

Admin Guides

Setting up an event and inviting authors

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Contents

THE FOCUS OF THIS GUIDE.....	1
CREATING YOUR EVENT.....	2
CREATING THE INVITE EMAILS TO SEND TO YOUR ACCEPTED EPOSTER AUTHORS.....	3
ADDING YOUR EPOSTER AUTHORS	6
SENDING THE INVITATIONS TO YOUR EPOSTER AUTHORS	10
THE FOCUS OF THE NEXT GUIDE.....	11

This guide will take you through the steps needed to set up your ePoster event within Learning Toolbox and invite your authors.

The focus of this guide

This guide covers the first of the key stages involved in setting up and managing an ePoster event in Learning Toolbox:

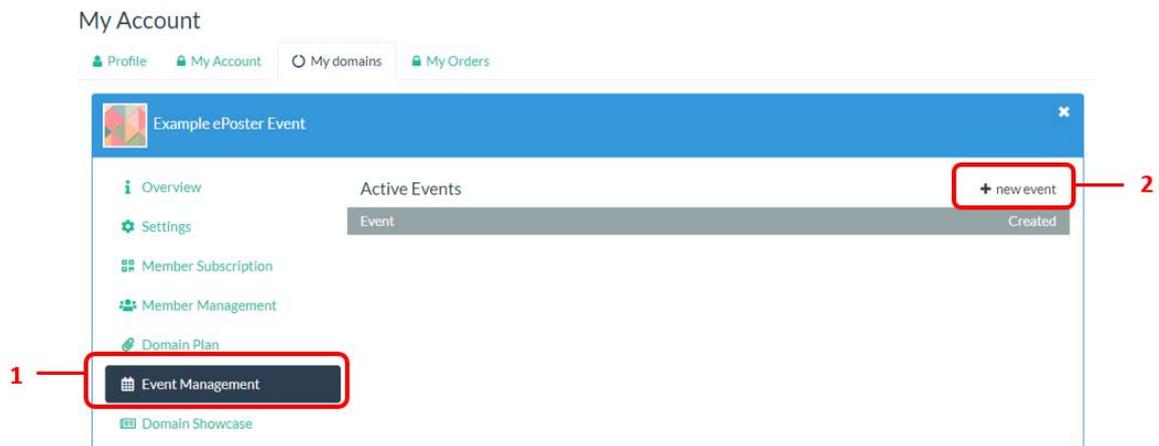
1. **Setting up an event and inviting authors**
2. Monitoring and supporting your authors
3. Printing mini-posters and publishing ePosters
4. Onsite preparations and requirements
5. Setting up next year's event

You should start this stage once you know which authors have been accepted to present ePosters at your event.

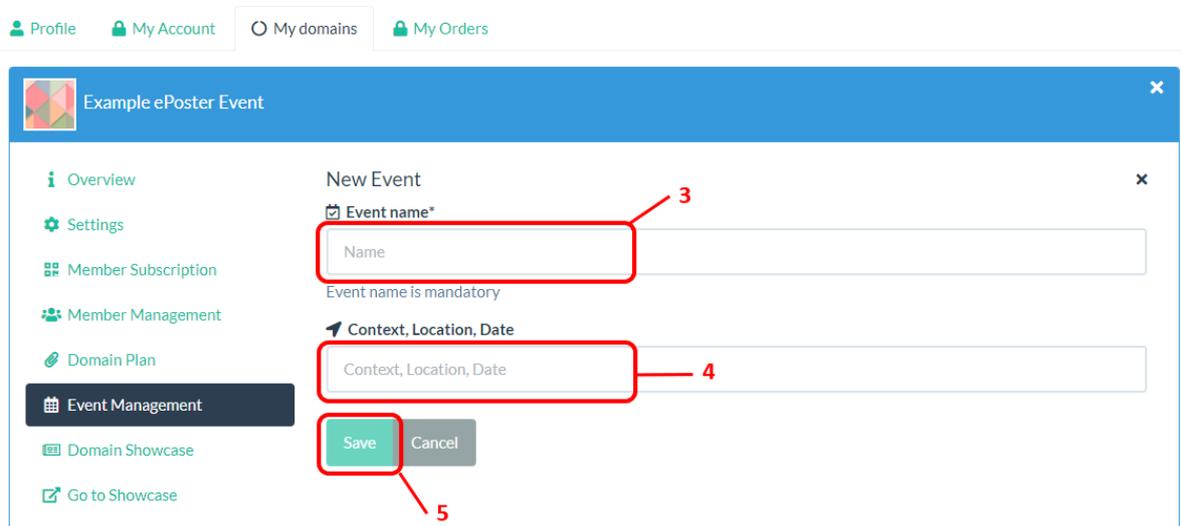
Creating your event

Go to your domain admin screen (click on the cogwheel next to your domain name).

