. Click the **Log In** button.

A login form with a light gray border. At the top left is the text "Log In" in bold, and at the top right is a blue link "Create An Account". Below this is the label "User ID" followed by a text input field. Underneath is a checkbox labeled "Remember User ID". Below that is the label "Password" followed by another text input field. At the bottom left is a blue "Log In" button, and at the bottom right is a blue link "Forgot Password".

Log In [Create An Account](#)

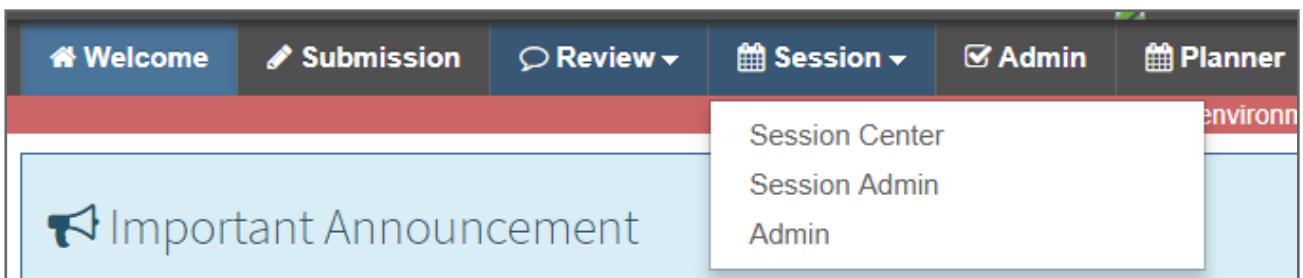
User ID

☐ Remember User ID

Password

[Log In](#) [Forgot Password](#)

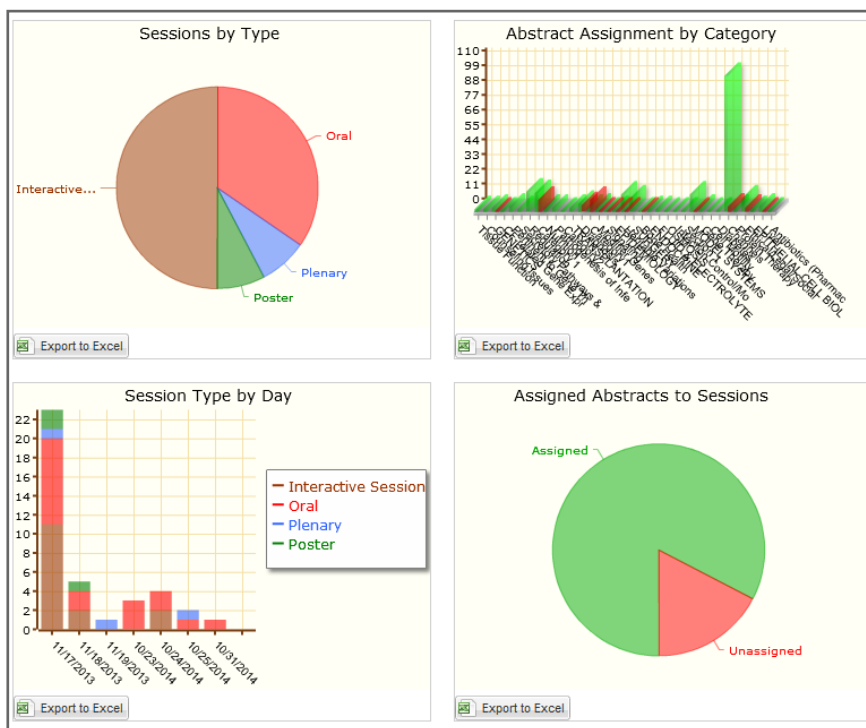
Select the **Session** tab at the top of your Welcome Screen. If you have more than one session center role, choose which role you want to access in the dropdown.



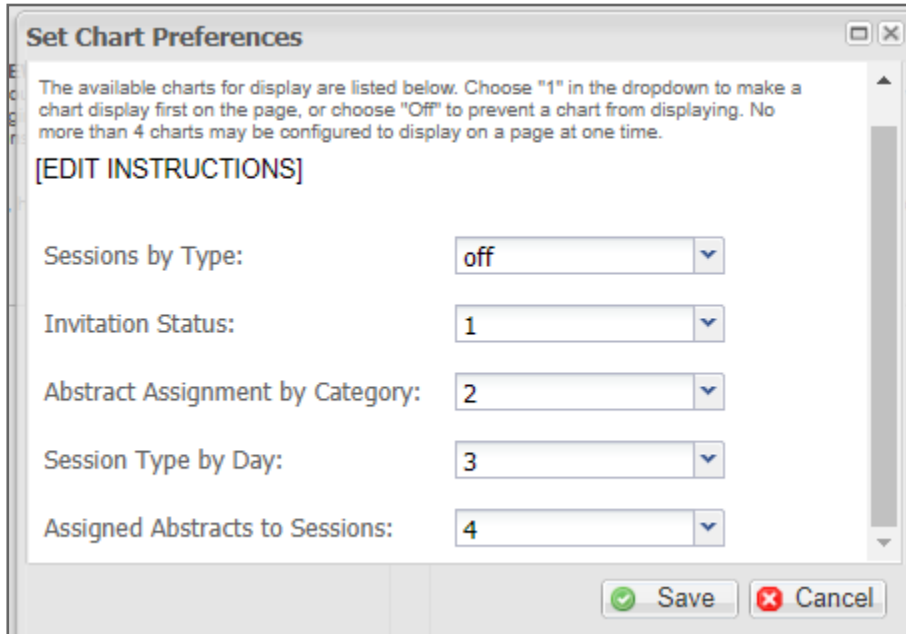
THE DASHBOARD

The Session Center **Dashboard** is designed to give you a quick view of the overall progress and status of your sessioning process. The dashboard is comprised of five configurable charts that summarize and display key session aspects. You may choose up to four to display.

- **Sessions by Type** displays the relative proportion of each type of session present in the meeting.
- **Abstract Assignment by Category** displays the number of abstracts assigned in their designated category.
- **Session Type by Day** displays a view of the sessions scheduled for an individual day of the conference.
- **Assigned Abstracts to Sessions** displays the relative proportion of all abstracts currently assigned or unassigned.
- **Invitation Status** (not shown) displays the number of invitations in each status, including declined, accepted, and no response. This chart is available for sites where Speaker Management is used.



To set-up the Dashboard, select **Set Preferences**. You will select the four of five charts to display. Order the charts by selecting the dropdown orders.



Set Chart Preferences

The available charts for display are listed below. Choose "1" in the dropdown to make a chart display first on the page, or choose "Off" to prevent a chart from displaying. No more than 4 charts may be configured to display on a page at one time.

[EDIT INSTRUCTIONS]

Sessions by Type:

Invitation Status:

Abstract Assignment by Category:

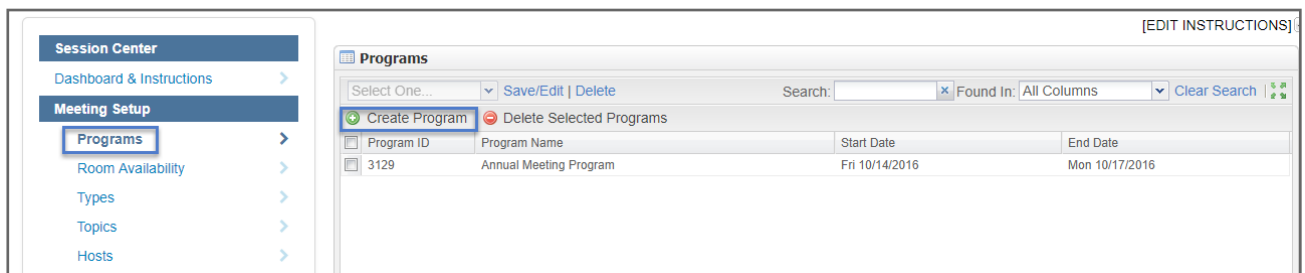
Session Type by Day:

Assigned Abstracts to Sessions:

SETUP A MEETING

PROGRAMS

The first step to building your meeting is to create a program into which you will then place and arrange sessions according to your schedule. To do this, navigate to the **Programs** link under **Meeting Setup** in the Session Center's left menu. Selecting the Programs link will open the Programs grid. Click the **Create Program** button and fill in the required fields as noted by red asterisks.



Session Center

- Dashboard & Instructions
- Meeting Setup**
 - Programs**
 - Room Availability
 - Types
 - Topics
 - Hosts

Programs

Select One... Save/Edit | Delete Search: Found In: All Columns Clear Search

Create Program Delete Selected Programs

Program ID	Program Name	Start Date	End Date
3129	Annual Meeting Program	Fri 10/14/2016	Mon 10/17/2016

Note: In some cases, a default program may already be started for you.

The **Program Start and End Dates** are the days over which the meeting is occurring. **Daily Start Time** is the earliest starting time throughout the whole program. For example, if Saturday begins at 6 a.m. and every other day begins at 7 a.m., then this field would need to be set to 6 a.m. Similarly, **Daily End Time** is the last possible time a session will end during the program.

Create Program

Information | Add/Edit Rooms

Instructions

CREATE PROGRAM
Create the program shell by naming the program, inputting the days of the annual meeting, as well as the earliest possible start time and the latest possible end time for any day of the meeting. Save when done, and be sure to add rooms for this program before you begin scheduling sessions by clicking the Add/Edit Rooms tab at the top of this page.

Program Title - This is the name of the Annual Meeting.

Start Date and End Date - Use the pop-up calendar to enter the first and last of the Annual Meeting.

Daily Start and End Times - The system uses these times to determine the available time slots for each day of the Meeting. For example, if the earliest session for any day of your meetings starts at 7AM, then the daily Start Time should be set to 7AM.

Time Interval - This refers to the time interval used on the Programming Grid. If all your sessions begin and end on a certain time interval (15 min for example) then use that time interval for the programming grid. It's best to use common intervals (30 min, 15 min, 5 min), although the system will accept others.

[EDIT INSTRUCTIONS]

Program Creator:

* Program Title:

* Start Date:

* End Date:

Program Owner(s):

* Daily Start Time:

* Daily End Time:

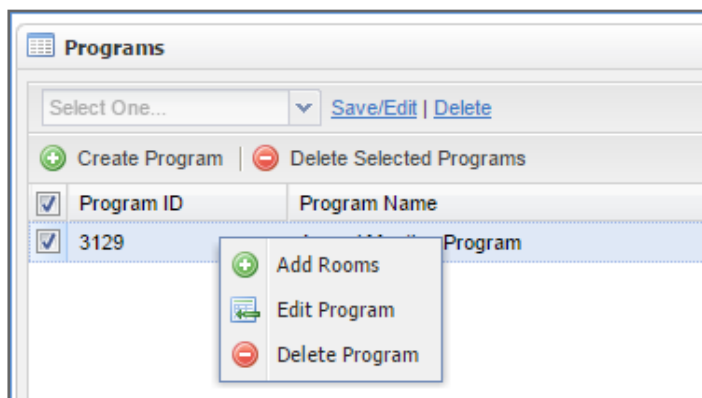
* Time Interval:

The time interval selected when you create the program will affect all session schedules in your program. For example, in the Schedule Sessions screenshot below, Time Interval is set at 15 minutes. This means all sessions will have 15-minute intervals available for scheduling. Set your interval to the smallest interval based on the durations of your sessions and events.

Filters		Albemarle Room	
Title:	<input type="text"/>	7:00 AM	
Type:	>>	7:15 AM	
Topic:	>>	7:30 AM	
Sessions	-	7:45 AM	
Clinical 30		8:00 AM	
Clinical Session #1		8:15 AM	8:15 AM - 9:30 AM Clinical Session 25; Clinical Session; Host Names: Host, Christina (Moderator)
Oral Example		8:30 AM	
		8:45 AM	
		9:00 AM	
		9:15 AM	

CREATE ROOMS

Once you have created a Program, it is time to add the rooms that will house the sessions. To do this, double-click on the **Program Name** and go to the **Add/Edit Rooms** tab or right-click on the program name and choose **Add Rooms** from the menu list.



In the **Add/Edit Rooms** section, add a room by entering the room name and availability, and clicking **Save**. You can set the availability for a room by checking the desired days, choosing the Start and End times, and clicking the **Add Times** button.

Edit Program: 3129 - Annual Meeting Program

Information **Add/Edit Rooms**

Instructions

ADD/EDIT ROOMS
Enter the necessary information about each room in the space below. Be sure to press Save when done. To edit an existing room, double-click on the room in the grid. Any existing configured availability will appear immediately above the Save button, click "REMOVE" to delete a block of availability or add new availability by selecting new preferences in the Availability section on the right and pressing Save.

Add Availability - Check the boxes for each day the room should be available during the annual meeting, and then select the blocks of time the room should be available for each day. To update the list of available dates or start/end times, the click the "Information" tab in the top left of this grid.

[EDIT INSTRUCTIONS]

* Room Name:

Building/Venue:

Room Notes:

Max Capacity:

Multiple Sessions: ☐

Add Availability:

☒ Fri 10/14/2016
☒ Sat 10/15/2016
☒ Sun 10/16/2016
☒ Mon 10/17/2016

Start Time:

End Time:

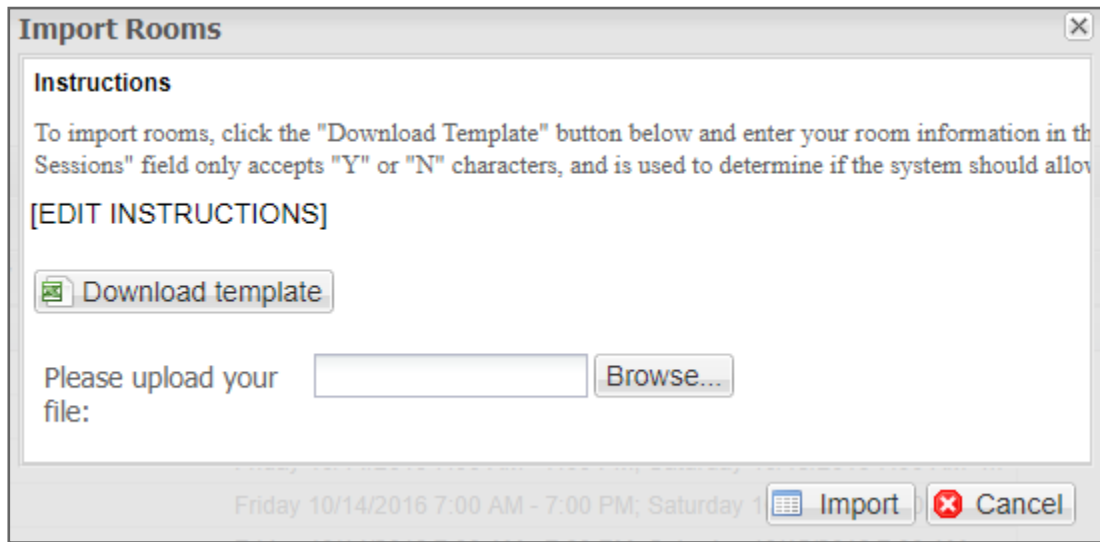
Previously created rooms are visible in the Current Rooms section.

Current Rooms

Export Room List to CSV **Import Rooms** Delete Selected Rooms

	Room Name	Building/Venue	Currently Configured Availability
1	Albemarle Room		Saturday 10/15/2016 7:00 AM - 7:00 PM; Friday 10/14/2016 7:00 AM - ...
2	Ashlawn Room		Friday 10/14/2016 7:00 AM - 7:00 PM
3	Barboursville Room		Friday 10/14/2016 7:00 AM - 7:00 PM; Saturday 10/15/2016 7:00 AM - ...
4	Blue Ridge Room		Friday 10/14/2016 7:00 AM - 7:00 PM; Saturday 10/15/2016 7:00 AM - ...
5	Buckingham Room		Friday 10/14/2016 7:00 AM - 7:00 PM; Saturday 10/15/2016 7:00 AM - ...
6	Crozet Room		

You can also import rooms using the **Import** function noted above. Click on **Import** and then download the template. The template downloads a .csv file that opens in Excel. Fill in your template and save it as a .csv file. Browse to your completed template and click **Import**.




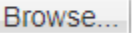
Import Rooms


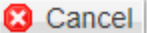
Instructions

To import rooms, click the "Download Template" button below and enter your room information in the Sessions field only accepts "Y" or "N" characters, and is used to determine if the system should allow

[EDIT INSTRUCTIONS]

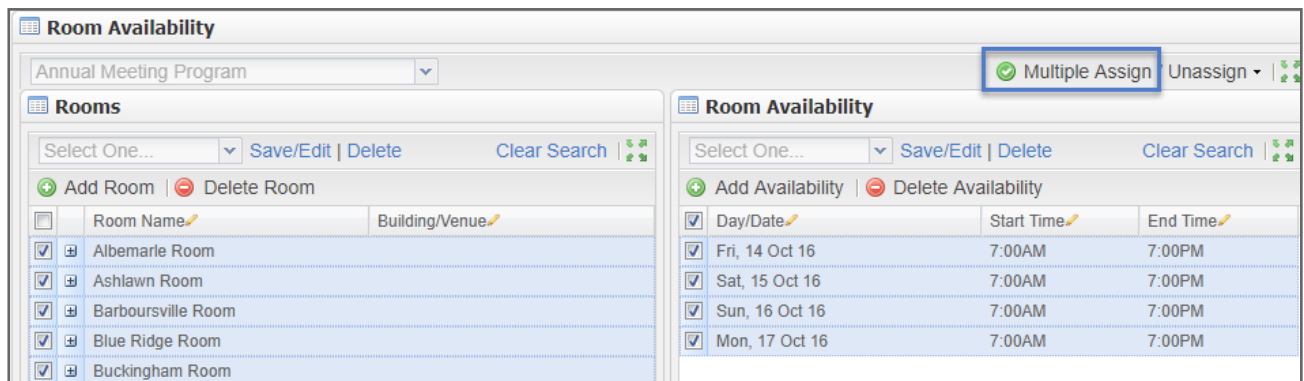
 Download template

Please upload your file: 

Friday 10/14/2016 7:00 AM - 7:00 PM; Saturday 1  Import  Cancel

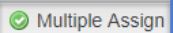
Room Availability

Room times can be edited using **Room Availability** under **Meeting Setup**. You can edit room availability or add availability to one or more rooms.





