Admin Guides

Monitoring and supporting your authors

Version 3.0

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Contents

> This guide provides advice on monitoring and supporting your authors using the Event Management tool within Learning Toolbox. It also provides links to additional support material you can use.

The focus of this guide

This guide covers the second 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 have set up your event and sent invites out to your authors.

Support available to your authors through Learning Toolbox

Your authors will have access to all the videos and answers to frequently asked questions on the general Support Page.

They can access this page from within Learning Toolbox itself by simply clicking on the Support link. This link is always visible in the editor.
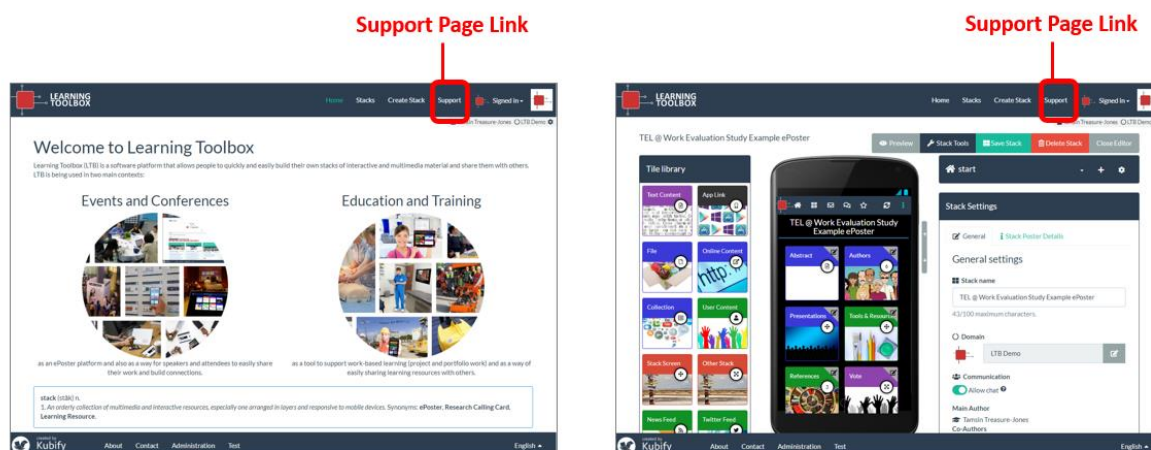
We recommend that you (or a member of your team), familiarise yourself with the contents of the Support page and the process of creating an ePoster, so that you can answer any questions from your authors and/or direct them to the answer on the Support page.

**Welcome email and regular support emails**

To help your authors to get started and to ensure they meet your deadlines, we recommend sending your authors a welcome email, signposting them to the ePoster support, and some guidance and reminder emails in the run-up to the conference. If we are providing the support ourselves to a conference then we do this using a system such as MailChimp.

In the Event Admin Support Page, we have provided you with a folder containing some of our own support list emails, so that you can adapt these and use them for your authors if you would like.

**Monitoring your authors' progress through the ePoster creation process**

The key area you will be working in when monitoring and managing your author's progress is the **Event Management (1)** and the **Participating Authors tab (2)**.
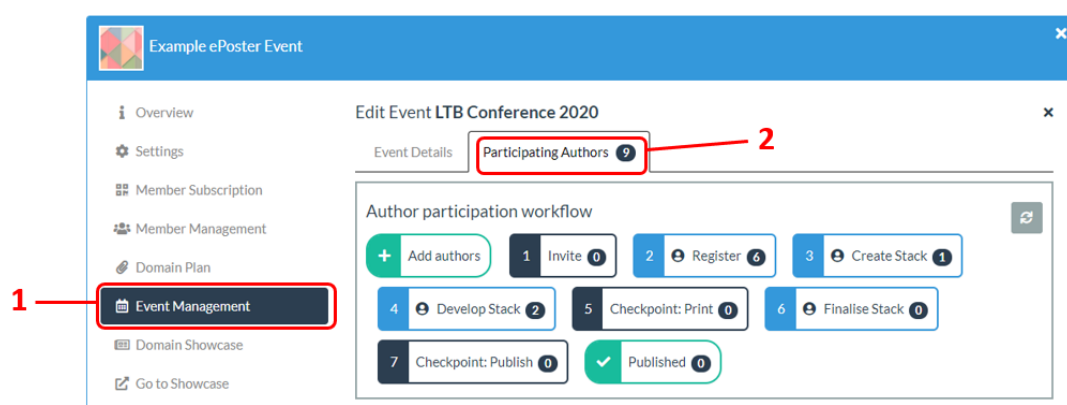

You can then use the author workflow view to monitor your authors' progress as they make their ePosters.

3. The number in each stage indicates the number of records that are at that stage. Each record refers to one ePoster.
4. Boxes with a **blue tab** are stages where an *action from the author is required* to move them to the next stage. The required action is the name of that stage. For example, at stage 2 their required action is Register.
5. Boxes with a **black tab** are stages where an *action is required from you* as the administrator in order to move the author to the next stage. The focus of the action is, again, the name of that stage. For example, stage 7 is a checkpoint where the author has indicated their ePoster is ready and your required action is to Check it.


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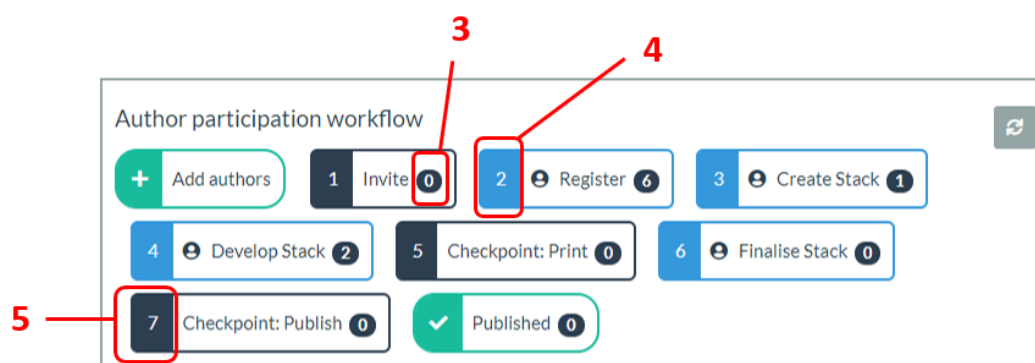
If you **click on a stage to select it** then you will be shown the list of records that are in that stage.

6. You can then **step through the records** in that stage one by one or…
7. You can **search the records** in the stage. The search matches text in the code, author name, email address, abstract title, programme slot or showcase name.