1. Click on the **Event Management** link
2. Then click on **new event**



3. Give your event a **Name**. This name will appear in the invitation emails sent to authors. This can be the conference acronym and year, it does not need to be the full conference name.
4. In the **Context, Location, Date** field add the full conference name, location and date as you want it to appear on each of the mini-posters
5. Click on **Save**.



When you have created your event then you will see the event screen as shown below.

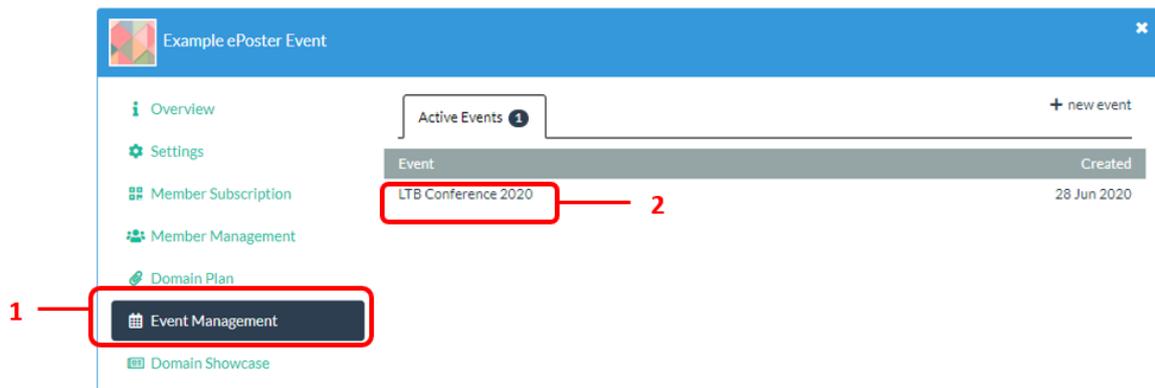
The screenshot shows the 'Edit Event LTB Conference 2020' interface. The 'Settings' section is highlighted with a red box, containing two toggle switches: 'Publish to domain members only' (labeled 6) and 'Lock published Stacks' (labeled 7). The 'Event name*' field contains 'LTB Conference 2020' and the 'Event or Context' field contains 'LTB Conference, Utrecht and Online, December 2020'. The 'Support email' field is empty. The 'Invitation email template' section has buttons for 'HTML email' and 'Plain text email'. At the bottom, there are buttons for 'Save changes', 'Close', 'Finish Event', and 'Delete Event'.

6. You can now choose to set some restrictions on your event, such **publishing to domain members only**. This would mean that only people with accounts in your domain within Learning Toolbox could view the event ePosters. The default is for this to be turned off so that everyone has easy access to view the ePosters without logging in. We recommend leaving it in this state. If you do want to restrict access then you would also need to give all your conference delegates accounts in Learning Toolbox. This is possible but we recommend you talk to us support@stack.services if you want to do this.
7. You can also choose to set a restriction to **lock published stacks**. This would mean that once the ePoster was published to the showcase website then the author would no longer be able to edit it. Again the default is for this to be turned off as we want to offer authors the ability to update their ePoster following discussions and feedback at the conference. However, you can turn this lock on here if you require this. It can then be turned off again later, if you only want to lock the ePosters for a certain time.

