ASHG 2023 Online Planner Guide
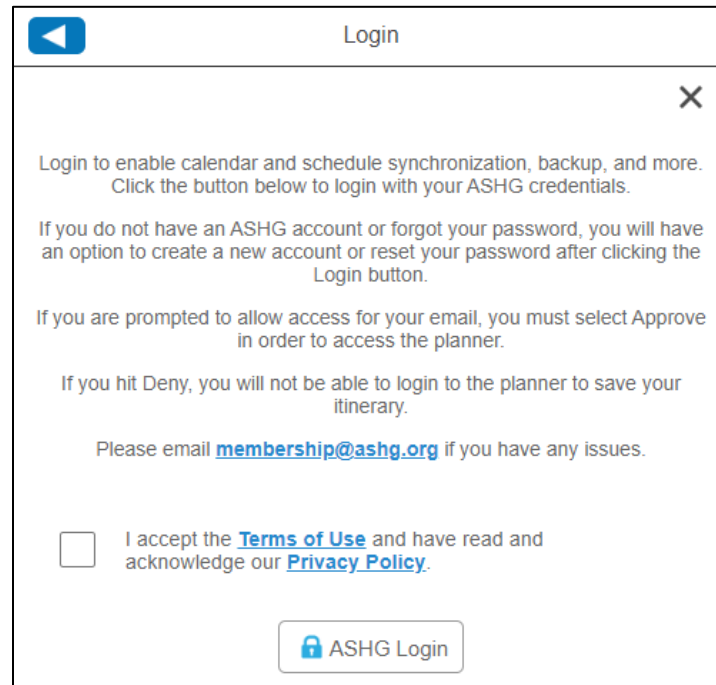
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Accessing the Online Planner

From the main ASHG home page, hover over "Meetings" near the top banner. In the dropdown menu that appears, select "Schedule" below "2023 Annual Meeting." Scroll down and click the "Schedule and Online Planner" button.

Navigation Tips

There are multiple navigation icons within the planner:

- Program: the complete listing of events with descriptions, which you can search by session, day, speaker, or abstract. This is the function you will use most. You will use this function to build your itinerary/schedule. You must be logged in to build and save your itinerary.
- Schedule: a snapshot/overview of the schedule. You will see the general schedule with dates and times. You can also add your sessions to this schedule.
- Abstracts: a complete list of all abstracts. You can search for an abstract by title using the "Search" feature. When logged in, you can bookmark abstracts of interest.
- Speakers: a list of all speakers in alphabetical order. You can search for a speaker by name using the "Search" feature or using the filter by first initial of last name.
- Registration: to register for the meeting (if you have not already done so).
- Exhibitors: allows users to view and connect with ASHG's exhibitors, providing solutions for you and your lab.

Logging-in

You are not required to log in to view the planner. However, to build your personal itinerary and enable calendar synchronization, you must log in. Make sure you **1) allow pop-ups in your web browser,** and **2) enable the pop-up function when logging in.**

To allow pop-ups (Chrome):

1. Click the three-dot menu icon (⋮) in the upper-right corner of your web browser, and then click Settings.
2. Navigate to Privacy and Security > Site settings > Pop-ups and redirects, and then click the radio button "Sites can send pop-ups and use redirects." Pop-ups are now allowed.
3. To block pop-ups once again, click the radio button "Don't allow sites to send pop-ups or use re-directs."

To allow pop-ups (Microsoft Edge):

1. Click the three-dot menu icon (•••) in the upper-right corner of your web browser, and then click Settings.
2. Navigate to Cookies and site permissions > Pop-ups and redirects, and then untoggle "Block." Pop-ups are now allowed.
3. To block pop-ups once again, toggle "Block" back on.

To allow pop-ups (Firefox):

1. Click the hamburger menu icon (☰)in the upper-right corner of your web browser, and then click Settings.
2. Navigate to Privacy & Security and then uncheck the box next to "Block pop-up windows." Pop-ups are now allowed.
3. To block pop-ups once again, check the box next to "Block pop-up windows."

Building Your Schedule

There are several ways to build your itinerary/schedule in the Online Planner.

- Click on the "**Program"** icon on the home page.
- Click on the **"Build My Schedule"** icon on the home page.

