Admin Guides

Setting up an event and inviting authors

Version 3.0

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Contents

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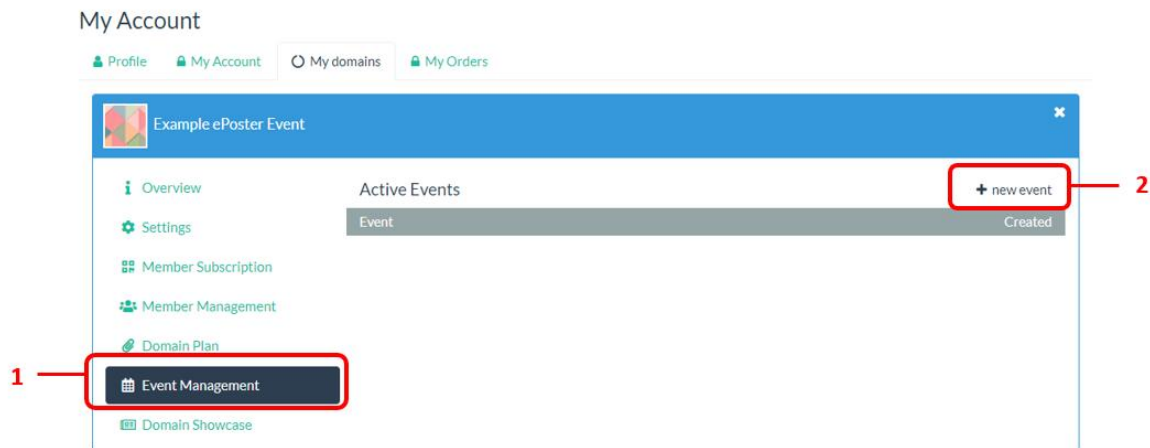
3. Give your event a **Name**. This name will appear in the invitation emails sent to authors. This can be the conference acronym and year, it does not need to be the full conference name.