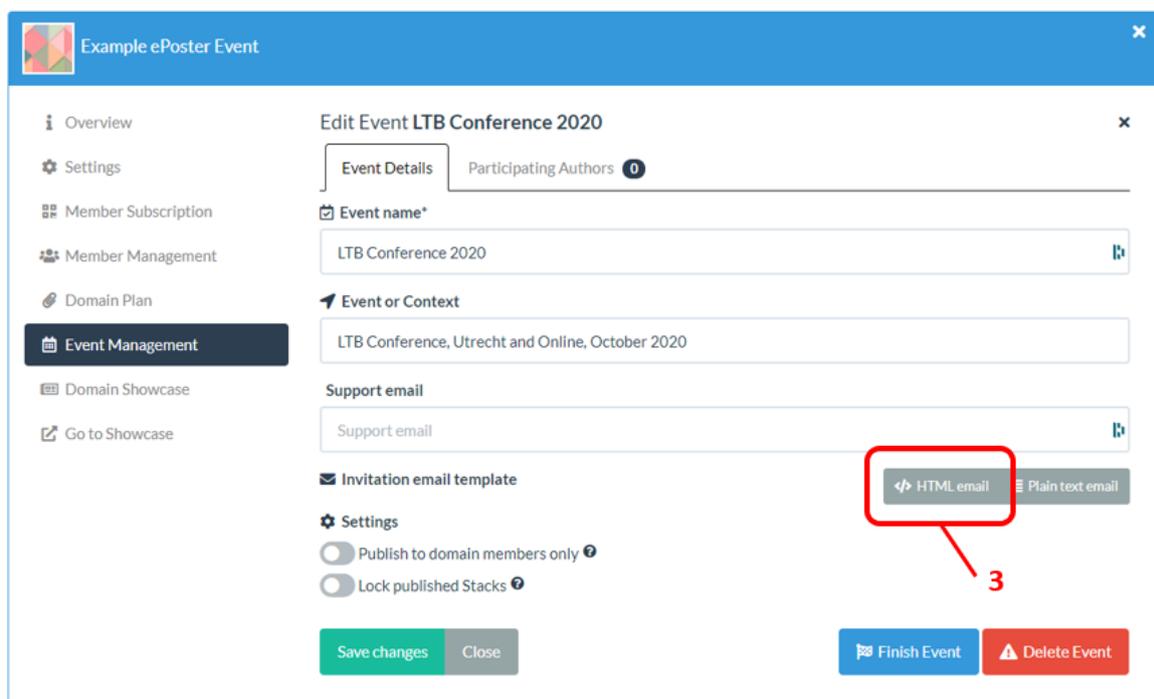
Creating the invite emails to send to your accepted ePoster authors

Within Learning Toolbox you should create and send invite emails to your accepted ePoster authors, as these invite emails will provide them with a personalised invite link to login to Learning Toolbox and start to make their ePoster for your event. To set this up:

1. Go to your Domain Administration Area and click on **Event Management**
2. Click on the **name of the event** you want to open