Room Availability

Annual Meeting Program

 Multiple Assign Unassign

Rooms



Select One... Save/Edit Delete Clear Search

 Add Room  Delete Room

	Room Name	Building/Venue
<input checked="" type="checkbox"/>	Albemarle Room	
<input checked="" type="checkbox"/>	Ashlawn Room	
<input checked="" type="checkbox"/>	Barboursville Room	
<input checked="" type="checkbox"/>	Blue Ridge Room	
<input checked="" type="checkbox"/>	Buckingham Room	

Room Availability

Select One... Save/Edit Delete Clear Search

 Add Availability  Delete Availability

<input checked="" type="checkbox"/>	Day/Date	Start Time	End Time
<input checked="" type="checkbox"/>	Fri, 14 Oct 16	7:00AM	7:00PM
<input checked="" type="checkbox"/>	Sat, 15 Oct 16	7:00AM	7:00PM
<input checked="" type="checkbox"/>	Sun, 16 Oct 16	7:00AM	7:00PM
<input checked="" type="checkbox"/>	Mon, 17 Oct 16	7:00AM	7:00PM

Select the room you wish to edit and then select the appropriate start and end times. Click **Save** to complete the updates.

To add an availability, click **Add Availability**. Fill in the required fields: Date, Start time, and End time. You can then apply the availability to all rooms or a set of rooms using **Multiple Assign**.

Room Availability

Select One... Save/Edit | Delete Clear Search

+ Add Availability | - Delete Availability

Day/Date	Start Time	End Time
Sat, 15 Oct 16	8:00AM	9:00AM
Fri, 14 Oct 16		7:00PM
Sat, 15 Oct 16		7:00PM
Sun, 16 Oct 16	7:00AM	7:00PM
Mon, 17 Oct 16	7:00AM	7:00PM

Cancel Save

TYPES

Once you have created your Program and added rooms, you will need to set the framework for the sessions and events you will add later. The selection and creation of **Types** is a crucial element of organizing your meeting. This allows you to classify every session and event into a type that will make your Program's Itinerary (if configured) easy to navigate for your attendees.

Session types are those sessions that contain abstracts. Events are sessions that do not contain abstracts (coffee breaks or lunches, for example).

Under the **Meeting Setup** option on the left menu, select **Types**.

Session Center

- Dashboard & Instructions >

Meeting Setup

- Programs >
- Room Availability >
- Types >**
- Topics >
- Hosts >
- Roles >
- Sessioning >

You **Add** or **Delete** types at your discretion by utilizing the buttons along the top of the window. You may also right-click individual types to edit or delete based on the needs of your meeting.

The types you create will become the **Type** dropdown selections when you create a new session or event. Note if any changes are made to these types from year to year you will want to communicate this to your Client Implementation Manager.

Add New Type

Instructions
Add the session type name (e.g. "Poster Session"), a description for it (if necessary), choose a color (can be used in the Schedule Sessions Grid) and indicate if the type is for use in a Session or an Event. All required fields are indicated with a red asterisk.

[EDIT INSTRUCTIONS]

* Type Name: Sample Type

Description: Plenary session

Color:

* Type: ☒ Session ☐ Event

Min number of hosts allowed:

You may choose a color for each session or event type. The colors will appear in the **Scheduling** grid and will make it easy to visually organize your **Program**.

* Type Name: Sample Type

Description: Plenary session

Color:

* Type: ☒ Session ☐ Event

Min number of abstracts allowed:

Max number of abstracts allowed:

Default Session duration:

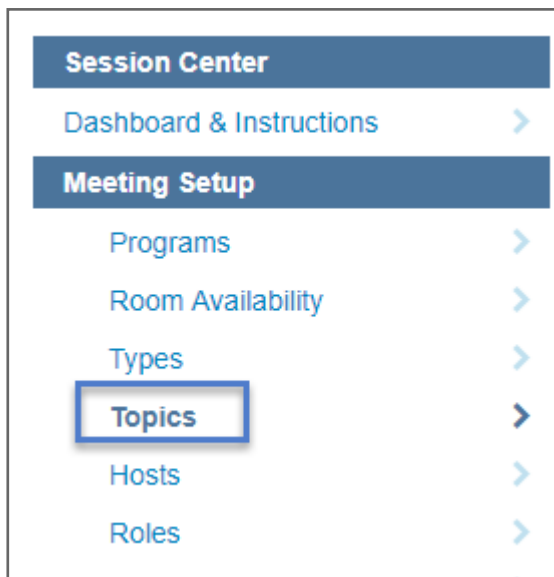
multiple sessions?

You can also create custom question on all session types or for certain session types. The custom questions can be configured by your Client Implementation Manager. You can make these questions required for a session type or not required.

The screenshot shows a configuration window for 'Session Detail Type'. At the top, there is a dropdown menu labeled 'Session Detail Type:' with a blue arrow icon. To its right is a green button with a plus icon and the text 'Add Session Detail Type'. Below the dropdown, there are two rows of configuration options. The first row has a small dropdown with '1' and a blue arrow, followed by the text 'Previous Attendance'. To the right of this text are two checkboxes, both checked, labeled 'Required?'. Further right is a red button with a minus icon and the text 'remove'. The second row has a small dropdown with '2' and a blue arrow, followed by the text 'Available for CE Credit'. To the right of this text are two checkboxes, both checked, labeled 'Required?'. Further right is a red button with a minus icon and the text 'remove'. A dropdown menu is open from the 'Session Detail Type:' dropdown, showing three options: 'Select...', 'Available for CE Credit', and 'Previous Attendance'. At the bottom of the window, there are three buttons: a green button with a plus icon and the text 'Save and Add Another', a blue button with a document icon and the text 'Save and Close', and a red button with an 'X' icon and the text 'Close'.

TOPICS (TRACKS)

If your site uses Topics, create the topics for your meeting by navigating to **Topics** under the **Meeting Setup** menu on the left side of your screen. Topics are a higher level of categorization than types. Often a Topic will encompass several types.



The **Current Topics** toolbar gives you the options to **Add**, **Delete**, **Export**, or **Import** topics. You may also right-click individual topics to edit or delete based on the needs of your meeting. Select a color if you wish to color code your topics for easy visual tracking on the **Scheduling** grid.

Topics		
Add Topic Delete Topics Export to Excel Import Topics		
<input type="checkbox"/>	Topic Name	Type
<input type="checkbox"/>	Clinical Trials	Session
<input type="checkbox"/>	Genetics of Cancer	Session
<input type="checkbox"/>	Immunotherapy	Session
<input type="checkbox"/>	Medical Administration	Session
<input type="checkbox"/>	No Topics	Event
<input type="checkbox"/>	Scientific Trials	Session

Topic Owners can be added. Select **Add Owners** from the **Edit Topic Screen**.

Instructions
 Add the session topic name (e.g. "Poster Session"), a description for it (if necessary), choose a color (can be used in the Schedule Sessions Grid) and indicate if the topic is for use in a Session or an Event. All required fields are indicated with a red asterisk.

[EDIT INSTRUCTIONS]

* Topic Name:

Description:

Color:

Pick ▾

* Type:

☒ Session
 ☐ Event

Topic Owner(s): Smith, Alex, Clarivate Analytics

Add/Edit Owners

Save and Add Another

Save and Close

Close

Search for the Topic Owner's name in the **Search Criteria** field and click on **Add Selected** in the **Search Results**. The host moves to the Current Hosts grid. You can add more than one host.

Topic Owners

[EDIT INSTRUCTIONS]

Current Owners

Remove Selected

First Name	Last Name	Institution	Email Address	Role
------------	-----------	-------------	---------------	------

Search Criteria

First Name: Last Name:

Institution: Email Address:

Search Results

Add Selected

First Name	Last Name	Institution	Email Address
Alex	Smith	Clarivate Analytics	alex0623@donotsend....

The last step is to select the **Topic Owner's** role. Topic Owner roles are configured under **Meeting Setup/Roles**. We will cover this in the next section of **Meeting Setup**.

Current Owners

Remove Selected

	First Name	Last Name	Institution	Email Address	Role
1	Alex	Smith	Clarivate Analytics	alex0623@donotsend.com	<div> Co-chair Lecturer Moderator Panel Leader Event Chair </div>

Search Criteria

First Name:

Last Name:

smith

Institution:

Email Address:

Search

Save and Close

HOSTS

In addition to Rooms, Types, and Topics, you'll need to create a pool of hosts to choose from when you create your Sessions and Events. Under the **Meeting Setup** option on the side bar, select **Hosts**.

Session Center

Dashboard & Instructions

Meeting Setup

Programs

Room Availability

Types

Topics

Hosts

Roles

You may **Add** or **Delete** Hosts by utilizing the buttons along the top of the window.

The screenshot shows the 'Hosts' management interface. At the top, there is a 'Select One...' dropdown, 'Save/Edit | Delete' buttons, a search bar, and a 'Found In: All Columns' dropdown. Below these are buttons for 'Add New Host' (highlighted with a red box), 'Delete Hosts' (highlighted with a red box), 'Import / Export', 'Search for Hosts', and 'Set / Reset max limit'. The main table has columns: First Name, Last Name, Institution, Email Address, Limit, and # of Assigned to Sessions. The table contains two rows: Alex (Host, ScholarOne, host10@donotsend.com, Limit 5, Assigned 2) and Alexis (Host, ScholarOne, host21@donotsend.com, Limit 5, Assigned 3).

First Name	Last Name	Institution	Email Address	Limit	# of Assigned to Sessions
Alex	Host	ScholarOne	host10@donotsend.com	5	2
Alexis	Host	ScholarOne	host21@donotsend.com	5	3

First name, Last name, Institution and Email address are all required fields for adding a host.

The screenshot shows the 'Hosts' management interface with the 'Add New Host' form open. The form has fields for First Name, Last Name, Institution, Email Address, and Limit. Red dashed lines are drawn around the First Name, Last Name, Institution, and Email Address fields, indicating they are required. Below the form are 'Cancel' and 'Save' buttons. The table below the form shows the existing hosts: Alex (Host, ScholarOne, host10@donotsend.com, Limit 5, Assigned 2) and Alexis (Host, ScholarOne, host21@donotsend.com, Limit 5, Assigned 3).

First Name	Last Name	Institution	Email Address	Limit	# of Assigned to Sessions
Alex	Host	ScholarOne	host10@donotsend.com	5	2
Alexis	Host	ScholarOne	host21@donotsend.com	5	3

You may also double click individual Hosts to edit or delete based on the needs of your meeting and how your site is configured.

Email Potential Host

You can email a potential host from the **Available Host** list by clicking on the hyperlinked **Email Address** in the grid.

The screenshot shows the 'Hosts' management interface. At the top, there is a 'Select One...' dropdown, 'Save/Edit | Delete' buttons, a search bar, and a 'Found In: All Columns' dropdown. Below these are buttons for 'Add New Host', 'Delete Hosts', 'Import / Export', 'Search for Hosts', and 'Set / Reset max limit'. The main table has columns: First Name, Last Name, Institution, Email Address, Limit, and # of Assigned to Sessions. The table contains four rows: Alex (Host, ScholarOne, host10@donotsend.com, Limit 5, Assigned 2), Alexis (Host, ScholarOne, host21@donotsend.com, Limit 5, Assigned 3), Ben (Host, ScholarOne, host7@donotsend.com, Limit 5, Assigned 3), and Christina (Host, ScholarOne, host12@donotsend.com, Limit 5, Assigned 2). The 'Email Address' column is highlighted with a red box.

First Name	Last Name	Institution	Email Address	Limit	# of Assigned to Sessions
Alex	Host	ScholarOne	host10@donotsend.com	5	2
Alexis	Host	ScholarOne	host21@donotsend.com	5	3
Ben	Host	ScholarOne	host7@donotsend.com	5	3
Christina	Host	ScholarOne	host12@donotsend.com	5	2

Clicking on the host email address will bring up an email template for you to complete. Click **Send** when you have completed your template updates. If you would like to pre-load text into this email template, the template can be configured under **Admin > Email Administration > System emails**.

The screenshot shows a 'Send Email' dialog box with a title bar that includes a close button. Below the title bar, a message reads: 'assigned to any session. Full contact information is not required, just name, institution and email address.' The main area of the dialog is titled '[EDIT INSTRUCTIONS]' and contains several input fields for email details:

- To:** ackerman@wustl.edu
- From:** abstracts@abc.org
- CC:** (empty field)
- BCC:** (empty field)
- Subject:** Host Notification
- Body:** (large empty text area)

At the bottom of the dialog, there is a status bar showing the user 'Debraj Singh' and their role 'M.Sc'. To the right of the status bar are two buttons: 'Send' (with a floppy disk icon) and 'Cancel' (with a red X icon).

Track and Limit Host Assignments

To assist Sessioners and Administrators in providing varied host assignments, the **# of Assigned to Session** column appears on the host grid. You may also set a maximum number of sessions for any Host by double-clicking the **Limit** cell for that host, entering a value, and selecting **Save**.

Hosts

Select One... Save/Edit Delete Search: Found In: All Columns

+ Add New Host - Delete Hosts Import / Export Search for Hosts Set / Reset max limit

First Name	Last Name	Institution	Email Address	Limit	# of Assigned to Sessions
Alex	Host	ScholarOne	host10@donotsend.com	5	2
Alexis	Host	ScholarOne	host21@donotsend.com	5	3
Ben	Host	ScholarOne	host7@donotsend.com	5	3

Cancel Save

To set limits for multiple hosts, check the box beside the hosts' first names and click **Set/Reset Max Limit**. Enter a limit value and select **OK**.

Hosts

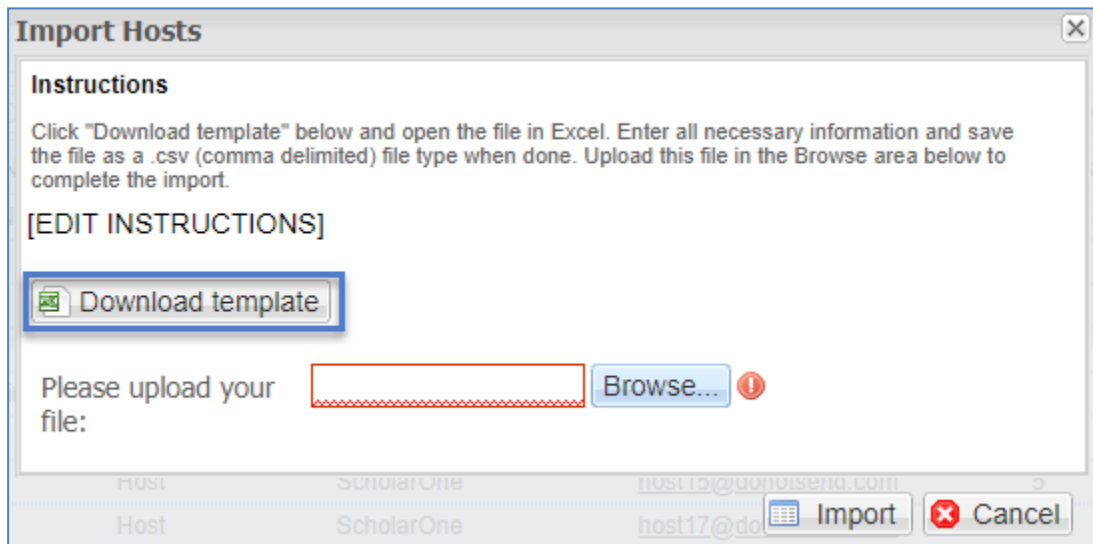
Select One... Save/Edit Delete Search: Found In: All Columns Clear Search

+ Add New Host - Delete Hosts Import / Export Search for Hosts Set / Reset max limit

First Name	Last Name	Institution	Email Address	Limit	# of Assigned to Sessions
✓ Alex	Host	ScholarOne	host10@donotsend.com	5	2
✓ Alexis	Host	ScholarOne	host21@donotsend.com	5	3
✓ Ben	Host	ScholarOne	host7@donotsend.com	5	3
✓ Christina	Host	ScholarOne	host12@donotsend.com	5	2
✓ David	Host	ScholarOne	s1ahost5@gmail.com	5	1
✓ Elsie	Host	ScholarOne	host15@donotsend.com	5	2
✓ Emily	Host	ScholarOne	host17@donotsend.com	5	0

Import Hosts

You may import hosts or update host information in the system through an upload. Select the **Import/Export** button then **Import Hosts**. Select the **Download Template** button to download the Hosts template file.




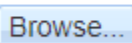

Import Hosts

Instructions

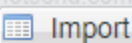
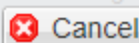
Click "Download template" below and open the file in Excel. Enter all necessary information and save the file as a .csv (comma delimited) file type when done. Upload this file in the Browse area below to complete the import.

[EDIT INSTRUCTIONS]

 Download template

Please upload your file:  

Host ScholarOne host12@dundis.edu.com
Host ScholarOne host17@dundis.edu.com

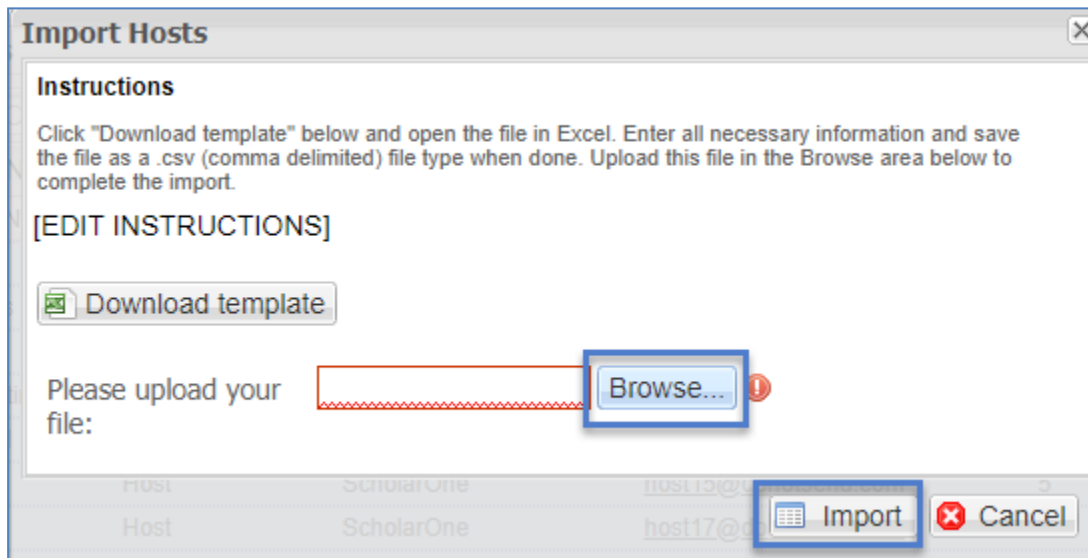
Enter data for each host to import into a separate line in the template. The **Person ID** must match a valid **Person ID** in the system to make an existing user a host. If the **Person ID** field is blank, a new account will be created on the site for that person. To obtain a spreadsheet that includes person IDs, contact your Client Implementation Manager.