Selected stage

7

6

First record in selected stage
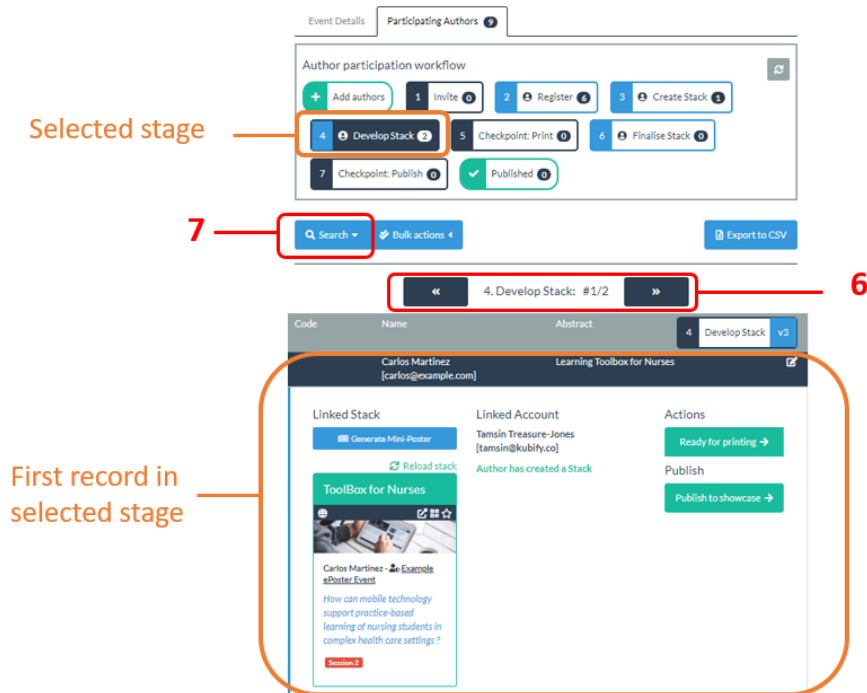
If you **click on the stage a second time** (to **deselect it**) then it turns off that filtered view and you return to seeing all the records in your event. Again you can choose to either step through these or search them.


No stages selected

Now listing all records
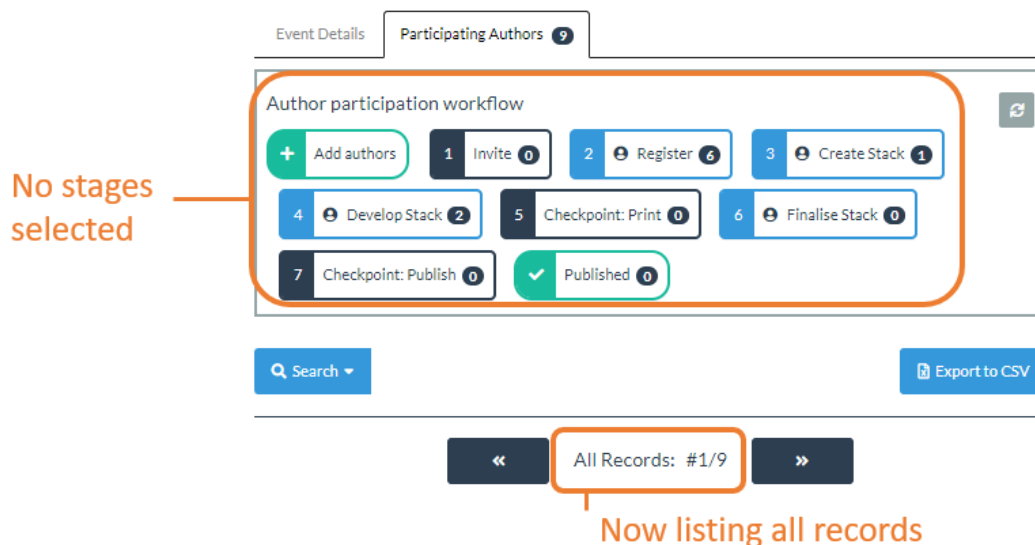
When you are viewing a record you will be able to see important information about the author's progress as well as seeing the actions that you (as the administrator) can take.

Viewing a record in stage 2 – author yet to register

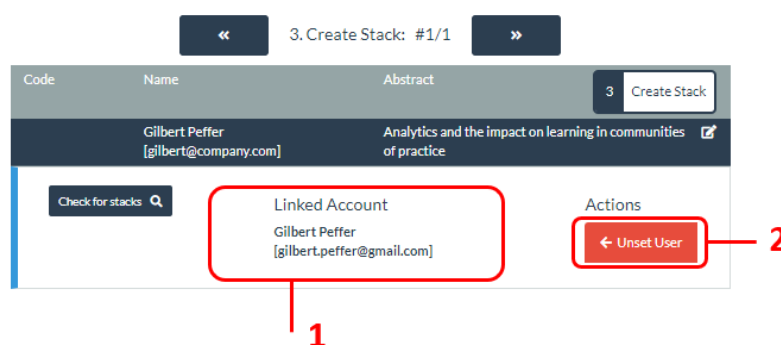For a record in stage 2 (author needs to register) you can:

1. See their **personal invite link** (this will have been emailed to the author)
2. **Search** to see if they have created a Learning Toolbox account without following the link. If you find them here then you will be offered the opportunity to link them to the invite so they no longer need to use the invite link themselves, but can sign in directly to Learning Toolbox.
3. **Re-send** them their personal invite link
4. **Edit** the record. You might use this to make a correction to their abstract title, delete them from the event or change their category.
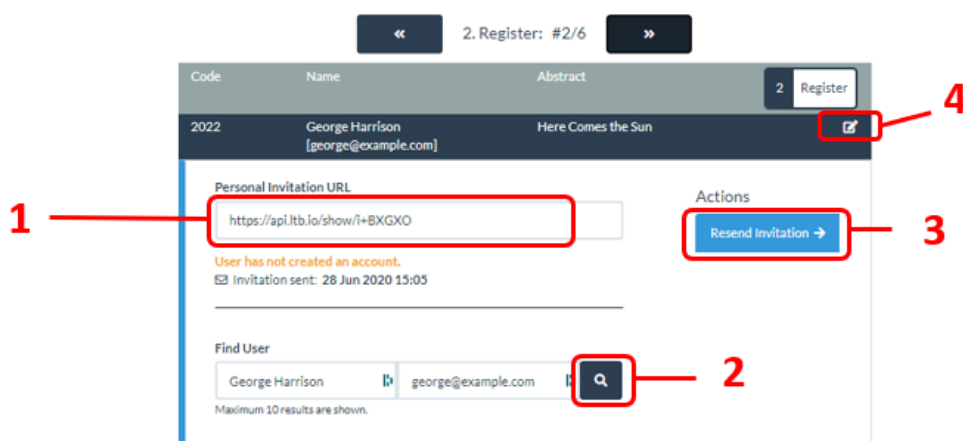
Viewing a record in stage 3 – author registered but not yet made a stack/ePoster

For a record in stage 3 (author has registered & needs to create their stack) you can:

1. See the details of their **linked Learning Toolbox account**. Note, as is shown here, sometimes the email address they use for their Learning Toolbox account is not the same as the one you have on record for the ePoster. This is not a problem, but it is helpful to be able to see this since sometimes an author passes on the invite to one of their co-authors and then you can see here that it is actually their co-author who has followed the invite link and who is creating the ePoster.
2. **Unset** the user from this record. You may need to do this if the author has changed their mind about which co-author will actually create & edit the ePoster. Refer to the specific questions at the end of this guide if you come across this issue.

For a record in stage 4 (author has registered and started to create their ePoster), you can:

1. **Preview** their developing ePoster by clicking on its title.
2. **Open their ePoster's summary view** in a new browser tab. From this view you can also choose to edit the ePoster if you need to make changes to their ePoster yourself.
3. **Change the ePoster's category or tags**.
4. **Unlink** this ePoster from the invitation. You would only need to do this if they had started to create this ePoster in error (perhaps linked to the wrong invitation if they are an author with multiple ePosters/invites).
5. *Confirm the ePoster is **ready to print** or **publish the ePoster** to the showcase. These steps will be explained in more detail in the next guide.*
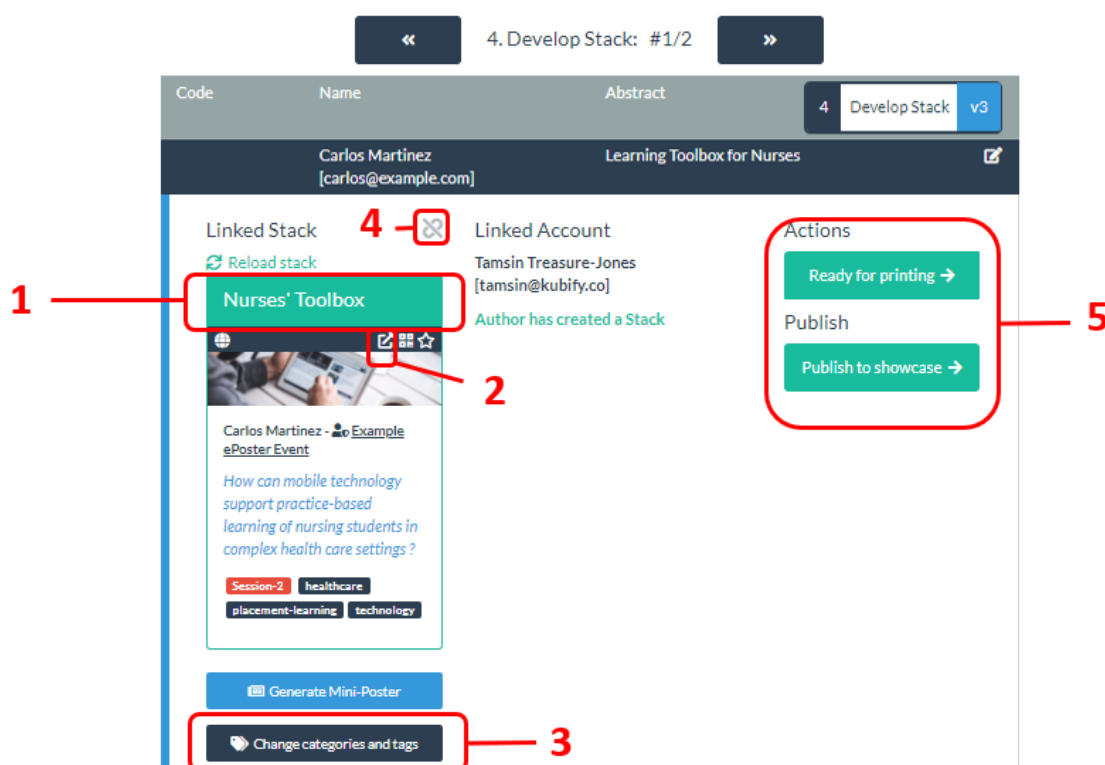
Answering authors support questions

The Support page provides answers to many questions asked by Authors, so you can often simply point them towards the relevant answer here if they contact you with a question. This is why it is helpful to familiarise yourself with the Support page, so you know where to point

people towards. Note that if you right click on a question in the support page then you can copy its URL (web address) so that you can send the author that direct link to the answer.

However, there are a few support questions which require some further action from the administrator. These are:

- I have not received my invitation link
- My invitation link is not working
- I would like one of my co-authors to edit the ePoster
- I have accidentally deleted my ePoster can you restore it
- Can an administrator make an ePoster for an author

We have guidance on the steps to answer each of these questions from authors in the Appendix.

The focus of the next guide

This next guide covers the third 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

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:
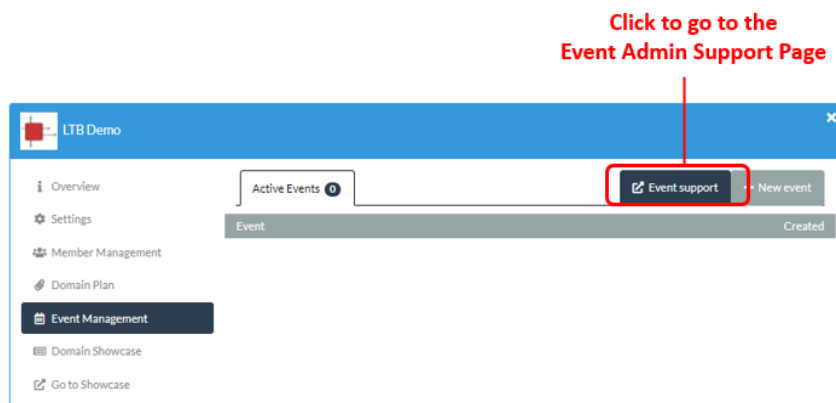
Appendix – Steps to answer specific questions from authors

*Q: I have not received my invitation link*

Many organisations use very strong spam and junk mail filters nowadays which can mean that in some cases the invitation emails are re-directed to an author's spam/junk/clutter/promotions folder by their mail reader or even blocked at an organisation level. We follow industry guidance on best practice to avoid this, but it does still sometimes occur. It is also possible that authors overlook emails in their busy inboxes.

If an author contacts you to say they have not received their invite link then:

1. Go to the **Event Manager** in Learning Toolbox, open the **Event**
2. Then click on the **Participating Authors** tab
3. Use the **search** to find this author's record
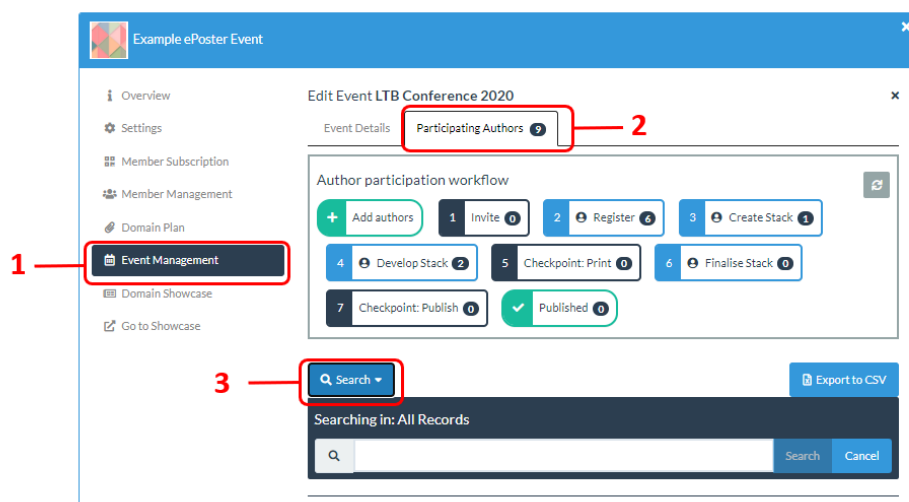
4. Within their record click on the **Find User** search button to see if they have created an account without following the link.
5. **If an account is found** and you are happy it is the right author then click on the **Link User** button to link their account to this record.
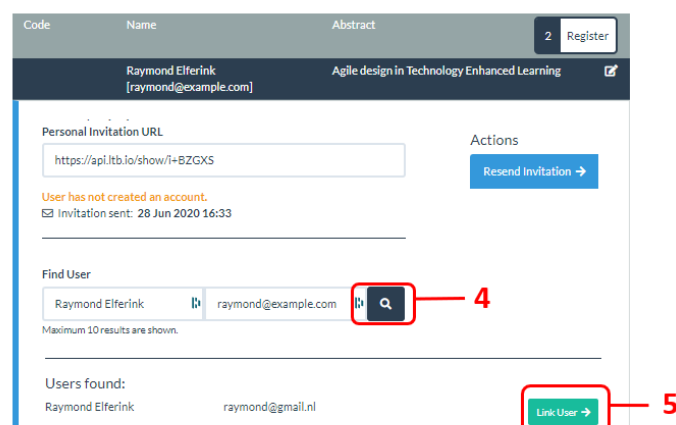
You can then email the author to let them know that you have linked their account and that they no longer need to follow the invitation. They can now simply sign-in to Learning Toolbox https://my.ltb.io/ using the account you have just linked.

6. **If no account is found** then we recommend that you copy the invitation link and email that yourself to the author explaining that they should follow this link.

Q: My invitation link is not working

This is usually caused by one of three things:

- One of their co-authors has already followed the invitation link and so is now registered as the editing author for this ePoster.
- They have themselves previously used the invite link but are now trying to login using a different email address
- Their organisation is using a virus or malware checking software that has put a wrapper around the link that is preventing it from working.

You can check to see if this issue has been caused by a co-author registering by:
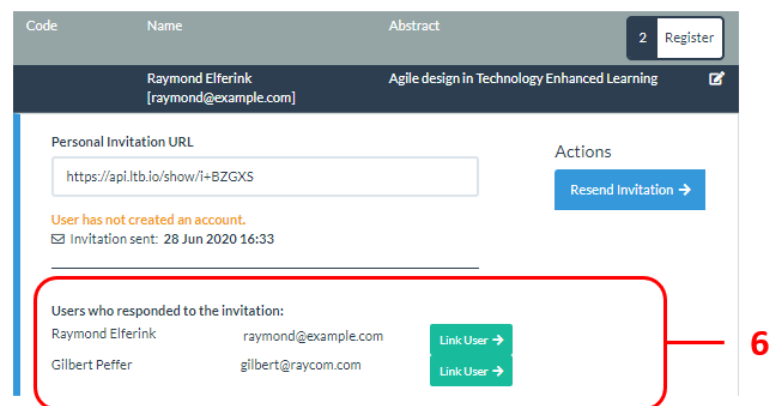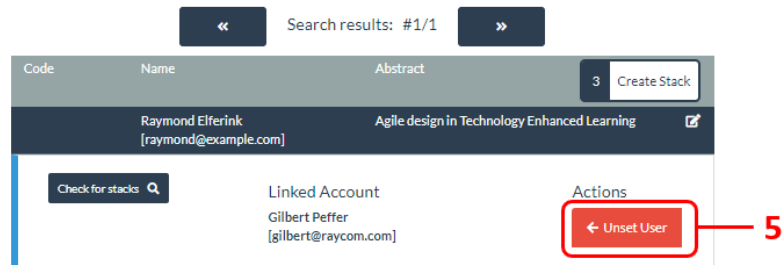
1. Go to the **Event Manager** in Learning Toolbox, open the **Event**
2. Then click on the **Participating Authors** tab
3. Use the **search** to find this author's record
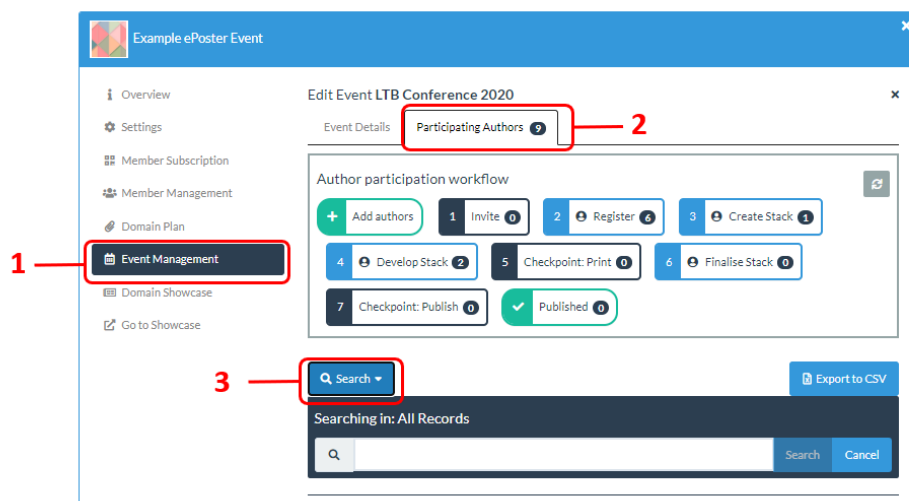
4. In their record check to see if there is a **linked account** already connected to this invite and if that linked account is actually a different person. You can see an example of this in the image below. In this case we recommend that you email the author who reported the problem (copying in the author whose account is linked) and ask them to confirm which one of them will be taking on the editing role.
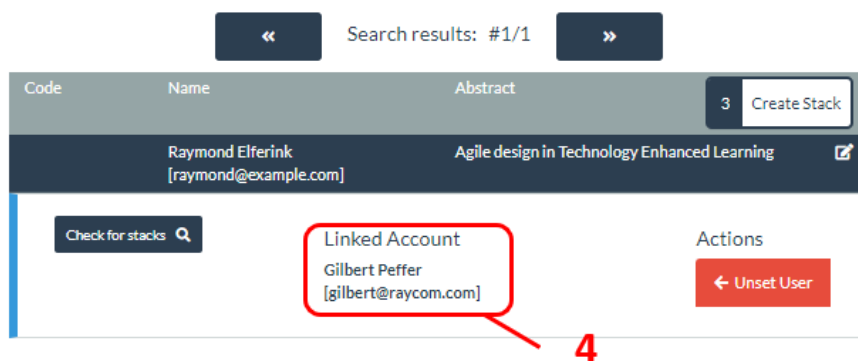
5. If the authors reply to say that they would like to switch the editing role then you can do this by first clicking on the **Unset User** button
6. In the record you will now be shown a list of all the users who have responded to the invite and you can **Link** the one that they have told you they want to take on the editing role.

You can check to see if this issue has been caused by them already having used the link themselves:

1. Go to the **Event Manager** in Learning Toolbox, open the **Event**
2. Then click on the **Participating Authors** tab
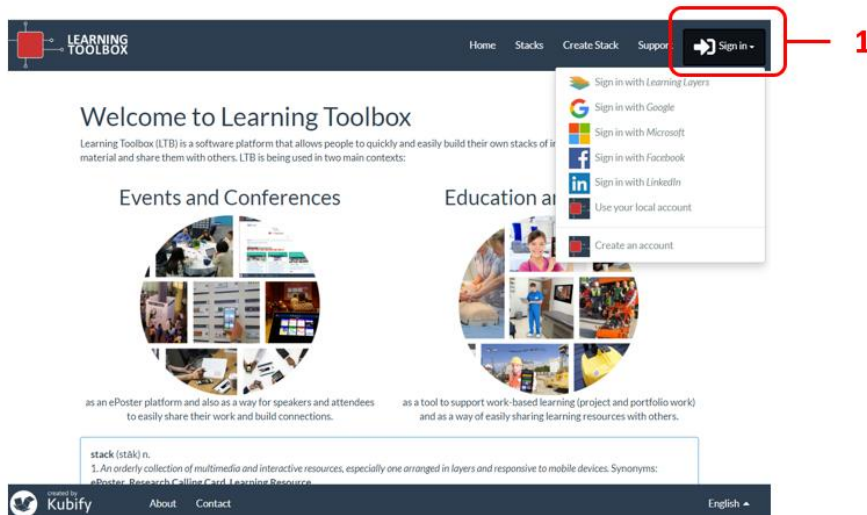3. Use the **search** to find this author's record
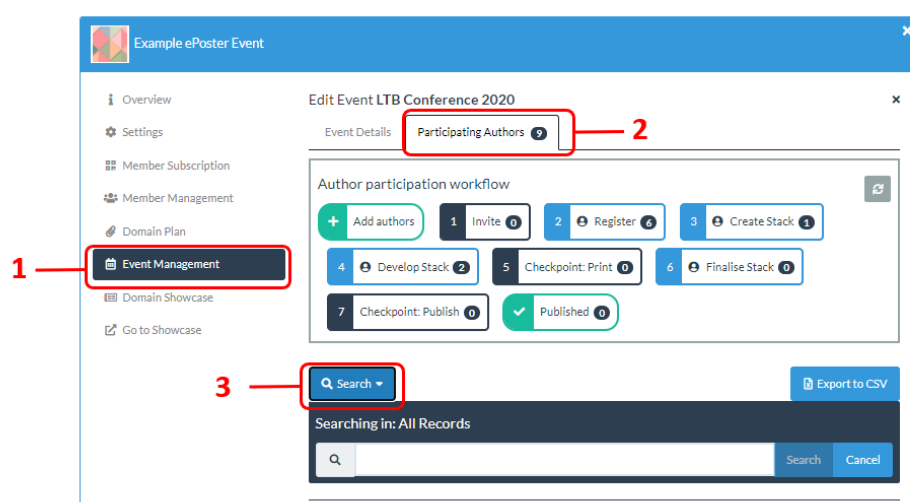
4. In their record check to see if there is a **linked account** already connected to this invite and if that linked account is actually the author but with a different email address. You can see an example of this in the image below.
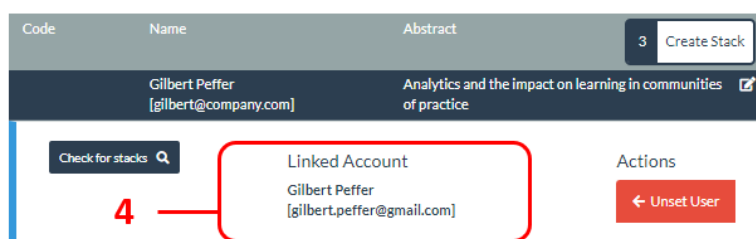
In this case you would just need to remind them that they have already registered and remind them of the email address of their Linked account. You can tell them that they no longer need to use the invite link, they can now just sign-in direct to Learning Toolbox https://my.ltb.io/ using the Linked account.

If there is no Linked account connected to their invite then the issue is probably caused by their organisation's virus/malware software corrupting the invite link. In this case you should:

1. Explain that this is the likely cause. Ask them to go to the Learning Toolbox website https://my.ltb.io/ and to click on the **Sign In** button and either sign-in using one of the social media routes or create an account. This will give them an account but it will not yet be linked to their ePoster invite.

Ask them to tell you when they have done that. When they have you can:

2. Go to the **Event Manager** in Learning Toolbox, open the **Event**
3. Click on the **Participating Authors** tab
4. Use the **search** to find this author's record
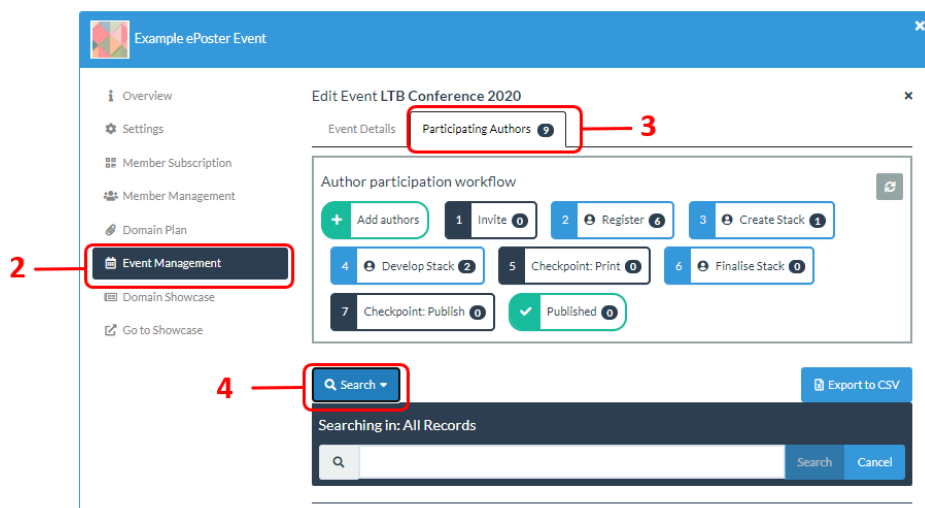
5. In the record you can now use the Find User search button to find the account they have created
6. And then use the Link User button to link it to this record.