3. Click on **HTML email**



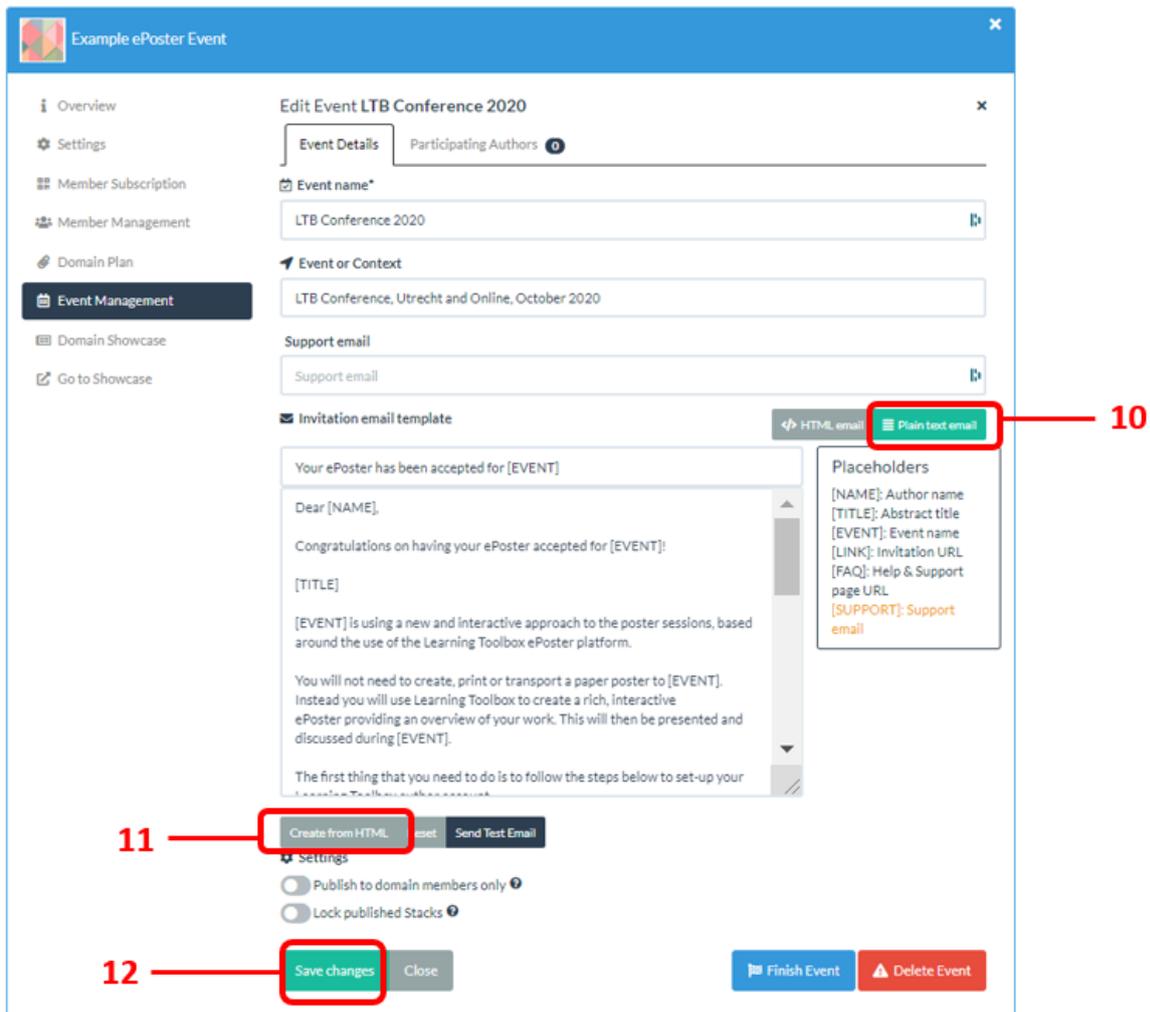
You will now see a screen showing the default invite email text as shown below.

4. You can **edit** this default text
5. However we strongly recommend that you **do not change this section** that refers to the invite link and the steps to follow
6. One part you might need to change is the **web link to your Learning Toolbox support page**. This link currently points at the general help page, but if we have customised this page for you then it will have a different address. You can find out your support page address by clicking on the Support in the top menu bar in Learning Toolbox and seeing what address appears in your browser's address bar.
7. Note that you can use the **placeholder text** in the email and this text will be replaced when the email is sent out by the relevant information for that author.
8. When you are happy with the email then you should press **Save**.

9. You can send yourself a **test email** if you want to check how the email will appear to authors.

The screenshot shows the 'Example ePoster Event' management interface. The main content area is titled 'Edit Event LTB Conference 2020'. It includes a sidebar with navigation options like 'Overview', 'Settings', 'Member Subscription', 'Member Management', 'Domain Plan', 'Event Management', 'Domain Showcase', and 'Go to Showcase'. The main content area shows event details such as 'Event name' (LTB Conference 2020) and 'Event or Context' (LTB Conference, Utrecht and Online, October 2020). A large text editor is used for the 'Invitation email template', with a preview of the email content. A 'Placeholders' box lists variables like [NAME], [TITLE], [EVENT], [LINK], [FAQ], and [SUPPORT]. A 'Send Test Email' button is highlighted with a red box and the number 9. A 'Save changes' button is highlighted with a red box and the number 8. A 'Plain text email' button is highlighted with a red box and the number 7. A 'Useful links to remember' section is highlighted with a red box and the number 6. A 'CLICK ON THIS INVITE LINK' section is highlighted with a red box and the number 5. A yellow box highlights the main email template content, with a red box and the number 4 pointing to it. The interface also includes buttons for 'Finish Event' and 'Delete Event'.