4. In the **Context, Location, Date** field add the full conference name, location and date as you want it to appear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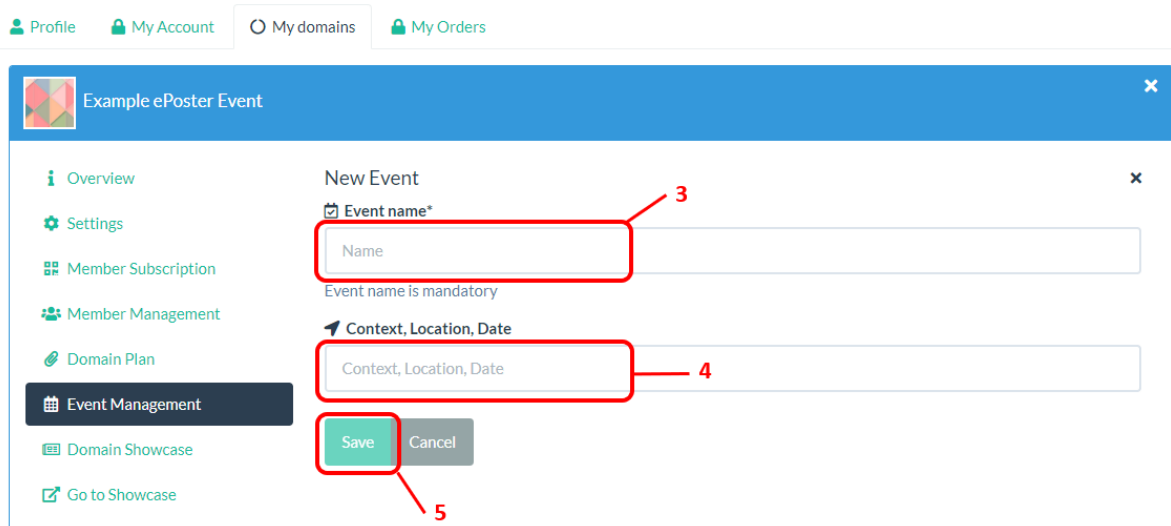
When you have created your event then you will see the event screen as shown below.
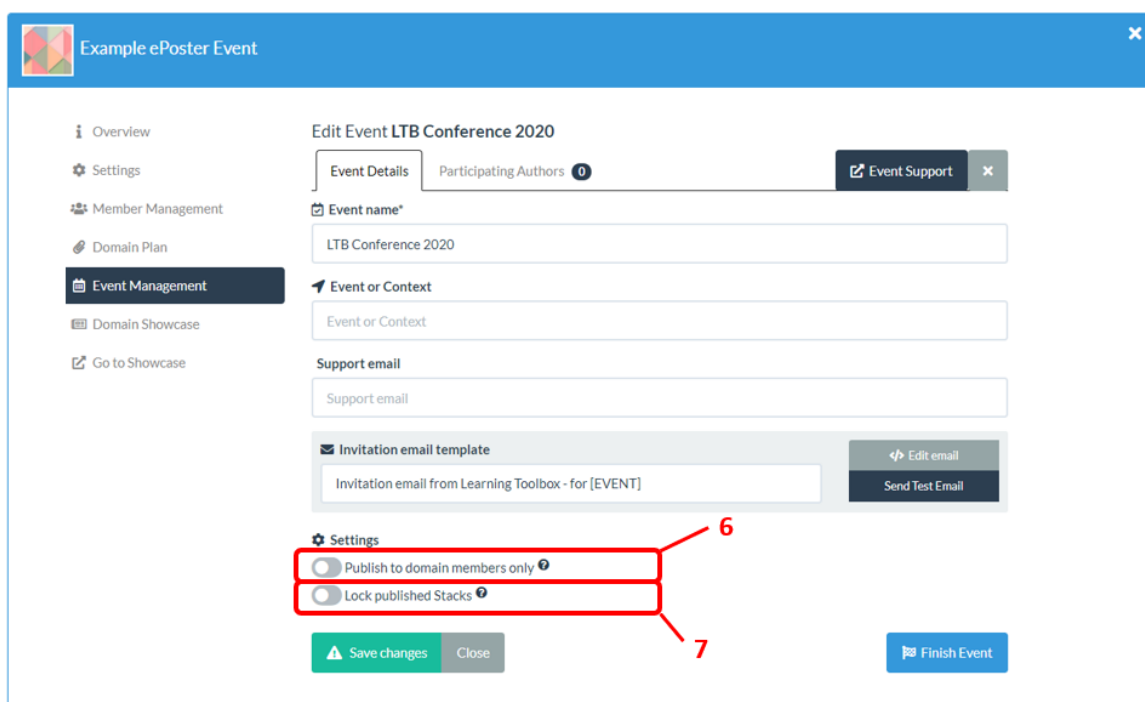