Note: First Name, Last Name, Institution, and Email Address are required fields.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	First Name	Middle Name	Last Name	Suffix	Degree	Institution	Department	Address1	Address2	City	Country	State	Zip	Phone	Email Address	Limit	Person ID
2																	
3																	

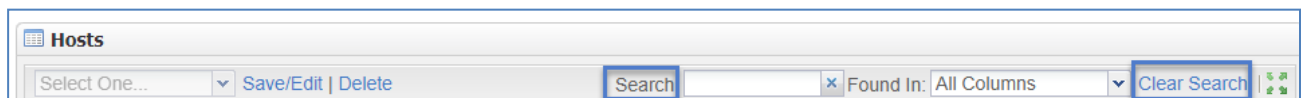
Save the completed template as a .csv file.

Select the **Import/Export** button then **Import Hosts** again. Browse to your file and click **Import**.



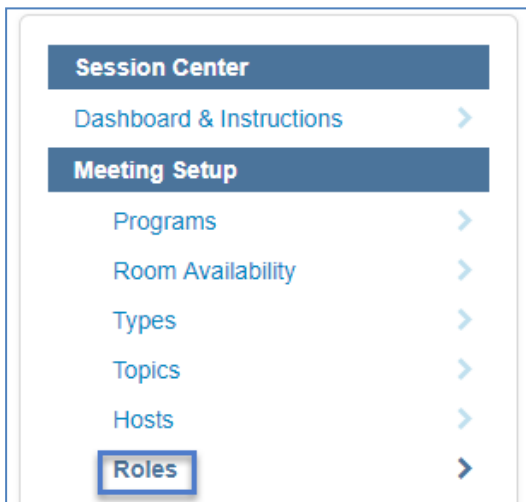
Note: To export the host data, select **Export** to Excel from the **Import/Export** button.

You can easily search for hosts by using the Search option at the top of the grid. Clear your search to return to the full list of hosts.



ROLES

The Hosts you choose will need to have assigned Roles in the Sessions and Events grid. Use the **Roles** option under the **Meeting Setup** on the left menu to **Add**, **Edit**, and **Delete** roles for Hosts.



Note: Common names for host roles are moderator, chair, panelist, and leader. You may have the same role name for a Session host and for an Event host.

A screenshot of the 'Add New Role' dialog box. The dialog has a title bar with 'Add New Role' and standard window controls. Inside, there is an 'Instructions' section with text: 'Add the role name (e.g. "Moderator"), a description for it (if necessary), and select a role type. All required fields are indicated with a red asterisk.' Below this is a link '[EDIT INSTRUCTIONS]'. The form contains three main fields: '* Role Name:' with the text 'Leader', 'Description:' with an empty text area, and '* Type:' with two radio buttons: 'Session' (selected) and 'Event'. To the right of the 'Type' section is a checkbox labeled 'Is Disclosure Reviewer:'. At the bottom, there are three buttons: 'Save and Add Another' (with a green plus icon), 'Save and Close' (with a blue floppy disk icon), and 'Close' (with a red X icon).

SESSIONS & EVENTS

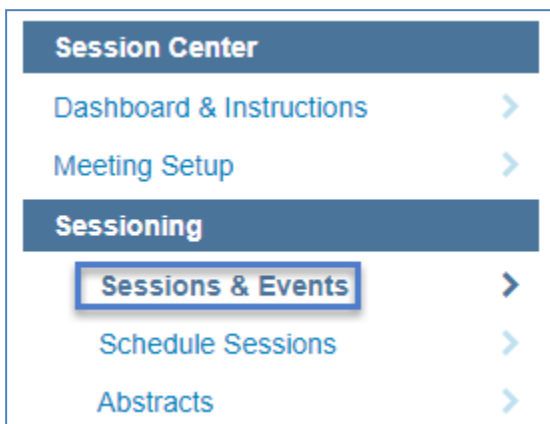
Programming Sessions & Events involves several steps:

- Entering the basic information about a session or event (title, type, and session duration)
- Adding/removing abstracts to/from sessions
- Adding hosts to Session & Events
- Setting durations for session presentations

Note: Completing all steps of a session or event creation can be done in one continuous flow by moving from one creation tab to the next.

ACCESSING SESSIONING

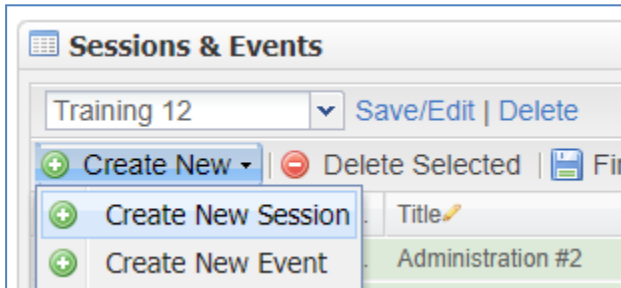
Select **Sessioning** on the left menu. Then select **Sessions & Events**. The **Sessions & Events** grid displays.



CREATE/EDIT/DELETE SESSIONS & EVENTS

To begin, navigate to the **Sessions & Events** grid, click the **Create New** option from the grid. Choose either **Create New Session** or **Create New Event**. Sessions have

abstracts associated with them. Events do not have abstracts associated with them, for example coffee breaks or lunches that are not within a session.



This will open the **Information** tab where you give the Session or Event a title, as well as assign additional data items such as Session Type, Topic/Track (if configured), Duration, and Session Owners (if configured). Once you have entered all the required fields, indicated by a red asterisk (*), press the **Save** button to complete the new session or event. **Session/Event Information** is the first step in creating a session or event.

Note: Required fields such as Topic can be configured with your Client Implementation Manager. Title, Type and duration are always required fields.

SESSION OWNERS

Some societies will have Sessioner Owners who will perform tasks on sessions. A sessioner owner is a user who can see/take action on any sessions that they own. The level of access (view only or ability to make full session changes, add hosts/abstracts and schedule) is determined by the society.

Note: For the session owner's name to appear in the Sessioner List, the Sessioner Owner must have the Sessioner Role on their account.

For those sites with a configured **Sessioner** role, you will want to designate the **Session Owner(s)** on the **Information** tab. Once you add the required fields (title, type, and duration), click on **Add/Edit Owners**. First search for the owner and then select them from the search results.

The screenshot displays the 'Current Owners' section of a web application. It features a table with one entry for Grace Donovan at ScholarOne. Below this is a 'Search Criteria' section with input fields for First Name, Last Name (containing 'donovan'), Institution, and Email Address. A 'Search' button and a 'Save and Close' button are present. The 'Search Results' section shows the same entry for Grace Donovan, with an 'Add Selected' button highlighted. The bottom of the interface includes pagination controls showing 'Page 1 of 1' and '50 Records per page'.

	First Name	Last Name	Institution	Email Address
1	Grace	Donovan	ScholarOne	gdovovan@donotsend...

Search Criteria

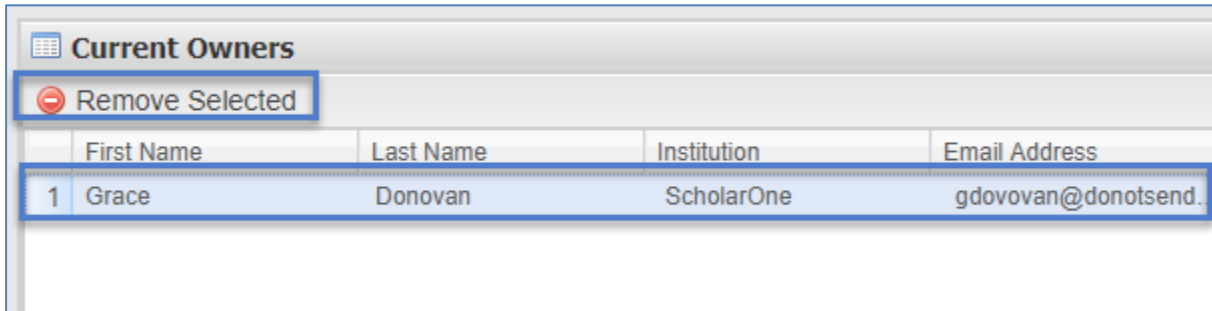
First Name: Last Name:
Institution: Email Address:

Search Results

	First Name	Last Name	Institution	Email Address
<input checked="" type="checkbox"/>	Grace	Donovan	ScholarOne	gdovovan@donotsend...

Page 1 of 1 | 50 Records per page | Displaying 1 - 1 of 1

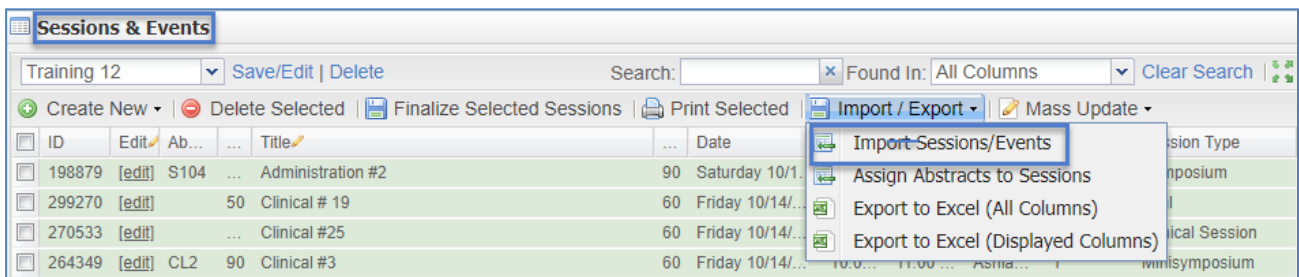
To remove a Session Owner, highlight his or her name in the **Current Owners** section and click on **Remove Selected**.



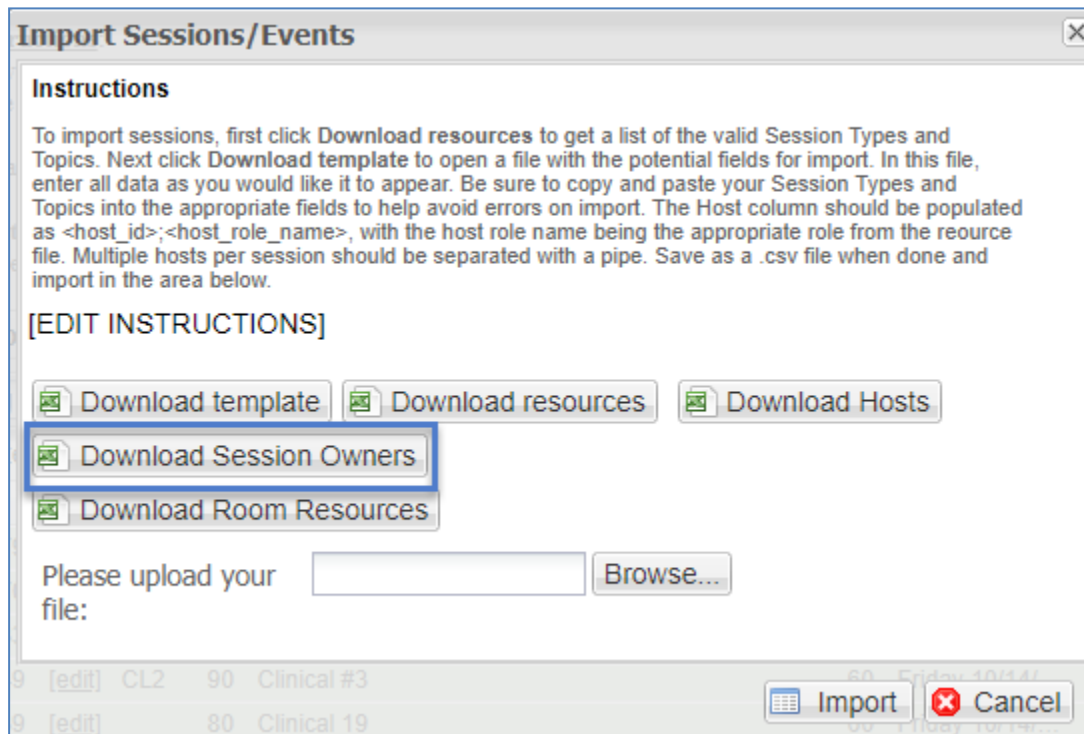
Importing Session Owners

As an alternative to adding owners one by one on the session level, you may choose to import your Session Owners.

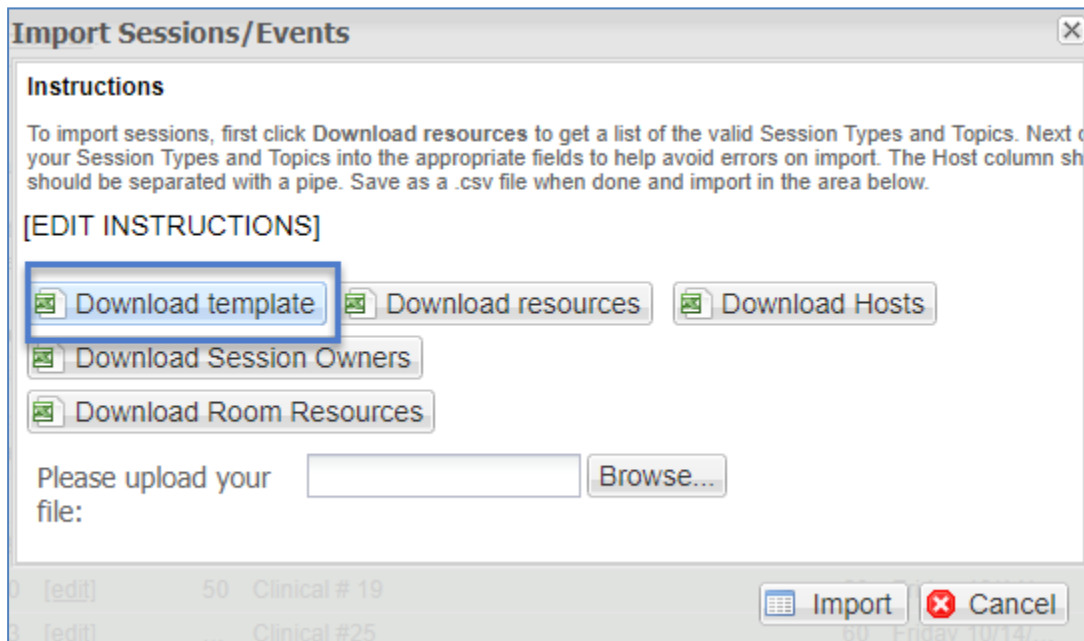
To import session owners to sessions using the import tool, go to the **Sessions & Events** grid and select the **Import/Export** option. From the dropdown, select **Import Sessions/Events**.



To import owners, first click **Download Session Owners** to get a list of the available users who could be owners (those with a Sessioner role).



Next click **Download template** to open a file with the potential fields for import. In this file, enter all data as you would like it to appear. Owners can be populated with the <person_id> found in the **Owner resource file**. Multiple owners per session should be separated with a pipe. Ex: 1234567|3456789







Import Sessions/Events


Instructions

To import sessions, first click **Download resources** to get a list of the valid Session Types and Topics. Next click your Session Types and Topics into the appropriate fields to help avoid errors on import. The Host column should be separated with a pipe. Save as a .csv file when done and import in the area below.

[EDIT INSTRUCTIONS]



 Download template  Download resources  Download Hosts

 Download Session Owners

 Download Room Resources

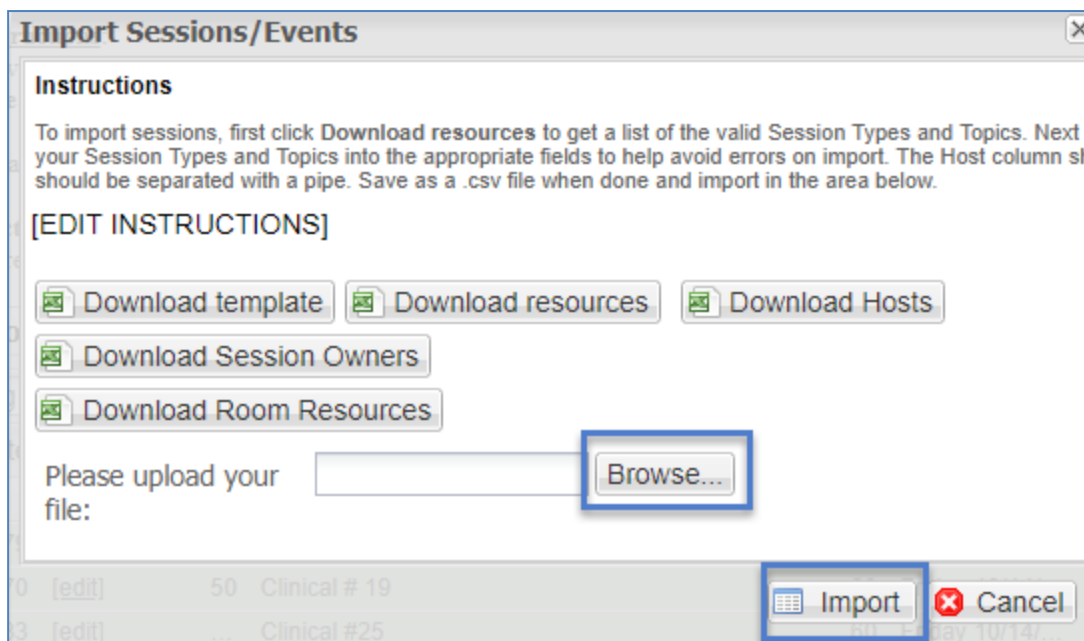
Please upload your **Browse...**

file:

 **Import**  **Cancel**

Complete the template using the person IDs in the Owner spreadsheet.

Save as a .csv file when done, browse to the file and click **Import**. Your Sessioners will then be tied to their sessions and based on their access level will be able to perform the Sessioner Owner tasks.







Import Sessions/Events


Instructions

To import sessions, first click **Download resources** to get a list of the valid Session Types and Topics. Next click your Session Types and Topics into the appropriate fields to help avoid errors on import. The Host column should be separated with a pipe. Save as a .csv file when done and import in the area below.