10. Some mail readers won't display HTML emails, so you will need to also create a plain text email of the invitation. Click on the **plain text email** button.
11. Then click on the **Create from HTML** button and it will create your plain text email from the HTML version that you had just saved.
12. Check the email to see if there are any small changes that need to be made to the formatting. Then **Save** it.

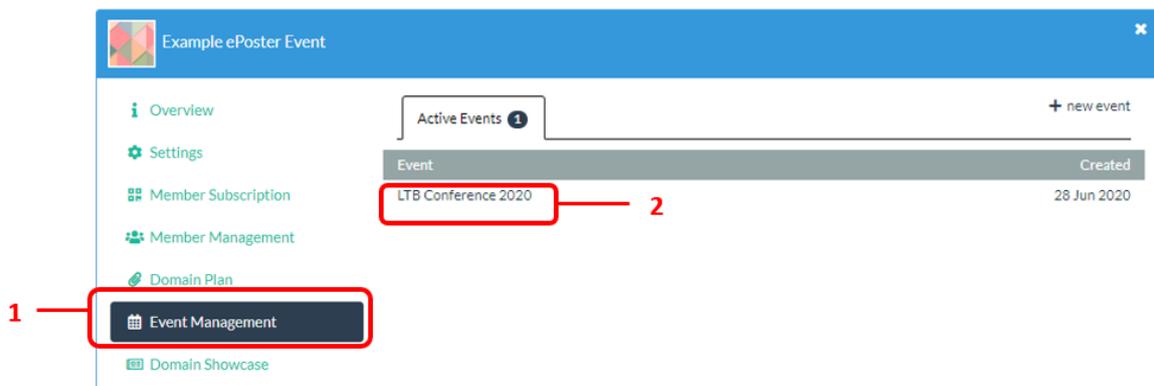


Adding your ePoster authors

Now you are ready to add your accepted ePoster authors to the system.

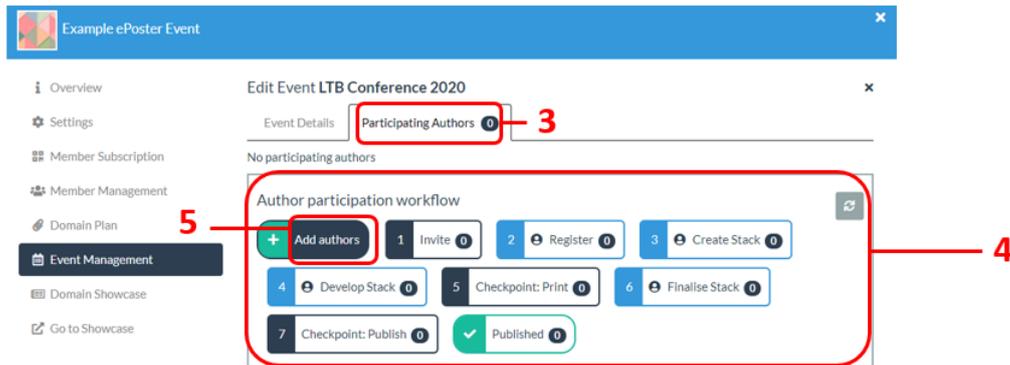
If you are not already there then open your event by:

1. Going to your Domain Administration Area and clicking on **Event Management**
2. Clicking on the **name of the event** you want to open

