SCHOLARONE ABSTRACTS™

v4.10 RELEASE NOTES

The following features are planned for release in *ScholarOne Abstracts* v4.10. This document provides information about the default configuration values and configuration time required for each of the features. If you have any questions, please contact, Chris Heid, Product Lead, at 434.964.4040.

This release includes enhancements or changes that will immediately impact all *ScholarOne Abstracts* users upon release. Please communicate to your users before the release to prepare them for any changes that might affect them. Other features must be activated by an administrator or ScholarOne representative for your users to benefit from the new functionality.

RELEASE SUMMARY

The default configuration settings and values for each of the features available are outlined below. If you wish to change any of the defaults, please contact your Client Implementation Manager or submit a case via the "Help" link on your *ScholarOne Abstracts* site.

FEATURE	SUMMARY
Redesigned Admin Center	The brand new Admin Center has been designed around usability and convenience. In addition to the device responsive framework established in other areas of the application, the new Admin Center includes a dashboard, expanded search capabilities, updated reports and even more self-service tools.
	Action Required: This feature can be activated through configuration. To activate this feature, contact your ScholarOne Client Implementation Manager.
Edit Abstract From Review Grids	A new, configurable link will be added in the v4.10 release allowing Admins to quickly and conveniently edit abstract information while in Review grids.
	Action Required: This feature can be activated through configuration. To activate this feature, contact your ScholarOne Client Implementation Manager.
Non-Required Scoring Columns	ScholarOne is adding the option to place a non-required scoring column in the Abstract Reviews grid. Previously, all visible scoring columns were required to complete the review.
	Action Required: This feature can be activated through configuration. To activate this feature, contact your ScholarOne Client Implementation Manager.

FEATURE	SUMMARY
Display of Invitation Close Date in CDE and Abstract Proofs	With the v4.10 release, Admins will be able to configure the Invitation Close Date as a data item in the 'Custom Data Export'. There will now also be a configurable option to display the Invitation Close Date on the Abstract Proof.
	Action Required: This feature is available to all clients; no other action is required to activate this feature.
Persistent Invitation Links	In the v4.10 release, ScholarOne Abstracts will give sites the option to shuffle the session assignment of abstracts while keeping the invitation data tied to the Abstract intact.
	Action Required: This feature can be activated through configuration. To activate this feature, contact your ScholarOne Client Implementation Manager.
HTML Whitelist for Instructions	As an important security measure, ScholarOne Abstracts will limit the allowed html entities in site instructions.
	Action Required: This feature is available to all clients; no other action is required to activate this feature.
Sunset of 'Accept' and 'Decline' Email Tags	In v4.10, ScholarOne Abstract will sunset the ##invite_accept## or ##invite_decline## to resolve functional incompatibilities with email security services, such as <i>Barracuda</i> .
	Action Required: This feature is available to all clients; no other action is required to activate this feature.
ScholarOne Abstracts Ideas	In conjunction with the <i>ScholarOne Abstracts</i> v4.10 release, we will also be launching ScholarOne Abstracts Ideas, a community-driven ideas portal that allows participants to post their product ideas, comment on the ideas of their peers, and vote to promote your favourites.
	Action Required: This feature is available to all clients; no other action is required to activate this feature.

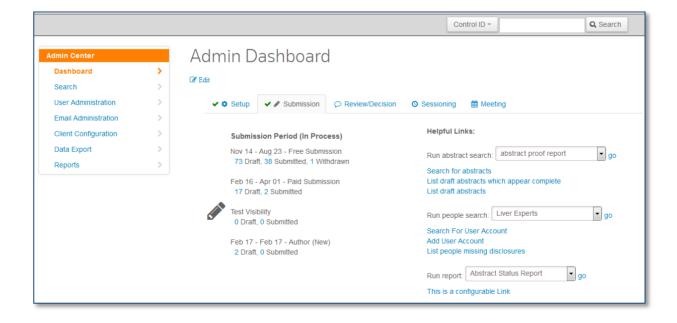
ADMIN CENTER

We have been adding high priority features and self service tools for site administrators over the last several releases and the *ScholarOne Abstracts* v4.10 release represents our largest leap forward in our efforts to enhance the administrative experience. In addition to moving the Admin Center to the "responsive" design framework (automatically identifies the user's device type (laptop, tablet, mobile phone, etc.) and adjusts the layout accordingly) previously implemented in other areas of the application, the following enhancements and new features are planned for the v4.10 release:

- New Admin Dashboard
- New Basic and Advanced Searching with Custom Email Integration
 - New Abstract Search Interface (Note this replaces the CDE)
 - New Session Search Interface
 - New Person Search Interface
- Streamlined Email Management Tools
- User Administration & Expanded Duplicate User Search
- New Reporting Tool
- Enhanced Configuration Tools

ADMIN DASHBOARD (NEW)

A new Admin Dashboard will be available in the redesigned Admin Center. The Admin Dashboard is designed to provide administrators with at-a-glance insight into where they stand in the meeting cycle. It serves as a launching point for drilling into details surrounding key meeting cycle indicators, identifying outstanding tasks, and streamlining the resolution of outstanding tasks.



The Admin Dashboard is highly configurable and may include the following tabs; with each tab displaying valuable information about each module within the site's meeting program workflow:

- Setup
- Submission
- Review/Decision
- Sessioning
- Meeting

Note: A green checkbox will display next to the tab label when the module is complete based on your site's workflow schedule.



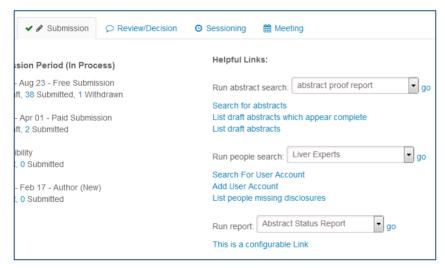
The information displayed on the left side of each tab is predetermined based on the constructed features of each site and includes key summary metrics allowing admins to drill down into the granular details and perform outstanding administrative tasks from the results (see New Basic & Advanced Searching with Custom Email Integration for more details).