6. You can now choose to set some restrictions on your event, such **publishing to domain members only**. This would mean that only people with accounts in your domain within Learning Toolbox could view the event ePosters. The default is for this to be turned off so that everyone has easy access to view 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
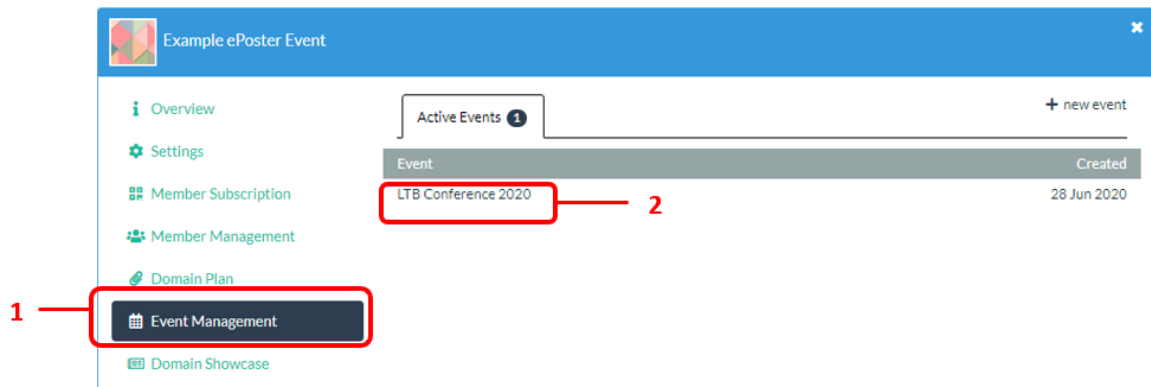
3. Click on **Edit email**
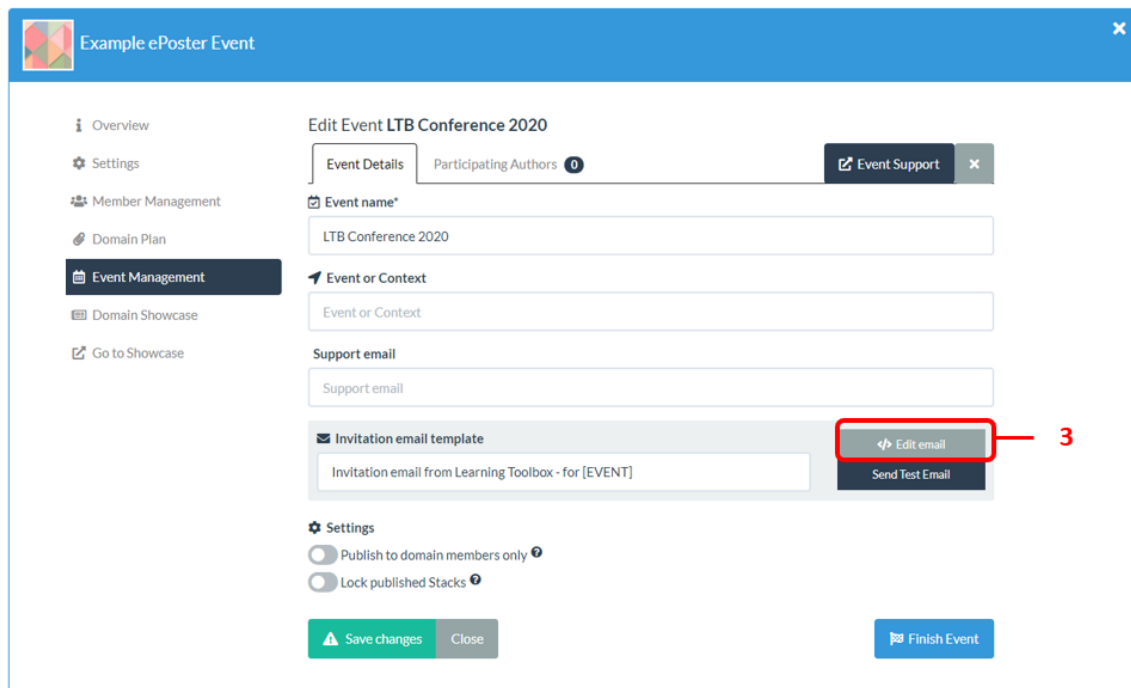
You will now see a screen showing the default invite email text as shown below.