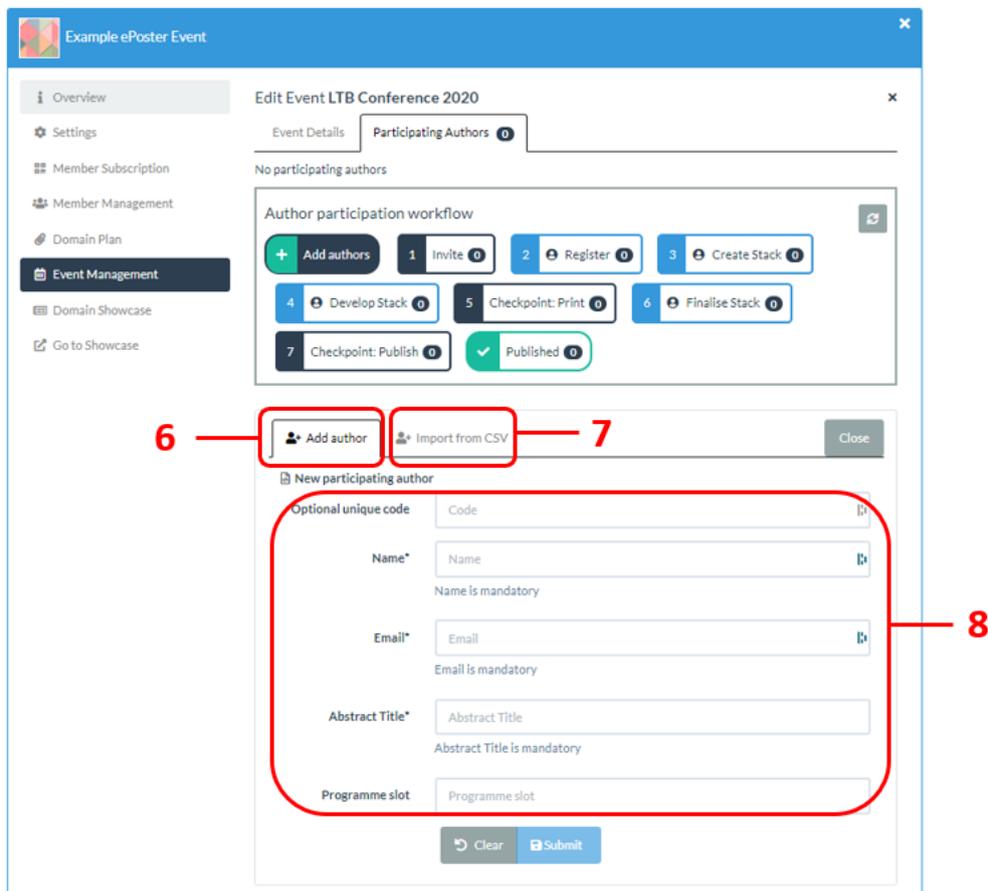


Once you have your event open then:

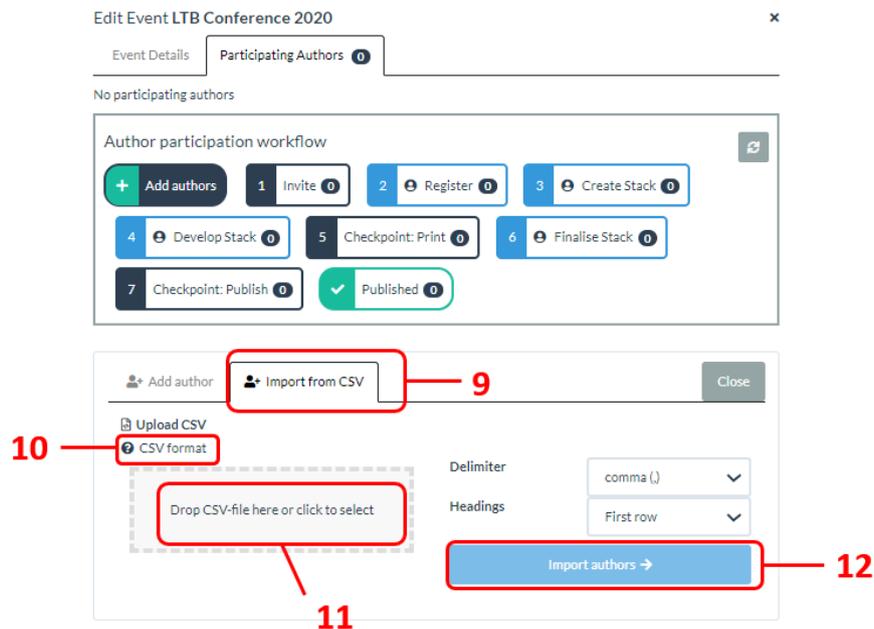
3. Click on the **Participating Authors** tab
4. Here you will see a very important part of the Event Management area, the **Author participation workflow**. This shows you where the authors are in the ePoster creation process and allows you to monitor & manage their progress.
5. The **Add authors** stage is highlighted to show that is your current selected stage.



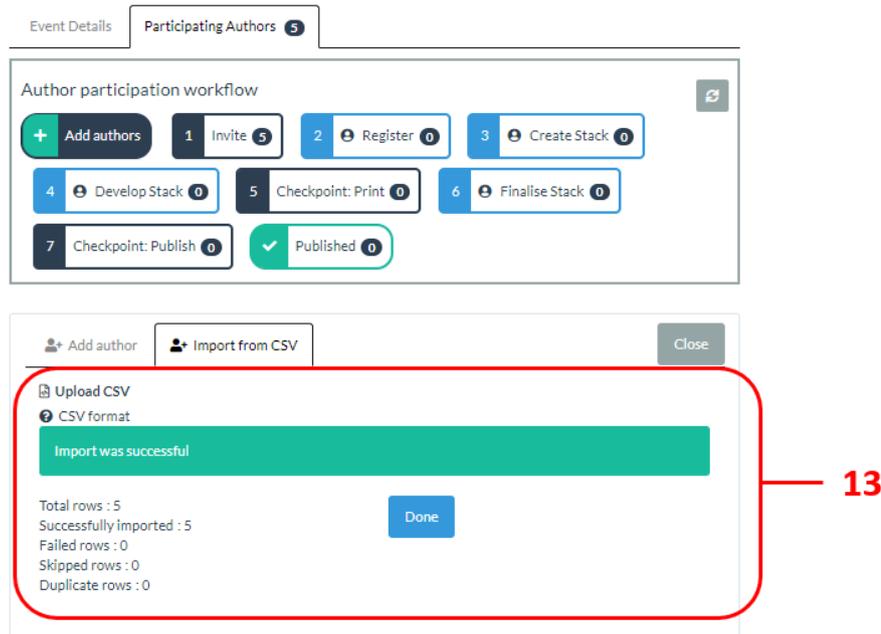
6. You can now choose to either **add authors** individually
7. Or add all your authors **by importing from a CSV**
8. If you add them individually then you should fill out the required fields and press Submit.



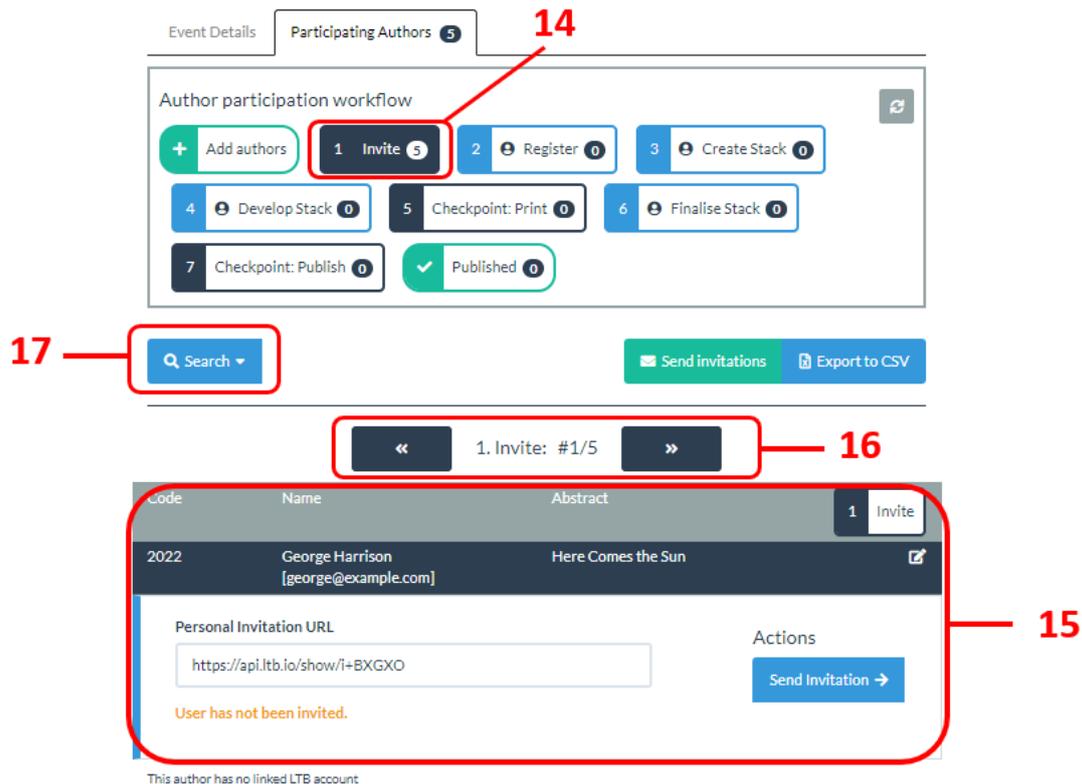
9. Unless you have a very small number of authors, then it is usually easier and quicker to import all your authors from a CSV file. Click on the **Import from CSV** tab.
10. If you click on CSV format then it will show you **details of the expected CSV format** and you can download an example CSV file. Please make sure that your CSV file contains the required information and that the columns have the required headings.
11. Once you have your CSV file ready then you can **upload** it from your computer.
12. Then click on the **Import authors** button



