



Session Organizer Setup for Presentation Management

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Summary

Administrators are seeking to assign Sessions to specific Presentation Management Session Organizers. These individuals will have the responsibility of reviewing (downloading) or editing (uploading and deleting) presentations within the Portal. Similar to presenters, this authorized role will have access to the presentations via the Portal to ensure quality control.

To assist CTI employees in following along, this document provides a step-by-step guide for setting up the meeting “CTI Demo Association (1875)” on Production.

Creating Activity Types for Session Organizers

The term “Activities” refers to content and role structures within the CTI tool. Common Activities for Presentation Management include “Session Scheduler”, “Moderators”, “Session Chair”, “Invited Speakers”. Each Activity can have its own structure (e.g., title, keywords, author block, abstract body, payment records) and its own workflow rules which will control the completion status. Setting up Activities to match the data you are trying to collect and workflow rules you are enforcing will make for the smooth operation of the virtual event and rich reporting. CTI allows administrative users to set auto-promotion functionality at the Activity type level. Auto-promotion rules will move and process content automatically, freeing administrators to monitor and report.

In **Settings -> Meeting set-up -> Collection activities & roles**, each activity has its own details page.

1. Click “Create a New Activity”
2. Provide the name for the activity (e.g., CME Reviewer), choose an Author Block Style (e.g., 1), and make sure to check “Session Organizer.” Fill out the:
 - a. Control number prefix: Usually a short text to see the meeting, year, and identify the activity type
 - b. Topic Selection List: The list of topic/category choices for the Topic step
 - c. Author Block Style: Which style of author block will be published?
3. Click “ADD”

Create an New Activity

* Name of Activity: (ie. Abstract, Moderator, Invited Speaker)
CME Reviewer

* Author Block Style: (Which style of author block will be published?)
1-Standard with Bold (ASM General)

Unsolicited? (Can users create their own records for this activity?)

Dashboards

Submission? (Is this a Submission Activity?)

Reviewer? (Is this a Reviewer Activity?)

Presentation? (Is this a Activity meant for Presentation?)

Session Organizer? (Is this a Session Organizer Activity?)

* Topic List: (The list of topic/category choices for the Topic step)
_presentationReviewStatusForCME

* Control Number Prefix: (usually a short text to see meeting/year and identify activity type)
TVT

* Control Number Postfix: (should be your Association abbreviation)
TVT

ADD

Setting Up Media Items for the Portal

To simplify the setup process, we offer a method for bulk assigning permissions based on Session type and Activity type (also referred to as Role). You can find these controls on the Session tab within **Settings -> Workflow Applications -> cPortal -> Session**.

To begin, make sure that the following Session organizer fields for the Portal are **ON**. The **Navigation Label** allows an administrator to specify the term for “Session Organizer” on the tab in the Portal, for example, “Session Builder.”

Portal Settings

Meeting information Submission Review Session Submission **Session** Presentation Booth Tasks Messages

Session organizers

Show session organizer tab ON Navigation Label {term: session} organizer

Session organizers can add/edit media items ON

Session leaders

Show session tab ON Navigation Label Session Organizer

Page instructions B / I
Please review these sessions.

Page instructions for session details B / I
Please review the presentations in this session.