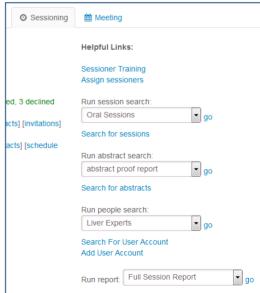


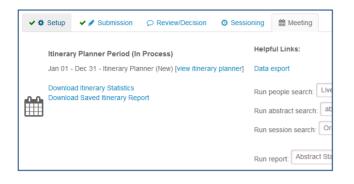
The Helpful Links on the right side of each tab are configurable by user role. The Helpful Links are designed to streamline performing tasks on other pages within the Admin Center, other pages within ScholarOne Abstracts, or on sites outside the application. The following is an initial inventory of Helpful Links that can be configured to display on any or all of the available dashboard tabs:

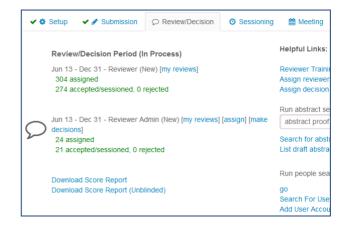
- Links to Self Service site configuration tools
 - Site Information
 - General Configuration
 - o Site Schedule
 - Email Template Setup

- o Configure System Page Instructions
- Links to Training Materials
 - Site Administrator Training Link
 - Site Reviewer Training Link
 - Site Sessioner Training Link
- Links to User Administration
 - o Add User Account
 - Search for User
 - Find people missing disclosures
- Links to Abstract Administration
 - Search for draft abstracts
 - o Find draft abstracts with all fields filled in
- Links to perform basic and advanced searches with custom email integration
 - Search for people
 - Search for abstracts
 - Search for sessions
- · Links to run saved basic and advanced searches, including custom emails
 - Run abstracts saved search
 - o Run session saved search
 - Run person saved search
- Links to perform assignment tasks
 - Assign reviewers
 - o Assign sessioners
 - Assign decision makers
- Links to Data Exports and run New Reports
 - o Data Export
 - o Run report
- Ability to add one or more ad-hoc links to sites outside the ScholarOne Abstracts application
 - Configurable URL





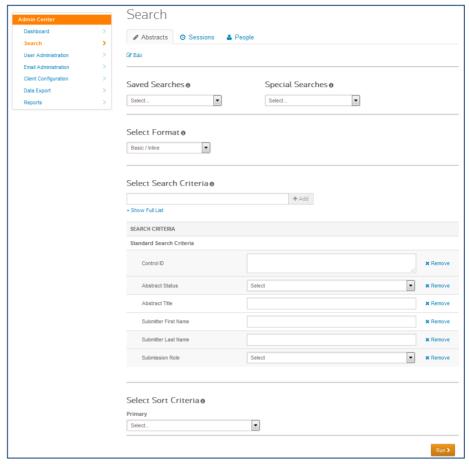




Please Note: The legacy score report and abstract score report (unblinded) will be available for download from the Review/Decision tab. The legacy Itinerary Planner Statistics report and Saved Itinerary report will be available for download from the Meeting tab.

NEW BASIC & ADVANCED SEARCHING WITH CUSTOM EMAIL INTEGRATION

The new Admin Center search capabilities provide a flexible and consistent interface for quickly or methodically exploring your meeting data and performing key tasks from the search results. When compared to similar functionality in the legacy admin center, the new Admin Center search interface consolidates the basic and advanced searching options, special reports, and includes the ability to send custom emails.



The three main data points to search across are represented as tabs across the top of the Search page. The Abstracts tab replaces the functionality found in the legacy Customizable Data Export (CDE). The Sessions and People tabs expand the search capabilities previously offered to include the very same popular features found only in the legacy CDE.



Each search tab includes the ability to run saved or special searches and select an output format.

Saved Searches:

Admins can build custom searches and save those searches they wish to run again in the future (similar to the CDE). Also, as noted in the Admin Dashboard, saved searches can be quickly run from the Helpful Links. Please note all your previously saved CDE searches will be available in the new Abstract Search.



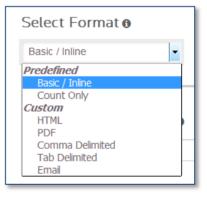
Special Searches:

Special Searches is the new home for the Special reports found in the legacy admin center. Similar to saved searches, Special Searches populate the format and search criteria when selected. The search can be modified prior to running the search; however, the modifications can only be saved as a Saved Search.

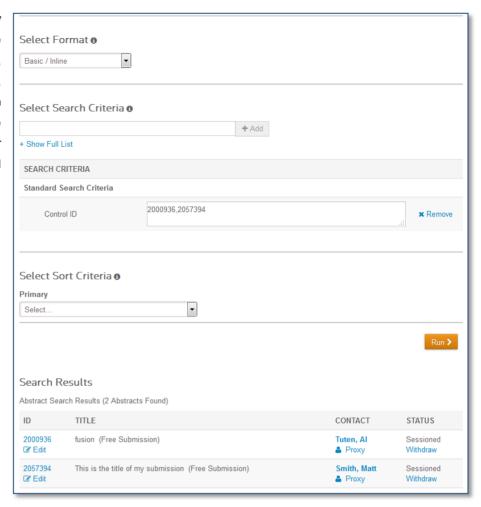


Select Format:

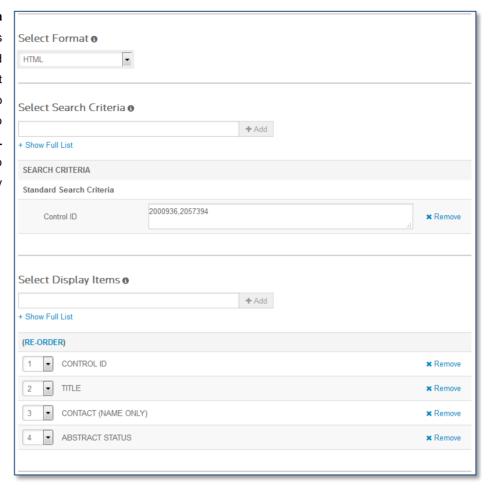
The available report output formats are divided into two sections; Predefined and Custom. The Predefined formats will provide the results in a predetermined format and the Custom formats will allow admins to define the output fields for the search results or send a custom email.



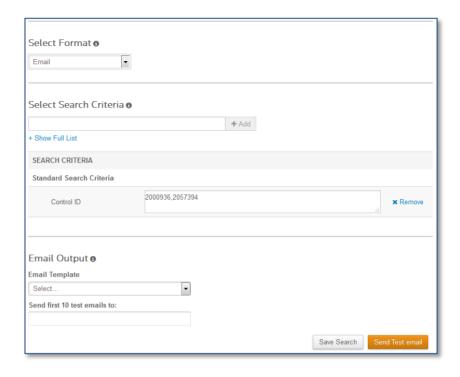
The **Basic/Inline** format is selected by default, and is leveraged to display the results from Admin Quick Searches, Admin Dashboard detailed drill downs, and **Special Searches**. The Search Results of a Basic/Inline search are displayed on the search page and offer the ability to perform tasks on each record returned.



The Count Only, HTML, PDF, Comma Delimited, and Tab Delimited formats replace the functionality currently offered in the CDE. With the exception of Count Only, these formats allow the admin to select the fields (Select Display Items) to display in the search results. The HTML option will provide equivalent formatting to the 'Table Format' option in the legacy Admin Center.

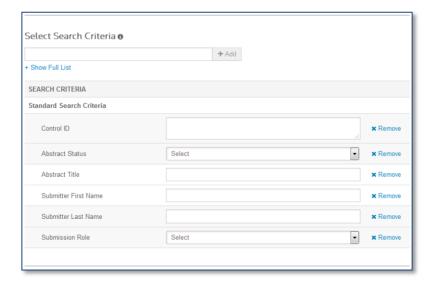


The Email format replaces the custom "email test and send" functionality found in the legacy admin center. This makes it much simpler for admins to run a count or display the full list of search results/email recipients prior to testing and sending a custom email blast.

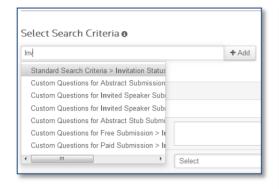


Select Search Criteria:

Each search tab will display default search criteria and provide admins with the ability to add additional search criteria for custom targeted searches.

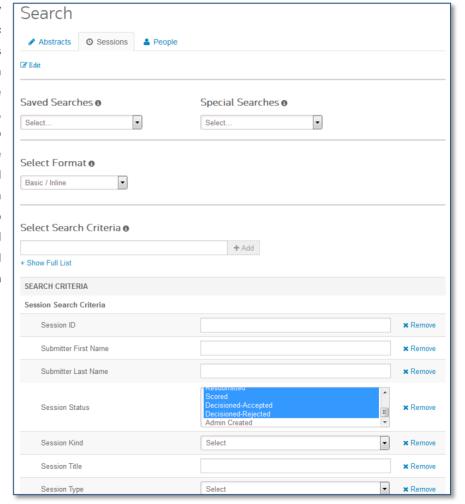


Custom search criteria can be found and added via a type-ahead search or by expanding the full list of available criteria.



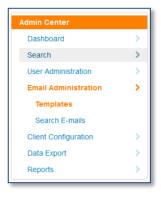


Please Note: Admins familiar with the legacy Session Proposal Quick Search and Basic Search will want to use the Session Status Search Criteria to ensure only Session Proposals are returned in the results. The integrated Session Search (Quick, Basic, Advanced/Custom) has been expanded to include all sessions. includina sessions created in the Session Center. All sessions that are created in the Session Center will have a Session Status equal to Admin Created. To perform a search that will only return Session Proposals, admins will want to exclude sessions with a Session Status equal to Admin Created.



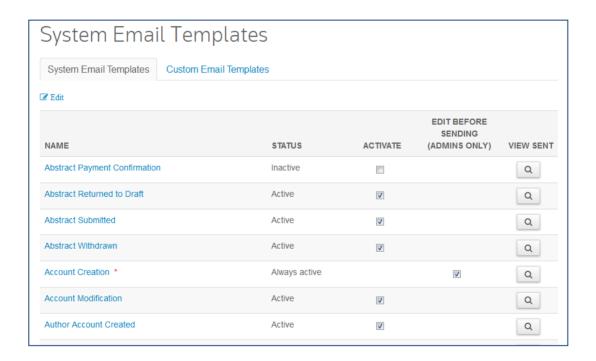
STREAMLINED EMAIL MANAGEMENT TOOLS

The new **Email Administration** menu option allows administrators to manage a site's system and custom email templates as well as search for the system or custom emails sent from the *ScholarOne Abstracts* application.

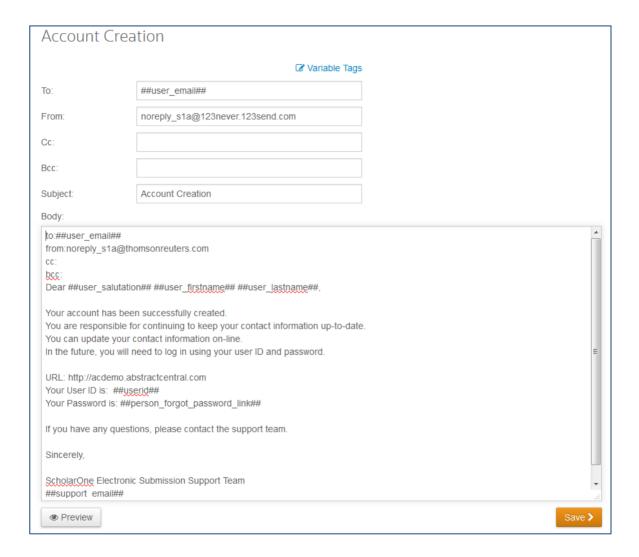


Templates:

System Email Templates, when active, are automatically sent based on events occurring in the *ScholarOne Abstracts* application. Custom Email Templates are available to be manually sent individually or in batch to recipients generated from Search results.

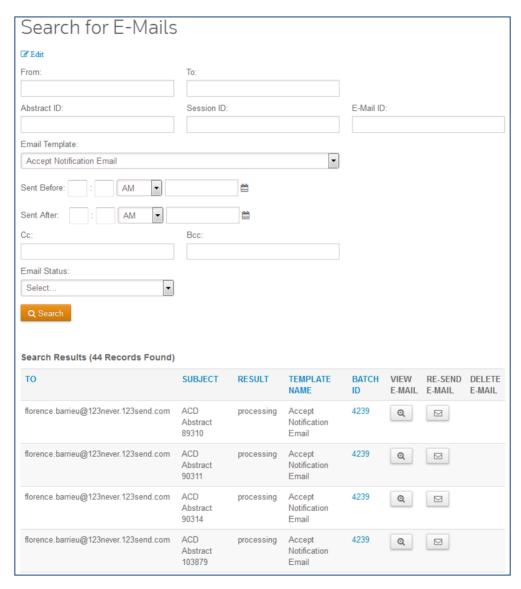


Selecting the template name will allow admins to view and edit the email template. The **Variable Tags** (designed for adding dynamic and personalized email recipients and email content) option will pop-up the variable tags menu in a new window allowing admins to simply copy from the tag list and paste to the email template. In addition, the **Preview** option provides the ability to view a sample of the email recipients and content with all non user specific variable tags resolved.



Search Emails:

Selecting the **View Sent** option for a system or custom email template will run a Search Emails query to display all emails sent for a template. Admins also have direct access to the email search tool from the Admin Center menu on the left. The search results will include every email sent that matches the search criteria. Admins can organize search result sets by selecting column headers to sort the displayed records.

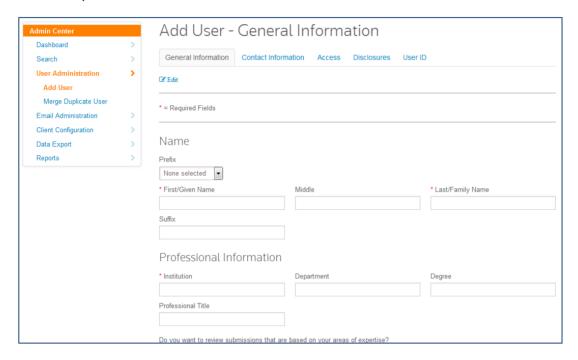


A **Batch ID** is displayed when an email was created from a custom search. Selecting the Batch ID provides the ability to view specific details about the entire email batch, including the ability to update the search results to include only emails sent with the selected batch.

The admin can also view and manually re-send sent emails. In addition, the re-send option provides the ability to preview and edit the recipients and contents prior to sending the email.

USER ADMINISTRATION & EXPANDED DUPLICATE USER SEARCH

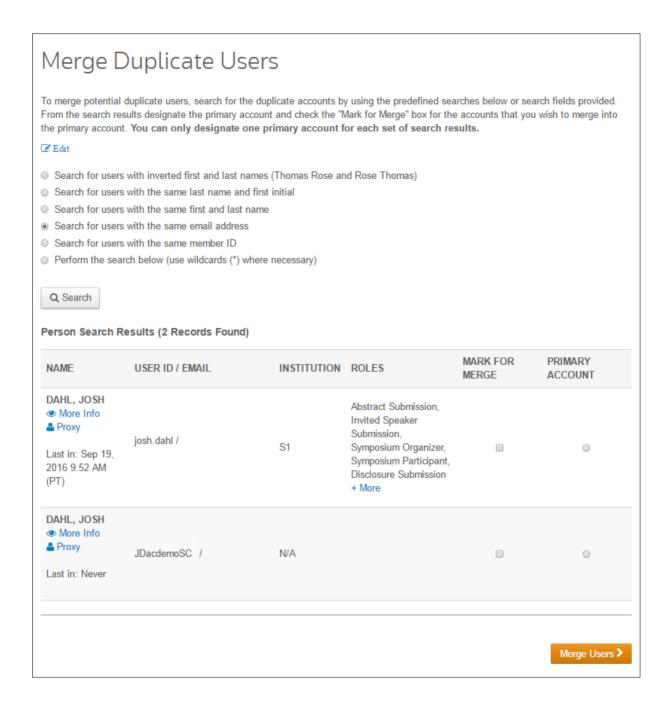
The **User Administration** option includes a refreshed Add User experience and expanded searching capabilities to help admins quickly find and resolve duplicate user accounts.



In addition to performing a search for users with any combination of the same First Name, Last Name, Member ID, and Email, the Merge Duplicate User tool will allow admins to quickly search across the user database to identify all of the following potential duplicates:

- Search for user with inverted first and last names (Thomas Rose and Rose Thomas)
- Search for user with the same last name and first initial
- Search for user with the same first and last name
- Search for user with the same email address
- Search for user with the same member ID

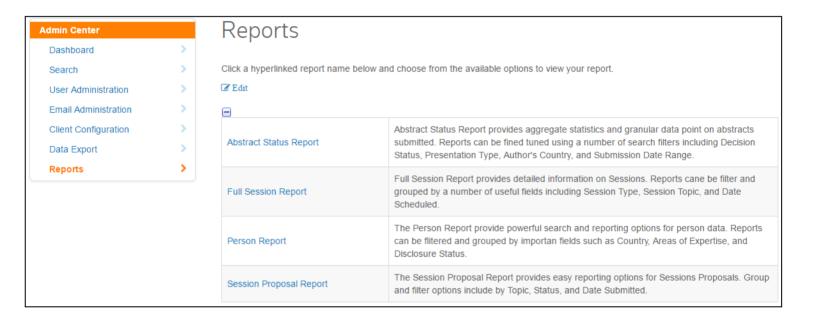
When a duplicate user is found, the accounts can be merged in one step by selecting the accounts to be merged, and then indicating which of the selected accounts is the primary (merge-to) account.



NEW REPORTING TOOL

In addition to more powerful search capabilities, the new Admin Center includes an initial set of reports built on a new reporting platform. The new reports are designed to allow admins to visually represent the statistical data from their meeting sites in an easy to read layout. The initial reports available in the *ScholarOne Abstracts* v4.10 release include:

- Person Report
- Abstract Status Report
- Full Session Report
- Session Proposal Report





Data Date: Sep 1, 2016, 12:59 PM

Abstract Status Report

SCHOLARONE™

Export as : PDF | Excel

Detailed Report

Selected Criteria

Submission Role: all

Submission Status: all

Decision Status: all

Presentation Type: all

Presentation Sub-Type: all

Category: all

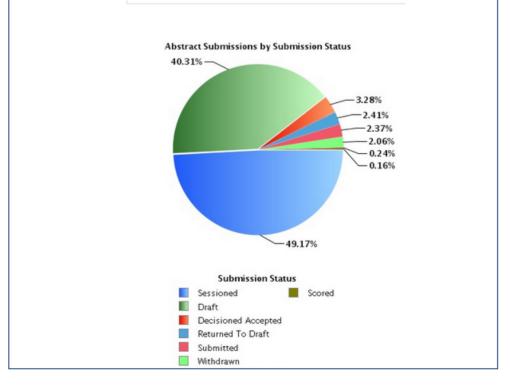
Sub-Category: all

Author's Country: all

Date Submitted: from earliest to latest

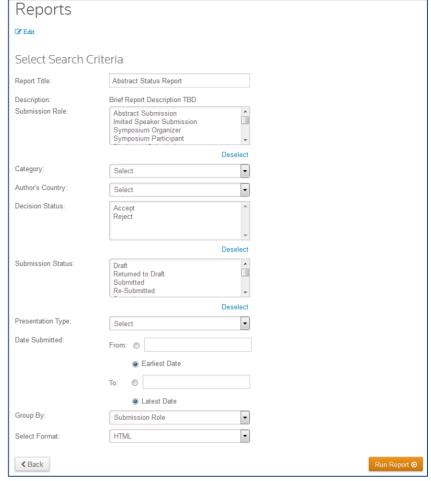
Group By: Submission Status

Submission Status	\$	# Submissions \$	Percentage
Sessioned		1243	49.17%
<u>Draft</u>		1019	40.31%
Decisioned Accepted		83	3.28%
Returned To Draft		61	2.41%
<u>Submitted</u>		60	2.37%
Withdrawn		52	2.06%
Decisioned Rejected		6	0.24%
Scored		4	0.16%
	Total	2528	100.00%



Each report includes the ability to control the summary information and details returned for each run. Prior to running a report, admins will drive the output by defining four key elements:

- Report Title
- Criteria
- Grouping
- Format



Report Title:

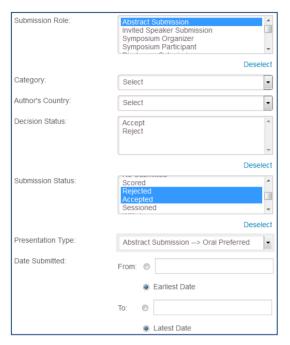
Each report will display a default report title and will provide the ability for admins to customize the title allowing them to label the report based on the report criteria and audience.





Criteria:

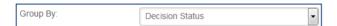
Each report will allow admins to select from a variety of criteria, providing the ability to customize (slice & dice) the data set represented in the report output. In addition, all criteria selected for a report is referenced in the report output.

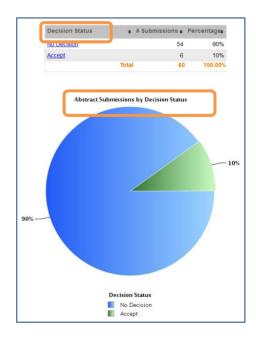


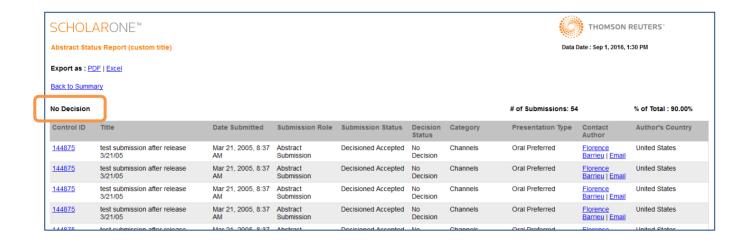


Group By:

Each report will allow admins to group the report data to drive the report summary table, chart, and detailed output.







Format:

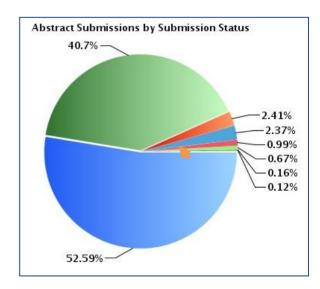
Each report will allow admins to export the results in a PDF or Excel file, or view the report in their browser (HTML). When selecting to view a report in HTML, admins will have the ability to export the current view into PDF or Excel.

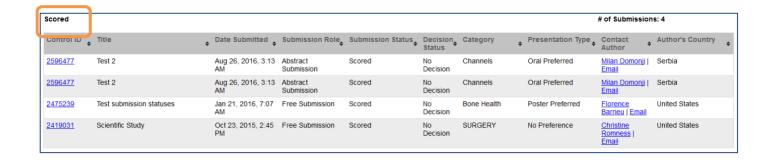




The HTML format also includes the ability to drill down into a subset of the details from the summary chart or table by simply clicking on the chart or selecting a link from the summary table.

Submission Status	\$ #!	Submissions +	Percentage \$
Sessioned		1331	52.59%
<u>Draft</u>		1030	40.7%
Returned To Draft		61	2.41%
Submitted		60	2.37%
<u>Withdrawn</u>		25	0.99%
Decisioned Accepted		17	0.67%
<u>Scored</u>		4	0.16%
Resubmitted		2	0.08%
Author Withdrawn		1	0.04%
	Total	2531	100.00%





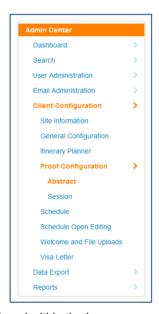
All report details can be displayed in groups by selecting the Detailed Report link.



ENHANCED CONFIGURATION TOOLS

Along with updating to the new User Interface framework, the admin self service configuration options have been organized under the Client Configuration.

New Menu



Legacy Menu

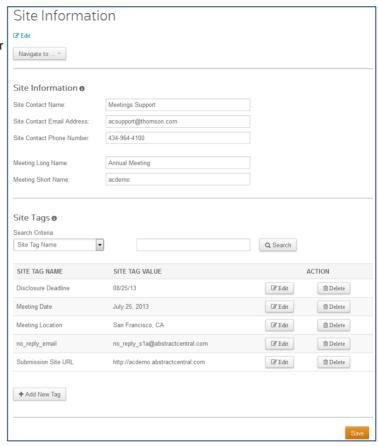


In addition, items found within the legacy pages have been re-organized and new self-service tools have been added giving admins greater control and flexibility over key functionality within their meeting sites.

Items previously managed from within the legacy Configuration Settings option are now found under the Site Information, General Configuration, and Itinerary Planner options in the new Admin Center.

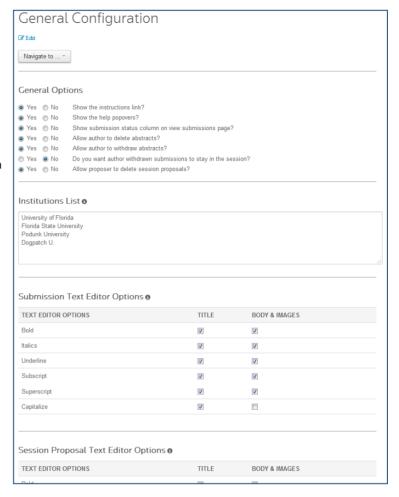
Site Information:

The **Site Information** page will provide admins with the ability to manage the Site Information and System Tags for their meeting site. These items were previously managed on the legacy Configuration Settings page.



The **General Configuration** page will provide admins with the ability to manage the following items:

- General Options (New)
- Institutions List (New)
- Submission Text Editor Options (legacy Configuration Settings)
- Session Proposal Text Editor Options (legacy Configuration Settings)
- System Page Instructions (legacy Configuration Settings)
- Announcements Message (New)



The **General Options**, **Institutions List**, and **Announcements Message** are new self-service options previously managed by a ScholarOne Client Implementation Manager.

The **General Options** section provides admins with control of key user functionality available within the Submission and Session Proposal centers.

```
General Options

Yes No Show the instructions link?
Yes No Show the help popovers?
Yes No Show submission status column on view submissions page?
Yes No Allow author to delete abstracts?
Yes No Allow author to withdraw abstracts?
Yes No Do you want author withdrawn submissions to stay in the session?
Yes No Allow proposer to delete session proposals?
```

The 'Show the instructions link?' option allows admins to control whether the "Full Instructions" link displays to users in the Submission and Sessions Proposal centers

The 'Show submission status column on view submissions page?' option allows admins to control an author's ability to view the current status of abstract submissions.

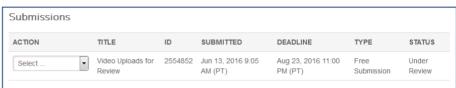
The 'Allow author to delete abstracts?' option allows admins to control the author's ability to delete an abstract currently in draft status.

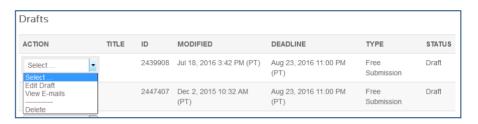
The Allow author to withdraw abstracts? option allows admins to control the author's ability to withdraw a submitted abstract.

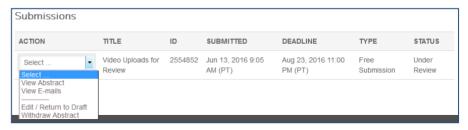
The **Do you want author withdrawn submissions to stay in the session?** option allows admins to control whether author withdrawn abstracts remain assigned to a session.

The Allow proposer to delete session proposals? option allows admins to control the proposer's ability to delete a session proposal currently in draft status.





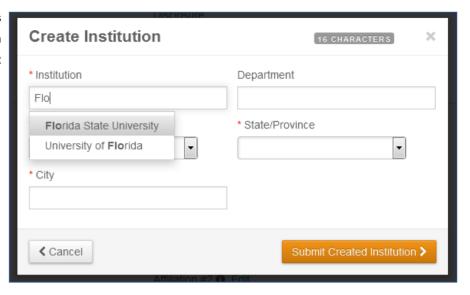








The **Institutions List** section provides admins with control of the type-ahead search results list for the Institution field on account profiles and when adding authors.



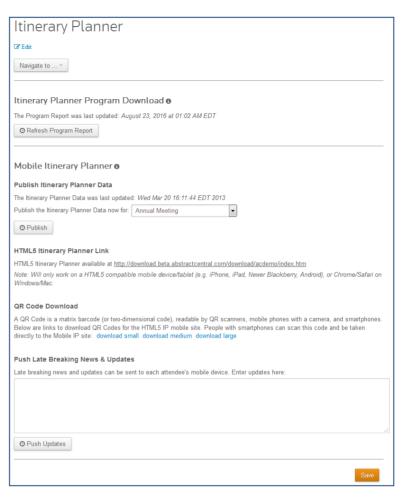
The **Announcements Message** section provides admins with control of posting announcements to the meeting site login page.



Itinerary Planner:

The Itinerary Planner page provides admins with the ability to manage the following items:

- Itinerary Planner Program Download (legacy Configuration Settings)
- Mobile Itinerary Planner: Publish Itinerary Planner Data (New)
- Mobile Itinerary Planner: HTML5 Itinerary Planner Link (New)
- Mobile Itinerary Planner: QR Code Download (New)
- Mobile Itinerary Planner: Push Late Breaking News & Updates (legacy Configuration Settings)

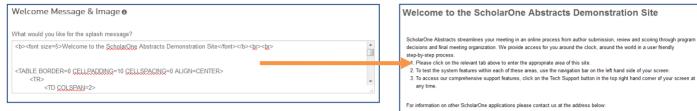


Welcome & File Uploads (New):

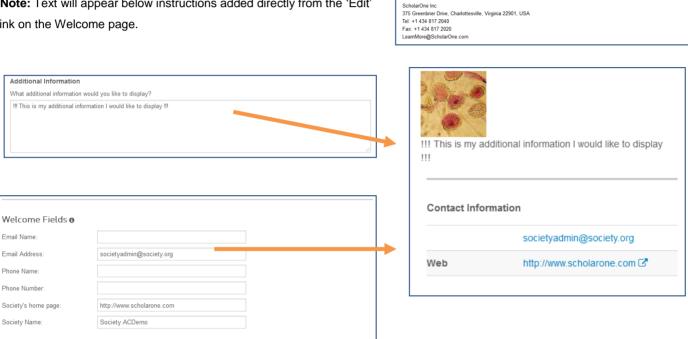
The **Welcome and File Uploads** page will now give admins the ability to manage the entire Welcome Page for their meeting site.



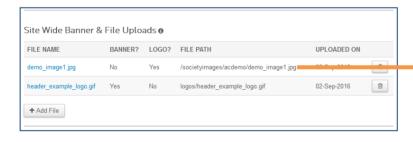
Welcome Page text



Note: Text will appear below instructions added directly from the 'Edit' link on the Welcome page.



Banner and Images

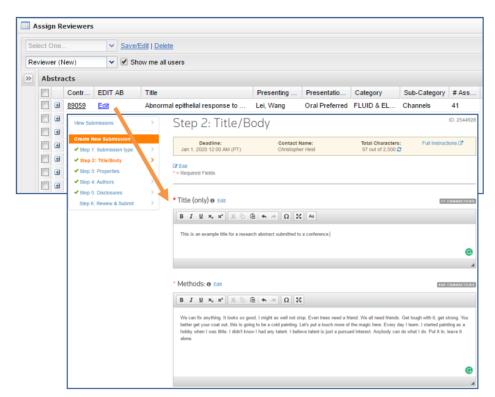




EDIT ABSTRACT FROM REVIEW GRIDS

Reviewer admins often need to edit abstracts while completing administrative tasks. Many of these edits can be made with inline editing tools, but it is not uncommon for an abstract to require more extensive changes. Currently a user's only means of making such edits is to leave their active work, run a search, dig into the submission, edit, and then return to the Review Center.

To improve this workflow for Reviewer Admins in ScholarOne Abstracts, the v4.10 release will feature a role-based, configuration

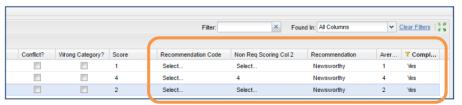


options which will provide a link to edit abstracts from the Assign Reviewers grid, the Reviewer Score report, and the Reviewer Status report. When configured, an Edit link will display after the CID in these grids. When clicked by the user, the link will open a pop-up window where the abstract is fully editable without taking the user away from their current workspace.

NON-REQUIRED SCORING COLUMNS

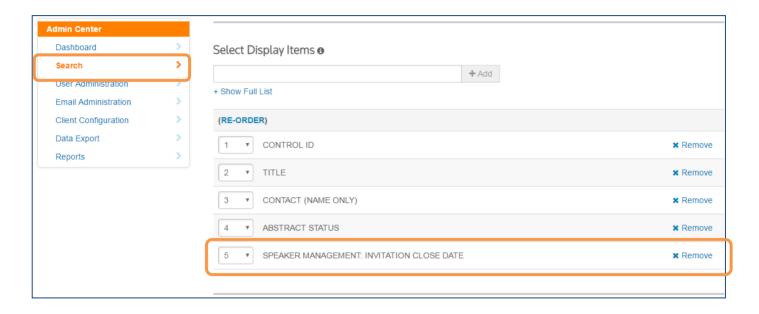
In the v4.10 release ScholarOne Abstract will offer a 'non-required' reviewer score option. Previously, any scoring column configured for a review was 'required'. There are numerous scenarios where a meeting may want to collect scoring for a particular item, but not require it. With this added flexibility, reviewers see a "Yes", denoting a completed review, when all 'required' fields are answered. The reviewer has the option to answer the non-required fields.

Please note: Non-required scoring field will still be included in the calculation of average score. Non-required fields left blank will be included in the calculation as a zero. Additional calculation options will be developed in an upcoming release.

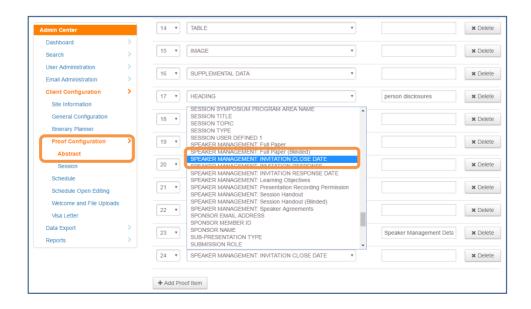


DISPLAY OF INVITATION CLOSE DATE IN CDE AND ABSTRACT PROOFS

With the v4.10 release, Admins will be able to configure the Invitation Close Date as a display item in the search features built into the new Admin Center. Under Admin Center > Search, the 'Invitation Close Date' display item may be found using the type-ahead search bar or selected from the full list under **Speaker Management: Invitation Close Date**.



Also in the v4.10 release, Invitation Close Date will be added as a configurable display in Proof Configuration so sites can display this data for each abstract proof. To configure this field in the new Admin Center, select **Proof Configuration > Abstracts** and add **Speaker Management: Invitation Close Date** as a proof display item in the desired position. Invitation Close Date is also available as a configuration option for abstract proofs in the legacy Admin Center.



HTML RESTRICTIONS FOR SITE INSTRUCTIONS

Recent security reviews of ScholarOne Abstracts flagged unrestricted entry of HTML in site instructions as security vulnerability. Unchecked use of HTML in the application gives potential malicious actors additional means, such as cross site scripting, to breach our system. We take the security of your data and our system very seriously. Restricting instructions to a list of allowed HTML entities and attributes greatly reduces the risk described above.

ALLOWED ENTITIES AND ATTRIBUTES WHEN MANUALLY ENTERING HTML IN INSTRUCTIONS

```
Formatting elements: "b", "i", "font", "s", "u", "o", "sup", "sub", "ins", "del", "strong", "strike", "tt", "code",
    "big", "small", "br", "span", "p", "div", "h1", "h2", "h3", "h4", "h5", "h6", "ul", "ol", "li", "blockquote", "hr", "em", "center"

Formatting attributes: "accesskey", "class", "contenteditable", "contextmenu", "draggable", "id", "lang", "spellcheck",
    "style", "tabindex", "title", "translate", "color", "background-color", "size", "target", "noshade"

Table elements: "table", "th", "tr", "td", "caption", "colgroup", "col", "thead", "tbody", "tfoot"

Table attributes: "align", "bgcolor", "border", "cellpadding", "cellspacing", "sortable", "summary", "width",
    "accesskey", "class", "contenteditable", "contextmenu", "draggable", "id", "lang", "spellcheck", "style",
    "tabindex", "title", "translate", "valign", "rowspan", "colspan"

Video elements: "video", "source"

Video attributes: "autoplay", "controls", "height", "loop", "muted", "poster", "preload", "src", "width",
    "accesskey", "class", "contenteditable", "contextmenu", "draggable", "id", "lang", "spellcheck", "style",
    "tabindex", "title", "translate"
```

SUNSET ACCEPT AND DECLINE DEEP LINK EMAIL TAGS

Earlier this year, ScholarOne began receiving reports from clients that network security services, such as *Barracuda*, were clicking links found in emails as part of their fraud protection process. This creates a challenge for deeplink email tags used in ScholarOne Abstracts' emails. These tags resolve to a hyperlink for the email recipient and allow the recipient to respond to an invitation by clicking either the ##invite_accept## or ##invite_decline## tag. By systematically clicking embedded hyperlinks as emails are received, these security products are erroneously registering responses on behalf of users who have not yet read the email. After working with *Barracuda*, ScholarOne determined the best resolution was to require users to confirm their response in the application and sunset the ##invite_accept## or ##invite_decline##. Existing templates with either of these tags will be automatically modified to use the ##view_invitation(deep_link)_plain_text## tag which links the user directly to the appropriate invitation in the Invitation Center. This new path for invitation responses will allow *ScholarOne Abstracts* to adapt new industry practices while maintaining functionality for users.

PERSISTENT INVITATION LINKS

In the v4.10 release, ScholarOne Abstracts will give sites the option to shuffle the session assignment of abstracts while keeping the invitation data tied to the Abstract intact.

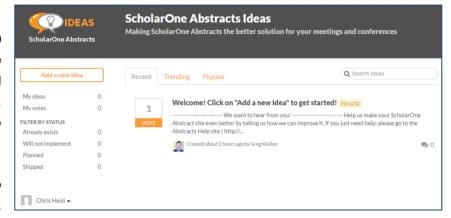
When the "Persistent Invitations" configuration is turned on, abstracts may be withdrawn and reassigned to the same session or a new session without affecting the status or data associated with the invitation.

Persons with an existing invitation on an abstract which has been removed from a session or withdrawn will not see invitation in their Invitations list. If they click on one of the email links (accept/decline/view invitation), they will receive the message "The abstract linked to this invitation is no longer available. Please contact your society for more information." However, when the abstract is assigned back to the same session or a different session and the session is finalized, the invitation will appear for the user and will maintain all of the previous data and status information. Each aspect of the invitation remains the same except it is tied to the new session. Existing email links will now work and the invitation will now appear in sessions -> invitation grid.

SCHOLARONE ABSTRACTS IDEAS

In conjunction with the *ScholarOne Abstracts* v4.10 release, we will also be launching ScholarOne Abstracts Ideas, a community-driven ideas portal that allows participants to post their product ideas, comment on the ideas of their peers, and vote to promote your favorites.

ScholarOne Abstracts Ideas is a great way to provide product feedback to the ScholarOne team,



interact and get ideas from other *Abstracts* user, and stay up to date on which requested features will be launched in coming releases. Please be on the lookout for more information regarding ScholarOne Abstracts Ideas in mid November.