Adding Events to Your Schedule

To begin selecting sessions to add to your schedule, you must first log in and then go to **"Program."**

1. Select "Browse all Sessions" and then use the **Filter** selections or search features outlined below to find the session you are looking for.
2. You can either click the calendar icon near the session title to add it to your schedule or click on the session to see more details. This will open a side panel with three buttons with "+" signs near the top.

   a. The calendar icon allows you to add the session to your schedule.

   b. The bookmark icon allows you to easily find the session again by adding it to your "Bookmarked Items."

   c. The page icon allows you to take notes on the session.
3. To view your schedule, click on **"My Schedule"** in the left panel of the screen.
4. To download your schedule, click on **"Download My Schedule"** near the top of the left panel.
5. Choose how you would like to download your schedule:
   a. PDF – 2 Column
   b. PDF – 3 Column
   c. PDF – 4 Column
   d. ICS Calendar File (Microsoft, Google, Apple, etc.)
   e. CSV Spreadsheet
6. Your browser should then prompt you to open or save the file.
   a. If you downloaded to add it to your Microsoft/Google/Apple calendar, simply click open and it should automatically add to and open your calendar. (Additional prompts may be needed depending on which program or browser you use.)
   b. If you downloaded a PDF or Excel, please save accordingly.

Search & Filter Options

You have several options to search and select sessions. You can search sessions by Day, Session Type, Track/Audience, and CME. The default when you open the online planner is the OnDemand content. Simply navigate to the appropriate filter located on the left side.

Remember to "clear" a filter and click "done" before toggling to a new filter unless you want to filter by multiple things such as: Invited sessions (Session Types) on Wednesday only (Day).

<u>By Day</u>: allows you to look at all content by day. When searching by Day, you will have the option to select sessions from the Morning, Afternoon, or Evening sessions.

<u>By Session Type</u>: allows you to view content type such as: awards, plenary, platform, invited sessions as well as posters, workshops, receptions, and meeting and networking events. Once you click on a filter, you can then view by day. Remember to clear a filter before toggling to the next filter.

<u>By Track/Audience</u>: allows you to view content by various tracks for audience types such as Clinical Research; Ethical, Legal, and Social Issues; Diversity, Equity, and Inclusion; Basic or Translational Research, Clinicians, or Researchers. This area also allows you to filter for sessions that contain abstracts recognized for awards and other honors.

<u>By CME</u>: allows you to view sessions that provide continuing education credits.

Viewing the Schedule at a Glance

The Schedule tab provides an overview of meeting events across all days. If you have logged into the planner/app, additional functionality is available.

- Use the left and right arrow keys along the top of the grid to move back and forth between meeting days.
- If you have added sessions to your schedule in this tool, items added to your schedule will appear in a bold color overlaid on the regular schedule.
- Click on any day at the top to view that particular day's events.
- Click "Add Meeting" to add a personal appointment to your schedule within this tool. Any personal meetings you have added to your schedule in this tool will appear with a person icon at the desired date/time.
- You may choose to hide your personal schedule from view using the icon at the top of the screen.
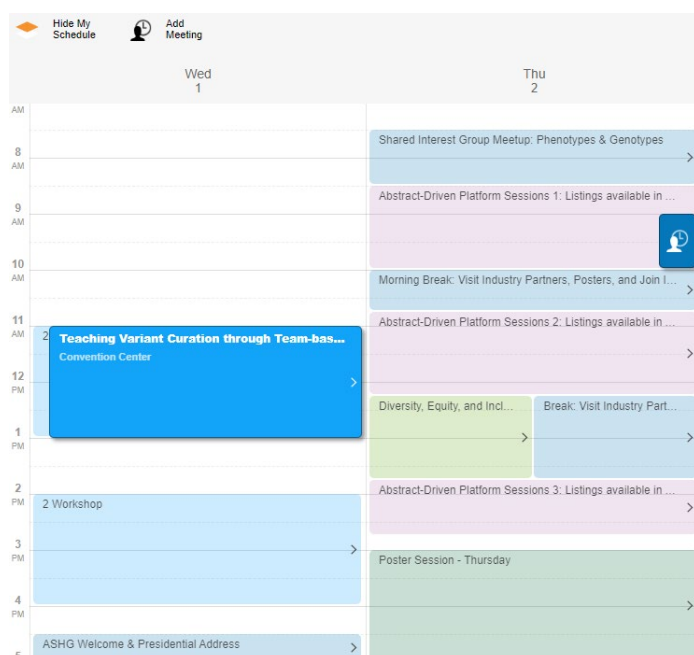
Example: Personalized schedule showing a personal meeting at 9am Thursday and a Tuesday workshop added to the personal calendar shown in bold blue.

Viewing Bookmarked Items

If you have bookmarked items for future reference (login required):
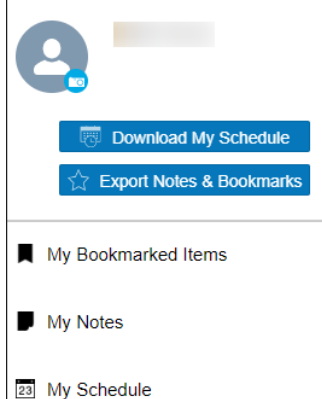
- Use the "Export Notes & Bookmarks" button to export your bookmarks and notes.
- Use the "My Bookmarked Items" to view bookmarked items in list form within the planner.
- Use the "My Notes" button to view your notes.