4. You can **edit** this default text
5. However, **do not change the section** that refers to the invite link
6. 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 and your event.
7. When you are happy with the email then you should press **Save**.
8. You can send yourself a **test email** if you want to check how the email will appear to authors.

Adding your ePoster authors

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

You will be creating one record for each ePoster, with its key details (code, title and lead author name and email address). The author who you list for the ePoster will be the author who is emailed the invite to create that ePoster. However, they will be able to forward that email invite onto one of their co-authors if they want a co-author to become the editing author for the ePoster. Each ePoster can only have one editing author. We have an FAQ on the Support Page that explains this to authors.

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
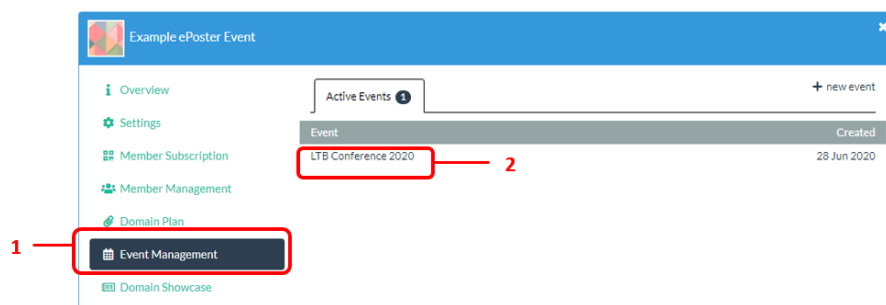
Once you have your event open then:

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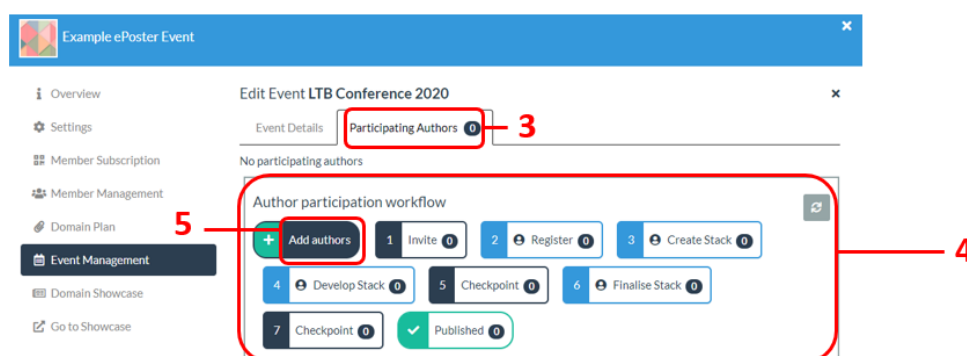
6. You can now choose to either **add authors** individually
7. Or add all your authors **by importing from a CSV** file
8. If you add them individually then you should fill out the required fields and press Submit.
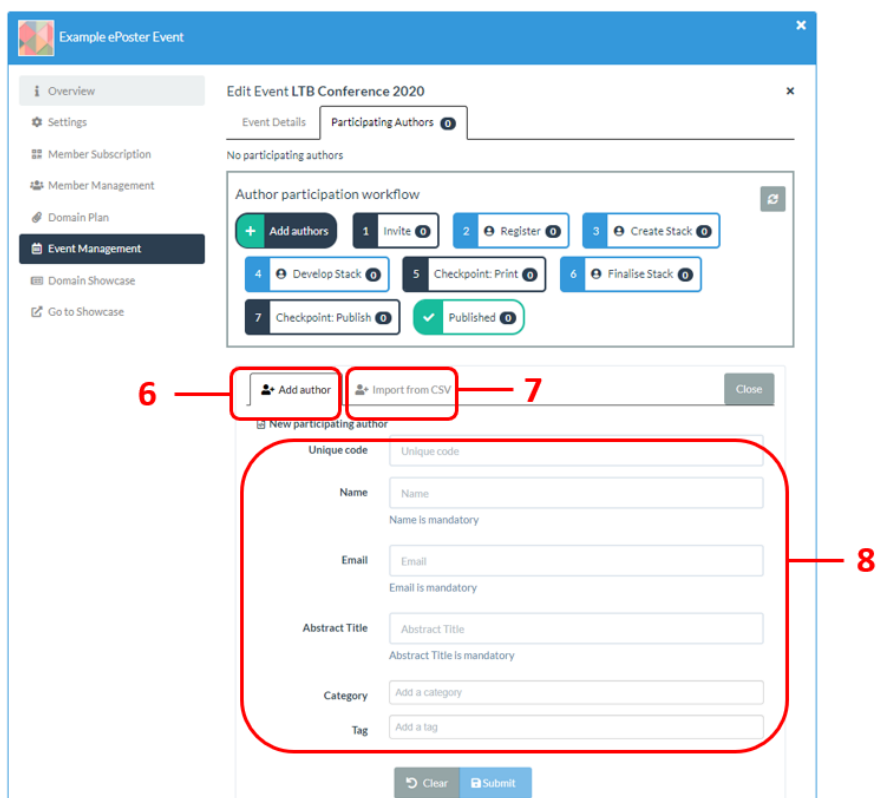
How will the information you add be used?