You can tell them that they can now just sign-in direct to Learning Toolbox https://my.ltb.io/ using the account they have created and they will be able to start creating their ePoster/stack.

No-one has registered

If neither author has yet registered (clicked on the invite link) then this is very easy to arrange. The author just needs to forward the email with the invite link to their co-author who can then click on it and will become the Linked Account (editing author) for that ePoster.

One author has already registered

If one of the authors has already followed the link but they want to switch the editing role and give it to a co-author, then you can check this and make the change by following these steps:

1. Go to the **Event Manager** in Learning Toolbox, open the **Event**
2. Then click on the **Participating Authors** tab
3. Use the **search** to find this author's record
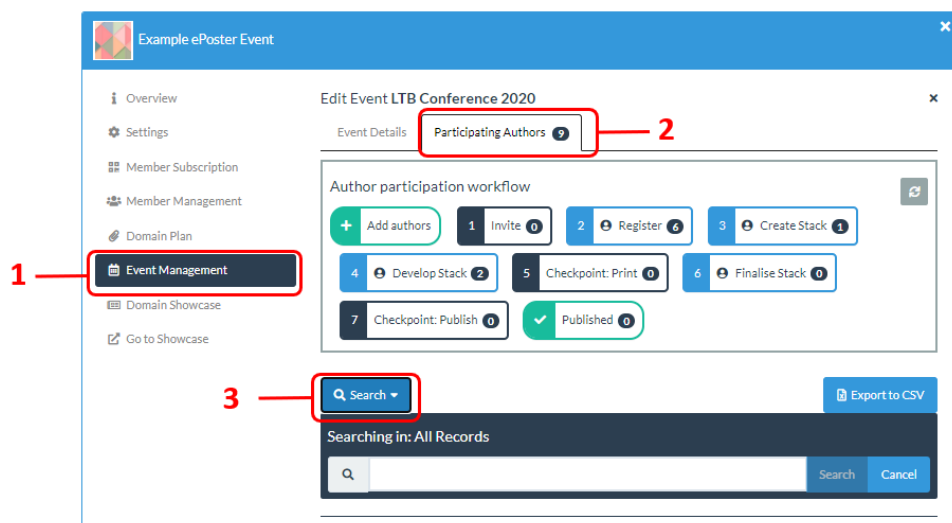
4. In their record you will see a **linked account** connected.
5. Click on **Unset User** to disconnect this account from the record.
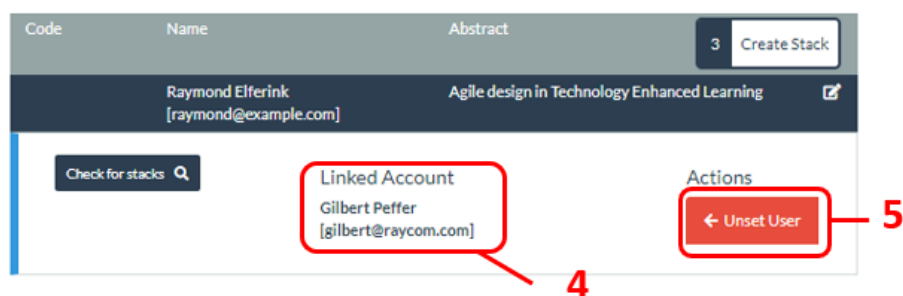
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6. In the record you will now be shown a list of all the users who have responded to the invite and you can **Link** the one that they have told you they want to take on the editing role.
7. If the co-author who wants to take on the editing role is in this list then you can use the **Link User** button to connect them to this record. They will now be the editing author for this ePoster.
8. If the co-author who wants to be the editor is not in the list then copy and email them the **invitation link**. If they follow that and login then they will be given the editing role for this ePoster.

If an author deletes an ePoster then it is not immediately removed from the system. Instead we store it in the Deleted ePosters folder that is viewable to administrators. This means that you can restore it for the author and link it again to their invite in your event.

To restore and re-link the ePoster follow these steps:

1. Click on **Stacks** in the top menu bar of Learning Toolbox. This will take you to the view that shows you the Stacks in your domain.
2. Click on the **Deleted Stacks** tab.
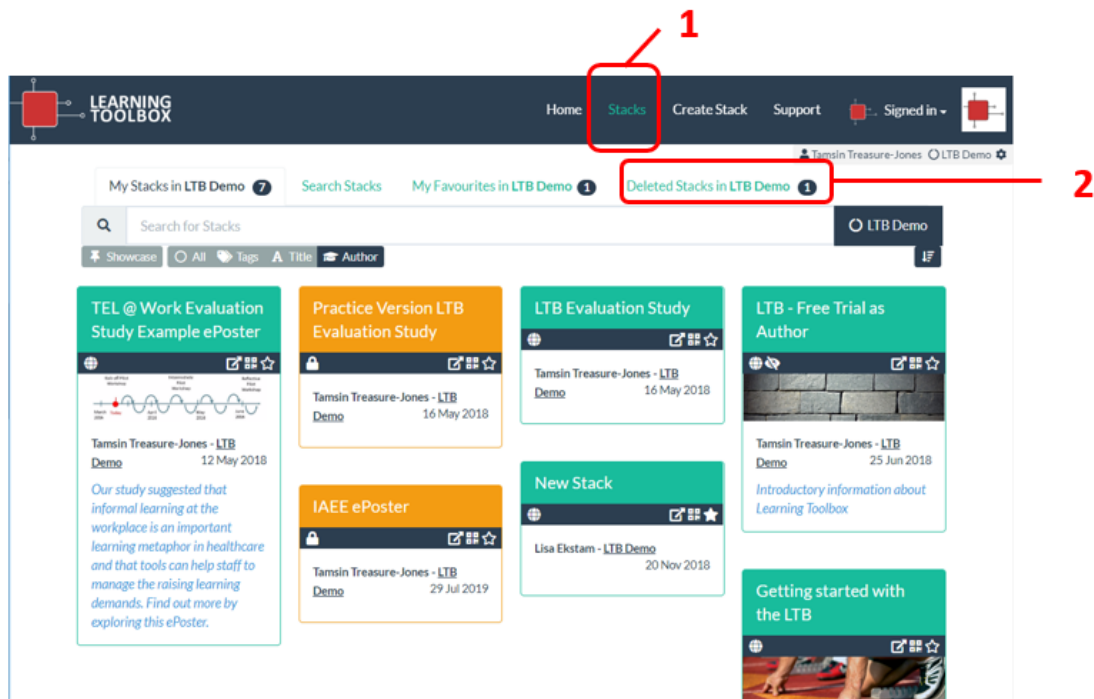
3. This will show you the stacks that have been deleted. Find the stack that needs to be restored and click on its **title**. Be careful not to click on the Delete option below it.
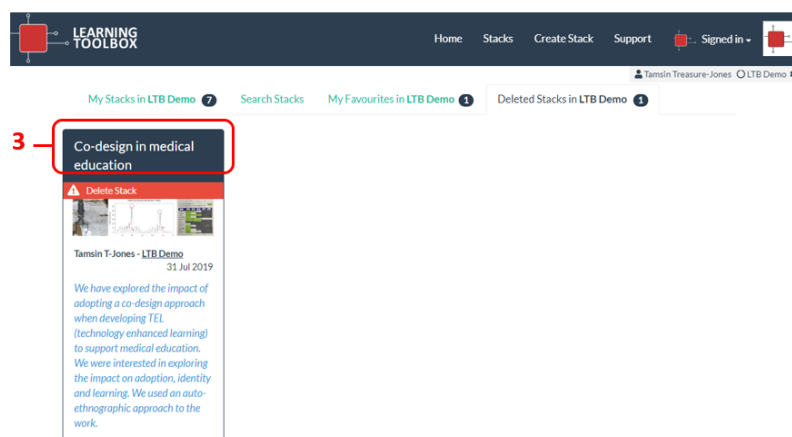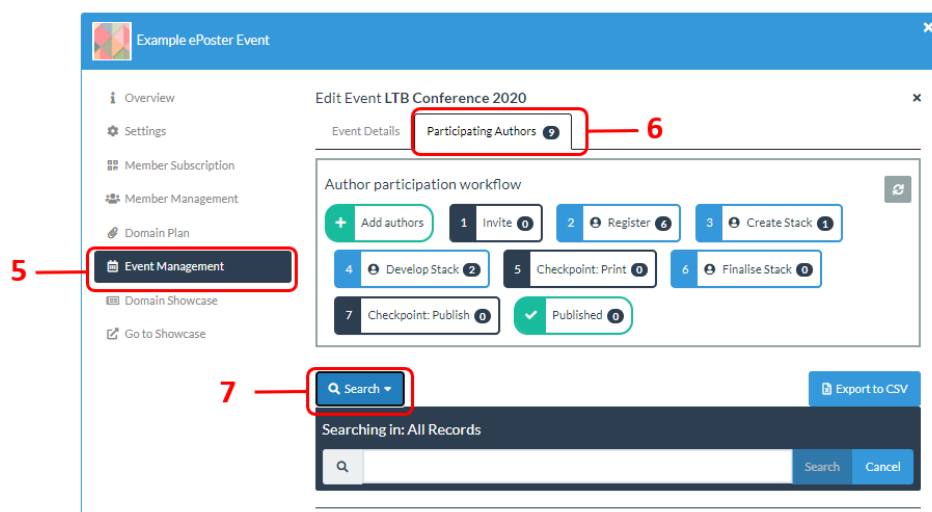
4. This will open the ePoster. You can now click on the **Restore** button.
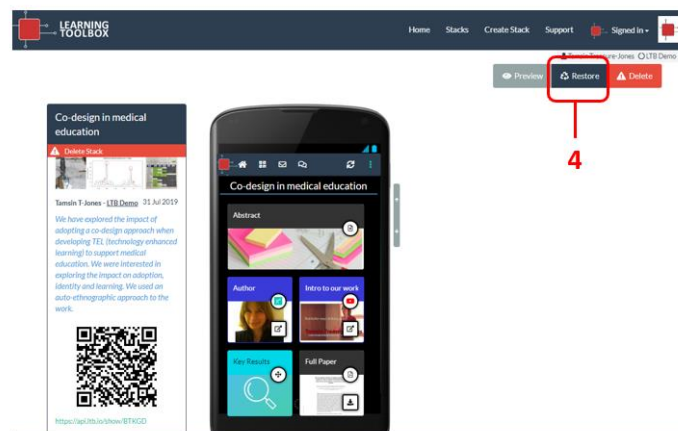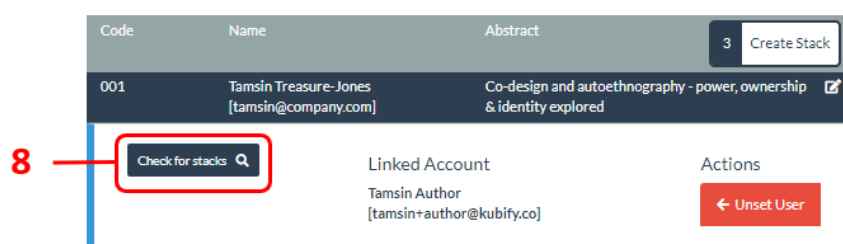

The ePoster is now restored but it still needs to be re-linked to the record in your event. To do this:
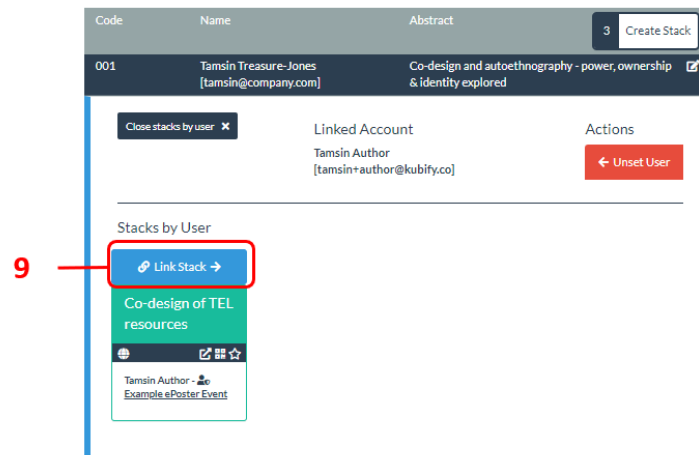
5. Go to the **Event Management**, open your **event**
6. Click on the **Participating Authors** tab
7. Use **Search** to find the author's record

8. In their record you will see a button titled **Check for stacks**. Click on this to find all stacks/ePoster made by this author.

9. Find the stack/ePoster you have restored and click on **Link Stack** to connect it to this record again.

You can then inform the author that the ePoster has been restored and that next time they sign-in to Learning Toolbox https://my.ltb.io/ and open their stacks they will see it and can continue to edit it.

Be aware that in some cases authors may have decided to start a new ePoster whilst waiting for the deleted one to be restored and that new ePoster may now be connected to the invite. In that case you will need to confirm with them which ePoster they intend to continue working on and ensure that that is the one that is linked to the invitation in your event.

*Q: Can the administrator make an ePoster for an author*

Ideally the author should activate their invite link and create their ePoster. However, sometimes this is not possible, due to author illness for example. In that case, if the administrator has the content that the author wanted to add to their ePoster then the administrator can create the ePoster on behalf of the author.

The following steps show how to do that if the author has not yet started to create their ePoster. You can even do this if the author has not yet registered.

1. Go to the **Event Management**, open your **event**
2. Click on the **Participating Authors** tab
3. Use **Search** to find the author's record
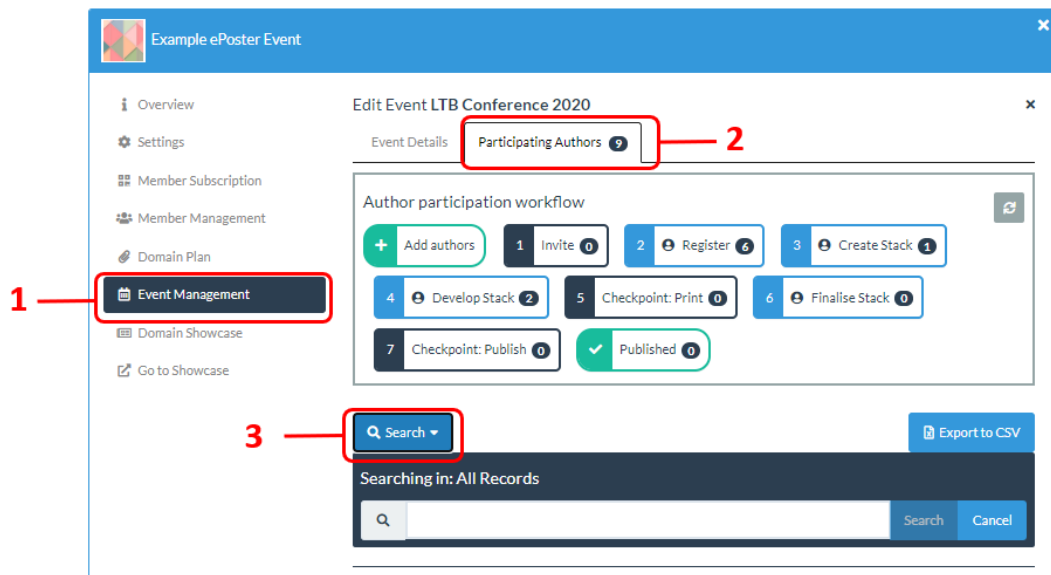
4. Click on the **Create Stack for Author** button.
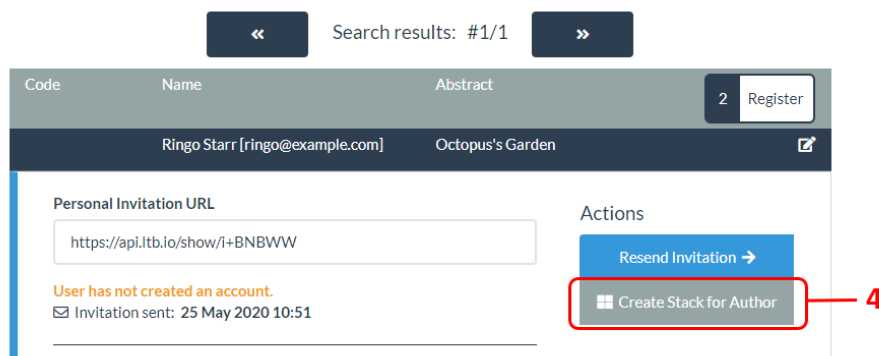
5. This will open the editor in a new tab in your browser and you can then edit the ePoster/Stack. Remember to **Save** when you are finished. You can then close that tab and return to the tab with the Event Manager open.
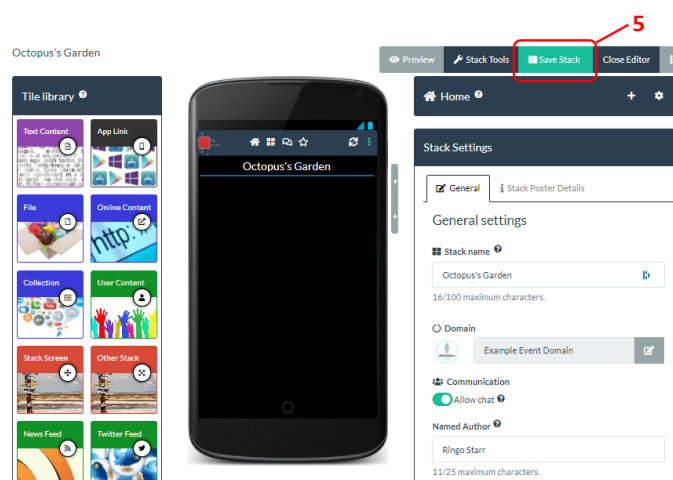
6. You will be prompted to **click to refresh** the record and the record will be moved to the Develop Stack stage in the workflow. You can now monitor and publish this ePoster/stack in the same way as those that have been created by the authors themselves.
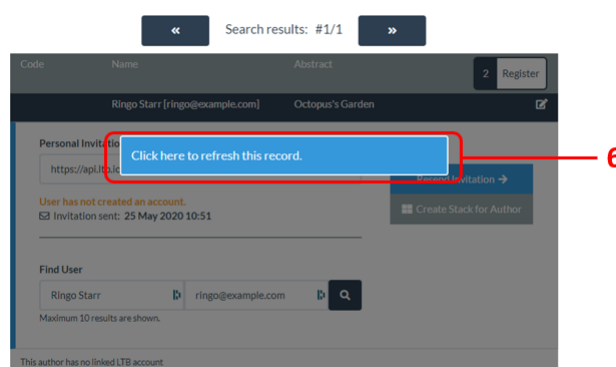
Please note: If the author had registered already

If the author had already activated their invite link and registered, then their account will be linked to the ePoster you have created. This will mean that if they do then sign-in to Learning Toolbox later then they will be able to click on Stacks, find their ePoster/Stack and continue to edit themselves.

Please note: If the author had not yet registered

If the author had not yet activated their invite link and registered, then author's name will show under the ePoster title in the showcase, but your account will be the linked account for this ePoster. If the author later decides tries to use their invite link then they will be shown an error message saying that it no longer works as it has been used by you. In that case if they contact you and want to be made the editing author of the stack then please contact us and we can do this.