13. Learning Toolbox will provide you with a summary of the import, which you can close by clicking on **Done**.



14. Note that the number of authors that have been imported is now showing in the invite stage in the workflow view. Click on the **invite stage**.
15. Below the workflow view, it now shows you the **first record in the selected stage**. In this case this is the first author who is waiting to be sent an invite.
16. You can step through the list of records in the stage using the **arrow buttons**.
17. Alternatively, you can click on the **search** button to search for a record in this stage. The search will look for matches in code, name, email address and abstract.



Summary of how the workflow view works

If you select any stage in the workflow then it shows you the list of records in that stage. You can step through these or search for a particular record.

When viewing a record you will be able to see the progress the author has made and you will see the actions that you (as an administrator) can take.

If you click again on the stage (to deselect it) then you will be shown the list of all records in your event. Again you can step through these or search for a particular record.

Sending the invitations to your ePoster authors

1. If you are not already there, then return to your event's workflow view and click on the **Invite stage**.
2. To send the invitation emails to all the authors in this stage click on the **Send Invitations** button.

The screenshot shows the 'Author participation workflow' interface. The 'Participating Authors' tab is active, showing 5 authors. The workflow consists of several stages: 1. Invite (5), 2. Register (0), 3. Create Stack (0), 4. Develop Stack (0), 5. Checkpoint: Print (0), 6. Finalise Stack (0), 7. Checkpoint: Publish (0), and a final 'Published' stage (0). The 'Invite' stage is highlighted with a red box and a red arrow labeled '1'. Below the workflow, there is a search bar and a 'Send invitations' button, which is also highlighted with a red box and a red arrow labeled '2'. Below the workflow, there is a pagination control showing '1. Invite: #1/5'.

Code	Name	Abstract	1 Invite
2022	George Harrison [george@example.com]	Here Comes the Sun	

Personal Invitation URL: Actions: [Send Invitation →](#)

User has not been invited.

3. You have now successfully set up your event and sent out the invitation links to all your invited authors. Note that your authors have now all moved from the Invite to the **Register stage** in the workflow view. This indicates that we are now waiting for them to follow the link and register.

The screenshot shows the 'Author participation workflow' interface. The 'Participating Authors' tab is active, showing 5 authors. The workflow consists of several stages: 1. Invite (0), 2. Register (5), 3. Create Stack (0), 4. Develop Stack (0), 5. Checkpoint: Print (0), 6. Finalise Stack (0), 7. Checkpoint: Publish (0), and a final 'Published' stage (0). The 'Register' stage is highlighted with a red box and a red arrow labeled '3'. Below the workflow, there is an 'Export to CSV' button. At the bottom, there is a green confirmation message: '✓ 5 invitations have been sent.'

Congratulations on setting up your event and inviting your authors.

The focus of the next guide

This next guide covers the second key stage involved in setting up and managing an ePoster event in Learning Toolbox:

1. Setting up an event and inviting authors
2. **Monitoring and supporting your authors**
3. Printing mini-posters and publishing ePosters
4. Onsite preparations and requirements
5. Setting up next year's event