Unique code	This can be whatever you use as the unique identifier for this ePoster. You will be able to use it to later search for and find this ePoster in the Event (both in the Event Manager and the Showcase).
Name	This is the name of the author. In a later step when you send the invites then this is the author to whom the invite will be addressed.
Email	This is the email address of the author. In a later step when you send the invites then this is the author to whom the invite will be sent.
Abstract title	This is the title of this ePoster. When the author starts to create their ePoster then this will be the name it is given, although they will be able to edit it.
Category	This is the category (or categories) in which this ePoster belongs. The categories are used create red filter buttons on your showcase allowing the delegates to filter the view to see only ePosters in the chosen category. You might use categories to group ePoster by theme or by presentation session. Do consider that a filter button will be added to the showcase for each category, so it is best to keep the number of categories relatively small and to keep the names of the categories short. You can view our example showcase to see how the red filter buttons look and work.
Tag	You can choose to add some tags to this ePoster. When the author creates their ePoster these tags will be automatically added to it. The author will be able to add more tags and/or delete tags. Delegates will be able to search the showcase for ePoster with specific tags. There is a 20-character limit to individual tags. It is advisable not to add too many tags to an ePoster as they will all be displayed in its summary view on the showcase. You can view our example showcase to see how the tag search works.

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. Onscreen it lists the **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**.
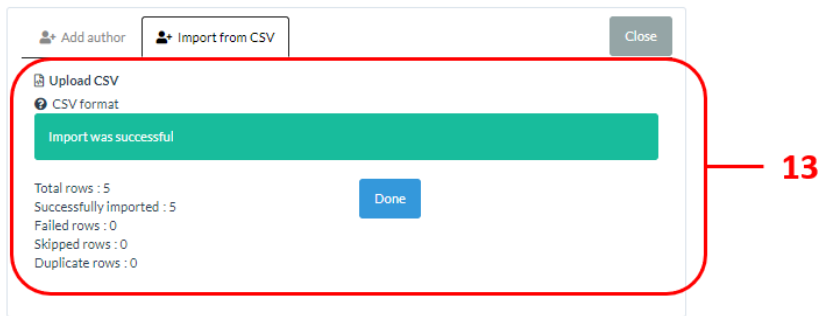
14. Note that the number of authors that have been imported is now showing in the invite stage in the workflow view. Click on the **invite stage**.
15. Below the workflow view, it now shows you the **first record in the selected stage**. In this case this is the first author who is waiting to be sent 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 title.
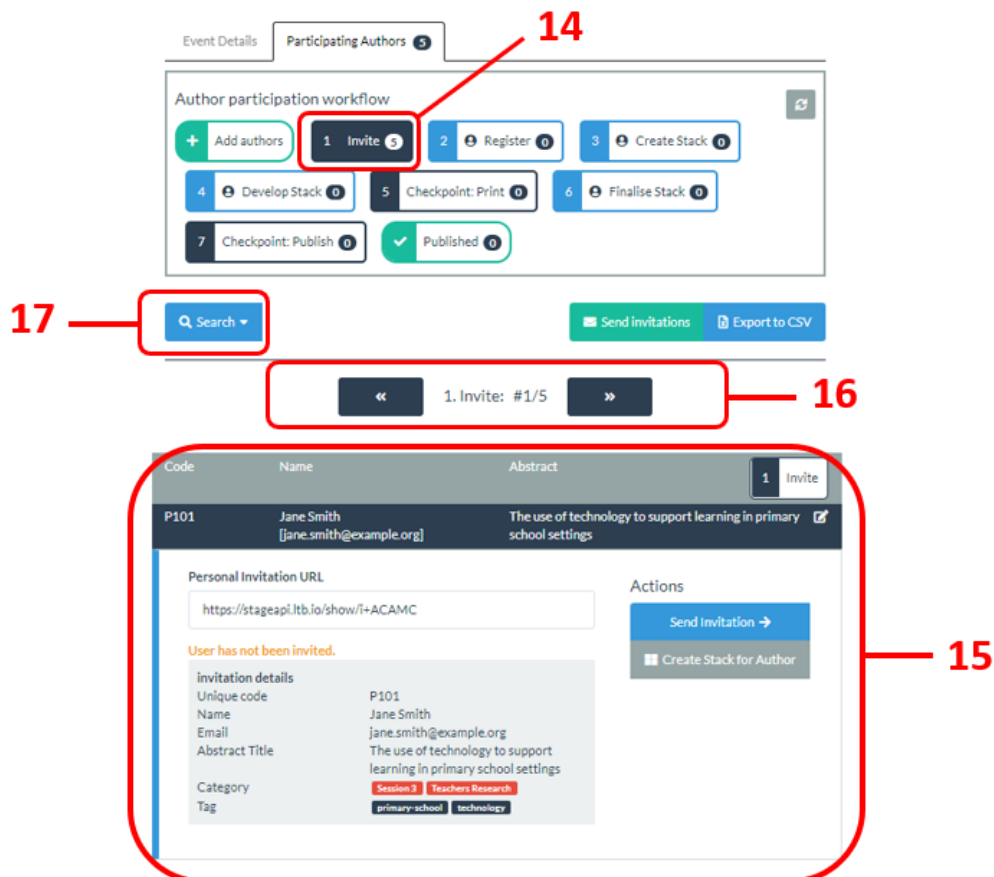