[EDIT INSTRUCTIONS]



 Download template  Download resources  Download Hosts

 Download Session Owners

 Download Room Resources

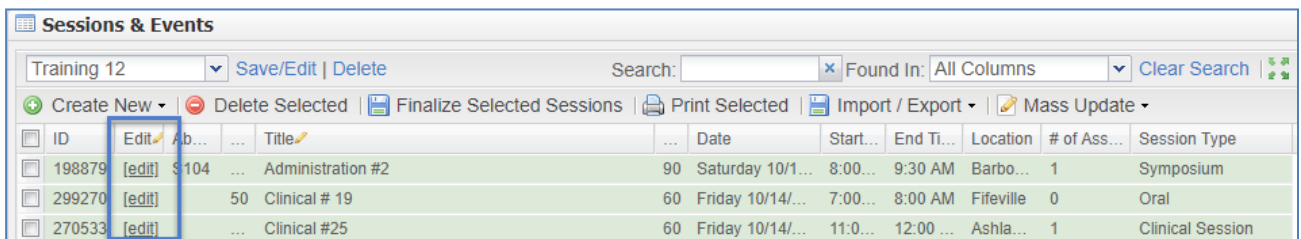
Please upload your **Browse...**

file:

 **Import**  **Cancel**

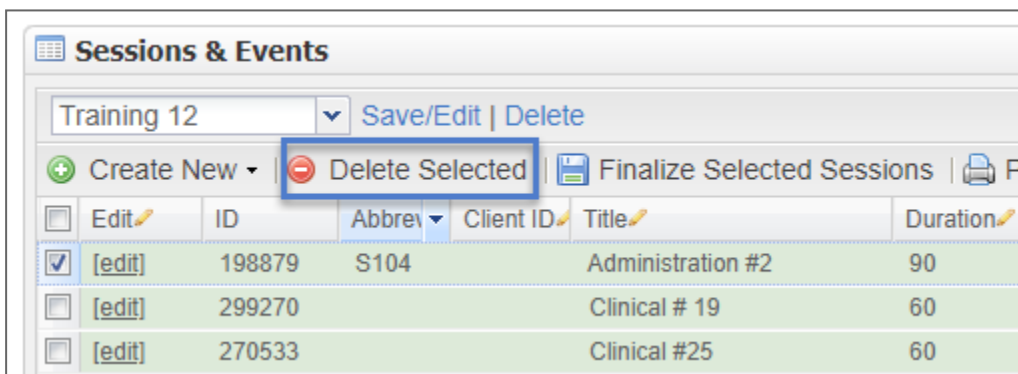
SESSIONING NEXT STEPS

Once a session has been created, it will automatically be available in the grid. Should you want to edit the Session in any way (i.e. the title, duration, hosts, session owners, or abstracts associated with it), you may do so by finding the session in the grid and right-clicking on it. You can also easily access a session or event by clicking on the *Edit* option in the **Edit** column. This takes you immediately to the session or event's **Information** tab.



Sessions & Events										
Training 12 Save/Edit Delete Search: [] Found In: All Columns Clear Search										
Create New Delete Selected Finalize Selected Sessions Print Selected Import / Export Mass Update										
	ID	Edit	Ab...	Title	Date	Start...	End Ti...	Location	# of Ass...	Session Type
<input type="checkbox"/>	198879	[edit]	S104	Administration #2	90 Saturday 10/1...	8:00...	9:30 AM	Barbo...	1	Symposium
<input type="checkbox"/>	299270	[edit]	50	Clinical # 19	60 Friday 10/14/...	7:00...	8:00 AM	Fifeville	0	Oral
<input type="checkbox"/>	270533	[edit]		Clinical #25	60 Friday 10/14/...	11:0...	12:00 ...	Ashla...	1	Clinical Session

Deleting a session is just like editing a session. Navigate to **Sessions & Events**, find your Session in the list, check the box next to the Title, then press the **Delete Selected** button from the action bar. If a session has abstracts tied to it, you will first need to remove the abstracts from the session before you can delete the full session.



Sessions & Events						
Training 12 Save/Edit Delete						
Create New Delete Selected Finalize Selected Sessions Print Selected						
	Edit	ID	Abbrev	Client ID	Title	Duration
<input checked="" type="checkbox"/>	[edit]	198879	S104		Administration #2	90
<input type="checkbox"/>	[edit]	299270			Clinical # 19	60
<input type="checkbox"/>	[edit]	270533			Clinical #25	60

ADD/EDIT HOSTS

Next, you will add Hosts (chairs, co-chairs, moderators, etc.) to your Sessions or Events. To do this, find your Session or Event in the grid by using the Search option. You can search on any data point, including title, type, and topic.

Sessions & Events

Training 12

Save/Edit | Delete

Search:

Found In: All Columns

Clear Search

Create New

Delete Selected

Finalize Selected Sessions

Print Selected

Import / Export

Mass Update

<input type="checkbox"/>	Edit	ID	Abbrev	Client ID	Title	Duration	Date	Start Time	End Time	Location	# of Assign...	Session Type
<input checked="" type="checkbox"/>	[edit]	198879	S104		Administration #2	90	Saturday 10/15/2016	8:00 AM	9:30 AM	Barbours...	0	Symposium
<input type="checkbox"/>	[edit]	299270			Clinical # 19	60	Friday 10/14/2016	7:00 AM	8:00 AM	Fifeville	1	Oral
<input type="checkbox"/>	[edit]	270533			Clinical #25	60	Friday 10/14/2016	11:00 AM	12:00 PM	Ashlawn ...	1	Clinical Session

Once you find the Session you want to edit, you will click on the **Edit** link on the session row. A list of available hosts will automatically populate in the **Add/Edit** screen. You can pare down the list by using the **Search Hosts** option.

Available Hosts

Search:

Search for New Hosts

First Name	Middle Name	Last Name	Suffix	Institution	Email Address	Phone	Limit	# of Assigned to Sessions
Alex		Host		ScholarOne	host10@donot...		5	2
Alexis		Host		ScholarOne	host21@donot...		5	3
Ben		Host		ScholarOne	host7@donots...		5	3
Christina		Host		ScholarOne	host12@donot...		5	2
David		Host		ScholarOne	s1ahost5@gm...		5	1
Elsie		Host		ScholarOne	host15@donot...		5	2

Page 1 of 1 | 50 Records per page |

Displaying 1 - 24 of 24

Current Hosts

Remove Selected

	First Name	Last Name	Institution	Country	State	Email Address	Phone	Role
1	Jami	Host	ScholarOne			host22@donotsend...		Moderator

303615 [edit] 10 Clinical 30 60 Save Save & Close Close

266116 [edit] 30 Clinical Session #1 60

The screenshot shows the 'Available Hosts' window with a search bar containing 'host'. Below the search bar is a table of available hosts. A blue box highlights the 'Last Name' column, which contains a drop-down menu with the value 'Host' selected. A callout bubble points to the 'Role' field in the 'Current Hosts' table, stating: 'Assign a Person's Role by clicking the Role field and choosing the desired role from the drop-down'. The 'Current Hosts' table shows one host, Ben, with the role field open, displaying a list of roles: Co-chair, Lecturer, Moderator, and Panel Leader.

First Name	Middle Name	Last Name	Suffix	Institution	Email Address	Phone	Limit	# of Assigned to Sessions
Alex		Host		ScholarOne	host10@donot...		5	2
Alexis		Host		ScholarOne	host21@donot...		5	3
Ben		Host		ScholarOne	host7@donots...		5	4
Christina		Host		ScholarOne	host12@donot...		5	2
David		Host		ScholarOne	host5@donot...		5	1
Elsie		Host		ScholarOne	host1@donot...		5	1

First Name	Last Name	Institution	Country	State	Email Address	Phone	Role
1 Ben	Host	ScholarOne			host7@donotsend.c...		Co-chair Lecturer Moderator Panel Leader

Create Host Account On the Fly

If you search for a host and they do not have an account in the system, you can add a new host on-the-fly. Click the **Search for New Hosts** link in the Session host tab, **Add/Edit Hosts**. You will be required to search for the host before you can add an account.

Enter the information for the Host you would like to search for and click **Search**. You can search on **First Name**, **Last Name**, **Institution** or **Email Address**.

The screenshot shows the 'Search Hosts' dialog box. On the left, there are two panels: 'Available Hosts' and 'Current Hosts'. The 'Available Hosts' panel has a search bar and a table with columns 'First Name', 'Middle Name', and 'Last Name'. The 'Current Hosts' panel has a 'Remove Selected' button and a table with columns 'First Name', 'Last Name', and 'Institution'. The main area of the dialog is divided into 'Search Criteria' and 'Search Results' sections. The 'Search Criteria' section has fields for 'First Name', 'Last Name' (containing 'smith'), 'Institution', and 'Email Address'. It also has a checkbox for 'Is an author on an Abstract?'. Below these fields are 'Search' and 'Close' buttons. The 'Search Results' section has three buttons: 'Add to List of Available Hosts Only', 'Add Hosts to Current Session', and 'Add New Host'. It contains a table with columns 'First Name', 'Last Name', 'Institution', and 'Email Address'. The table lists three results: Alex Smith (Clarivate Analytics), Grace Smith (Grace Inc.), and a third entry with a blank first name. At the bottom, there are pagination controls showing 'Page 1 of 1' and '50 Records per page', and a status bar indicating 'Displaying 1 - 2 of 2'.

First Name	Middle Name	Last Name
Alex		Host
Alexis		Host
Ben		Host
Christina		Host
David		Host
Elsie		Host

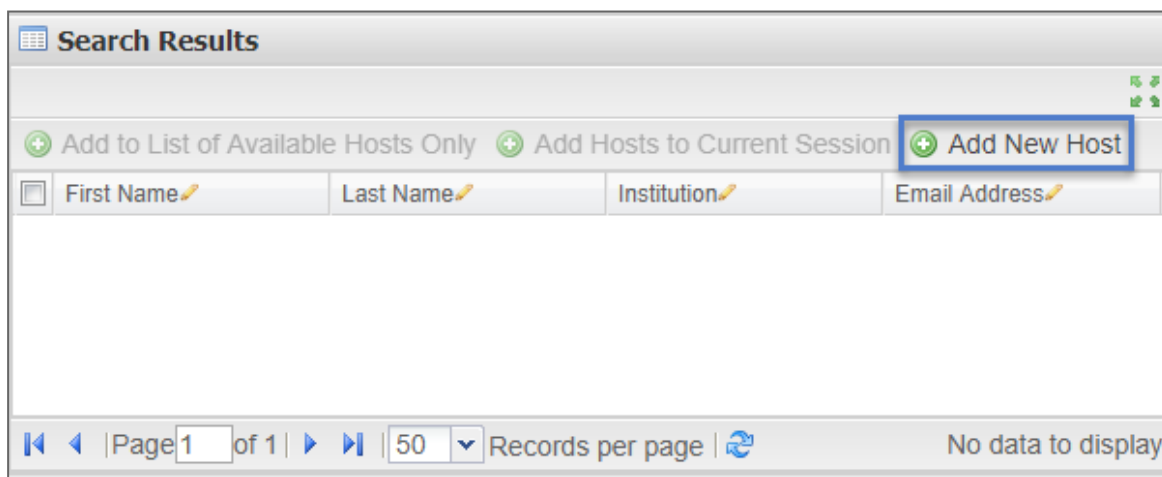
First Name	Last Name	Institution	Email Address
Alex	Smith	Clarivate Analytics	alex0623@donotsend....
Grace	Smith	Grace Inc.	grace@gmail.com

The following message will display if the person does not have an account in the system. Click **Ok**.

The screenshot shows the 'Search Criteria' dialog box with a search for 'tom' in the 'Last Name' field. A 'Search Result' error message is displayed in the foreground, stating 'Your search returned no results, please try again or add a new host.' The message includes a yellow warning icon and an 'OK' button. The background dialog box shows the 'Search Criteria' section with fields for 'First Name', 'Last Name' (containing 'tom'), 'Institution', and 'Email Address'. It also has a checkbox for 'Is an author on an Abstract?'. Below these fields are 'Search' and 'Close' buttons. The 'Search Results' section is partially visible behind the error message.

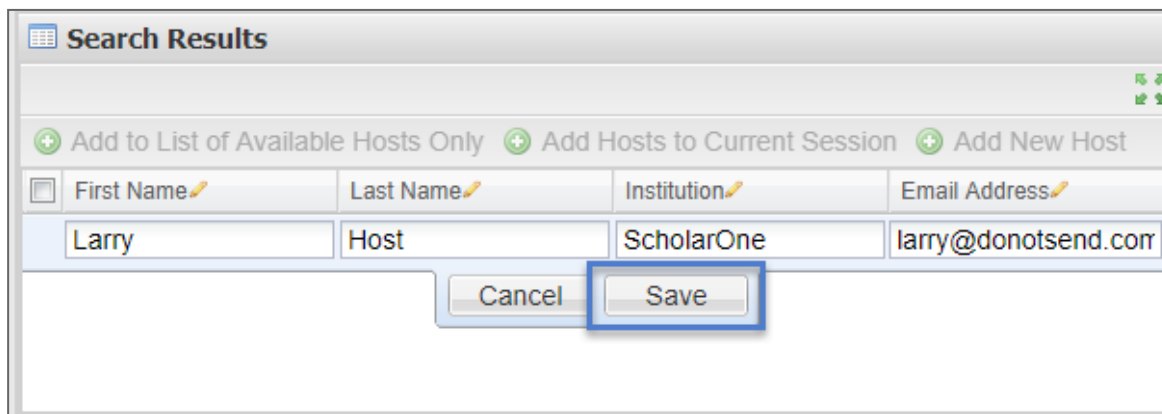
First Name	Last Name	Institution	Email Address
	tom		

To add the host, click the **Add New Host** button.



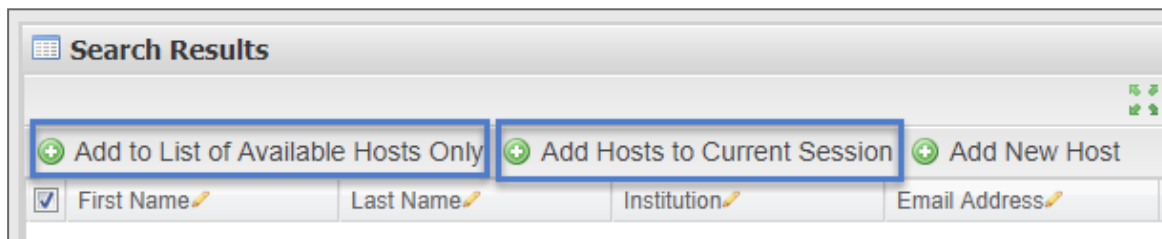
The screenshot shows the 'Search Results' interface. At the top, there are three buttons: 'Add to List of Available Hosts Only', 'Add Hosts to Current Session', and 'Add New Host'. The 'Add New Host' button is highlighted with a blue box. Below the buttons is a table with columns: First Name, Last Name, Institution, and Email Address. The table is currently empty. At the bottom, there is a pagination bar showing 'Page 1 of 1', '50 Records per page', and a 'No data to display' message.

Enter the required host information; **First Name**, **Last Name**, **Institution**, and **Email Address** and click **Save**.



The screenshot shows the 'Search Results' interface with the host information entered. The 'Add New Host' button is still highlighted. Below the buttons, the table now contains one row with the following data: First Name: Larry, Last Name: Host, Institution: ScholarOne, Email Address: larry@donotsend.com. Below the table, there are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with a blue box.

Once the host has been saved, click the checkbox to the left of the host name and select **Add to List of Available Hosts** or **Add Host to Current Session**.



The screenshot shows the 'Search Results' interface with the host information entered. The 'Add to List of Available Hosts Only' button is highlighted with a blue box. Below the buttons, the table now contains one row with the following data: First Name: Larry, Last Name: Host, Institution: ScholarOne, Email Address: larry@donotsend.com. The checkbox to the left of the first name is checked.

ADD ABSTRACTS TO SESSIONS

The final step in building a complete session is adding the abstracts to the Session. In the **Sessions & Events** grid open a session (click on the Edit column link) and go to the **Manage Abstracts** tab. Search for the abstracts you would like to assign to the session.

Note: You may search for abstracts by Decision Status as well as Category, Sub Category, Presentation Type, specific Author Last Name or Email Address, and Control ID. You can search on more than one control id. All unassigned abstracts will list those abstracts that have yet to be put in any session.

Search		Results	
Author First Name:	<input type="text" value="David"/>	Author Last Name:	<input type="text" value="smith"/>
Author Institution:	<input type="text" value="ScholarOne"/>	Author Email Address:	<input type="text" value="smith@donotsend.com"/>
Category:	<input type="text" value="Administration"/>	Sub-Category:	<input type="text" value="Select a Sub-Category..."/>
Presentation Type:	<input type="text" value="Abstract Submission - Oral Prefi"/>	Control IDs:	<input type="text" value="12341234"/> <input type="text" value="23423456"/>
Decision Name:	<input type="text" value="Accept for Plenary"/>	<input type="button" value="Search"/>	
Unassigned abstracts:	<input checked="" type="checkbox"/>		

Assign the abstracts by dragging and dropping them into the **Currently Assigned Abstracts** area. If you have multiple abstracts to assign from your search results, you can also check the box next to each abstract and click **Assign Selected Abstracts**. Once the abstracts are assigned, they will appear in the **Currently Assigned** section of the search results.

Search Results

Search:

Assign Selected Abstracts

Control ID	Title	Submitted Date	Presenting Author	Status	Category	Sub-Category	Presentation Type
<input checked="" type="checkbox"/> 2082947	Abstract #1	Mon 9/15/2014	Support, Meetings	Decisioned Ac...	Basic Science	none	Poster Preferred
<input checked="" type="checkbox"/> 2280347	Abstract #3	Wed 4/01/2015	Support, Meetings	Decisioned Ac...	Basic Science	none	Poster Preferred
<input checked="" type="checkbox"/> 2280391	Abstract #5	Wed 4/01/2015	Support, Meetings	Submitted	Clinical Science	none	Poster Only
<input checked="" type="checkbox"/> 2280392	Abstract #6	Wed 4/01/2015	Support, Meetings	Decisioned Ac...	Clinical Science	none	Video
<input checked="" type="checkbox"/> 2280414	Abstract #7	Wed 4/01/2015	Support, Meetings	Decisioned Ac...	Clinical Science	none	Video

Page 1 of 1 | 50 Records per page | Displaying 1 - 32 of 32

Currently Assigned Abstracts

Search:

Select One... | Save/Edit | Delete

☒ Add Placeholder | ☒ Withdraw Selected | ☒ Remove Selected | ☒ Mass Update

Duration: 0 min -- Remaining: 90 min

Control ID	Edit ...	Final ID	Title	Presenting Author	Order	Start T...	End Ti...	Day/Date	Presentation Type
278039	[edit]	80	Clinical 19		60	Friday 10/1/14	8:00	10:30	Clinical 19
303615	[edit]	10	Clinical 30		60				

Save Save & Close Close

Users may drag and drop between both grids or within each individual grid, allowing users to both add and remove abstracts or to change the order of presentations in the session.

Should someone need to have their presentation withdrawn for any reason, click on the abstract and either click the **Withdraw Selected** button or right-click and select **Withdraw** from the option list. Abstracts that are withdrawn are kept in the session and may show in exports (if configured). If you want to remove an abstract completely, highlight the abstract and then click **Remove Selected**.

Currently Assigned Abstracts

Search:

Select One... | Save/Edit | Delete

☒ Add Placeholder | ☒ Withdraw Selected | ☒ Remove Selected | ☒ Mass Update

Duration: 0 min -- Remaining: 90 min

Control ID	Edit ...	Final ID	Title	Presenting Author	Order	Start T...	End Ti...	Day/Date	Presentation Type	Duration
1 2082947	[Edit]		Abstract #1	Support, Meetings	1	8:00 AM	8:00 AM	Saturday 10/1...	Poster Preferred	0
2 2280347	[Edit]		Abstract #3	Support, Meetings	2	8:00 AM	8:00 AM	Saturday 10/1...	Poster Preferred	0
3 2280391	[Edit]		Abstract #5	Support, Meetings	3	8:00 AM	8:00 AM	Saturday 10/1...	Poster Only	0
4 2280392	[Edit]		Abstract #6	Support, Meetings	4	8:00 AM	8:00 AM	Saturday 10/1...	Video	0
5 2280414	[Edit]		Abstract #7	Support, Meetings	5	8:00 AM	8:00 AM	Saturday 10/1...	Video	0

Add Placeholder to a Session

For sessions with breaks, you can insert a **Placeholder** within the presentation line up. This is often used for coffee breaks or lunches that fall between *presentations*. If you have coffee breaks or lunches between *sessions*, then you would enter an **Event** on the Program level instead.

Click **Add Placeholder** in the **Currently Assigned Abstracts** grid. Give the placeholder a name and apply a duration. Drag and drop the placeholder to the correct location in the session.

Currently Assigned Abstracts

Search:

Select One... Save/Edit Delete

Add Placeholder Withdraw Selected Remove Selected Mass Update

Duration: 60 min -- Remaining: 0 min

	Control ID	Edit ...	Duration	Title	Order	Start Time	End Time	Day/Date
1	2287061	Edit	20	Abstract #12	1	7:45 AM	8:05 AM	Saturday 10/15/2016
2	2287117	Edit	10	Abstract #23	2	8:05 AM	8:15 AM	Saturday 10/15/2016
3			10	Coffee Break	3	8:15 AM	8:25 AM	Saturday 10/15/2016
4	2287124	Edit	20	Abstract #27	4	8:25 AM	8:45 AM	Saturday 10/15/2016

Note: Placeholders can also be used to designate times in a session where the Admin knows an invited speaker will present.

SET DURATIONS

Using the Mass Update Tab

To set the duration of an abstract presentation, go to the **Currently Assigned Abstracts** grid located on the **Manage Abstracts** tab of the Edit Session window.

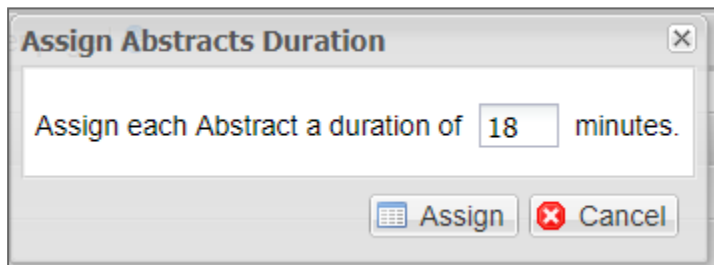
If the Session Type has a configured default duration value (available in **the Meeting Setup > Session Type**), it will set the duration for each abstract as it is added to the session. Otherwise, you may manually set the presentation duration in the **Duration** column by double clicking in that field and typing in the desired value.

Currently Assigned Abstracts											
Select One...										Search:	
Save/Edit Delete											
Add Placeholder Withdraw Selected Remove Selected Mass Update										Duration: 0 min -- Remaining: 90 min	
	Control ID	Edit ...	Duration	Title	Order	Start T...	End Ti...	Day/Date	Distin...	Category	Invitation Status
1	2082947	Edit	15	Abstract #1	1	8:00 AM	8:00 AM	Saturday 10/1...		Basic Science	Not Yet Invited
2	2280347	Edit	0	Abstract #3	2	8:00 AM	8:00 AM	Saturday 10/1...		Basic Science	Not Yet Invited
3	2280391	Edit	0	Abstract #5	3	8:00 AM	8:00 AM	Saturday 10/1...		Clinical Science	Not Yet Invited
4	2280392	Edit	0	Abstract #6	4	8:00 AM	8:00 AM	Saturday 10/1...		Clinical Science	Not Yet Invited
5	2280414	Edit	0	Abstract #7	5	8:00 AM	8:00 AM	Saturday 10/1...		Clinical Science	Not Yet Invited

If you wish to assign durations of equal value to the current presentations, select **Mass Update**. The **Assign Durations** button will suggest a time to set for all session presentations, based on the number of abstracts in the session and the total duration of the session.

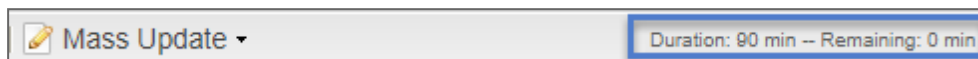
Currently Assigned Abstracts											
Select One...											
Save/Edit Delete											
Add Placeholder Withdraw Selected Remove Selected Mass Update											
	Control ID	Edit ...	Duration	Title	Order	Start T...	End Ti...	Day/Date	Distin...	Category	Invitation Status
1	2082947	Edit	15	Abstract #1	1	8:00 AM	8:00 AM	Saturday 10/1...		Basic Science	Not Yet Invited
2	2280347	Edit	0	Abstract #3	2	8:15 AM	8:15 AM	Saturday 10/1...		Basic Science	Not Yet Invited
3	2280391	Edit	0	Abstract #5	3	8:15 AM	8:15 AM	Saturday 10/1...		Clinical Science	Not Yet Invited
4	2280392	Edit	0	Abstract #6	4	8:15 AM	8:15 AM	Saturday 10/1...		Clinical Science	Not Yet Invited
5	2280414	Edit	0	Abstract #7	5	8:15 AM	8:15 AM	Saturday 10/1...		Clinical Science	Not Yet Invited

For example, if the session duration is 90 minutes and there are 9 presentations in the session, clicking the **Assign Durations** button will trigger a prompt to set all presentations to a duration of 10 minutes. However, you may overwrite the suggested value by simply typing in a new value via inline editing.



Note: For Presentations that extend the full length of the session, you may leave the duration value as zero.

You will see in the right corner of the grid a section that helps track durations. It lists the Time Remaining and Current Duration as time is set for each session.



In the Information tab, you can configure a presentation to be either set at the full session duration or set by individual presentation type.



Using Controlled by Presentation Type

You can control the duration of specific abstracts within a session type by selecting a Submission **Role/Presentation Type** combination.

To set up the process, access **Types** under Meeting Setup. Right-click on the session type and click **Edit Type**.

The screenshot shows the Session Administrator interface. On the left, the 'Meeting Setup' menu is expanded, and 'Types' is selected. The main content area shows the 'Types' section with a table of session types. The 'Clinical Session' type is selected, and a context menu is open with 'Edit Type' and 'Delete Type' options.

Session / Event Type Name
<input checked="" type="checkbox"/> Clinical Session
<input type="checkbox"/> Luncheon
<input type="checkbox"/> Meet the Expert
<input type="checkbox"/> Minisymposium
<input type="checkbox"/> Oral
<input type="checkbox"/> Plenary

Scroll to the bottom of the window to assign the durations by Presentation Type. Select the Submission **Role/Presentation Type** combination to assign the durations you would like to automatically be assigned.

The screenshot shows the 'Duration by Presentation Type Assignment' form. The 'Role/Presentation Types' dropdown is set to 'Oral or Poster Submission - Poster', and the 'Duration (in minutes)' field is set to 12. The 'Assign Duration' button is visible.

Enter the **Duration** in minutes for the selected Submission Role/Presentation Type. Click **Assign Durations**.

Note: The assignments are not retroactive for presentations that have already had their duration assigned.

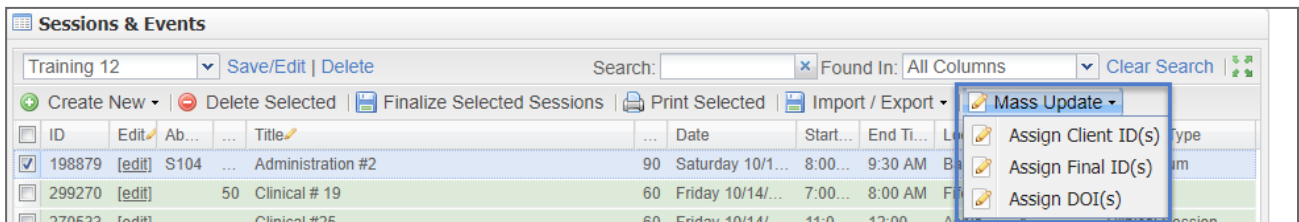
For abstracts that meet the Role/Presentation Type for a specific session type, the durations will be automatically assigned.

Adjust Duration

You may adjust the session duration after scheduling without unscheduling the session. The new end time will automatically calculate.

ASSIGNING IDS

You can assign three types of IDs for your sessions and abstract presentations: Final IDs, DOIs, and Client Session IDs. The **Mass Update** button automates the numbering. The **Mass Update** tool is available from the main **Session & Event** grid.



Final IDs and DOIs

Final IDs are used to assign unique numbering formats to presentations across all presentations in a program or by specified sessions. You can also apply sequential numbering within a session. Arrange your sessions and presentations in the desired order. **Select Assign Final ID or Assign DOI** from the **Mass Update** tool, create the numbering format using the available tags, and select **Run**. Select **Edit** or **Delete** to modify the desired format.

Assign Abstract Final ID(s) Session in question and navigating to the "Add/Edit Hosts" Close

Instructions

Create a final id string in the area below by naming your format (i.e. - Monday Posters) and then entering the final id exactly as you would like it to display, using the numbering tags to designate your preferred numbering style. Two numbering formats have been created for your reference (feel free to edit or delete these); you may hover over each of the Available Tags to get more information on what they are and how they might work.

[EDIT INSTRUCTIONS]

Available Tags:
 Session Abbreviation Tag - ##SESS_ABBV##
 Year Tags - ##YEAR##, ##NEXT_YEAR##
 Numbering Tags - ##NUM1##, ##NUM2##, ##NUM3##, ##NUM4##

Final ID Formats & Examples:

Name	Format	Appearance	
Number only	##NUM1##	1	run edit delete
Sample format	##YEAR## ##NUM2##	2015 01	run edit delete
New <input type="text" value="Sample format"/>	<input type="text" value="##YEAR## ##NUM2##"/>		save

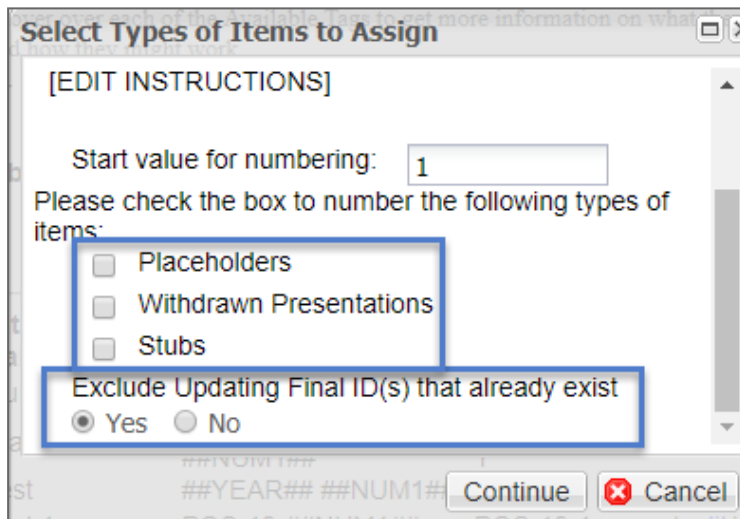
Event 0 30 Wednesday 10/14/2015 0 Close

Session 0 0 0

Note: Hover over the examples under **Available Tags** to see more information on the tag options.

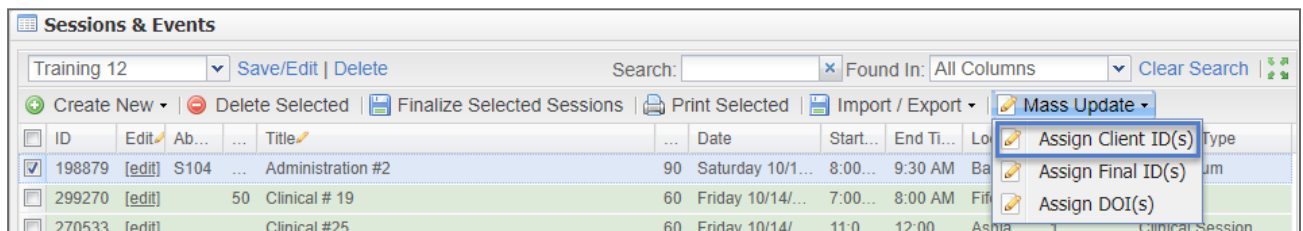
You may choose to skip numbering on abstracts that already have final IDs assigned. You can also choose to skip numbering on placeholders, withdrawn abstracts, and stubs.

Select **Run** and then click the **Yes** option for **Exclude Updating Final ID(s) that Already Exist**. Check the placeholders, withdrawn presentations, and stubs to skip numbering on these abstract presentation types.



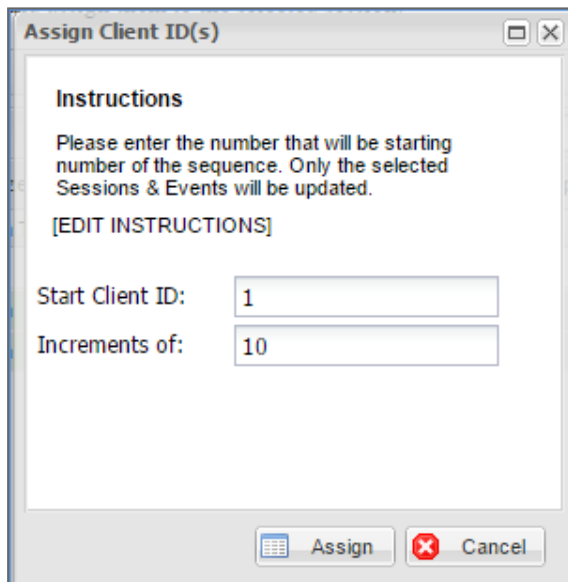
Client Session IDs

Client Session IDs determine the print order of sessions and events. In the **Sessions & Events** Grid, arrange your sessions and events in the proper order using sorting and filtering. Check the desired sessions and events in the Grid. Select **Mass Update** and navigate to **Assign Client Session IDs**.



Indicate the starting value and the incremental value for the IDs. Click **Assign** when you are ready to have the system update the IDs. Assignment of IDs can be repeated if the program changes order.

Note: Incrementing by 10 will allow you to insert sessions and events after the Client Session IDs have initially been assigned.



The 'Assign Client ID(s)' dialog box contains the following elements:

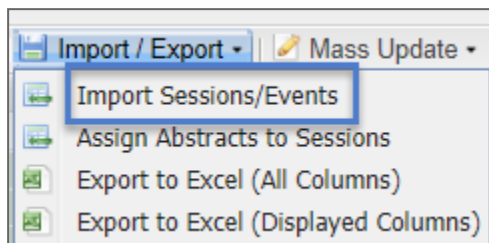
- Instructions:** Please enter the number that will be starting number of the sequence. Only the selected Sessions & Events will be updated.
- [EDIT INSTRUCTIONS]** link
- Start Client ID:** Input field with the value '1'.
- Increments of:** Input field with the value '10'.
- Buttons:** 'Assign' (with a grid icon) and 'Cancel' (with a red X icon).

Note: You can do all three steps of building a session in one process. Move from task to task by clicking on the tabs of the session (Information, Add/Edit Hosts, Manage Abstracts).

SESSION IMPORTS

Import Session and Events

As an alternate option, you can import session information via an import template. Click on **Import/Export** and choose **Import Sessions/Events**.



Download the template and resources files. You will use the resources to properly designate the data in the fields you will include in your import. The template includes all

possible sessioning and scheduling fields. It is not necessary to populate all fields. Session title, type and duration are the required fields for the import. Fields like Topics are often required as well.

Note: The best way to resolve the required fields for your configuration is to start a new session and note which fields are required. The fields are the same for the import.

Hosts, session owners, and room resources include the identifying number for each entity. You must use the unique identifiers in the import template. If you prefer to schedule your session and events after the import, you do not need to include scheduling information in the template.

Once you have your template completed, save it as a .csv file and Import it.

Import Sessions/Events

Instructions

To import sessions, first click **Download resources** to get a list of the valid Session Types and Topics. Next click **Download template** to open a file with the potential fields for import. In this file, enter all data as you would like it to appear. Be sure to copy and paste your Session Types and Topics into the appropriate fields to help avoid errors on import. The Host column should be populated as <host_id>;<host_role_name>, with the host role name being the appropriate role from the resource file. Multiple hosts per session should be separated with a pipe. Save as a .csv file when done and import in the area below.

[EDIT INSTRUCTIONS]

Download template Download resources Download Hosts

Download Session Owners

Download Room Resources

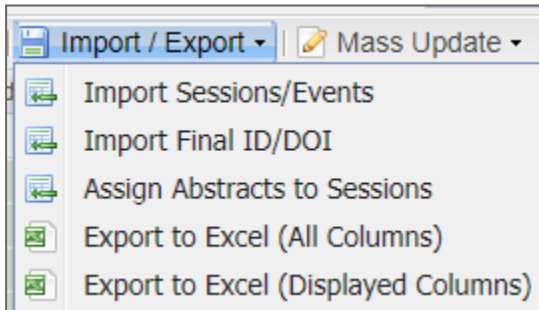
Please upload your Browse...

Import Cancel

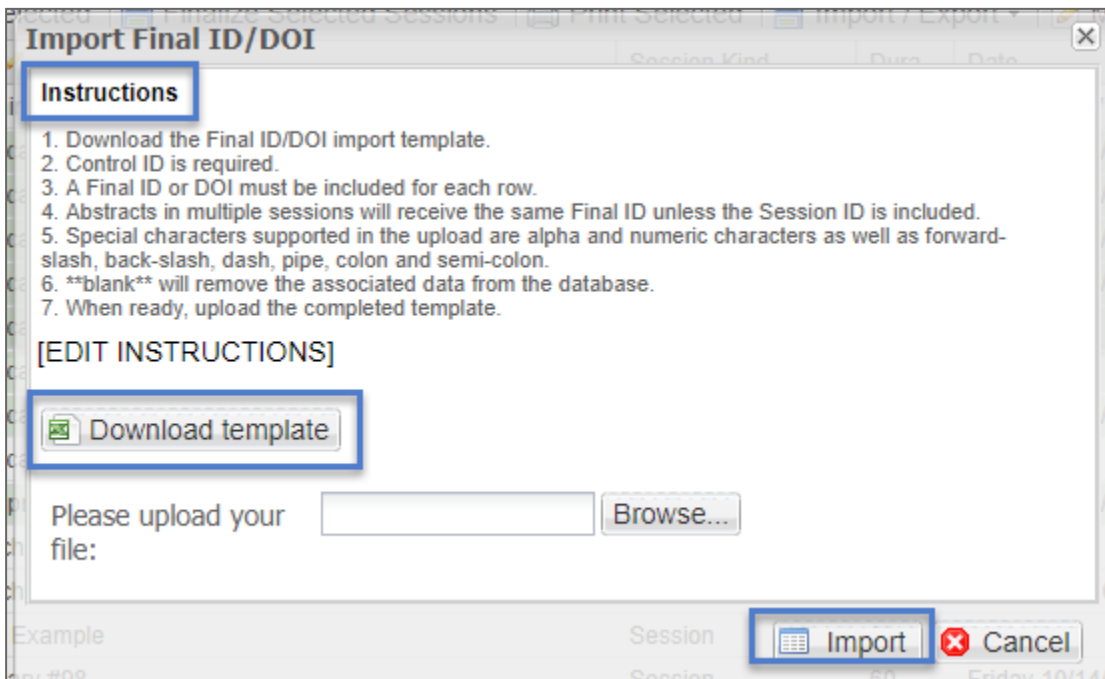
Note: You can do more than one import.

Import Final ID/DOI

To begin importing Final ID/DOIS, click on **Import/Export** and select **Import Final ID/DOI**.

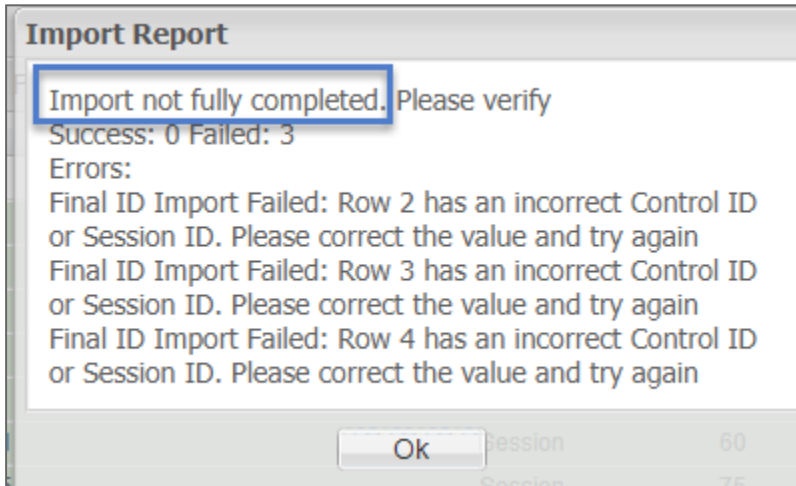


In the pop-up window, download the import template. Instructions are available above the template download. Complete the template, save the file as a .csv file and click **Upload**.

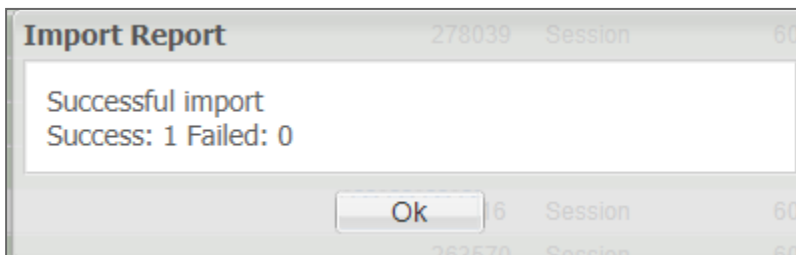


Note: Either a Final ID or DOI is required for a successful import.

If a row in the uploaded template is missing any of the required fields, the import will fail, and an error will display. If multiple rows fail, the error message will list each failure.



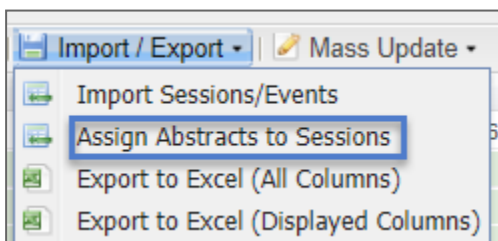
If the import is successful, a confirmation message will display.



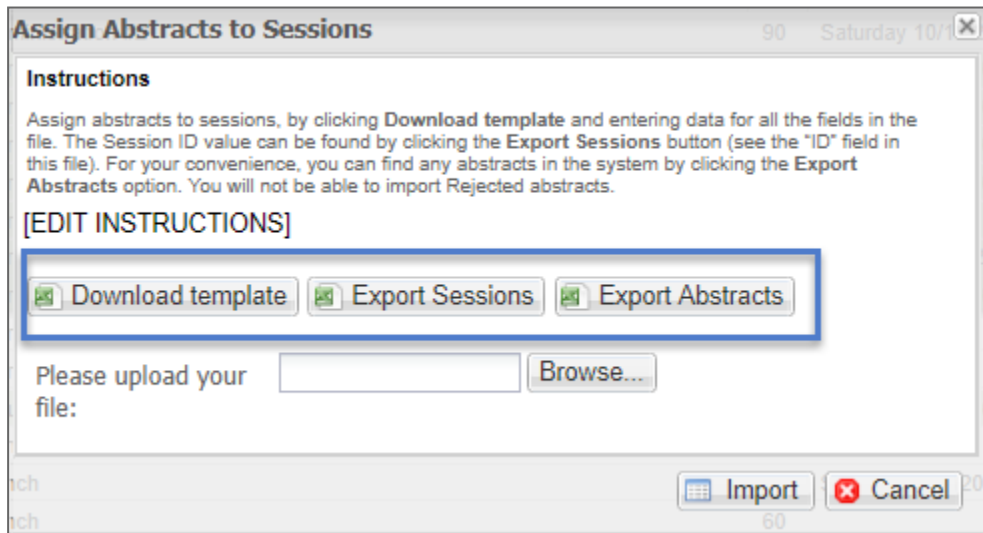
Import Abstracts

When your sessions have been created, you can perform an Abstract Import.

Click **Import/Export** and select **Assign Abstracts to Sessions** from the dropdown.



Download the template and the two export files.



The Export Sessions file represents all session data including the unique session id. You will use this id to designate abstracts to sessions.

The Export Abstracts file represents all abstract data including Control ID. You will use the Control ID to designate which abstract is to be placed in each session.

Here is sample import template:

	A	B	C	D	E	F
1	Session ID	Session Title	Control ID	Duration	Presentation Order	
2	1234567	Sample #1	8009000	15	1	
3	1234567	Sample #1	9900800	30	2	
4	2345678	Sample #2	9900899	20	1	
5	2345678	Sample #2	9900888	20	2	
6	2345678	Sample #2	9900879	20	3	
7	2345678	Sample #2	9900800	20	4	
8	2345678	Sample #2	9900800	20	5	
9						
10						

You will use the session ID instead of the session title for the import. Note which Control IDs will be placed in each session. Each Control ID will need a duration and a presentation order.

Note: You can do more than one import.

CHANGING COLUMN HEADERS AND RESOURCES

Do not change column headers or resources. Imports with altered headers and resources will fail.

SESSION EXPORTS

There are two options for exporting session information to Excel. Export to Excel (All Columns) includes all columns available for the Session & Event grid. Export to Excel (Displayed Columns) exports those columns you have chosen for your grid configuration.

FINALIZE SESSIONS FOR SPEAKER MANAGEMENT

If your configuration includes Speaker Management (Invitations and Emails), you will need to finalize each session to make the data available in the Speaker Management grid. Check the sessions you want to finalize and select **Finalize Selected Sessions**. Sessions that have been finalized will appear in green highlight.

Sessions & Events

Training 12

Save/Edit | Delete

Search:

Found In: All Columns

Create New

Delete Selected

Finalize Selected Sessions

Print Selected

Import / Export

Mass Update

<input type="checkbox"/>	Edit	ID	Abbrev	Client ID	Title	Duration	Date	Start Time	End Time	Location	# of Assign...	Session Type
<input checked="" type="checkbox"/>	[edit]	198879	S104		Administration #2	90	Saturday 10/15/2016	8:00 AM	9:30 AM	Barbours...	0	Symposium
<input type="checkbox"/>	[edit]	299270			Clinical # 19	60	Friday 10/14/2016	7:00 AM	8:00 AM	Fifeville	1	Oral
<input type="checkbox"/>	[edit]	270533			Clinical #25	60	Friday 10/14/2016	11:00 AM	12:00 PM	Ashlawn ...	1	Clinical Session
<input type="checkbox"/>	[edit]	264349	CL2		Clinical #3	60					1	Minisymposium
<input type="checkbox"/>	[edit]	278039			Clinical 19	60	Friday 10/14/2016	9:30 AM	10:30 AM	Christina	1	Clinical Session

Note: If you make a change to the session after it has been finalized, you will need to refinalize the session.

CUSTOMIZE THE SESSION AND EVENTS GRID

The Session Center's multi-column, multi-row grid has a number of unique and dynamic features that allow you to customize the data display. Within the grid you can add and remove columns, sort and filter, and import or export data.

ADD AND REMOVE GRID COLUMNS

Each grid includes a default set of columns displayed when the page is initially loaded. In addition to the default columns, there may also be a number of additional columns which are initially hidden from view. To see the full list of available columns for the overall grid, rolling your mouse over any column header will reveal a small down arrow.

Clicking the down-arrow and then hovering over the **Columns** selection will show a list of all available columns. Columns checked are those currently displayed. To add or remove a column from the display, simply check or uncheck the column label within the **Columns** list.

Your list of available sessions and events appear below. Click **Create New** to create a new session or event; you may **edit** an existing item by double-clicking or right-clicking on the desired row. If **in-line editing** is turned on, you will see a pencil icon next to the header of each column.

Add Hosts - add hosts to a session by double-clicking on the session in question and navigating to the "Manage Hosts" tab in the pop-up window.

Add Abstracts - add abstracts to a session by right-clicking on the session in question and selecting the "Manage Abstracts" tab in the pop-up window where you may search for abstracts and assign them to the selected session.

Sessions & Events

Training 12 Save/Edit Delete Search

Create New Delete Selected Finalize Selected Sessions

ID	Edit	Abb...	Title	Date
270533	[edit]	...	Clinical #25	
278039	[edit]	80	Clinical 19	
303615	[edit]	10	Clinical 30	
273774	[edit]	60	Clinical Session 25	
263506	[edit]	20	Lunch	
305481	[edit]	...	Lunch	
264349	[edit]	CL2 90	Clinical #3	60 Friday 10/14/201
266116	[edit]	30	Clinical Session #1	60
299270	[edit]	50	Clinical # 19	60 Friday 10/14/201
305479	[edit]	40	Oral Example	60
263570	[edit]	PL15 70	Equipment	60 Friday 10/14/201
280389	[edit]	...	Plenary #98	60 Friday 10/14/201
263505	[edit]	...	Plenary 2	60 Saturday 10/15/...
310462	[edit]		Sample Session	45

Sort Ascending
Sort Descending
Configure Sort
Columns
Filters

ID
Edit
Abbrev
Client ID
Title
Session Kind
Creator
Owners
Duration
Date
Expected Attendance
Actual Attendance
Start Time
End Time
Location
of Assigned Abstracts
Session Type
Topic
Commercial Sponsor
Status
Notes
Notes to Admin

All Columns Clear Search

Export Mass Update

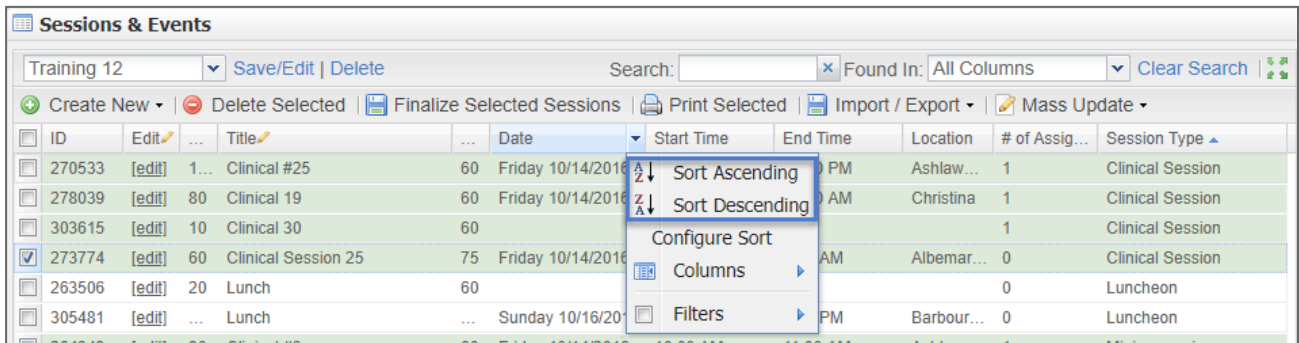
Location	# of Assi...	Session Type
Ashlaw...	1	Clinical Session
Christina	1	Clinical Session
	1	Clinical Session
Albema...	0	Clinical Session
	0	Luncheon
Barbou...	0	Luncheon
Ashlaw...	1	Minisymposium
	0	Minisymposium
Fifeville	0	Oral
	1	Oral
Blue Ri...	1	Plenary
Barbou...	1	Plenary
Albema...	1	Plenary
	0	Plenary

REARRANGE COLUMNS

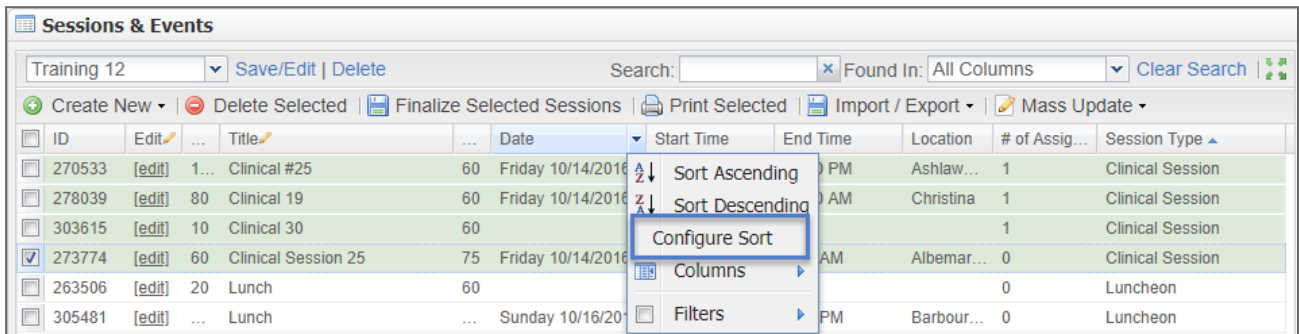
Drag and Drop functionality also allows for rearranging of columns. Simply left click on a column header and with the left mouse button pressed down, drag the column to the position in the Grid you wish for it to appear. Release the left mouse button. You will see two blue arrows indicating the new position.

SORT GRID DATA

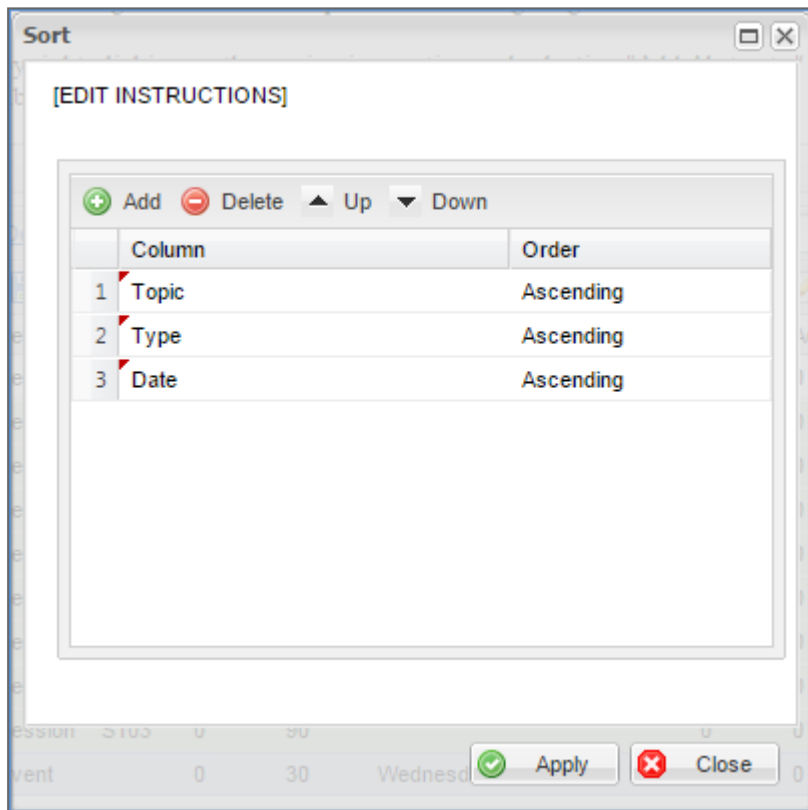
Data sort order can be modified for a column by clicking once on the column header. A drop-down menu will display both Ascending and Descending sorts. Click on the preferred sort to activate. If you would like to switch the sort order from Ascending and Descending or vice versa, simply repeat this process.



Data can also be sorted on multiple criteria. Select **Configure Sort** in the column header drop-down.



Apply the proper sort criteria using the **Add**, **Delete**, and **Up** and **Down** arrows.

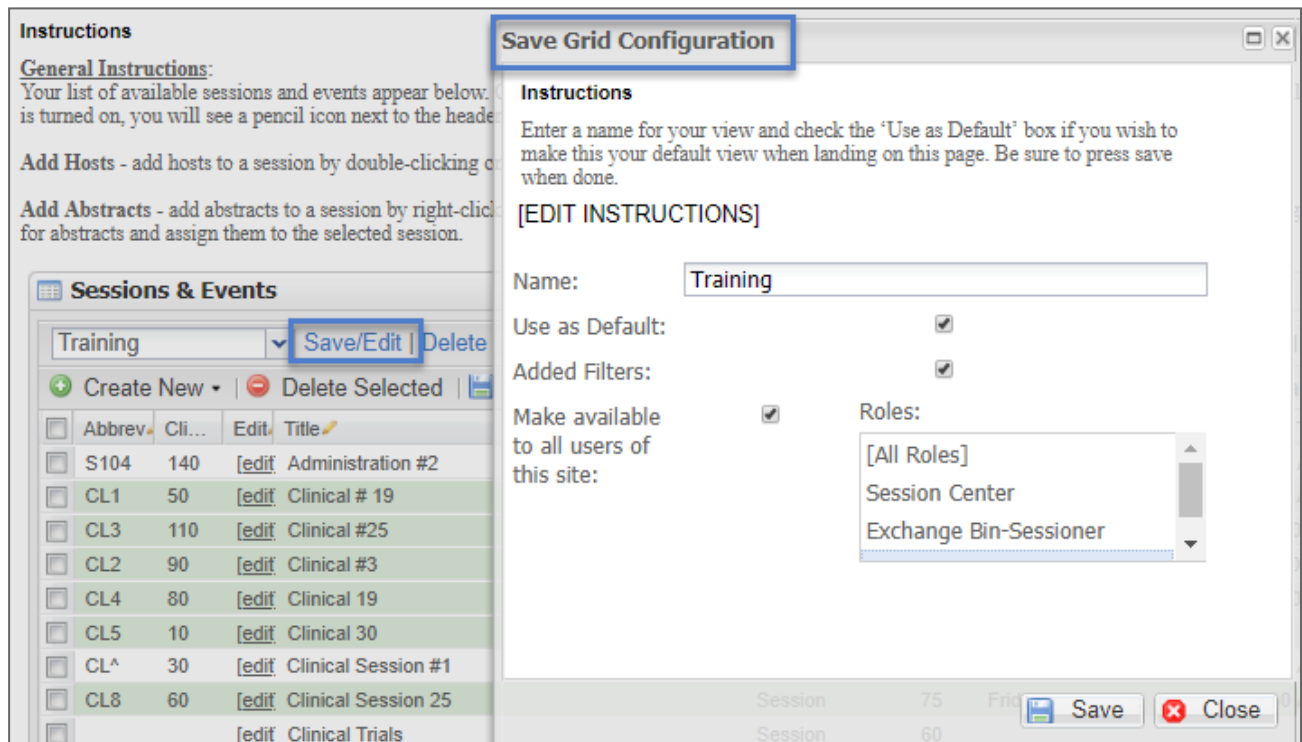


Once the sort is complete, numbering next to the column headers will indicate the appropriate sort that was applied.

ID	Edit	...	Title	...	Date ▲2	Start Time ▲3	End Time	Location	# of Assig...	Session Type ▲1
----	------	-----	-------	-----	---------	---------------	----------	----------	---------------	-----------------

SAVING VIEWS

For each view you create, you may want to save the view for future reference. You will often want one default view with all your data and then several other views for specific criteria. To save a view, select **Save/Edit** in the top right corner of the grid.

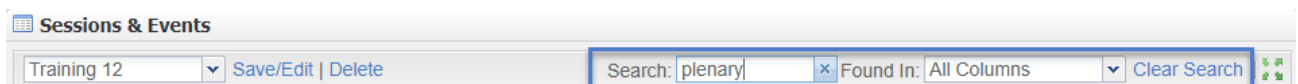


In the grid configuration, give the view a descriptive name. Mark the view as Default only if you want the view to appear as the default view each time. If your view has used filters, check the Added Filters box. Finally mark the roles the view should be available to.

When you want to use the view, select it from the dropdown beside **Save/Edit**.

SEARCH GRID DATA

The **Sessions and Events** grid contains a **Search** text box above the grid data. Entry of text in this box will cause the grid contents to be reduced to those rows that contain the search term in one or more columns. Narrow down the search by indicating the specific column(s) you want to search by. Select the appropriate option in the **Found In:** drop-down. You can click on **Clear Search** to clear all selections. When a search is added to a field, a search icon will display at the top of the column header.



Note: The search term is applied against all columns available for the grid, both those that are displayed and those that are hidden, when All Columns is selected.

You may also **Filter** by column data using the column header drop-down. Click on the down-arrow beside a column header and then select **Filter** from the drop-down. Filtering options for each column will appear.

Abbrev	Client ID	Duration	Date	Type
S203			Wednes...	Symposium
S104			Wednes...	Symposium
S102				Plenary
S105			Wednes...	Technical Session
S101				Minisymposium
S204				um
S205	0	120		Technical Session
S201	0	60		Workshop

EDIT SESSION OR EVENT INFORMATION

There are three ways to edit the information found in the grid: new window, in-line edit., and the **Edit** link on each session and event in the grid.

Edit in New Window

To edit type items (Session Types, Session Topics, or even the session or event data) and to access the **Information**, **Add/Edit Hosts** and **Manage Abstracts** tabs, double click on the checkmark field. The **Information** tab opens.

Information		Add/Edit Hosts	Manage Abstracts
Instructions Enter the necessary information in the area below; all required fields are marked with a red asterisk. Please note that you will not be able to navigate to any other tab until all the required fields are complete.			
[EDIT INSTRUCTIONS]			
<input type="button" value="Show Special Characters"/>			
Session Abbreviation:	S104	Session Creator:	Support, Meetings
* Session Title:	Administration #2	Session Owner(s):	Donovan, Grace, ScholarOne
Client Session ID:		<input type="button" value="Add/Edit Owners"/>	
* Session Type:	Symposium	Session Notes:	
Session Topic:	Medical Administration	Notes to Admin:	
Symposium:	Select...	Learning:	
* Duration (in minutes):	90		

Edit In-Line

When working on the highest level of data, double-clicking an item will allow you to edit the data directly in the grid. In the example below, double-click on a **Title** to edit the title. **In-line Editing** is available for basic session data.

Columns allowing in-line editing are indicated with a pencil icon in the column header.

Sessions & Events

Training 12

Save/Edit | Delete

Search:

Found In: All Columns

Clear Search

Create New

Delete Selected

Finalize Selected Sessions

Print Selected

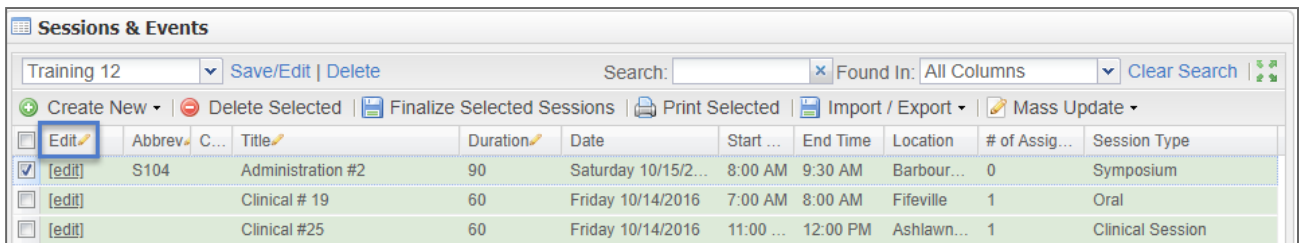
Import / Export

Mass Update

<input type="checkbox"/>	Edit	Title	Duration	Date	Start Time	End Time	Location	# of Assignments	Session Type
<input checked="" type="checkbox"/>	[edit]	Administration #2	90	Saturday 10/15/2016	8:00 AM	9:30 AM	Barbours...	0	Symposium
<input type="checkbox"/>	[edit]	Clinical # 19	60	Friday 10/14/2016	7:00 AM	8:00 AM	Fifeville	1	Oral
<input type="checkbox"/>	[edit]	Clinical #25	60	Friday 10/14/2016	11:00 AM	12:00 PM	Ashlawn ...	1	Clinical Session

Edit Link

To quickly access the **Information**, **Add/Edit Hosts**, and **Manage Abstracts** tabs, click on the **Edit** link. By default, the **Edit** link appears in the first column, but it may be moved to other locations using the drag and drop feature.



Sessions & Events

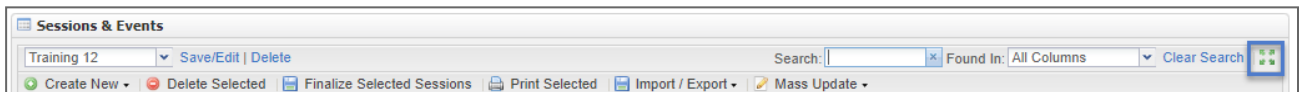
Training 12 Save/Edit | Delete Search: [] Found In: All Columns Clear Search

Create New Delete Selected Finalize Selected Sessions Print Selected Import / Export Mass Update

	Abbrev	C...	Title	Duration	Date	Start ...	End Time	Location	# of Assig...	Session Type
<input checked="" type="checkbox"/> [edit]	S104		Administration #2	90	Saturday 10/15/2...	8:00 AM	9:30 AM	Barbour...	0	Symposium
<input type="checkbox"/> [edit]			Clinical # 19	60	Friday 10/14/2016	7:00 AM	8:00 AM	Fifeville	1	Oral
<input type="checkbox"/> [edit]			Clinical #25	60	Friday 10/14/2016	11:00 ...	12:00 PM	Ashlawn...	1	Clinical Session

VIEW FULL SCREEN

To expand the Grid to a full screen view, click on the **Expand** button at the top right side of the Grid.

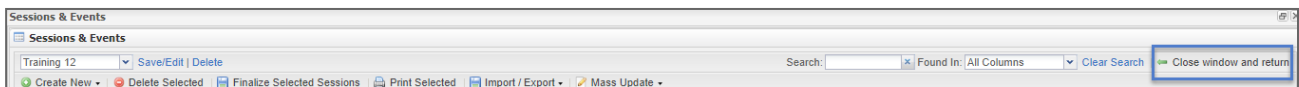


Sessions & Events

Training 12 Save/Edit | Delete Search: [] Found In: All Columns Clear Search

Create New Delete Selected Finalize Selected Sessions Print Selected Import / Export Mass Update

To return to the standard view, select **Close Window and Return**.



Sessions & Events

Training 12 Save/Edit | Delete Search: [] Found In: All Columns Clear Search

Create New Delete Selected Finalize Selected Sessions Print Selected Import / Export Mass Update

Close window and return

DELETE/PRINT GRID DATA

In certain grids, you will see the options to delete data or to print selected data. To delete or print data, simply click the data you would like to delete or print, then click the **Delete Selected** or **Print Selected** buttons.

Sessions & Events

Training 12

Save/Edit | Delete

Search: plenary

Found In: All Columns

Clear Search

Create New

Delete Selected

Finalize Selected Sessions

Print Selected

Import / Export

Mass Update

<input type="checkbox"/>	ID	Edit	Title		Date	Start Time	End Time	Location	# of Assig...	Session Type
<input checked="" type="checkbox"/>	263570	[edit]	70 Equipment	60	Friday 10/14/2016	8:00 AM	9:00 AM	Blue Ri...	1	Plenary
<input checked="" type="checkbox"/>	280389	[edit]	Plenary #98	60	Friday 10/14/2016	1:00 PM	2:00 PM	Barbour...	1	Plenary
<input type="checkbox"/>	261832	[edit]	Plenary 1	60	Friday 10/14/2016	11:00 AM	12:00 PM	Barbour...	2	Workshop
<input type="checkbox"/>	263505	[edit]	Plenary 2	60	Saturday 10/15/2...	9:00 AM	10:00 AM	Albemar...	1	Plenary
<input type="checkbox"/>	310462	[edit]	Sample Session	45					0	Plenary

Note: Select multiple rows in the grid by using control-click, shift-click, or by selecting the checkboxes one-by-one.

An example of the **Print Preview** screen that will appear after selecting **Print** is below.

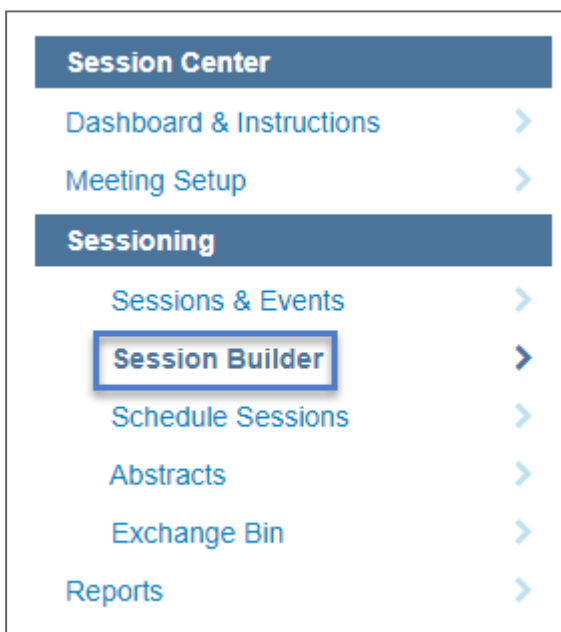
Print Sessions/Events Preview						
Session Title: Faith's Session Session Type: Interactive Session Session Start Time: Mon 11/18/2013 8:00 AM Session End Time: Mon 11/18/2013 9:00 AM Duration: 60 Session Location: Curie Expected Attendance: 0 Commercial Sponsor: Session Owners: Session Notes: Session Track: Session Abbreviation: Session Needs: Client Session ID: 23 Session Prefix: Notes to Admin: Learning Objectives 1: Learning Objectives 2: Learning Objectives 3: Include in IP: Yes Display Individual Presentation Times: No Display View Presentation Link in IP: Yes						
Order	Control ID	Final ID	Title	Presentation Type	Start time End time	Invitation Status
1	1670748		Regulating fluids	Oral Preferred	8:00 AM 9:00 AM	Not Yet Invited
2	1654378		Reactions to fluid electrolysis	Oral Preferred	8:00 AM 9:00 AM	Not Yet Invited

The Session Proof displayed above is a configurable item. Navigate to **Admin>Client Configuration>Session Proof Configuration** to modify the contents of the proof.

SESSION BUILDER

As an added feature, the **Session Builder** can be used to create sessions, add abstracts to sessions, and add hosts. There are two views to work with: **Assign Abstracts** and **Assign Hosts**.

To access the **Session Builder**, select **Sessioning** on the left menu and then **Session Builder**. The default view is **Assign Abstracts**.



ASSIGN ABSTRACTS TOGGLE VIEW

The **Assign Abstracts Toggle View** has three sections: Sessions on the left, Submitted Abstracts on the top right and Currently Assigned Abstracts on the bottom right.

Session Builder

Toggle Grids: [Assign Hosts](#) [Toggle View](#) [Clear Search](#)

[Create Session](#) [Delete Session](#) [Export to Excel](#) [Search for New Hosts](#) [Remove from View](#)

Select One... [Save/Edit](#) [Delete](#)

Search:

<input type="checkbox"/>	Edit	Title	A...	#
<input checked="" type="checkbox"/>	Edit	Administration #2	S...	7
<input type="checkbox"/>	Edit	Clinical # 19	C...	0
<input type="checkbox"/>	Edit	Clinical #25	C...	1
<input type="checkbox"/>	Edit	Clinical #3	C...	1
<input type="checkbox"/>	Edit	Clinical 19	C...	1
<input type="checkbox"/>	Edit	Clinical 30	C...	1
<input type="checkbox"/>	Edit	Clinical Session #1	C...	3
<input type="checkbox"/>	Edit	Clinical Session 25	C...	0
<input type="checkbox"/>	Edit	Clinical Trials		2
<input type="checkbox"/>	Edit	Clinical90		2
<input type="checkbox"/>	Edit	Equipment	P...	1
<input type="checkbox"/>	Edit	Oral Example		1
<input type="checkbox"/>	Edit	Plenary #98		1
<input type="checkbox"/>	Edit	Plenary 1	P...	2
<input type="checkbox"/>	Edit	Plenary 2		1
<input type="checkbox"/>	Edit	Poster 45		2
<input type="checkbox"/>	Edit	Poster Session #2	S...	2
<input type="checkbox"/>	Edit	Sample Session		0
<input type="checkbox"/>	Edit	Session Title #3	S...	1
<input type="checkbox"/>	Edit	Towards Common Wills		4

Page 1 of 1 | 50 Records per page | Displaying 1 - 22 of 22 | Selected 0 of 22

Currently Assigned Abstracts "Administration #2"

Duration: 90 min -- Remaining: 0 min Search:

Select One... [Save/Edit](#) [Delete](#)

[Add Placeholder](#) [Withdraw Selected](#) [Remove Selected](#) [Mass Update](#)

<input type="checkbox"/>	Control ID	Edit	Duration	Title	Order	Start Time	End Time	Day/Date
<input type="checkbox"/>	2082947	Edit	18	Abstract #1	1	8:00 AM	8:18 AM	Saturday 10/15/2016
<input type="checkbox"/>	2280347	Edit	18	Abstract #3	2	8:18 AM	8:36 AM	Saturday 10/15/2016
<input type="checkbox"/>	2280391	Edit	18	Abstract #5	3	8:36 AM	8:54 AM	Saturday 10/15/2016
<input type="checkbox"/>	2280392	Edit	18	Abstract #6	4	8:54 AM	9:12 AM	Saturday 10/15/2016
<input type="checkbox"/>	2280444	Edit	18	Abstract #7	5	9:12 AM	9:30 AM	Saturday 10/15/2016

To begin building your session, click **Create Session** at the top left of the Grid. Enter the required data and click **Save**. Your session will appear in the session listing on the left.

The screenshot shows the 'Session Builder' window. At the top, there are tabs for 'Assign Hosts' and 'Toggle View'. Below these, a 'Create Session' button is highlighted with a blue box. To the left of the main form is a list of session types, each with an 'edit' link and a checkbox. The list includes: Administrative, Clinical # 19, Clinical #25, Clinical #3, Clinical 19, Clinical 30, Clinical Sess, Clinical Sess, Clinical Trials, Clinical90, Equipment, Oral Example, Plenary #98, and Plenary 1. The main form has a tab labeled 'Information' and a button 'Add/Edit Hosts'. Below the tab is a section titled '[EDIT INSTRUCTIONS]'. The form contains several fields: 'Session Abbreviation:' with a text box and a help icon; '* Session Title:' with a large text box; 'Client Session ID:' with a text box; '* Session Type:' with a dropdown menu; 'Session Topic:' with a dropdown menu; and '* Duration (in minutes):' with a text box.

The next step is to add abstracts to the Session. Check the session title for the session with which you wish to work. From the Abstracts portion of the grid, drag and drop the desired abstracts to the **Currently Assigned Abstracts** section on the bottom right. Alternatively, drag and drop the abstract to the session title on the left.

Session Builder

Toggle Grids: [Assign Hosts](#) [Toggle View](#) [Clear Search](#)

[Create Session](#) [Delete Session](#) [Export to Excel](#) [Search for New Hosts](#) [Remove from View](#)

Select One... [Save/Edit](#) [Delete](#)

Search:

Control ID	Edit Abstr...	Title	Final ID	Presenting Author	Abstract Sta...	Re-Categorize
2287073	Edit	Abstract #15		Chambers, Patrick	Decisioned ...	Re-Categorize
2287074	Edit	Abstract #16		Chambers, Patrick	Decisioned ...	Re-Categorize
2287076	Edit	Abstract #18		Chambers, Patrick	Decisioned ...	Re-Categorize
2287077	Edit	Abstract #19!		Chambers, Patrick	Decisioned ...	Re-Categorize
2287119	Edit	Abstract #24		Donovan, Grace	Decisioned ...	Re-Categorize
2287127	Edit	Abstract #28		Donovan, Grace	Decisioned ...	Re-Categorize
2287130	Edit	Abstract #29		Donovan, Grace	Submitted	Re-Categorize
2287135	Edit	Abstract #31		Thompson, David	Decisioned ...	Re-Categorize

Page 1 of 1 | 50 Records per page | Displaying 1 - 22 of 22 | Selected 0 of 22

Currently Assigned Abstracts "Clinical # 19"

Duration: 0 min – Remaining: 60 min Search:

Select One... [Save/Edit](#) [Delete](#)

[Add Placeholder](#) [Withdraw Selected](#) [Remove Selected](#) [Mass Update](#)

Control ID	Edit ...	Duration	Title	Order	Start Time	End Time	Day/Date
------------	----------	----------	-------	-------	------------	----------	----------

To hide abstracts in the Abstracts section of the Grid, check the abstracts you wish to hide and select **Remove from View** in the top right corner. To make all abstracts visible again, click **Return to All Abstracts**.

Session Builder

Toggle Grids: [Assign Hosts](#) [Toggle View](#) [Clear Search](#)

[Create Session](#) [Delete Session](#) [Export to Excel](#) [Search for New Hosts](#) [Remove from View](#)

ASSIGN HOSTS TOGGLE VIEW

After abstracts have been assigned to the Session, the next step is to add hosts. Select **Toggle Grids: Assign Hosts**.

Session Builder

Toggle Grids: [Assign Hosts](#)

The grid has three main sections: Sessions on the left, Available Hosts on the top right, and Current Hosts on the bottom right.

The screenshot shows the Session Builder interface. On the left, there is a list of sessions with columns for Title, A..., and #... The session 'Clinical #25' is selected. On the top right, there is a list of available hosts with columns for First Name, Middle Name, Last Name, Institution, Email Address, Limit, and # of Assigned to Sessions. The host 'Christina' is selected. On the bottom right, there is a section titled 'Current Hosts "Clinical #25"' which shows a table with columns for First Name, Last Name, Institution, Email Address, and Role. The host 'Alexis' is listed as a Current Host.

To search for a host to add to the session, use the **Search** box to enter host information.

The screenshot shows the Search box at the top of the Available Hosts list. The search results are displayed in a table with columns for First Name, Middle Name, Last Name, Email Address, Limit, and # of Assigned to Sessions. The host 'Christina' is selected.

First Name	Middle Name	Last Name	Email Address	Limit	# of Assigned to Sessions
Grace		Donovan	gdovovan@donotsen...		1
Alex		Host	host10@donotsend.c...	5	3
Ben		Host	host7@donotsend.com	5	5
Christina		Host	host12@donotsend.c...	5	2
David		Host	s1ahost5@gmail.com	5	2
Elsie		Host	host15@donotsend.c...	5	3
Emily		Host	host17@donotsend.c...	5	0
Erica		Host	host16@donotsend.c...	5	1

Once you locate the correct host, drag and drop the host to the **Current Hosts** section in the bottom right.

Search:

<input checked="" type="checkbox"/>	First Name	Middle Name	Last Name	Email Address	Limit	# of Assigned to Sessions
<input checked="" type="checkbox"/>	Grace		Donovan	gdovovan@donotsend....		1

Page 1 of 1 | 50 Records per page | Displaying 1 - 1 of 1 | Selected 1 of 1

Current Hosts "Clinical #25"

Remove Selected

	First Name	Last Name	Institution	Email Address	Role
1	Alexis	Host	ScholarOne	host21@donotsend.com	Moderator

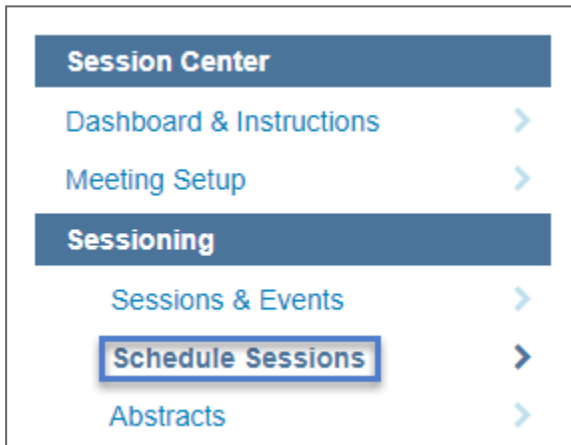
After you have added the abstracts and hosts, return to the **Session & Events** grid to view the complete session.

SCHEDULING SESSIONS & EVENTS

The Session Center features session scheduling tools designed to help you create your complete meeting program. There are two ways to schedule: The **Grid Scheduler** and the **Session Information** tab.

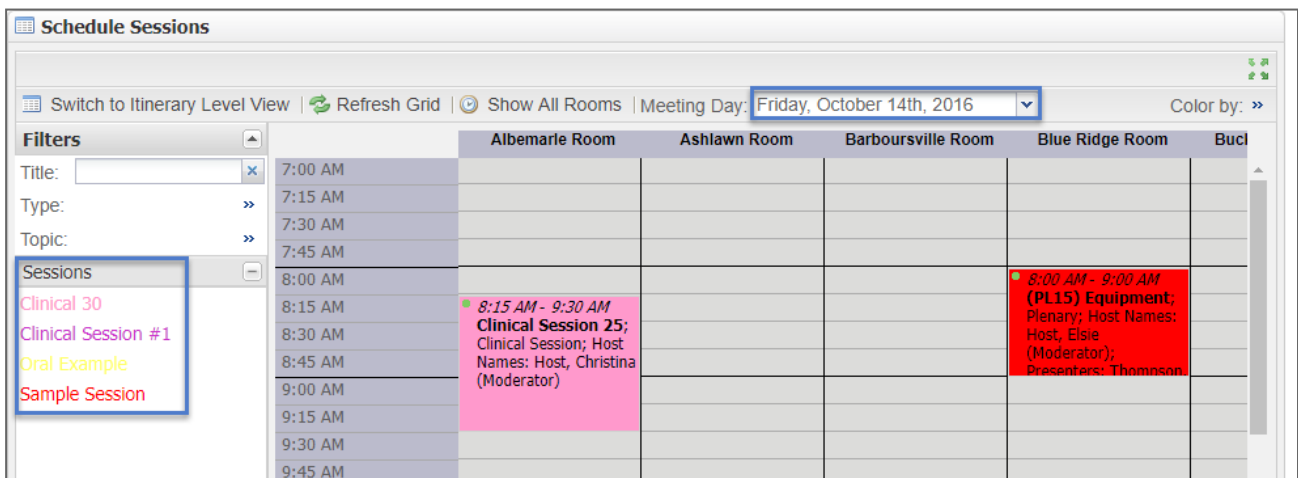
GRID SCHEDULER

The most popular way to schedule sessions and events is with the **Grid Scheduler**. To begin, select **Schedule Sessions** on the left-hand navigation pane.



Select the **Meeting Day** from the top drop-down menu and then drag **Sessions** to and from the pre-loaded sessions list into any of the available rooms. This tool allows users to drag sessions from room to room or time to time without needing to un-schedule them.

Note: A duration, room, or time of day may be changed without the date of the session updating.



Follow the same process for Events using the Event listing.

When viewing the schedule grid and red lines appear, this indicates the room is not available for scheduling during the selected days and times.

	Americas Seminar	Room 4a
7:00 AM		
7:15 AM		
7:30 AM		
7:45 AM		
8:00 AM		
8:15 AM		
8:30 AM		
8:45 AM		

If you chose colors for your session types (**Meeting Setup >Types or Topics**), the sessions will display in the grid with the appropriate colors. This makes it easier to see the layout of your different types of sessions and events.

In addition, a Sessioner may filter down the list of available sessions by typing text into the **Filter** area and pressing **Enter**. Clicking on a session will reveal details about that session or event in the **Session/Event Information** field.

Filters

Title: ×

Type: »

Topic: »

Sessions

- Clinical 30
- Clinical Session #1
- Oral Example
- Sample Session

Events +

Rooms +

Session/Event Information ▲

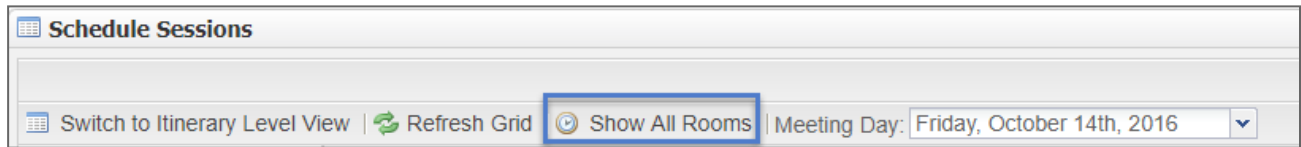
Abbrev: Clinical

Title: Session #1

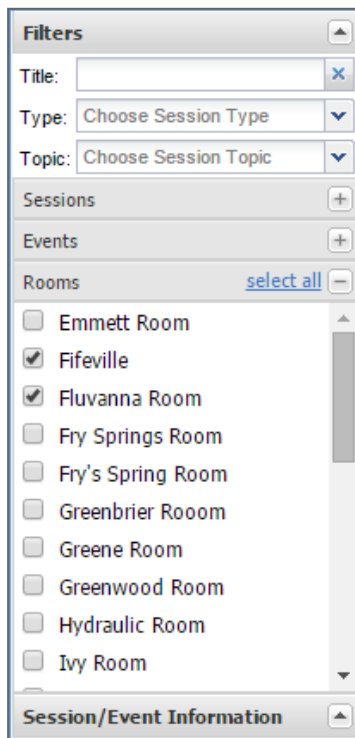
Tip: Assignments that run over the available time, conflict with previously assigned sessions, or result in Presenter conflicts will generate an error message, and the assignment will not be made. Assignment of concurrent sessions to a Room is allowed if the **Multiple Sessions** option is checked in the **Add/Edit Room** page.

Room Views

By default, the first ten rooms will be displayed (alphabetical sort). To show all rooms in the **Scheduling Grid**, click on **Show All Rooms**. You will then be able to scroll to all the rooms entered in **Meeting Setup > Programs > Rooms**.



You may also change the number of rooms displayed by dragging and dropping the rooms to the room listing in the left portion of the grid.



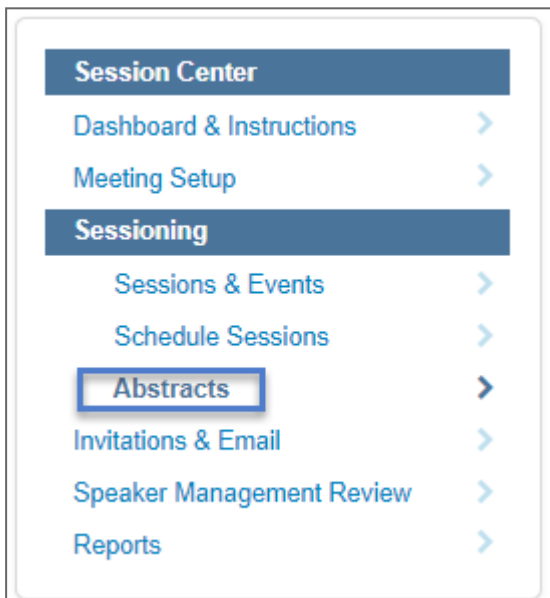
THE SESSION INFORMATION TAB

Access the **Information** tab by double-clicking on the desired session or by clicking the **Edit** option in the session row. In the bottom right corner are the three scheduling fields. Enter your desired schedule and click **Save**. This is a configurable option that your Client Implementation Manager can configure for your site.

Venue/Room:	Albemarle Room (Annual Meeting Program)	▼
Session Date:	Wed, Oct 14, 2015	📅
Start Time:	8:00 AM	▼

ABSTRACTS GRID

To view a complete listing of all submitted abstracts, select **Abstracts** from the left menu. This view can be useful in researching abstracts for inclusion in sessions.



The **Abstracts** grid can be customized in the same way as the **Session & Events** grid. Columns are sortable and configurable. There is also a **Search** option.

Abstracts						
Select One...		Save/Edit Delete		Search	Found In: All Columns	Clear Search »
Export to Excel		Toggle View				
<input type="checkbox"/>	Control ID	Edit Abstract	Title	Presentation Type	Category	Decision Status
<input type="checkbox"/>	2287047	Edit	Abstract #11	Oral Preferred	Basic Science	Accept for Podium
<input type="checkbox"/>	2287061	Edit	Abstract #12	Video	Clinical Science	Accept for Poster
<input type="checkbox"/>	2287067	Edit	Abstract #13	Poster Preferred	Clinical Science	Accept for Podium
<input type="checkbox"/>	2287074	Edit	Abstract #16	Video	Basic Science	Accept for Poster
<input type="checkbox"/>	2287077	Edit	Abstract #19	Poster Preferred	Basic Science	Accept for Podium
<input type="checkbox"/>	2287119	Edit	Abstract #24	Video	Basic Science	Accept for Podium
<input type="checkbox"/>	2287124	Edit	Abstract #27	Poster Preferred	Basic Science	Accept for Podium
<input type="checkbox"/>	2287127	Edit	Abstract #28	Video	Clinical Science	Accept for Podium

You can edit an abstract from this grid. Click on the blue **Edit** link (shown above) to access an abstract. You can then edit the abstract, close it, and return to the Abstracts grid.

Note: If changes are made to an abstract (for example, a presenting author is changed) and the abstract has been sessioned, no updates will occur to the Speaker Management grid. The session will need to be unfinalized and then refinalized for the updates to appear in the Speaker Management grid.

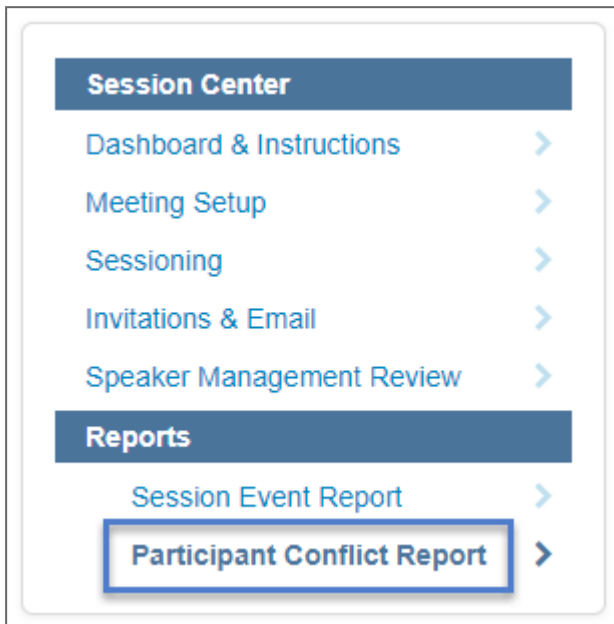
If you have the Final ID column configured, you can edit a Final ID directly from the grid. Use in-line editing to access the field and then edit the ID.

Export to Excel		Toggle View	
<input type="checkbox"/>	Control ID	Edit Abstract	Final ID
<input type="checkbox"/>	2082947	Edit	1
<input type="checkbox"/>	2280347	Edit	6
<input checked="" type="checkbox"/>	2280387	Edit	201610

REPORTS

PARTICIPANT CONFLICT REPORT

The **Participant Conflict Report** lists time conflicts for presenters and hosts. This allows administrators to move presentation times to remove the participant conflicts. To access the report, select **Reports** from the left-hand navigation pane and then select **Participant Conflict Report**.



Note: The report includes Final IDs and Control IDs for easy conflict resolution.

Select your session and topic (if configured) types. You will also indicate the buffer time. The buffer time is the minimum amount of time between sessions that the report will cover. Finally you will select to run the report on presenters only or both presenters and hosts.

Session Type:	<div> <div>Poster</div> <div>Poster 1</div> <div>Poster 2</div> <div>Scientific Session</div> </div>
Session Topic:	<div> <div>Clinical Trials</div> <div>Genetics of Cancer</div> <div>Immunotherapy</div> <div>Medical Administration</div> </div>
Buffer (min):	15
Role:	<div>Presenters and Session Host</div> <input type="checkbox"/> Include results where a presenter is also a host.
<div>Run Report</div>	

The report will display the conflicts in the schedule. In addition to the report results, when a session is scheduled and produces a presenter or host conflict an error message will appear.

SESSION EVENT REPORT

The **Session Event Report** can be found under **Reports** in the left navigation pane. This report lists all Events in the program along with the designated host, if applicable.

Event Title	Date	Start Time	End Time	Room	Abbr.	Type	Topic	Sponsor
Test Event	10/14/2015	09:00:00 AM	09:30:00 AM	Ashlawn Room (Thomson Reuters)		Meet the Expert		
Event Chair: Joseph JH Ackerman ackerman@wustl.edu								

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