Session leaders can add/edit media items ON

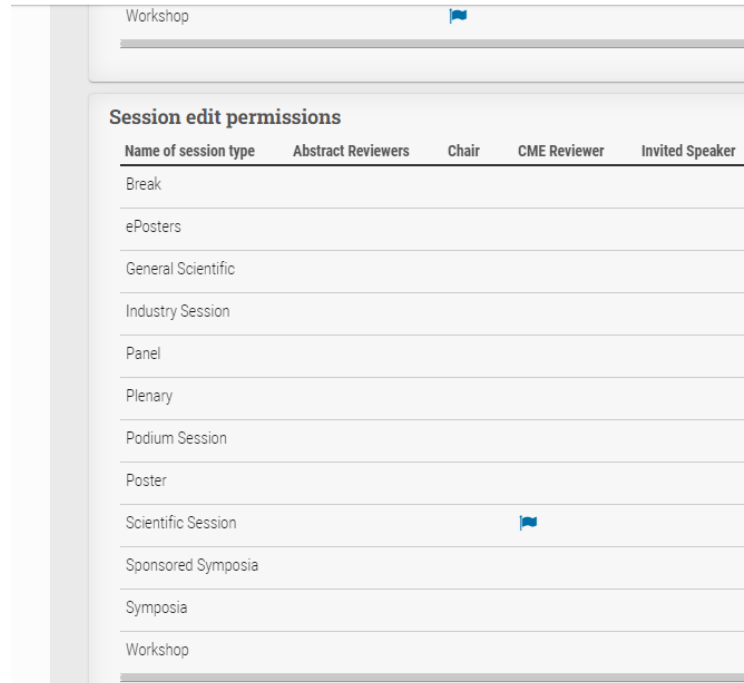
There are two permission tables at the bottom of the page: Session View Permissions and Session Edit Permissions. Within these tables, session types are listed on the left side, while activity types are listed

across the top. Clicking the flag(s) in these tables assigns specific roles to the sessions within the corresponding activity or session type. Additionally, on the right side, there are two-row actions that allow you to 'Select All' or 'Deselect All' the flags.

We define Session View and Edit Permissions as follows:

- **Session View Permissions:** This allows the role to download media items from the Portal (useful for moderators, for example).
- **Session Edit Permissions:** This allows the role to download, upload, and delete media items on the Portal. Onsite personnel with the cSlide Session Room Agent downloaded can also preview the file (this option only appears when the Agent is downloaded).

Portal Settings



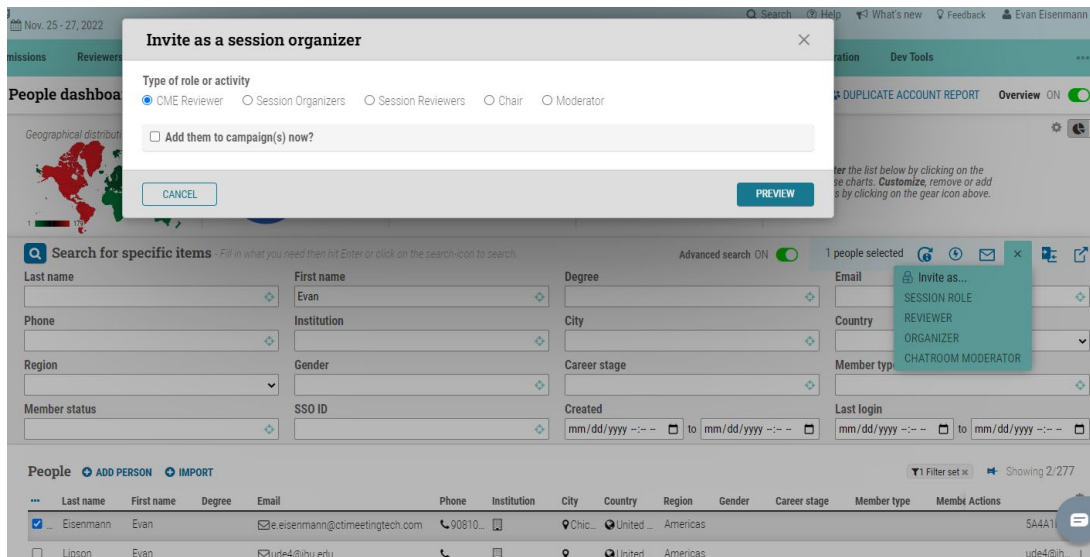
The screenshot shows a web interface for 'Workshop' settings. A table titled 'Session edit permissions' lists various session types and their associated roles. The roles are 'Abstract Reviewers', 'Chair', 'CME Reviewer', and 'Invited Speaker'. A blue flag icon is present in the 'CME Reviewer' column for the 'Scientific Session' row.

Name of session type	Abstract Reviewers	Chair	CME Reviewer	Invited Speaker
Break				
ePosters				
General Scientific				
Industry Session				
Panel				
Plenary				
Podium Session				
Poster				
Scientific Session				
Sponsored Symposia				
Symposia				
Workshop				

The Activity type runs horizontally, while the Session types run vertically down the left. Flagging edit permissions automatically grants the activity view permissions, eliminating the need to check both edit and view simultaneously. In this example, the "Scientific Session" Session type in Portal can be viewed and edited by CME Reviewers.

Adding Session Organizers as an Activity Type

1. Go to the People dashboard and search for the person (e.g., Evan Eisenmann)
2. Clear all the persons selected before selecting
3. Select the person(s), click the bulk action "Invite"
4. Select "Organizer" from the dropdown
5. Click "CME Reviewer"



6. Select “Preview” and “Continue”

Assign Sessions to a Session Organizer

Go to the Sessions dashboard and search for Sessions that meet specific criteria, such as finding sessions with a keyword in the Session Title.

1. On the Sessions Dashboard, use Advanced Search to search for a specific Session type or field (e.g., Session ID: 6)
2. Choose one or all sessions by clicking on the three dots icon and then clicking “Select All” to choose all the listed Sessions.
3. Click the Assign icon.

Sessions dashboard & manager

Session ID	Session number	Session title	Session type	Room / location	Date	Start time	Session status	Session rule status	Content capture vendor	Actions
6	OS006	Autism and Epilepsy	Scientific Session	Livestream Chann...	Nov 25, 2022	14:00:00	Active	Complete		
36	GS003	Autism: Behavioral Analysis?	General Scientific	Salzburg Auditorium			Active	Incomplete		

4. In the popup, use the search fields to find specific Session Organizers. (Note: You can select multiple Session Organizers if needed.)

Assign session to Organizer ×

First Name	Last Name	Activity	# Assigned	# Completed	
<input type="text" value="evan"/>	<input type="text" value="filter column..."/>	<input type="text" value="filter column..."/>			
<input checked="" type="checkbox"/>	Evan	Eisenmann	CME Reviewer	0	0

Add organizers to campaigns?

5. Select the Session Organizer box on the left (e.g., Evan Eisenmann)
6. Click "Preview" to view the confirmation screen and click "Continue."

Assign session to Organizer - Confirmation ×

Assign to sessioner: summary for 1 selections

7. A popup will confirm that the process is complete.

Review Portal Permissions

Navigate to the People dashboard, search by your new Session Organizer, and click "Access to... -> Portal" to check their Portal access.

People dashboard & manager DUPLICATE ACCOUNT REPORT

Geographical distribution

People by gender

People by career stage

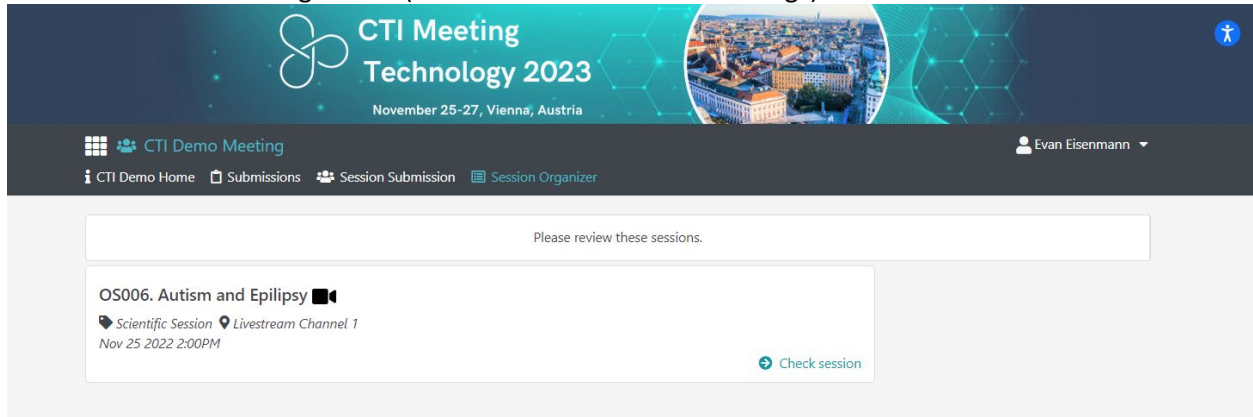
People by membership type

Enter your search term(s) Advanced search OFF 1 people selected

People Filter set

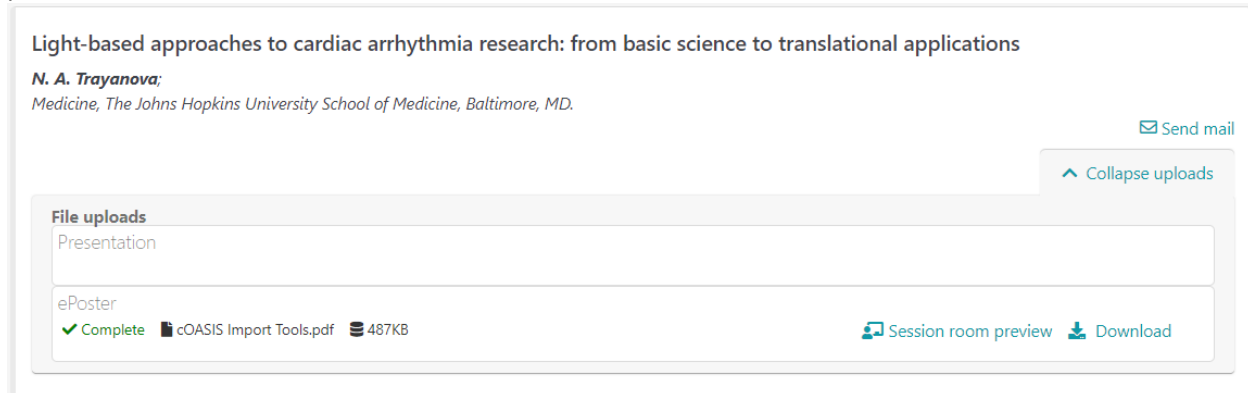
...	Last name	First name	Degree	Email	Phone	Institution	City	Country	Actions
<input checked="" type="checkbox"/>	Eisenmann	Evan		e.eisenmann@ctimeetingtech.com	90810...		Chic...	United ...	<input type="button" value="Access to..."/> <ul style="list-style-type: none"> <input type="button" value="PORTAL"/> <input type="button" value="PLANNER"/> <input type="button" value="VIRTUAL MEETING"/> <input type="button" value="PORTAL ACCESS PASS"/>
<input type="checkbox"/>	Lipson	Evan		ude4@jhu.edu					

Click the tab "Session Organizer" (the label we set in Portal Settings).



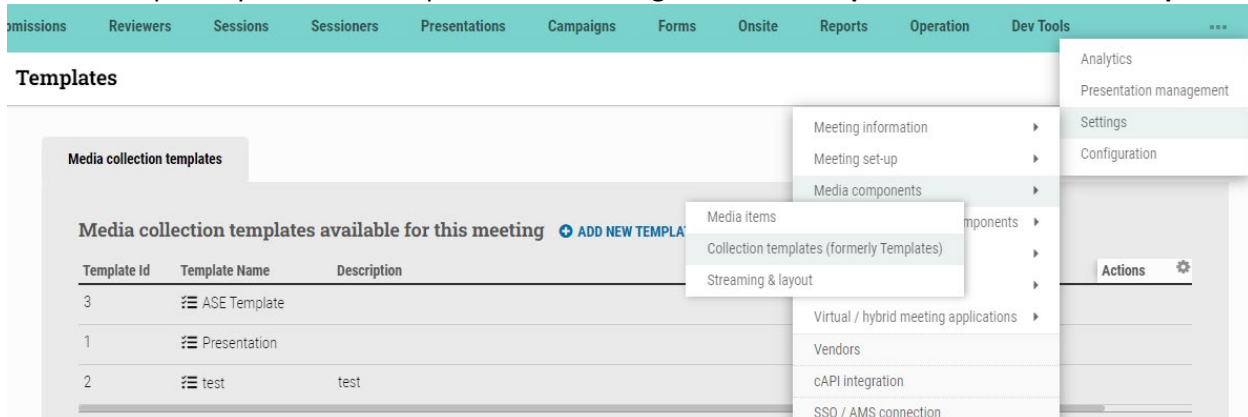
Click "Check session."

Now, the upload button that should enable me to upload media items as a session organizer is not present.



Check Collection Template Dates

I need to inspect my collection templates in the **Settings -> Media components -> Collection templates**.



I hover over the Action and click "View details."

Media collection templates

Media collection templates available for this meeting [ADD NEW TEMPLATE](#)

Template Id	Template Name	Description	Actions
3	ASE Template		
1	Presentation		View details
2	test	test	

I can see that both my “End For Editing” and “End For New Items” dates have expired, which means I cannot upload or delete any media items. An administrator needs to update these dates for collections on Portal to resume.

Media collection template details

[SAVE](#)

Session types using the template [EDIT THIS LIST](#)

[ePosters](#)
[General Scientific](#)
[Industry Session](#)
[Plenary](#)
[Podium Session](#)
[Scientific Session](#)
[Symposia](#)
[Workshop](#)
[Poster](#)

Collection details

Name	Start	End For Editing
Presentation	2022-07-14T11:40:00.000Z	2023-07-13T20:38:06.060Z
End For New Items	2023-07-13T20:38:06.060Z	Description

Step 1 [ADD MEDIA ITEM COLLECTION CONTROL](#)

Min. files required
Max. files allowed

Min. files required
Max. files allowed

I’ve changed the year from 2023 to 2024. You can find instructions on how to format the time in the “Times for Media Collection Template” How-to on the left.

[back](#) **Media collection template details** [SAVE](#)

Session types using the template [EDIT THIS LIST](#)

[ePosters](#)
[General Scientific](#)
[Industry Session](#)
[Plenary](#)
[Podium Session](#)
[Scientific Session](#)
[Symposia](#)
[Workshop](#)
[Poster](#)

Presentation
Target: Presentation

How to:

- Create Media Types & Templates
- Times for Media Collection

Collection details

Name	Start	End For Editing
Presentation	2022-07-14T11:40:00.000Z	2024-07-13T15:38:06.060Z
End For New Items	2024-07-13T15:38:06.060Z	Description

Navigate back to the Portal and refresh it. I will upload a file below and check if I can Upload, Download, and Delete the file. Onsite personnel with the cSlide Session Room Agent downloaded (which I have) can also preview the file (this option only appears when the cSlide Agent is downloaded to your computer).

Alpha-synuclein occurs physiologically as a helically folded tetramer that resists aggregation.

T. Bartels;

gDZFfdsvg, New Haven, CT.

Send mail

Collapse uploads

File uploads

Presentation Upload

ePoster Upload

Complete Session Organizer Setup v1.pdf 536KB

Edit

Session room preview

Download

Delete

INTERMITTENT FASTING AND HUMAN METABOLIC HEALTH

M. C. Harris;

Neonatology, Children's Hospital of Philadelphia, Philadelphia, PA.

Send mail

Collapse uploads

File uploads

Presentation Upload

ePoster Upload

Check Session View & Edit Permissions

Please be aware that if I had enabled the Session View Permissions (on page 4), I would have access to the assigned sessions, but I would only have the privilege to download, as shown below.

Light-based approaches to cardiac arrhythmia research: from basic science to translational applications

N. A. Trayanova;

Medicine, The Johns Hopkins University School of Medicine, Baltimore, MD.

Send mail

Collapse uploads

File uploads

Presentation

**Session VIEW permissions only allow Downloading.
No uploading or deleting files.**

ePoster

Complete cOASIS Import Tools.pdf 487KB

Download

Overlapping prefrontal systems involved in cognitive and emotional processing in euthymic bipolar disorder and following sleep deprivation: A review of functional neuroimaging studies

B. A. McKenna, L. T. Eyster;

7

Send mail

Collapse uploads

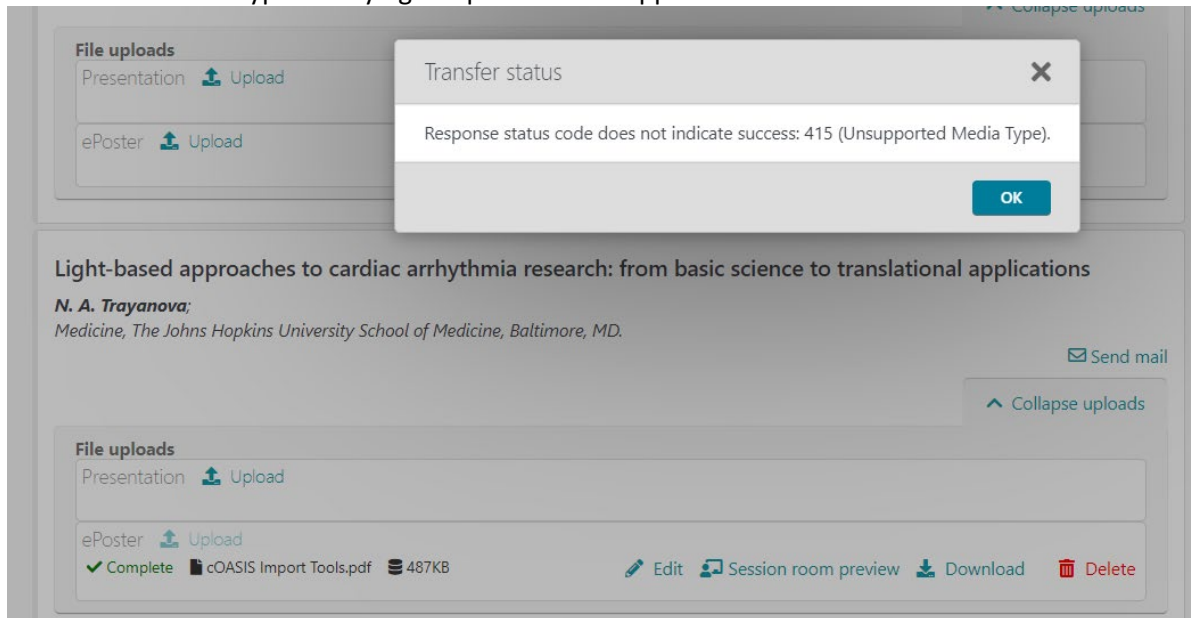
File uploads

Presentation

ePoster

Check Media Item Setup

If I click “Upload” and upload a file, and receive the error below for a Presentation upload, it usually means that the file type I’m trying to upload is not supported.



Go to **Settings -> Media components -> Media items.**

Click the media type you want to change, e.g., Presentation. Hover over Actions and click “Edit.”

Media Items Settings

Collection template

Media types [CREATE A NEW MEDIA TYPE](#)

Id	Name	Description	Icon	Allow multiple	Default max file limit	Display order	Actions
1	ePoster		Presentation	false		0	
2	Presentation		Presentation	false		0	Edit
3	SessionShowcase	Standard showcase media item type	Presentation	false		0	Edit
4	Audiofile	additional file upload	Attachment	false		0	

Check the file you want to include, e.g., PDF.

Click “Save,” and then check the Portal upload again.

Check Turning ON/OFF CME Review Process

Under **Settings -> Workflow applications -> cPortal -> Sessions**, setting up the session organizer follows the same process as setting up the COI/CME Review Process, with the only difference being the toggle below “Show CME review process elements” is turned ON if you are using it, or OFF if you are not. If you see CME review statuses on the Portal, simply turn the toggle OFF.

Portal Settings