Sending the invitations to your ePoster authors

You have now added your author/ePoster records to Learning Toolbox, but you have not yet sent the invites out to your authors. The next steps explain how to do that.

1. If you are not already there, then return to your event's workflow view and click on the **Invite stage**. *The name of the stage indicates what action needs to be taken in this stage.*
2. To send the invitation emails to all the authors in this stage click on the **Send Invitations** button.
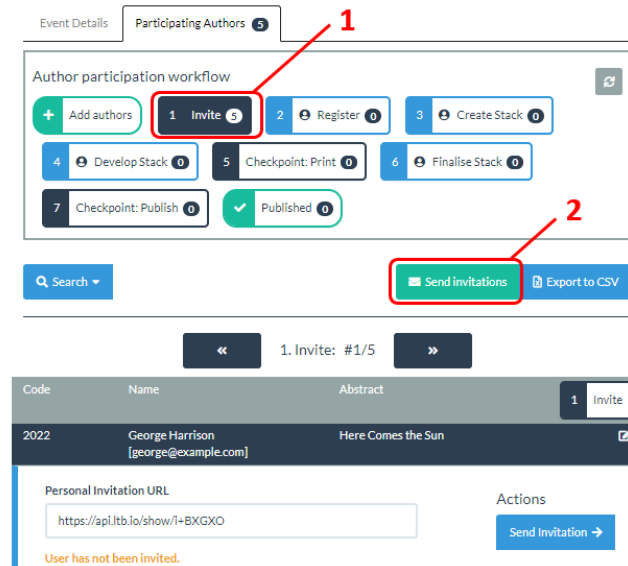
3. You have now successfully set up your event and sent out the invitation links to all your invited authors. Note that your authors have now all moved from the Invite to the **Register stage** in the workflow view. This indicates that we are now waiting for them to follow the link and register.
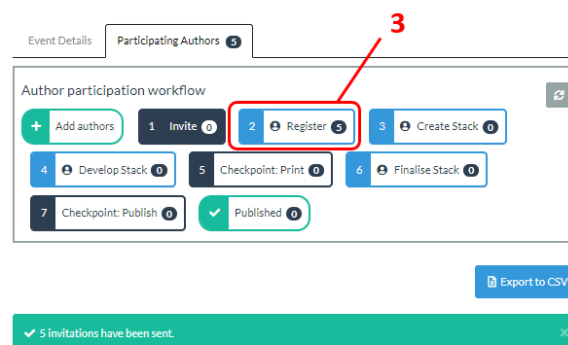
Congratulations on setting up your event and inviting your authors.

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. It provides you with more information on using the workflow view to help you in monitoring and supporting your authors:

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

The guides are all accessible on the Event Admin Support Page. The direct link to the Event Admin Support Page is: https://support.ltb.io/event-support/

You can also get to the page from within Event area of the Admin Screen as shown below: