OCS in an Hour

An Introduction to Open Conference Systems
Version 2.1

Last Updated: September 2, 2008

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Open Conference Systems is a research and development initiative of the Public Knowledge Project at the University of British Columbia. Its continuing development is currently overseen by a partnership among UBC's Public Knowledge Project, the Canadian Center for Studies in Publishing, and the Simon Fraser University Library.

For more information, see the Public Knowledge Project web site: http://pkp.sfu.ca

PKP PUBLIC KNOWLEDGE PROJECT

Overview

Open Conference Systems (OCS) is an open source solution to managing and publishing scholarly conferences online. OCS is a highly flexible management and publishing system that can be downloaded for free and installed on a local Web server.

It has been designed to reduce the time and energy devoted to the clerical and managerial tasks associated with managing a conference, while improving the record-keeping and efficiency of editorial processes. It seeks to improve the scholarly and public quality of conference publishing through a number of innovations, from making policies more transparent to improving indexing.

OCS Features

Open Conference Systems is a free Web publishing tool that will create a complete Web presence for your scholarly conference. OCS will allow you to:

1. Create a conference Web site
2. Manage conferences that occur more than once (e.g., yearly)
3. Compose and send a call for papers
4. Electronically accept paper and abstract submissions
5. Allow paper submitters to edit their work
6. Conduct peer reviews
7. Post conference proceedings and papers in a searchable format
8. Schedule a Conference
9. Post, if you wish, the original data sets
10. Register participants, including accepting payments
11. Integrate post-conference online discussions
12. Utilize an e-mail template system
13. Support multiple languages with localization files
14. Take advantage of more customizable, scalable and secure code

A Quick Look

The following image is a screenshot of an OCS Conference Home Page:

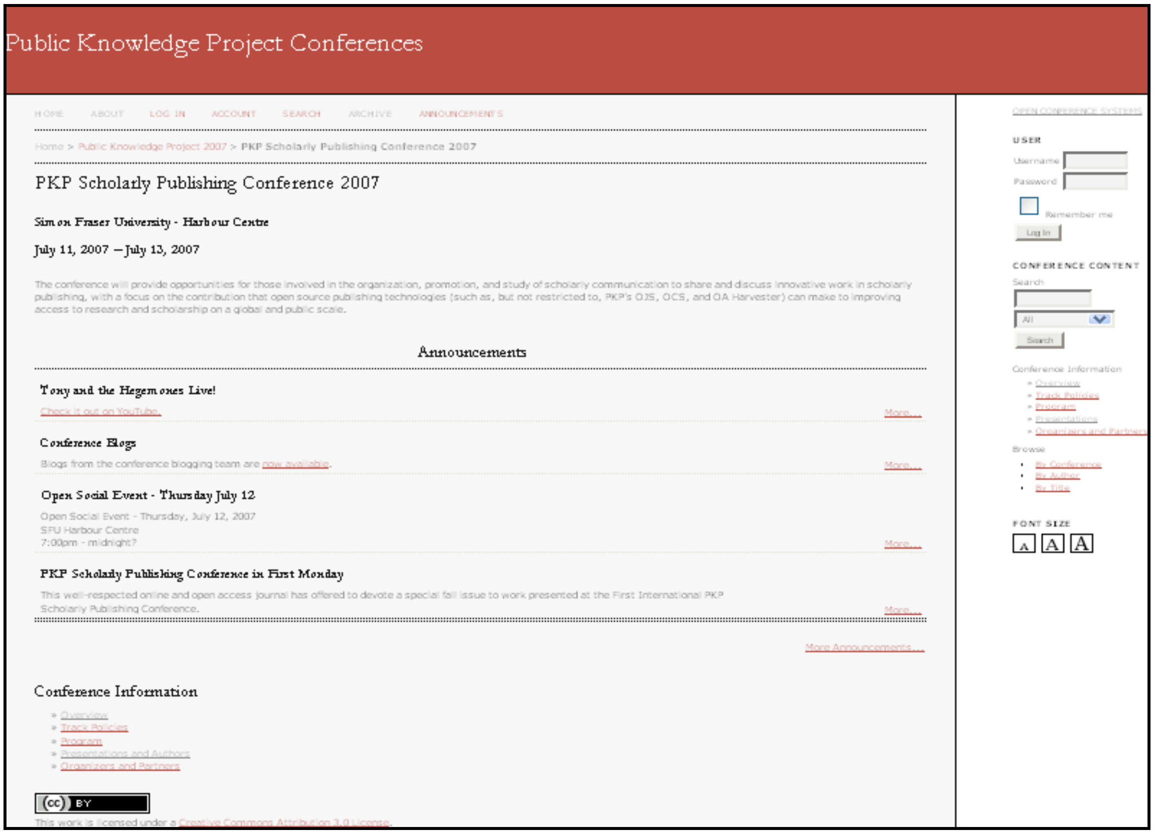


Figure 1: OCS Conference

The next image shows its online Proceedings Table of Contents organized by Tracks:

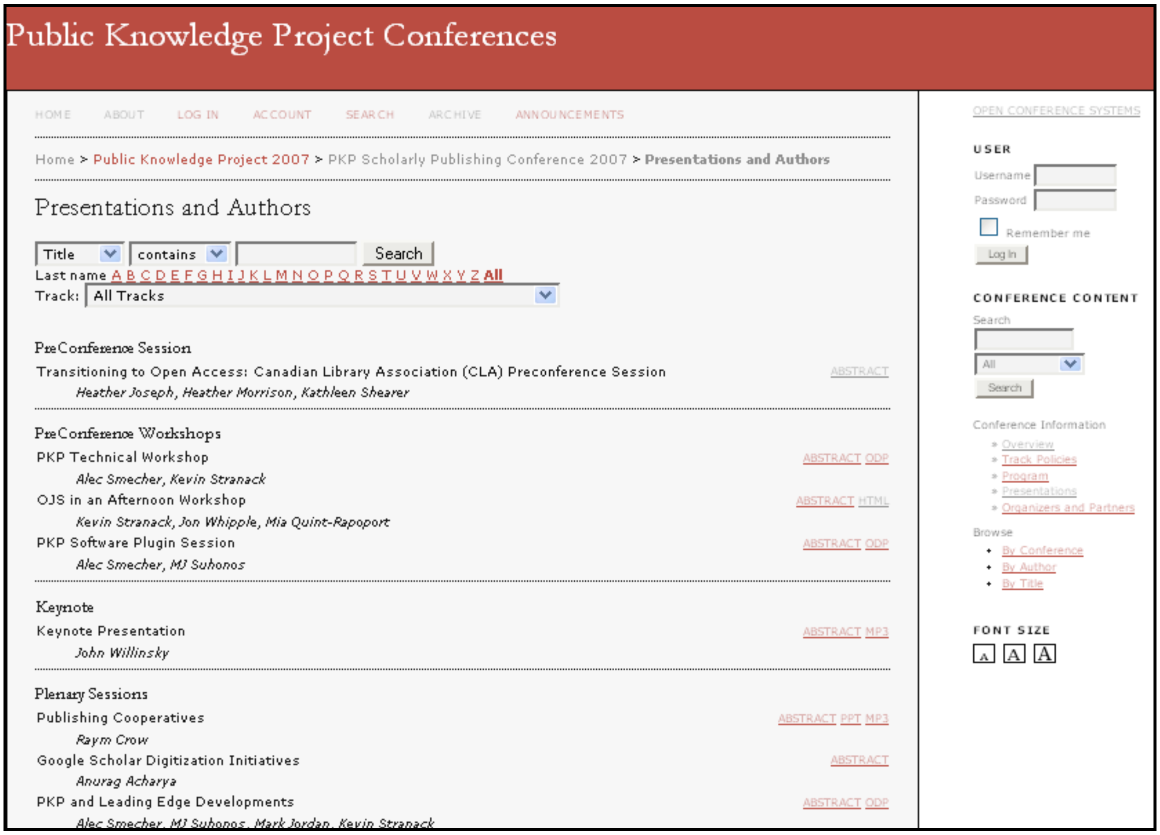
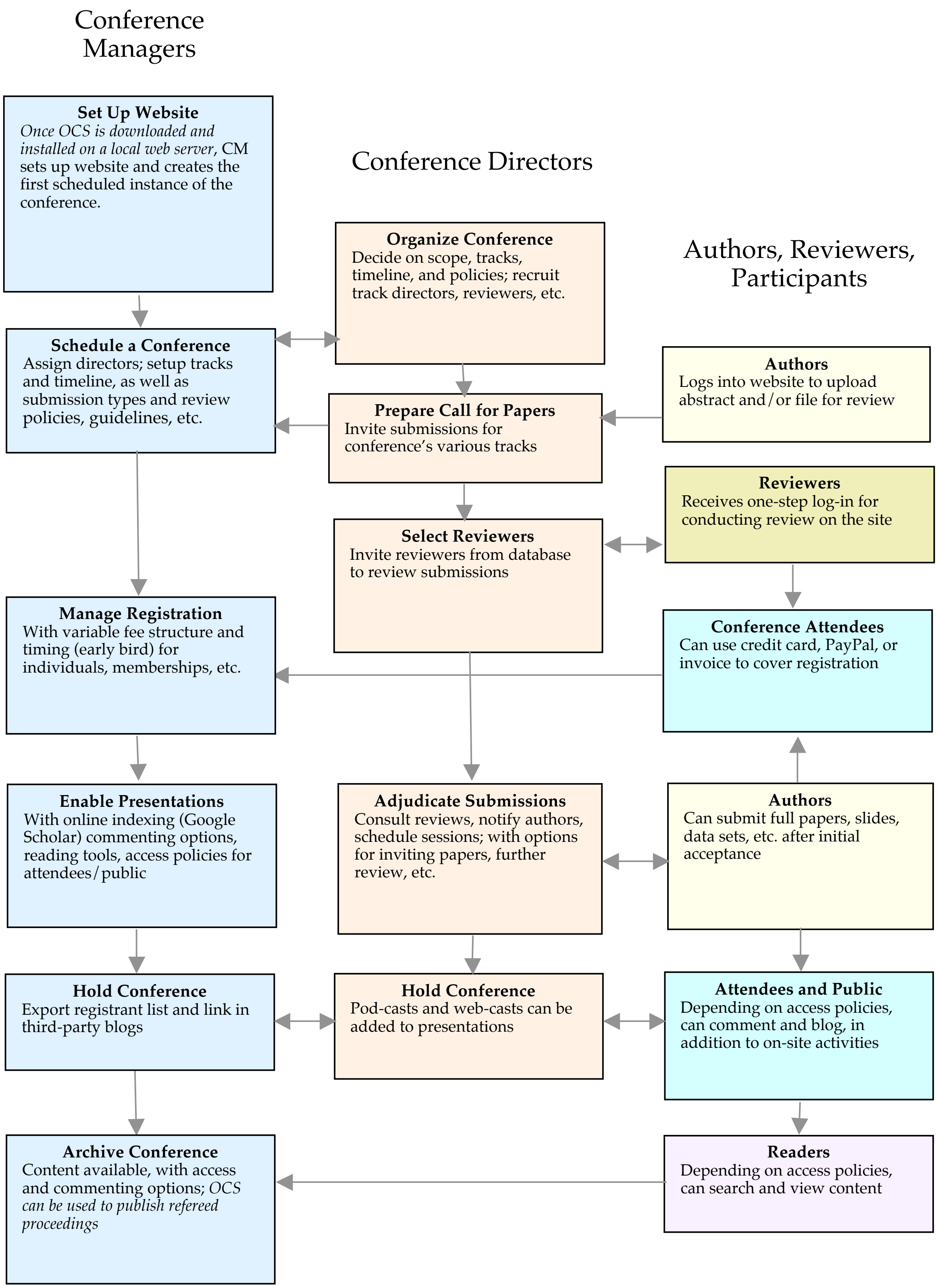


Figure 2: OCS Table of Contents

OCS Workflow Chart



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System Requirements

A server environment meeting the following requirements is recommended:

- PHP >= 4.2.x (including PHP 5.x); Microsoft IIS requires PHP 5.x
- MySQL >= 3.23.23 (including MySQL 4.x) or PostgreSQL >= 7.1 (including PostgreSQL 8.x)
- Apache >= 1.3.2x or >= 2.0.4x or Microsoft IIS 6
- Operating system: Any OS that supports the above software, including Linux, BSD, Solaris, Mac OS X, Windows

As PKP does not have the resources to test every possible combination of software versions and platforms, no guarantee of correct operation or support is implied. We welcome feedback from users who have deployed OCS on systems other than those listed above.

Help Documentation

Open Conference Systems has a help document that is contextually embedded within OCS, with the relevant pages coming up depending on where the user is when requesting Conference Help.

The Help document can be viewed at http://pkp.sfu.ca/ocs/demo/present/index.php/index/help/.

Further documentation can also be found at http://pkp.sfu.ca/ocs_documentation.

Community Contributions

The OCS team encourages contributions from the developer community. If you are interested in getting involved in making OCS even better, we welcome your participation.

Test-Drive OCS 2.1

A demonstration conference utilizing OCS 2.1 will be set up online at http://pkp.sfu.ca/ocs/demo.

In addition, potential users of OCS may take the software out for a test-drive – as a Conference Director, a Track Director, or a Reviewer – at a second demonstration site that will be set up for this purpose at http://pkp.sfu.ca/ocs2/demo/testdrive/.

Log in using **admin** as the username and **testdrive** as the password, and select one of the available roles in the management process, and explore how it operates.

Also feel free to submit a test manuscript to see what authors experience, or assign submissions to reviewers, and come in as a reviewer.

Please note that any changes made to the Test-Drive Conference will be cleared every Monday (8:00 GMT).

Roles

OCS 2.1 is based largely on the pre-existing code used for Open Journal Systems 2.x. As a result, you will notice many features from OJS, including the use of roles, and the ability to support multiple conferences, and multiple years for each conference, from a single installation. For those having used our OJS software, the concept of Roles will be very familiar. For those new to our software, it is important to remember that any one person may fulfill multiple roles, for different conferences.

- Site Administrator: Oversees the entire installation, and sets up any new conference sites hosted on the installation.

- Conference Manager: Oversees a conference site on the installation (e.g., the Important Music Association Conference site or the Important Biology Association Conference site), including all of the user accounts for that site. The CM configures the conference site and sets up any of the individual conference sites (e.g., Important Music Conference 2006, Important Music Conference 2007).

- Director: Manages the proposal submission, editing, and publication process for one of the conferences (e.g., Important Music Conference

2007). The Director also sets the conference timeline (starting dates, ending dates, etc.).

- Registration Manager: Responsible for the conference registrations.

- Track Director: Responsible for managing the presentation submissions for their track (or stream, category, etc.), seeing them through the review and editing process, and accepting or rejecting them for their conference.

- Reviewer: Provides peer-review of the submissions for the conference. They will recommend for or against the inclusion of the submission to the conference.

- Author: Submits their proposals to the conference, and participate in the review and editing process.

- Reader: Users that can register to read the proceedings. Some conferences do not require registration to read the proceedings, however.

Site Administrator

Once OCS is installed, the Site Administrator can generate as many conference sites as required from the single installation, and oversee the administration of each conference site that is created.

OCS is designed to allow you to host a single, one-time conference, or to be a complete multiple conference management system, allowing you to run several conferences from the single installation, each of which may occur repeatedly over several years. For example, the University of Important Ideas might use OCS to host the conference sites for the Important Biology Association conferences (2004, 2005, 2006, 2007), the Important Historical Association conferences (2005, 2006), and the Important Music conferences (2007, 2008).

In all, they have one central OCS conference site, supporting 3 conferences, each of which has one or more occurrences. It is important to keep this larger view of conference management in mind, because if the system is seen only from the perspective of a single, one-time conference, many of the features may seem overly complex or confusing.

Getting Started

Log in to your OCS account and select your role as 'Site Administrator'.

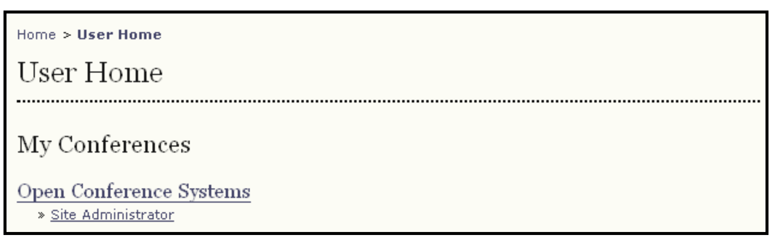

Figure 3: Selecting your role as Site Administrator

This will take you to the menu options for the Site Administrator.

Site Management

The Site Administrator's Site Management menu provides a set of links to begin the initial configuration of the conference site.

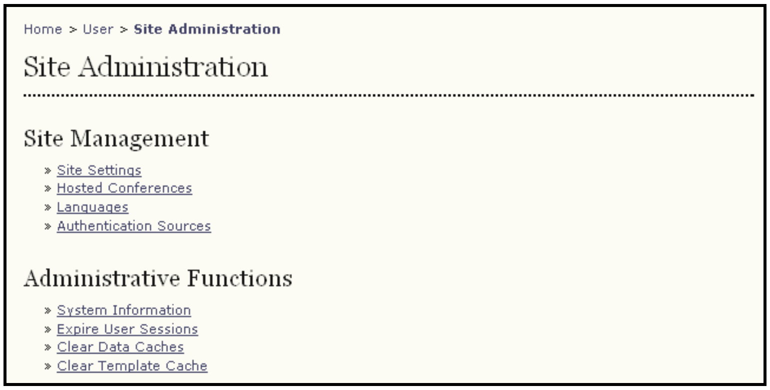

Figure 4: Site Management

Site Settings

This section will allow you to add information regarding your overall OCS installation, not individual conferences. This includes the name of your site, an introductory statement about your site, a redirect option, a description of your site, contact information, a minimum password length for registered users, and indexing registration. You will have the opportunity to provide details about your individual conference(s) at a later stage.

The redirect option is useful if you will only have a single hosted conference, and would like to direct users directly to that conference, rather than to the main site page. Once your hosted conference is set up (see later in this manual), it will appear in the redirect field as a dropdown option to select. If your site will host multiple conferences, or if you wish to have users first come to the site page, leave the redirect field as it is. At this point, you may wish to simply ignore this option and return to it once your conference or conferences are set up.

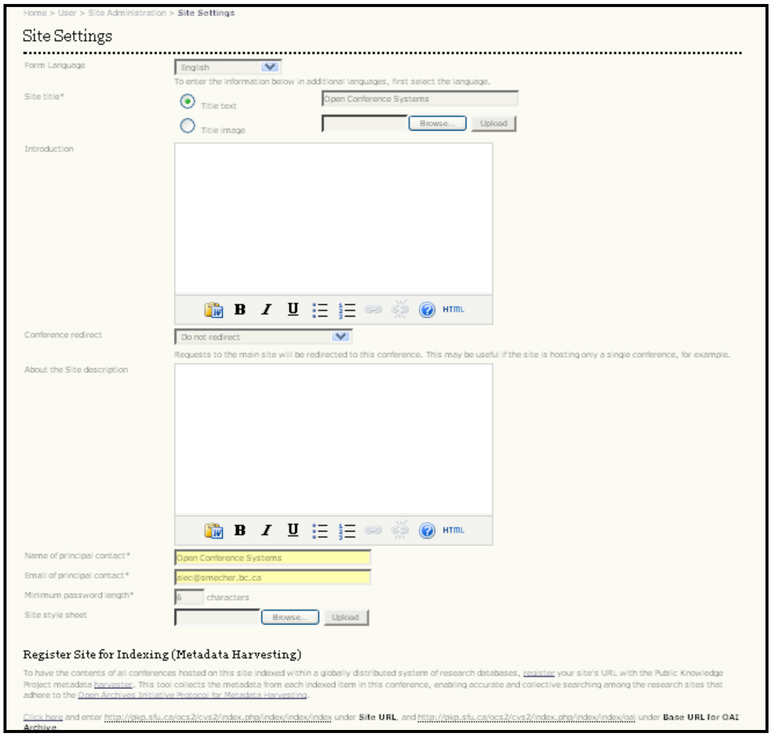

Figure 5: Site Settings

Once you have made your changes, use the Save button to update the system. You will then be presented with a link to return you to the Site Administrator menu.

Hosted Conferences

To create a hosted conference, click the Hosted Conferences link. On the resulting page, select Create Conference. Fill in the fields as appropriate (be sure to check "Enable this conference to appear publicly on the site"). The 'path' should be a single word or abbreviation that will be unique for this conference. It will also be part of your conference's URL, so choose carefully. In the figure below, we have added the conference title "PKP Scholarly Publishing Conference" and the abbreviation "spc" for the path. We did not specify a year, however, because we may want to hold the event annually. Each year's conference event would be created by the Conference Manager, under Scheduled Conferences (later in this manual).

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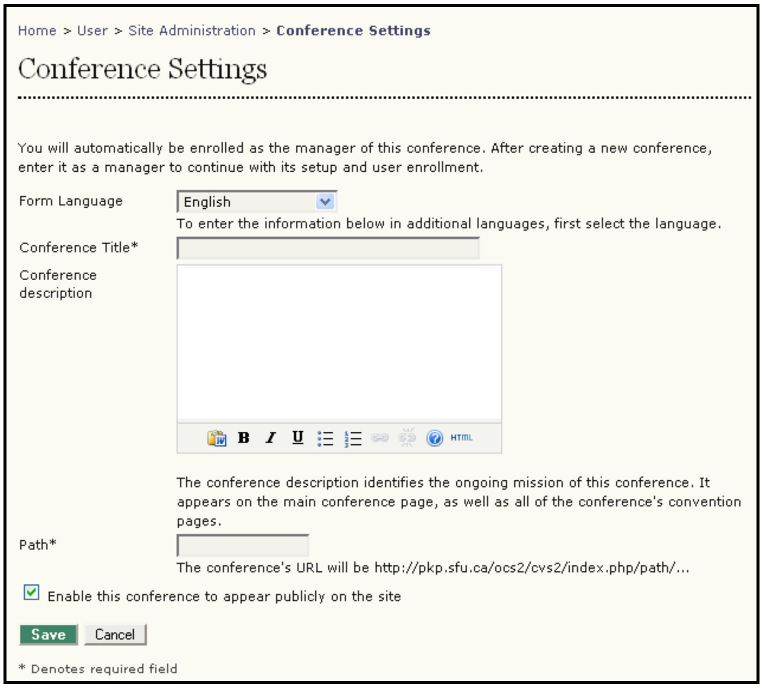


Figure 6: Conference Settings

It is also possible for this single OCS installation to host more than one conference series. For example, in the figure above, the Public Knowledge Project has created a Scholarly Publishing Conference (which may run every year), but the PKP may also wish to run a conference (or annual set of conferences) on OAI Harvesting technologies. This new conference would also be created by the Site Administrator here.

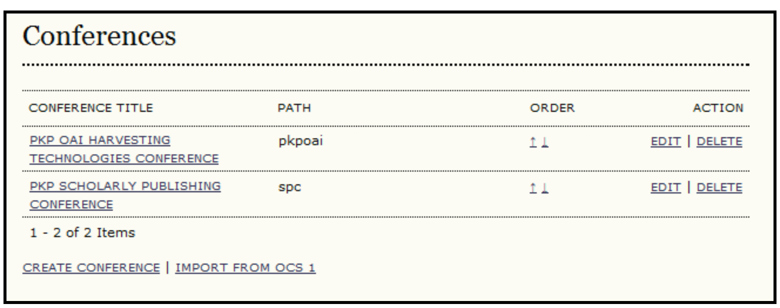


Figure 7: Conferences

Using the Order arrows, the Site Administrator can adjust the order in which the different conferences appear on the website:

Figure 8: Conference Listings

Languages

OCS is designed to be a multilingual system, allowing conferences supporting a wide variety of languages to be hosted under a single site. The Site Administrator can specify the default language of the site and install additional locales as they become available.

The next step in administering your OCS site is to select the languages to be used. English is enabled by default. Select the default language for your conference from the dropdown menu. You can also check other languages, to provide a multilingual interface for your conference.

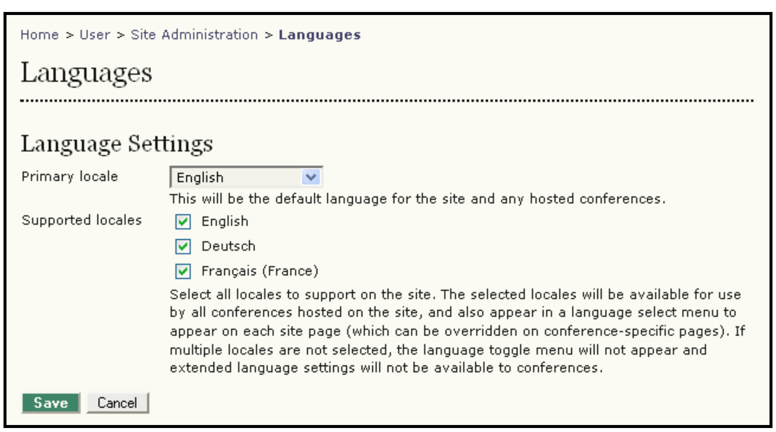


Figure 9: Languages

If additional languages are not showing under "Supported Locales", scroll down the page to the Manage Locales section. From here, you can check each additional language you would like for your conference, and then click "Install". Then you can scroll back up the page and check the languages for your conference.

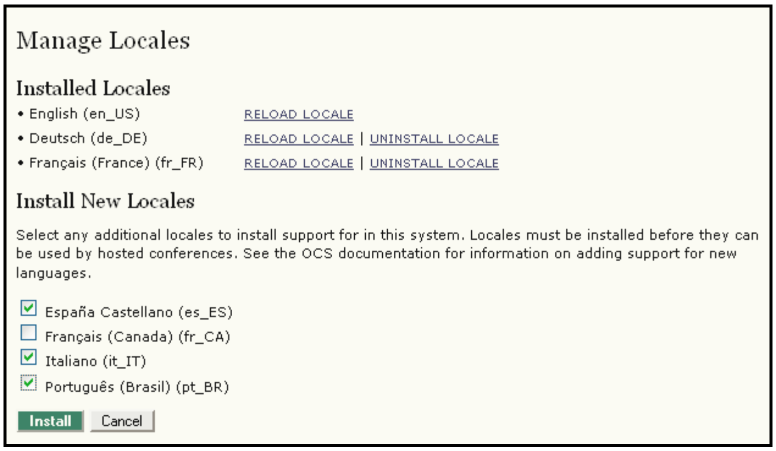


Figure 10: Installing additional languages

For further information on installing and supporting other languages, see the document titled *Translating OJS and OCS*, available in HTML at http://pkp.sfu.ca/files/docs/translating/index.html and in PDF at http://pkp.sfu.ca/files/docs/translating/translating.pdf.

Authentication Sources

By default, the OCS user database is used for authentication. Currently, this is the only authentication source available, however, alternative methods, such as LDAP, may be developed.

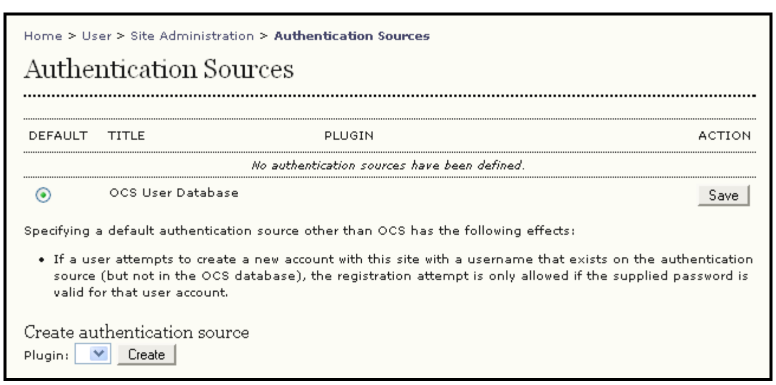


Figure 11: Authentication Sources

System Information

Under Administrative Functions, you will find a variety of options to administer your conference site. Selecting System Information provides information on the version of OCS you are running, the availability of any software updates, the ability to edit your OCS configuration file, and a range of other server settings at a glance.

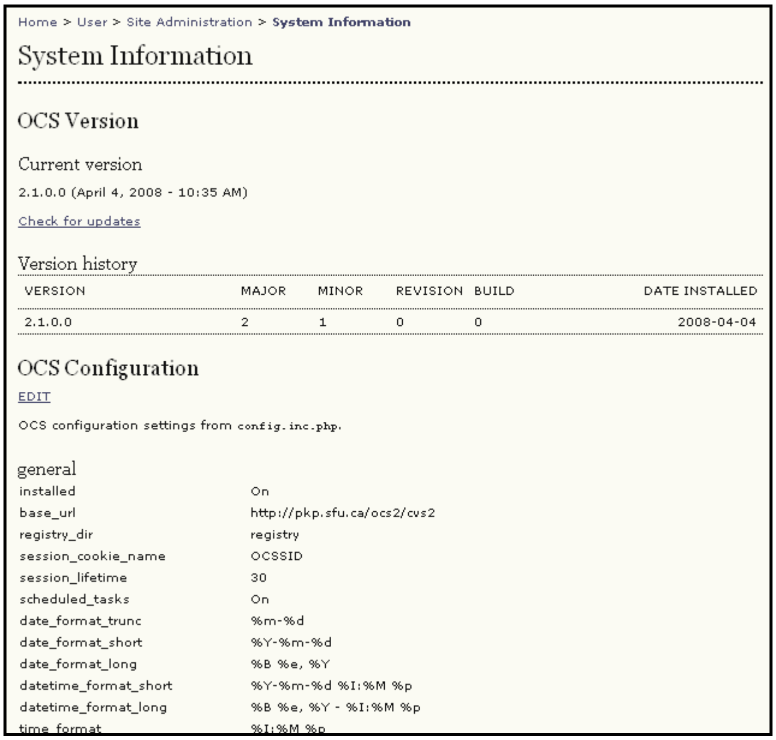


Figure 12: System Information

Expire User Sessions

This clears all active user sessions in the system, requiring any user that is currently logged in to sign in to the system again.

Clear Data Caches

Clears all cached data. This function may be useful to force data to be reloaded after customizations have been made.

Clear Template Cache

Clears all cached versions of HTML templates. This function may be useful to force templates to be reloaded after customizations have been made.

Conference Manager

The next step in setting up your conference site is to log in as the Conference Manager. If you are also the Site Administrator, this role will have been automatically created for you. If not, contact the Site Administrator for your username and password.

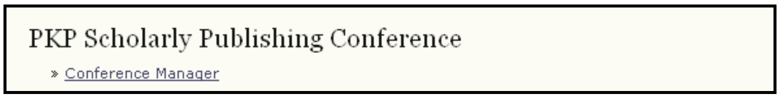


Figure 13: Logging in as Conference Manager

Once logged in, you will see a variety of menu options:

Figure 14: Conference Site Management

Website Management

Following the steps outlined, start with Website Management. This will take you through the six steps to set up the web site for your conference.

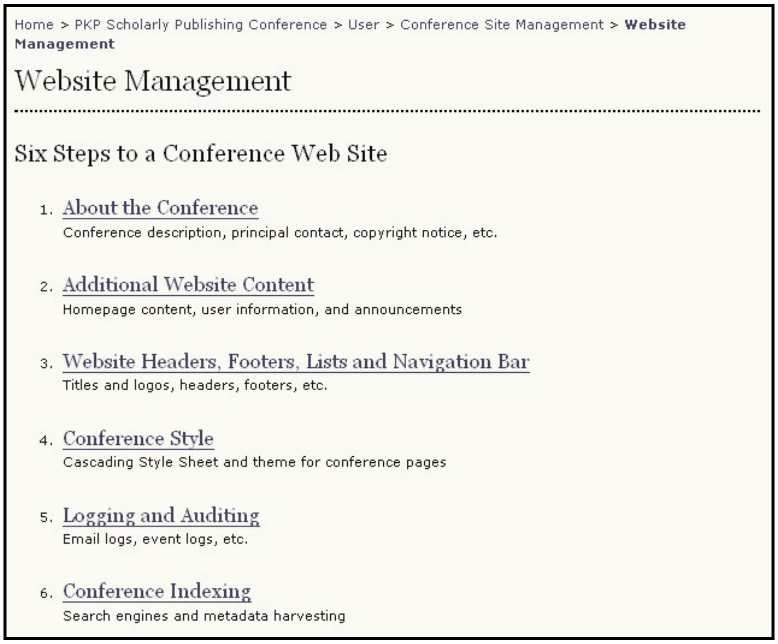


Figure 15: Six Steps to a Conference Web Site

Step 1: About the Conference

This section consists of a series of steps to describe your conference site.

1.1 Title

Enter the title of your conference website here.

Figure 16: Title

1.2 Conference Description

Sections 1.1 and 1.2 should be automatically filled in by information provided by the Site Administrator when they set up the Hosted Conference (see previous section).

Figure 17: Conference Description

1.3 Principal Contact for Conference Website

Use this section to add the details for contacting the conference organizer.

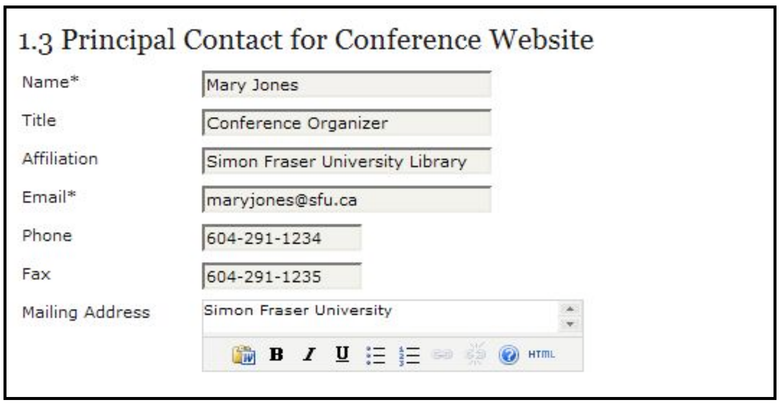


Figure 18: Principal Contact for Conference Website

1.4 Copyright Notice

A sample copyright notice is provided by default, but you can make any required changes here.

Figure 19: Copyright Notice

You can also elect to require authors to agree to the copyright notice as part of the submission process, and whether or not to post the Creative Commons license logo on your website.

1.5 Archive Access Policy

This option allows you to decide whether or not to require user registration for accessing the abstracts and presentations.

You may also decide whether to allow for reader comments on the presentations.

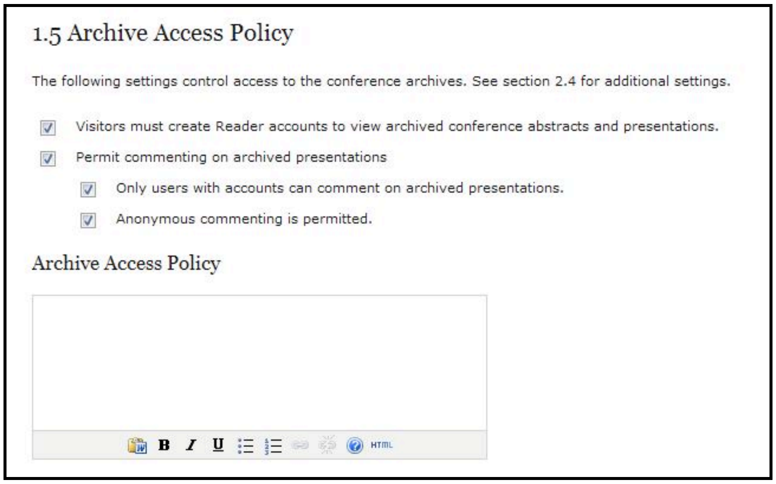


Figure 20: Archive Access Policy

1.6 Privacy Statement

A default privacy statement is included here, but you may modify this as appropriate.

Figure 21: Privacy Statement

1.7 Add Item to Appear in "About the Conference"

If you need to include any additional information about your conference, use this section to create a new entry on the About page. It is possible to add multiple entries using the "Add About Item" button.

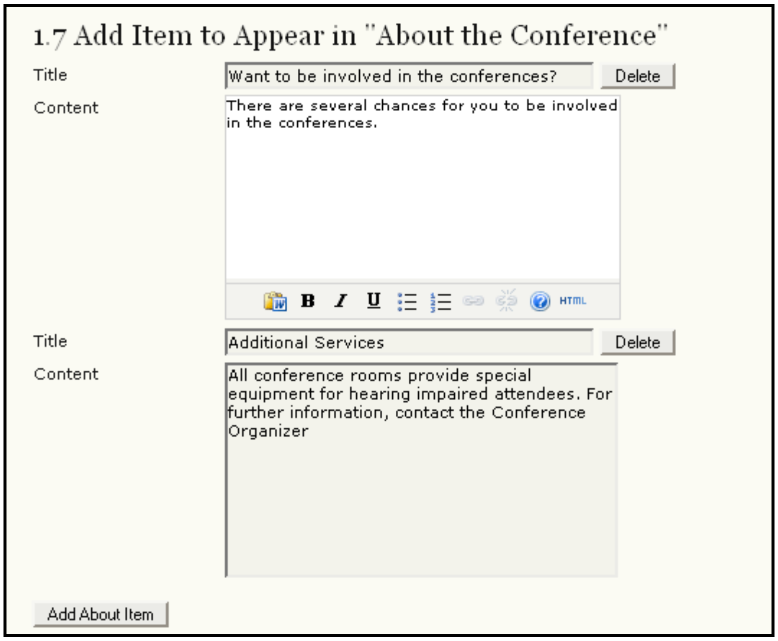


Figure 22: Additional Items in About the Conference

Step 2: Additional Website Content

2.1 Scheduled Conference Redirect

This will redirect the requests to the conference website to the scheduled conference. Typically this setting is used when the conference holds a single scheduled conference.

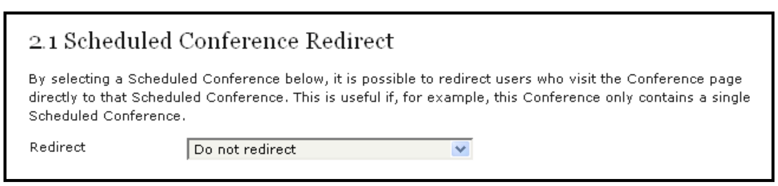


Figure 23: Scheduled Conference Redirect

2.2 Homepage

Each conference hosted on your website can have a unique homepage image, to provide additional visual interest or convey extra information. Use this section to upload an image of your choice, and additional text, if desired.

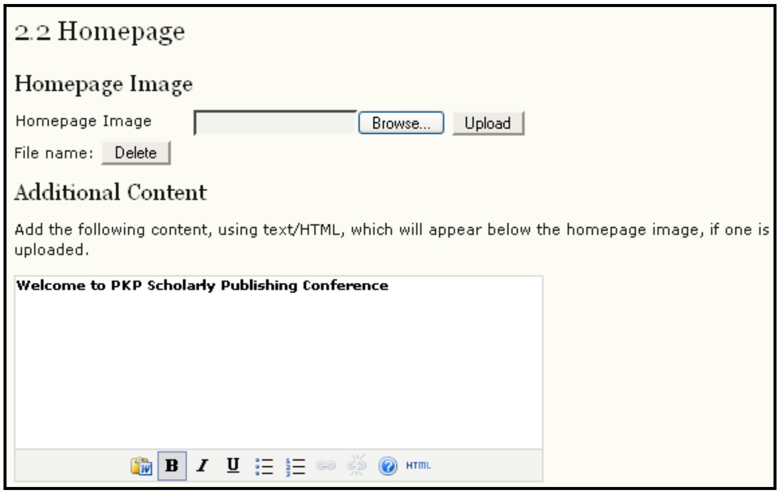


Figure 24: Homepage Image and Text

2.3 Information for Users

By default, information for your Readers and Authors has been included in the system. This information appears in the "Information" section of the sidebar. Use this section to make any necessary modifications.

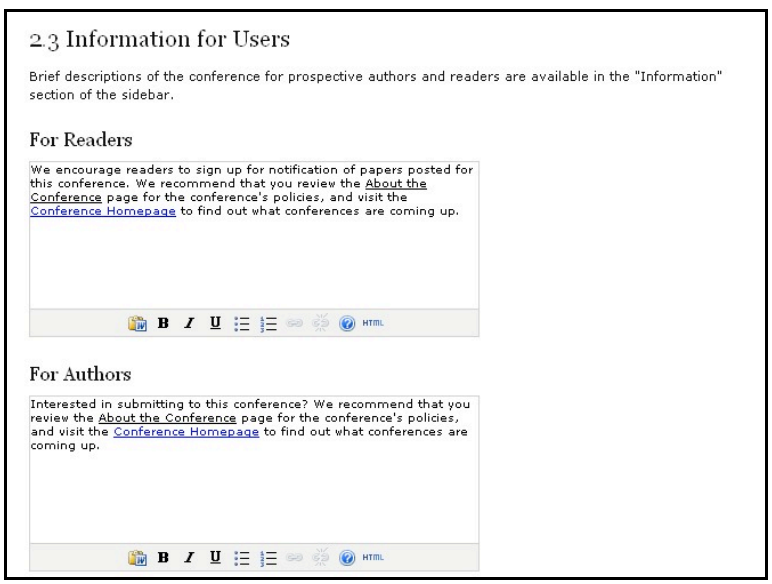


Figure 25: Information for Users

2.4 Announcements

You can also add Announcements to your conference homepage, to help keep your audience up to date on conference developments. Use this section to activate Announcements, and to decide how many to display by default.

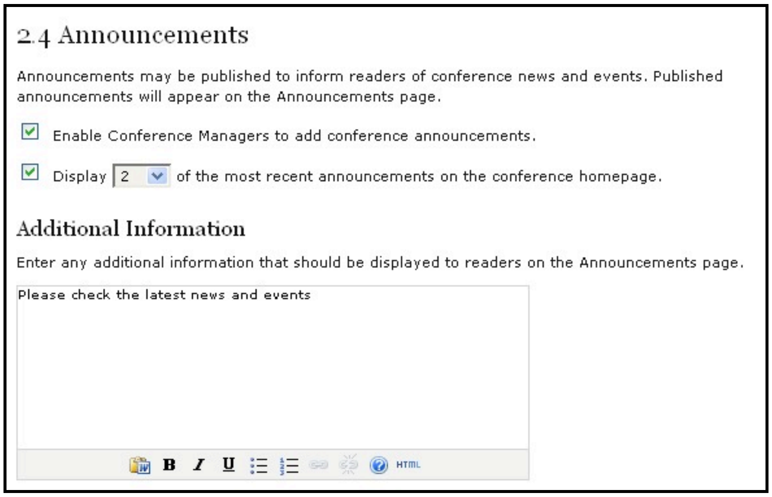


Figure 26: Announcements

2.5 Access to Conference Presentations

Next, use this section to determine the access to your online presentations. You can choose between allowing access to the presentations to anyone, requiring an account with your conference website to view the presentations, or to limit access to the presentations to registered conference participants.

Figure 27: Access to Conference Presentations

Step 3: Website Headers, Footers, Lists and Navigation Bar

3.1 Conference Homepage Header

Use this section to add a conference homepage header to your site, either as text-based title or as an image. You can also include a logo, if appropriate.

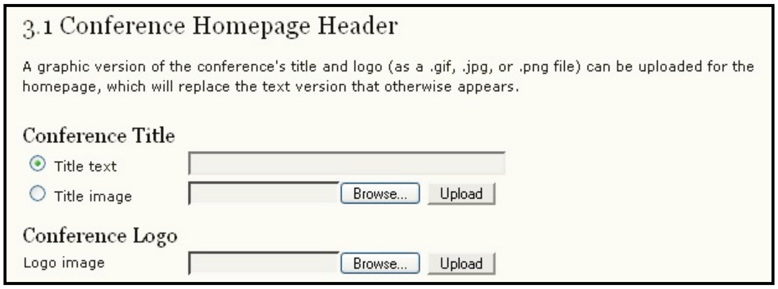


Figure 28: Conference Homepage Header

3.2 Website Header

In addition to adding a header to your conference homepage, you can also add a header that will appear throughout your conference site. You can add the text or upload the image and/or logo here.

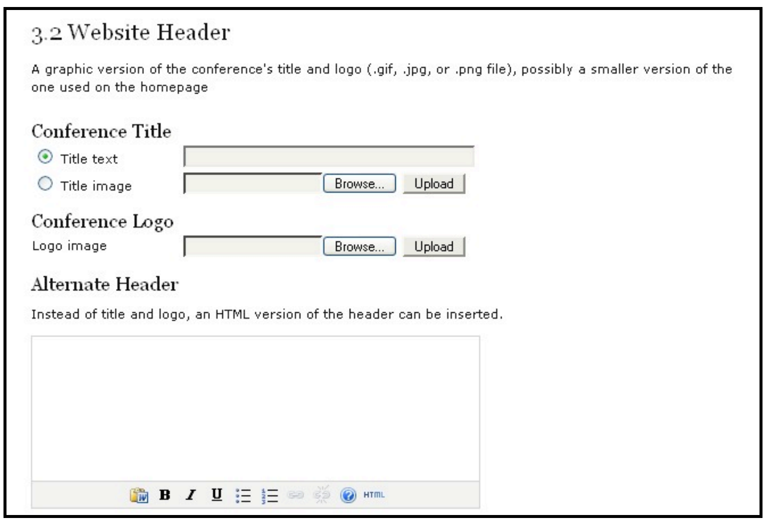


Figure 29: Website Header

3.3 Website Footer

Next, you can use this section to also include a footer throughout your website.

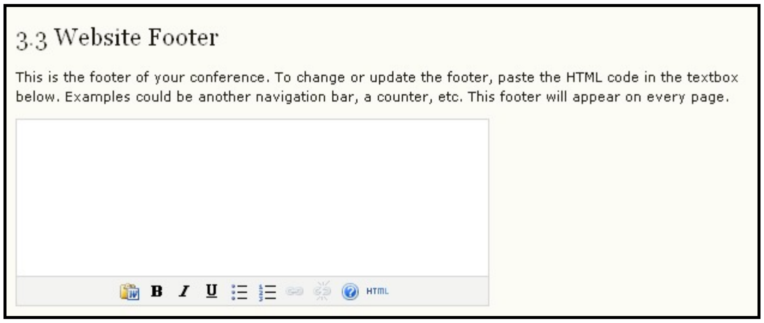


Figure 30: Website Footer

3.4 Navigation Bar

Use this section to add a new link to the top navigation bar. You can specify the link name in the first text field, and the URL in the following field. You can use a path relative to your OCS install, or point to a website elsewhere. You can also add more than one additional link to your navigation bar.

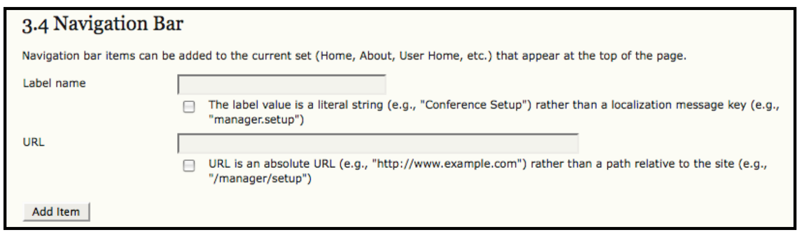


Figure 31: Navigation Bar

3.5 Lists

Use this section to control the number of items that appear on a page, such as users or submissions. The default figure is 25. If more than 25 items appear, a second page of items would automatically be created, with the appropriate links to navigate between the pages. This section also allows you to determine the number of page links to display on each page. The default is 10.

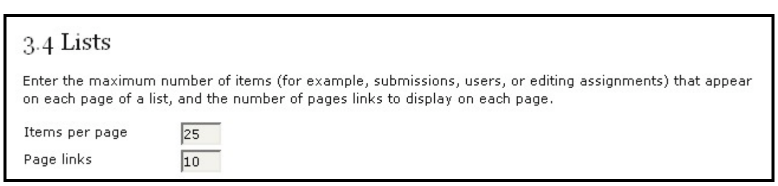


Figure 32: Lists

A good example of this would be your list of users. If, for example, a conference had 256 users, the above options would create 11 pages of users, with 25 users listed on each page. You would navigate through those pages with linked numbers (1, 2, 3…). The settings above would also result in 10 pages links, and a More link (>) to take you to the 11th page. If you reduced the Page Links number above to 5, you would only see 5 page links, and require you to use the More link to see the 6th, 7th, and higher pages:

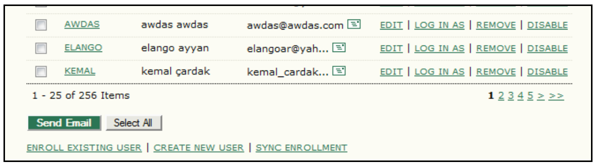


Figure 33: Navigating Lists

Step 4: Conference Style

Use this section to choose a packaged theme or upload a customized stylesheet for your conference, changing, for example, the background colour or font face. A list of alternative themes is available on the PKP web site, and themes can be used in conjunction with a custom stylesheet. Additionally, the interface can be customized to be presented differently by selecting and moving blocks of information.

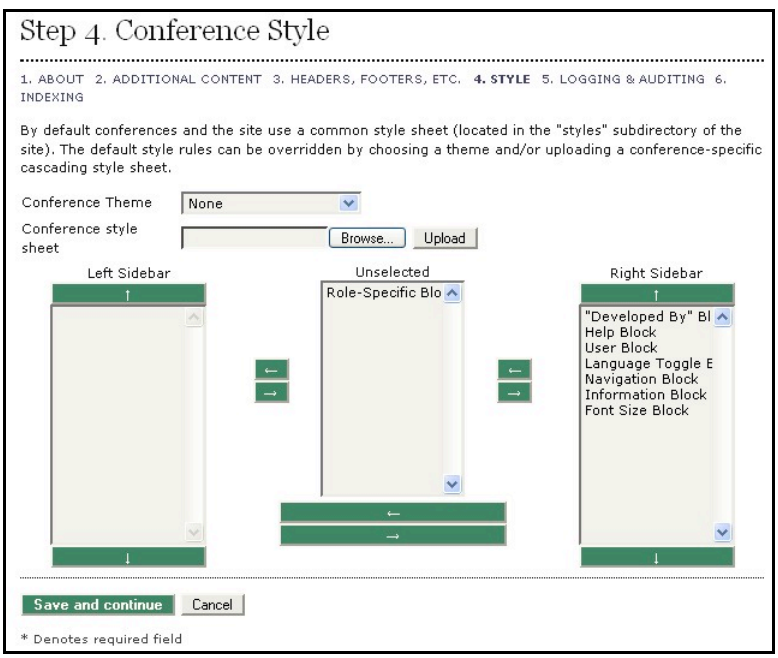


Figure 34: Conference Style

Step 5: Logging and Auditing

OCS allows you to maintain a record of actions and materials for your conference. You can activate these in this section.

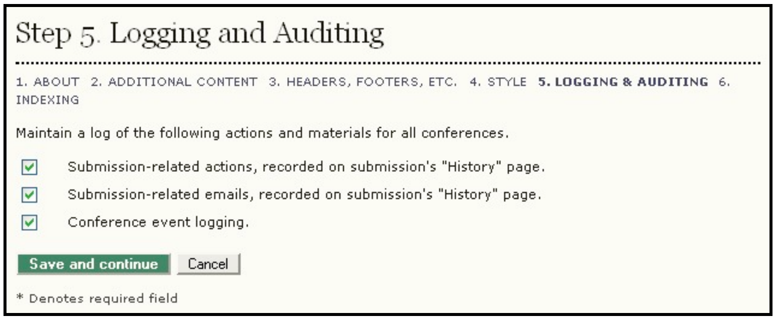


Figure 35: Logging and Auditing

Step 6: Conference Indexing

This section will help better index your conference website, and help people better find your information.

6.1 Search Engine Indexing

First, by adding a description, some keywords, and any useful HTML tags (e.g., META tags), you will enhance the visibility of your site in search engines.

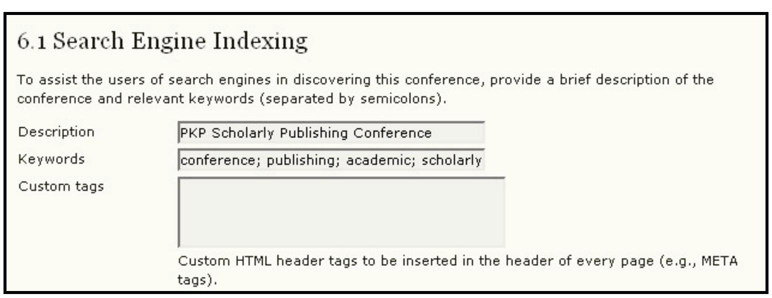


Figure 36: Search Engine Indexing

6.2 Register Conference for Indexing (Metadata Harvesting)

Next, you have the option of registering your site with the PKP Metadata Harvester, an online database of scholarly content from a variety of international sources. This section will also assist you in adding your conference papers and presentations to other harvesting tools or OAI archives. This can be an important way to easily archive your conference's papers and presentations, especially if you do not plan to maintain the conference website once the event is completed.

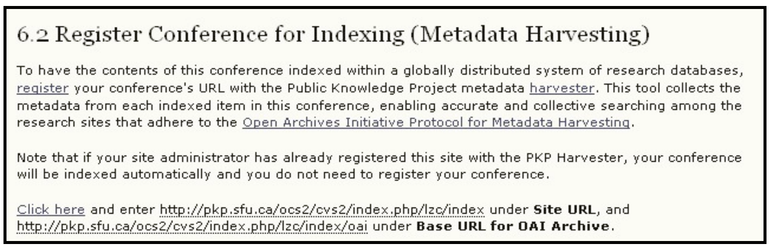


Figure 37: Registering for Metadata Harvesting

Your conference site has now been set up; it may entail a single scheduled conference, an annual conference, or a series of scheduled conferences, all of which can be managed from this conference site.

In order to schedule a specific instance of this conference, you will need to go to Scheduled Conferences, using the link provided on the page, or by returning to the Conference Manager homepage.

Figure 38: Conference Site Management

Scheduled Conferences

From the menu of General Management options, choose Scheduled Conferences. On the resulting page, choose "Create a Scheduled Conference".

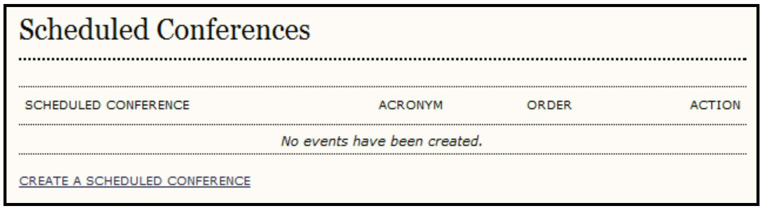


Figure 39: Creating a Scheduled Conference

You will then need to fill in some additional details about the scheduled conference. In the example below, we have added the year to the title, to differentiate it from later annual conferences that will be held.

Figure 40: Scheduling a Conference

This sets up your individual conference events (whether it is a single conference or a series of conferences to run each year). You can return to this page at any time to modify the details provided about this conference, or to add an additional event.

Return to the Conference Site Management page. You should now see your scheduled conference listed.

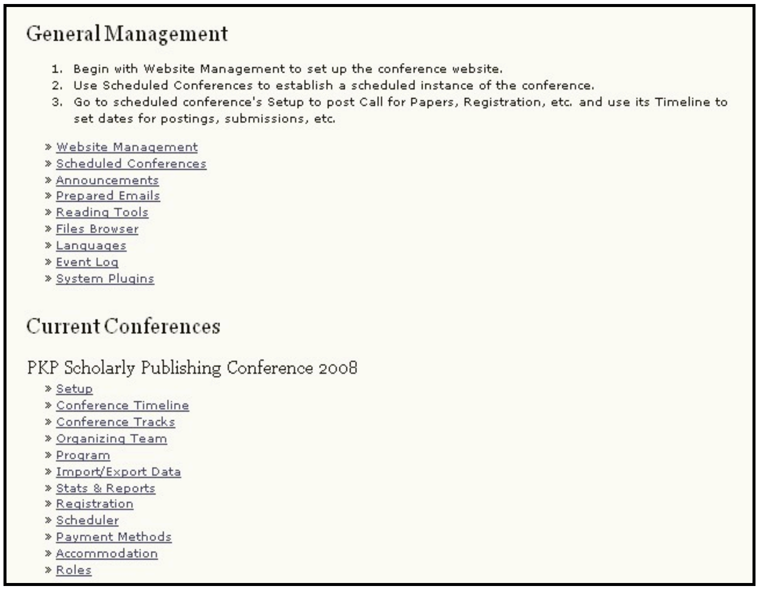


Figure 41: Current Conferences

Setup

From the conference menu, choose Setup. This will take you through the three steps: Details, Submissions, and Review.

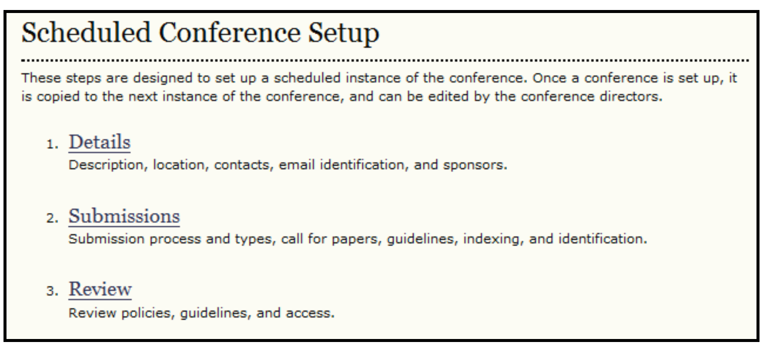


Figure 42: Scheduled Conference Setup

Step 1: Details

This first step will allow you to describe the scheduled conference.

1.1 Scheduled Conference Description

Use this section to provide a brief description and conference overview, which will appear on the website.

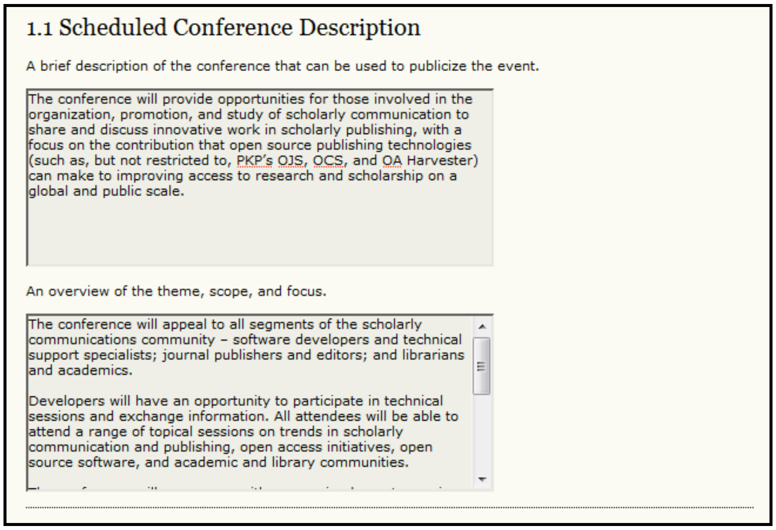


Figure 43: Scheduled Conference Description

1.2 Scheduled Conference Location

This section allows you to provide information on the location of the scheduled conference.

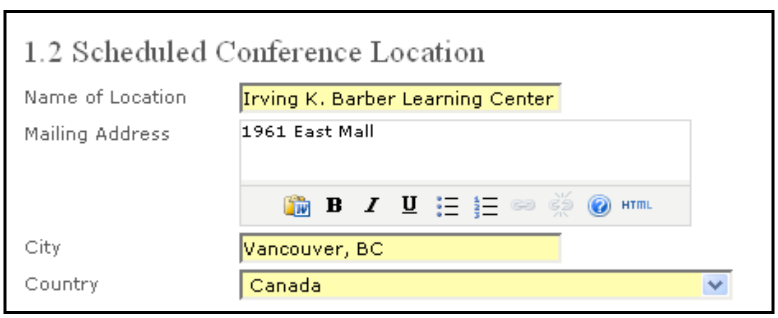


Figure 44: Scheduled Conference Location

1.3 Principal Contact for Scheduled Conference

Add details for the principal contact for the scheduled conference. This may or may not be the same as for the overall conference series.

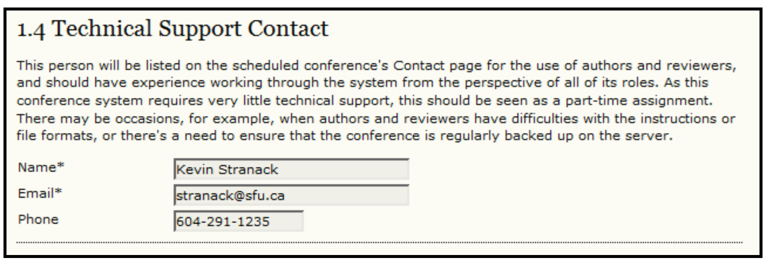
1.3 Principal Contact for Scheduled Conference

Name*	Brian Owen
Title	Conference Organizer
Affiliation	Simon Fraser University Library
Email*	owen@sfu.ca
Phone	604-291-1234
Fax	604-291-1235
Mailing Address	8888 University Drive Burnaby, BC, Canada V5A 1S6

Figure 45: Principal Contact for Scheduled Conference

1.4 Technical Support Contact

You may also want to specify a different person as the technical support contact, to deal with any website issues.



1.4 Technical Support Contact

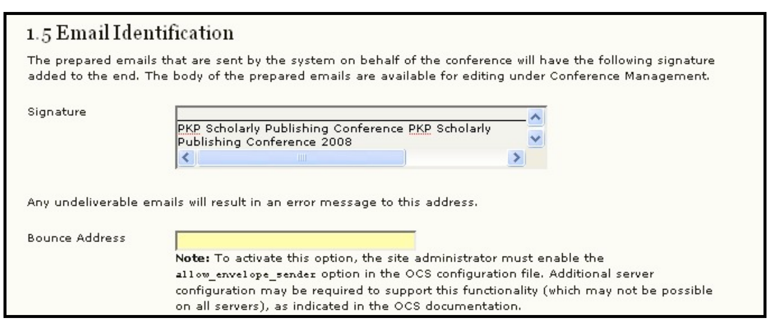
This person will be listed on the scheduled conference's Contact page for the use of authors and reviewers, and should have experience working through the system from the perspective of all of its roles. As this conference system requires very little technical support, this should be seen as a part-time assignment. There may be occasions, for example, when authors and reviewers have difficulties with the instructions or file formats, or there's a need to ensure that the conference is regularly backed up on the server.

Name*	Kevin Stranack
Email*	stranack@sfu.ca
Phone	604-291-1235

Figure 46: Technical Support Contact

1.5 Email Identification

You can add a customized email signature to all of the email messages sent out from the system. A default signature is created for you, but you can make any necessary changes here.



1.5 Email Identification

The prepared emails that are sent by the system on behalf of the conference will have the following signature added to the end. The body of the prepared emails are available for editing under Conference Management.

Signature: PKP Scholarly Publishing Conference PKP Scholarly Publishing Conference 2008

Any undeliverable emails will result in an error message to this address.

Bounce Address

Note: To activate this option, the site administrator must enable the allow_envelope_sender option in the OCS configuration file. Additional server configuration may be required to support this functionality (which may not be possible on all servers), as indicated in the OCS documentation.

Figure 47: Email Identification

In addition, with the assistance of the Site Administrator, you can specify a "bounce address", where a notification of any undeliverable email messages will be sent. This can be useful if you plan to send out email messages to a large group of users, some of whom may have incorrectly entered their email information or changed their email address.

1.6 Sponsoring Organizations

Use this section to add information about your sponsors, which will appear on your website. Notice the "Add Sponsoring Organization" button, which allows you to create as many entries as you will need.

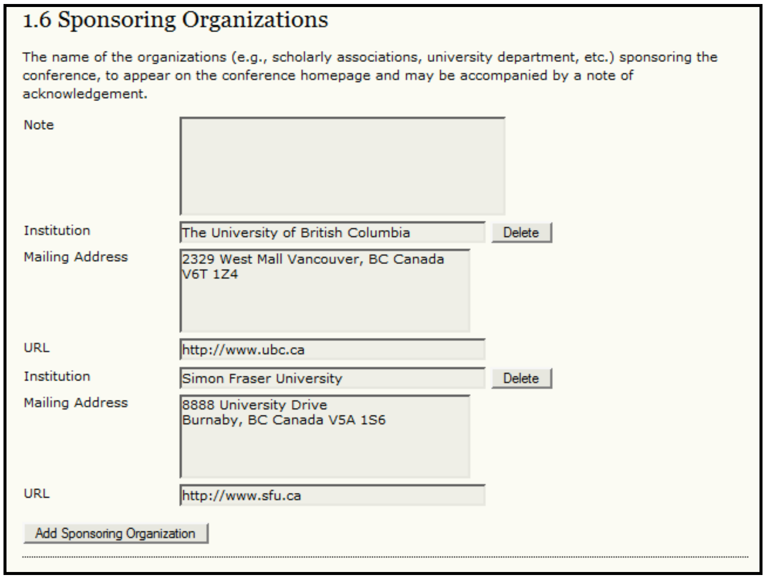


Figure 48: Sponsoring Organizations

1.7 Sources of Support

In addition, you can also specify any sources of support, which will also appear on your website.

Figure 49: Sources of Support

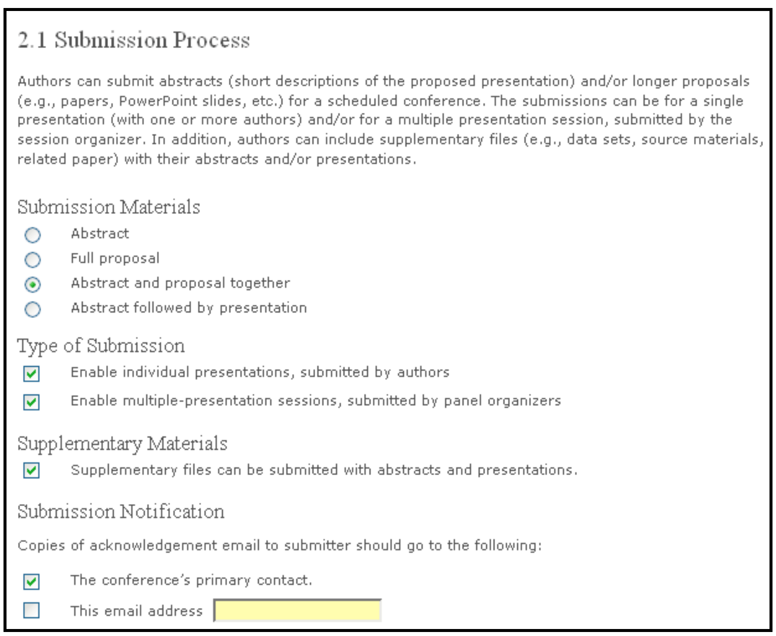
As with the Sponsoring Organizations above, you can add as many contributors as necessary, using the "Add Contributor" button.

Step 2: Submissions

This section will allow you to determine how submissions can be made to your conference.

2.1 Submission Process

You can set your conference to allow authors to submit abstracts (short descriptions of the proposed presentation) and/or longer proposals (e.g., papers, PowerPoint slides, etc.) for a scheduled conference. The submissions can be for a single presentation (with one or more authors) and/or for a multiple presentation session, submitted by the session organizer. In addition, authors can include supplementary files (e.g., data sets, source materials, related paper) with their abstracts and/or presentations.


2.1 Submission Process

Authors can submit abstracts (short descriptions of the proposed presentation) and/or longer proposals (e.g., papers, PowerPoint slides, etc.) for a scheduled conference. The submissions can be for a single presentation (with one or more authors) and/or for a multiple presentation session, submitted by the session organizer. In addition, authors can include supplementary files (e.g., data sets, source materials, related paper) with their abstracts and/or presentations.

Submission Materials

- Abstract
- Full proposal
- Abstract and proposal together
- Abstract followed by presentation

Type of Submission

- Enable individual presentations, submitted by authors
- Enable multiple-presentation sessions, submitted by panel organizers

Supplementary Materials

- Supplementary files can be submitted with abstracts and presentations.

Submission Notification

Copies of acknowledgement email to submitter should go to the following:

- The conference's primary contact.
- This email address

Figure 50: Submission Process

You can also choose to have a copy of the acknowledgement email sent to submitters also sent to the conference primary contact or an alternate email address of your choice. This can be very useful for keeping track of new submissions without having to login to the website.

2.2 Call for Papers (CFP)

Use this section to create a Call for Papers message for your website.

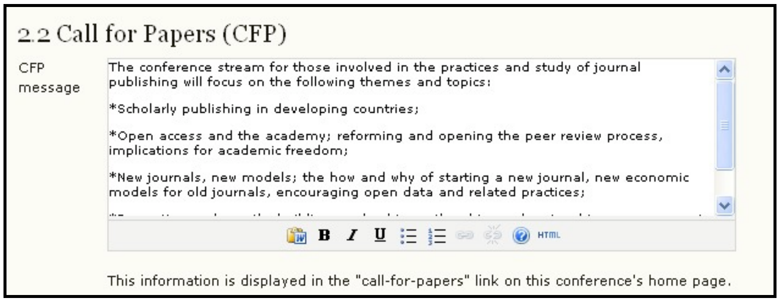


Figure 51: Call for Papers

2.3 Author Guidelines

This section allows you to set some guidelines for your authors to follow when submitting their proposals. You can add information in the text box.

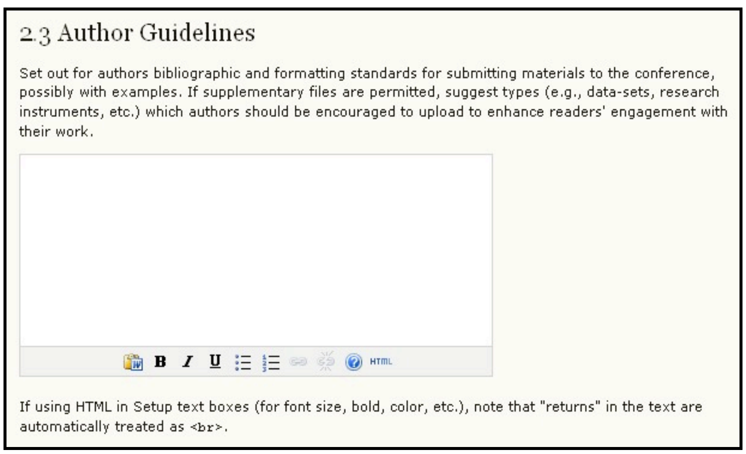


Figure 52: Author Guidelines

In addition, a set of submission checklist items has been automatically generated, which the author will need to agree to as part of their submission. You can modify these items, re-order them, delete them, or add new ones.

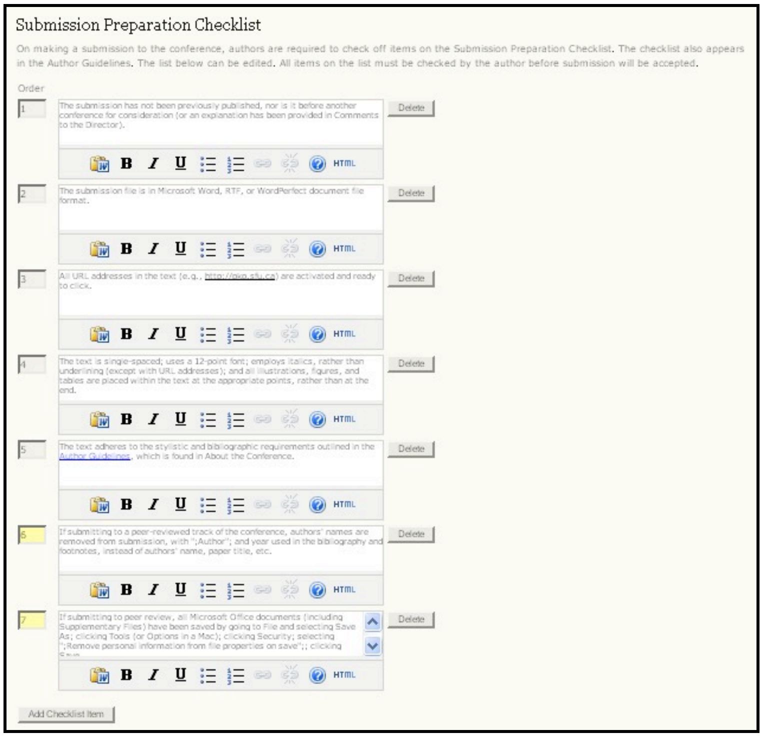


Figure 53: Submission Preparation Checklist

2.4 Submission Indexing

In OCS, authors can index their own submissions. This section allows you to provide some guidance in terms of keywords and classification systems.

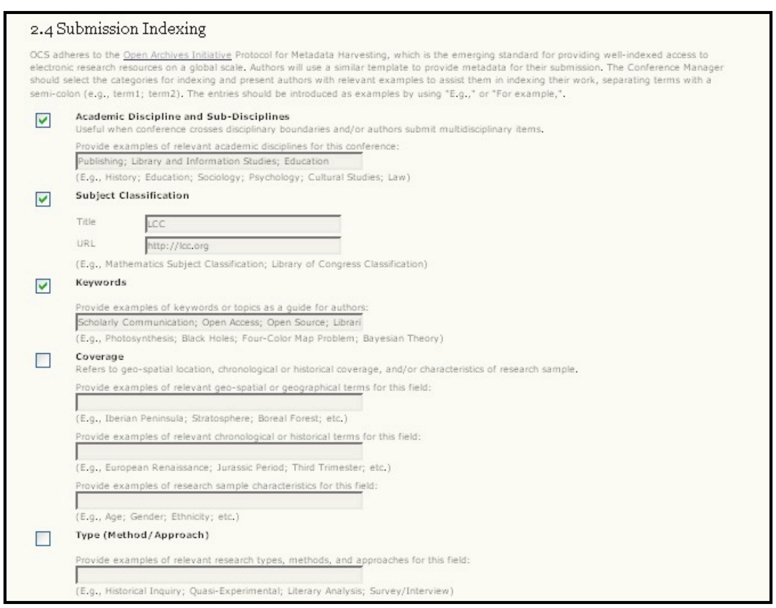


Figure 54: Submission Indexing

2.5 Identification of Conference Content

You can also choose to use an identification system, such as DOIs, to uniquely identify the conference presentations.

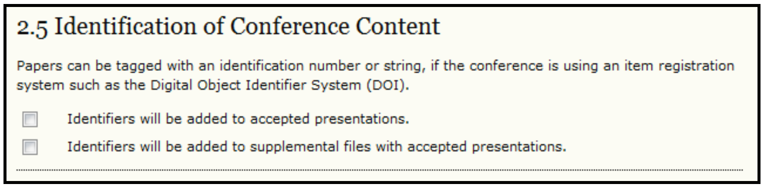


Figure 55: Identification of Conference Content

Step 3: Review

This section will allow you to define the review process for your conference.

3.1 Review Policy

Use this section to outline the conference's review policy and processes for readers and authors, including the number of reviewers typically used in reviewing a submission, the criteria by which reviewers are asked to judge submissions, typical time taken to conduct the reviews, and the principles for recruiting reviewers. This will appear in About the Conference.

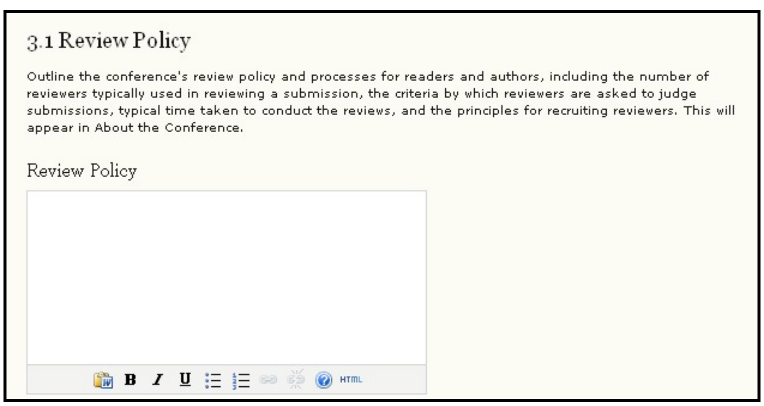


Figure 56: Review Policy

3.2 Peer Review

This section allows you to configure several aspects of your conference's peer review system, including additional instructions, email reminders, and the option for "one-click" review access, where reviewers do not need to login to the system to conduct their review. This option allows you to send Reviewers an email message that contains a link which will take them directly into OCS, without the need to enter a username or password. This is desirable when potential reviewers may be hesitant to create an account by themselves.

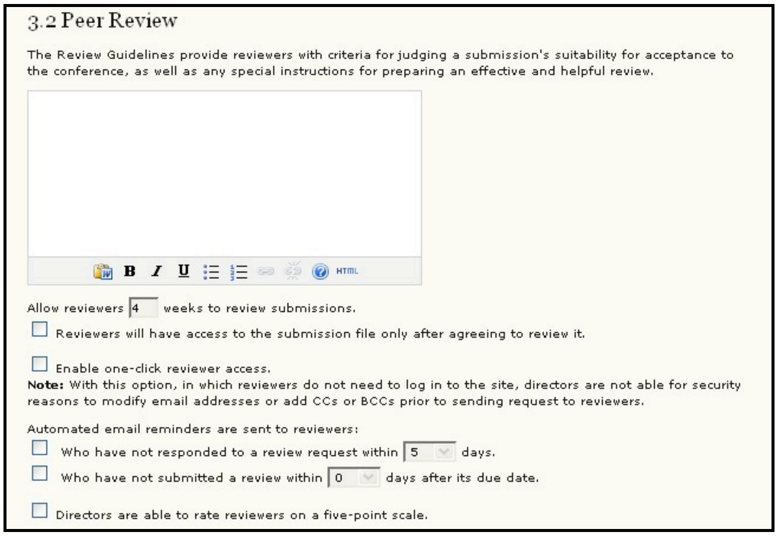


Figure 57: Peer Review

3.3 Director Decision

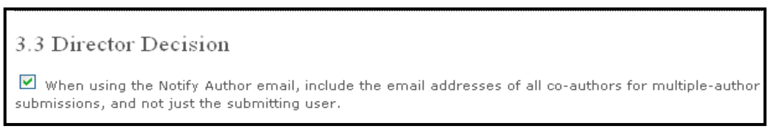


Figure 58: Director Decision

This section allows you to decide if the notification email goes to all co-authors or to the submitter only. Save your changes and return to the Conference Site Management page. You will now want to set the Conference Timeline.

Conference Timeline

The Conference Timeline is a critical step in setting up your scheduled conference. It will activate and deactivate different aspects of your site based on the dates you select here.

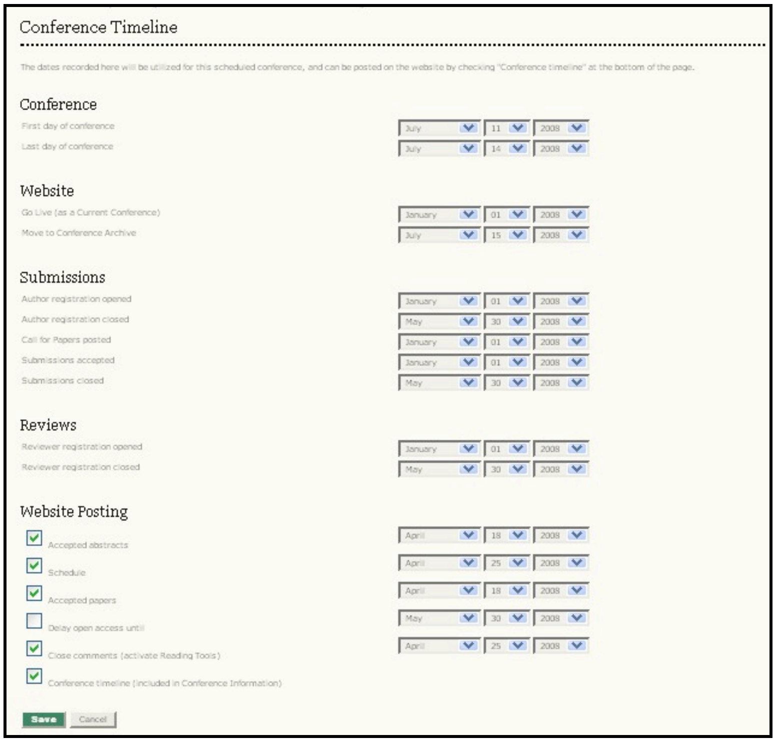


Figure 59: Conference Timeline

Use the Save button to record your changes and return to the Conference Site Management page.

Conference Tracks

From the scheduled conference menu, choose Conference Tracks.

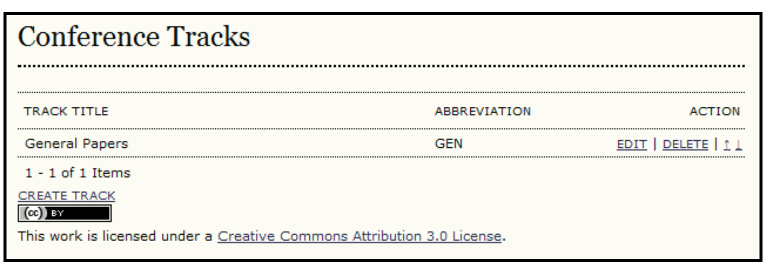


Figure 60: Conference Tracks

From the Conference Tracks page, create all of the tracks required for your conference.

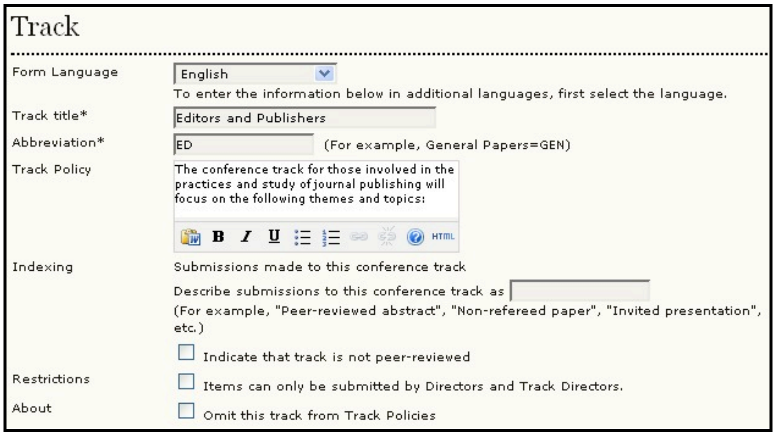


Figure 61: Creating Tracks

For each track, you will also have the option of assigning a Track Director.

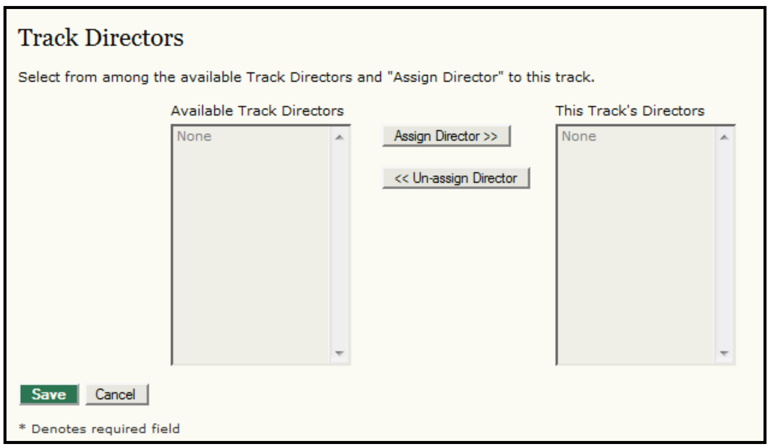


Figure 62: Track Directors

At this point, you may not have anyone enrolled as a Track Director and available for assigning to your new track. Once you have enrolled one or more Track Directors (see the section on enrolling users) however, you can return to this section to assign them to their appropriate tracks. Save your changes and return to the Conference Site Management page.

Organizing Team

From the Conference Menu, choose Organizing Team.

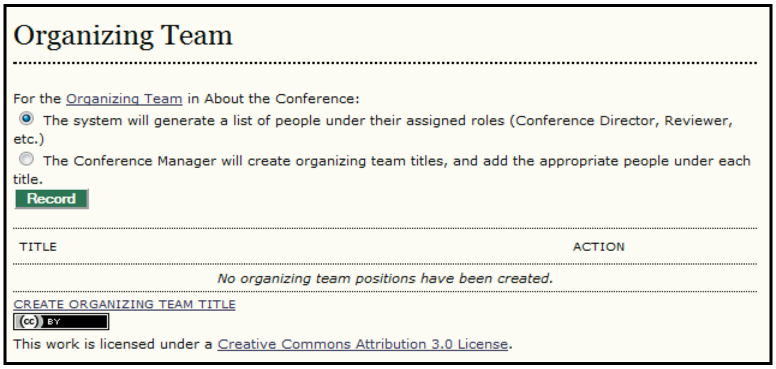


Figure 63: Organizing Team

The Organizing Team members will appear on your conference's About page. This section gives you the option of having a list of people automatically generated by the system, based on their roles in OCS.

You can also choose to specify your own list of people and titles, if the automatic feature is not appropriate. To do this, change the default radio button, and then press the Record button.

To create the members of your customized Organizing Team, select Create Organizing Team Title. This will take you to a page where you can create a new team title.

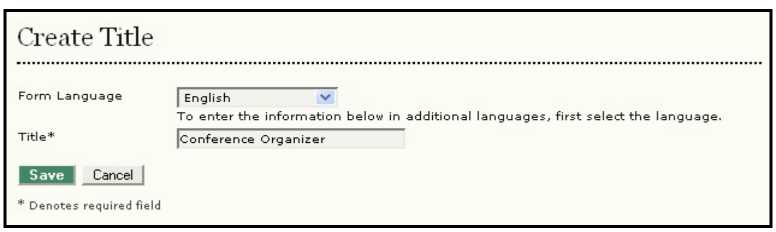


Figure 64: Create Title

Once you have saved this new entry, you can add individuals to it by selecting the Membership link.

Figure 65: Membership

On this page, you will choose Add Member.

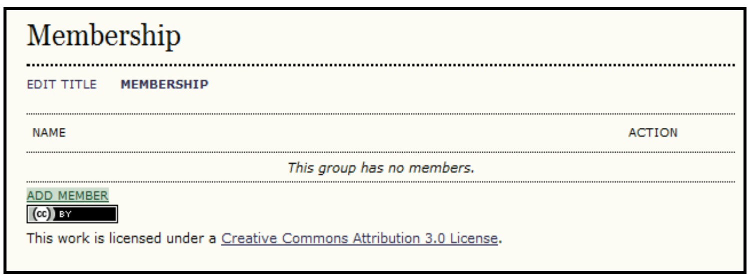


Figure 66: Add Member

Use this section to add members from your list of existing users. You may need to return to this section after you have created the appropriate user accounts.

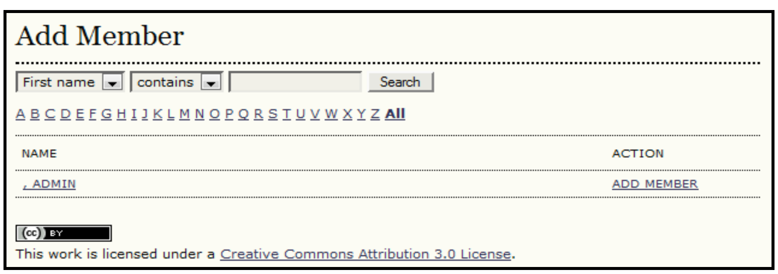


Figure 67: Select Members

Program

From the Conference Menu, choose Program. Use this section to add your program text, or upload a text file.

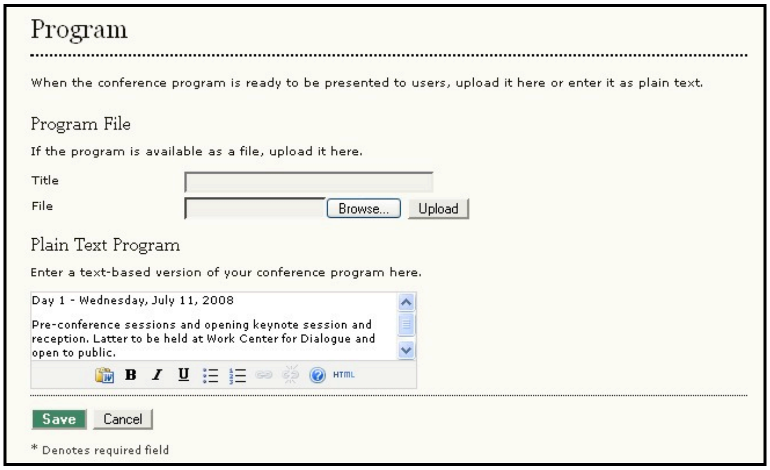


Figure 68: Program

Import/Export Data

Currently, there are two import/export plugins: User XML Plugin can be used to import and export users; NLM XML Export Plugin can be used to export conference data in the NLM Meeting Abstracts XML format for indexing. More importing and exporting options will be developed for future versions of OCS.

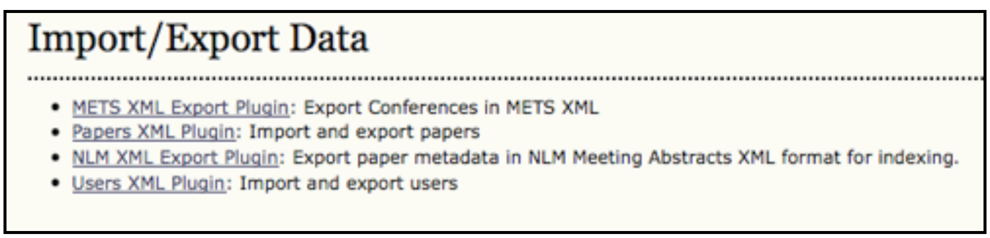


Figure 69: Import/Export Data

Stats & Reports

From the Conference Menu, choose Stats & Reports. This section provides information on usage statistics and reports on your conference.

Select the tracks you wish to include in your peer-review statistics and Record the changes.

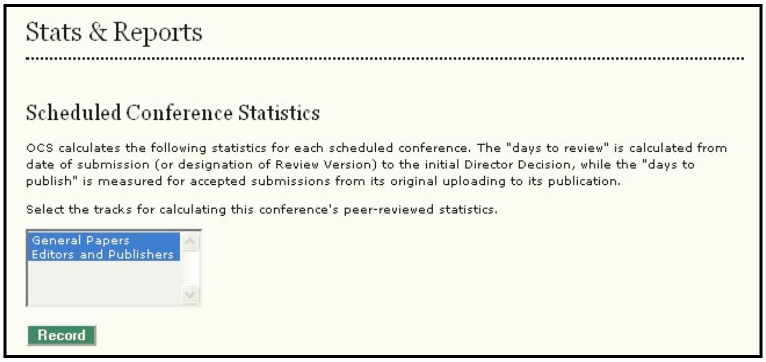


Figure 70: Selecting Tracks for Peer-Review Statistics

Next, you can decide which statistics to make publicly available on your site by checking off your choices, and pressing the Record button.

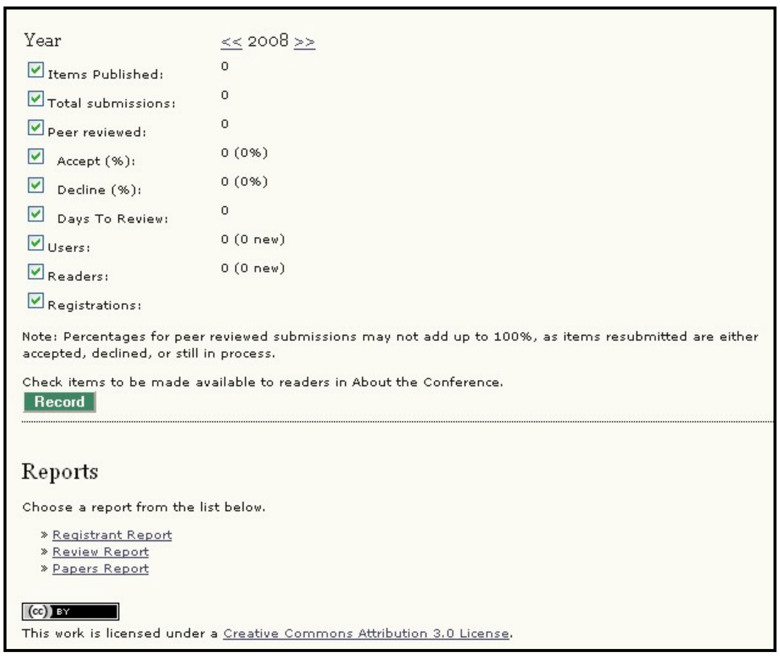


Figure 71: Selecting Public Statistics

You can also choose from a variety of reports, which are generated in .csv format.

Registration

From the Conference Management menu, select Registration. Once your conference is publicly available and open for registration, you will see your list of registrants appear here.

Figure 72: Registration

Registration Types

On the Registration page, choose Registration Types. This will take you to the Registration Types page, where you can select Create New Registration Type, to add new types (e.g., Students, Regular) to your scheduled conference.

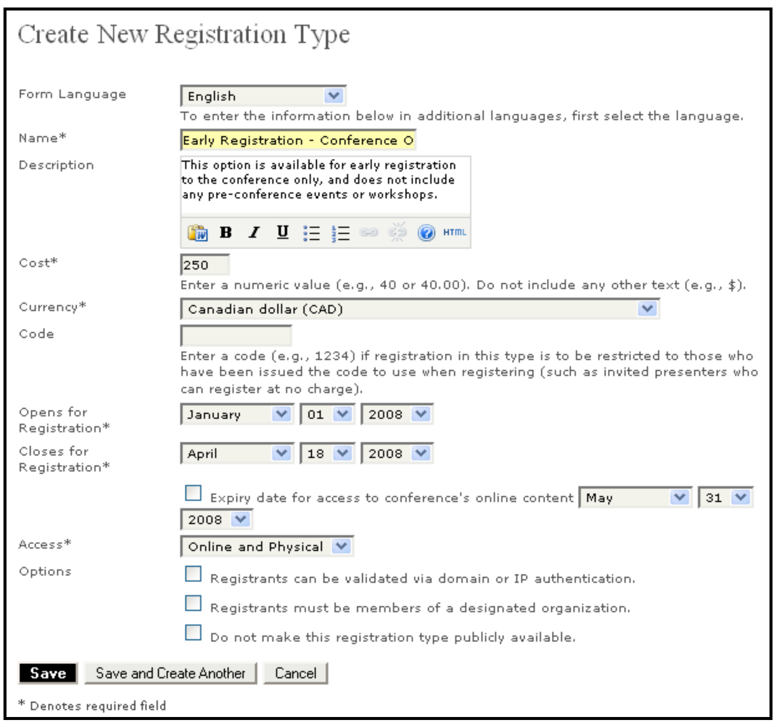


Figure 73: Creating a Registration Type

Notice that you can also set the dates for when the registration type is open and closed (useful for early registration options), as well the access options, such as for online only access to the presentations and papers, or physical access to the conference itself (or both). A variety of authentication options can also be made available to limit access to registered users, if so desired.

Registration Policies

Next, under Registration Policies, you can add a Registration Manager.

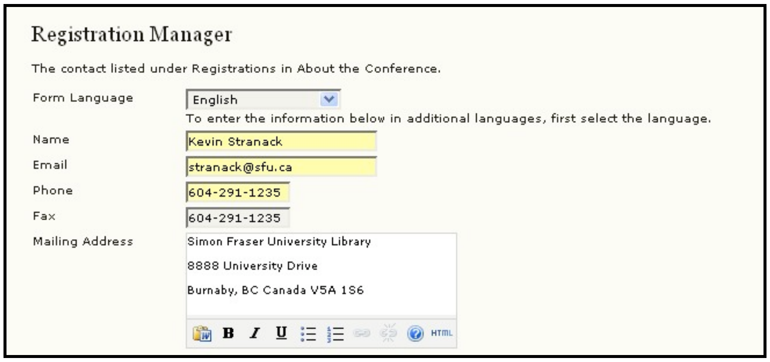


Figure 74: Registration Manager

Registration Information

Additional registration information can also be added further down the page.

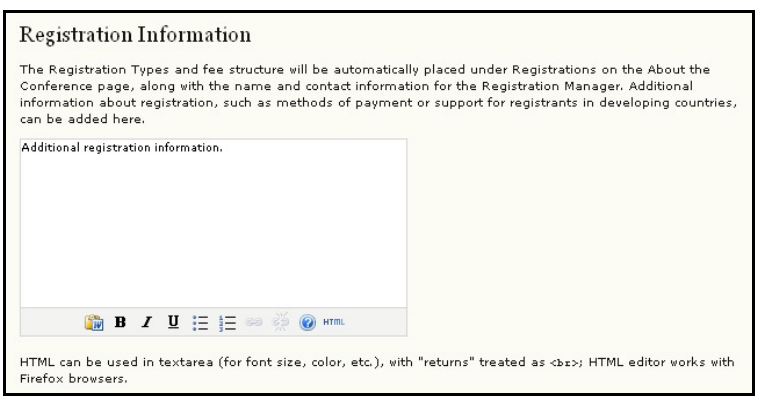


Figure 75: Registration Information

Registration Expiry Reminders

Automated email reminders are available in the Registration Policies section. You can configure the text of the messages in the Prepared Email section (see later in this manual). You will need to work with the Site Administrator to activate these options.

Figure 76: Registration Expiry Reminders

Open Access Options for Registration Conferences

Use this section to provide "delayed open access" and/or "author self-archiving" (which increase readership and citation of content). The text for the selected policies will appear in About the Conference.

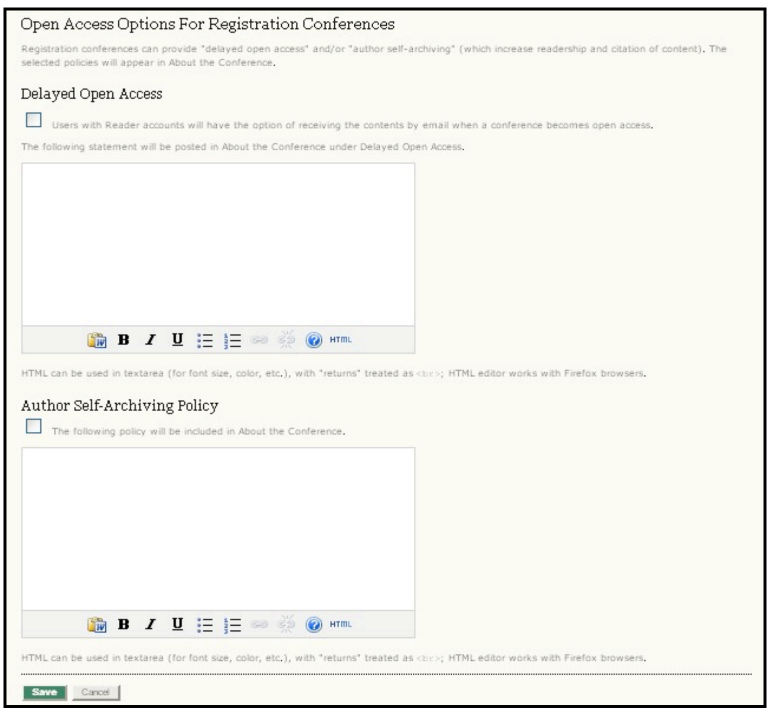


Figure 77: Open Access Options for Registration Conferences

Remember to use the Save button to record your changes.

Scheduler

The Conference Manager can use Scheduler to make arrangements of times and locations regarding conference presentations and any other events.

Figure 78: Scheduler

First define buildings and rooms for each building:

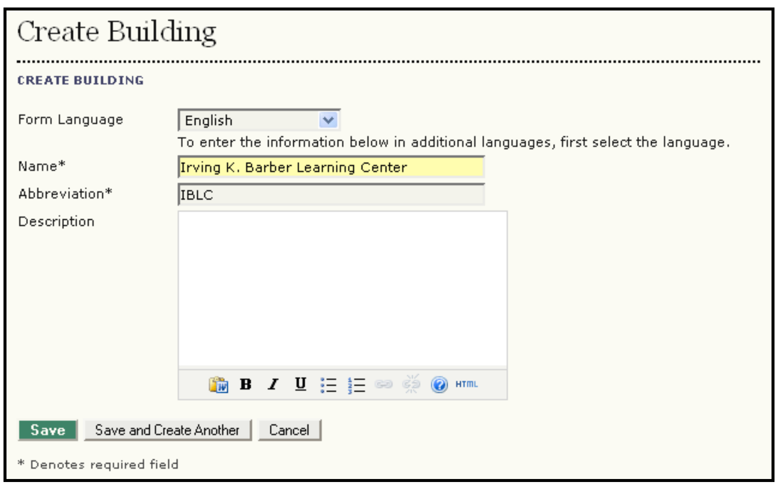


Figure 79: Create Building

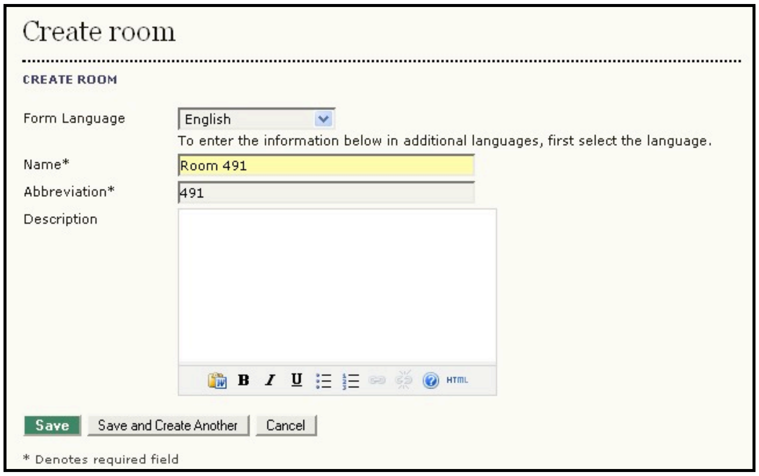


Figure 80: Create Room

You can also create a special event with Scheduler, indicating time and location for that event. (Special events don't need to be scheduled against an already-created room, which is handy if you have an off-site event – a banquet, for example.)

Figure 81: Create special event

After you have created buildings and room

Payment Methods

From the Conference Management menu, choose Payment Methods. This will allow you to determine how registrants will pay to attend your conference. Currently, OCS supports Manual Payment and Paypal Payments.

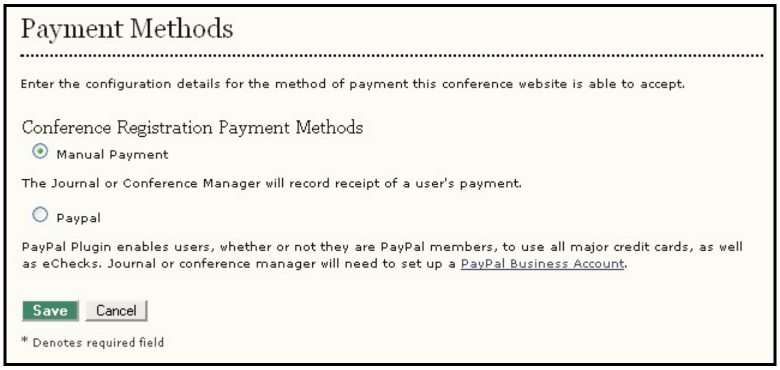


Figure 82: Payment Methods

Manual Payment

With Manual Payment, payments must be submitted outside of OCS (e.g., cheques, money orders, credit card information submitted by mail, telephone, etc.) and requires the Conference Manager to validate before the registration is active.

The contents of the Registration Information field in Registration Policy Management (see above) will be shown to the registrants and should provide information on how to proceed with a manual registration submission.

PayPal Payment

With this option, registrants can use all major credit cards, as well as eChecks. This option does NOT require PayPal membership from the registrants, but DOES require conference organizers to set up a PayPal Business Account (http://www.paypal.com).

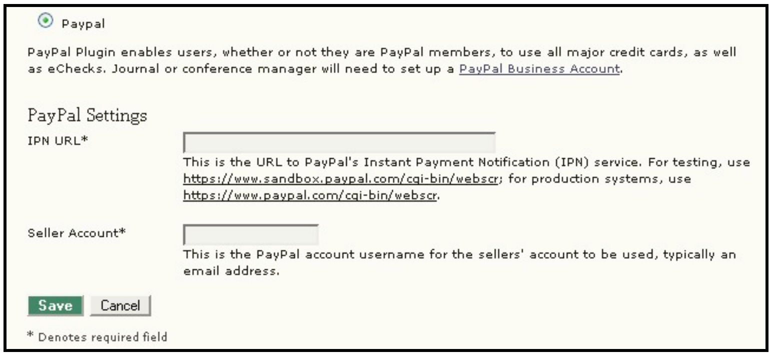


Figure 83: PayPal Payment

Once the PayPal Business Account has been activated, you will receive your IPN URL and Seller Account information to add to this section.

Accommodation

Hotel reservations, airport and transportation information, driving directions, tour guides, etc., can be provided here.

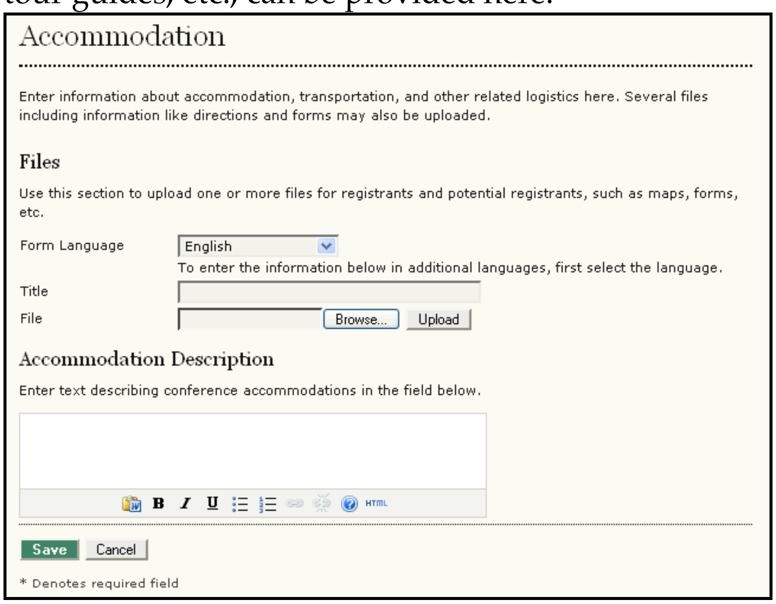


Figure 84: Accommodation

Roles

From the Conference Management menu, choose Roles. This will take you to a list of all of your users and the roles they fulfill.

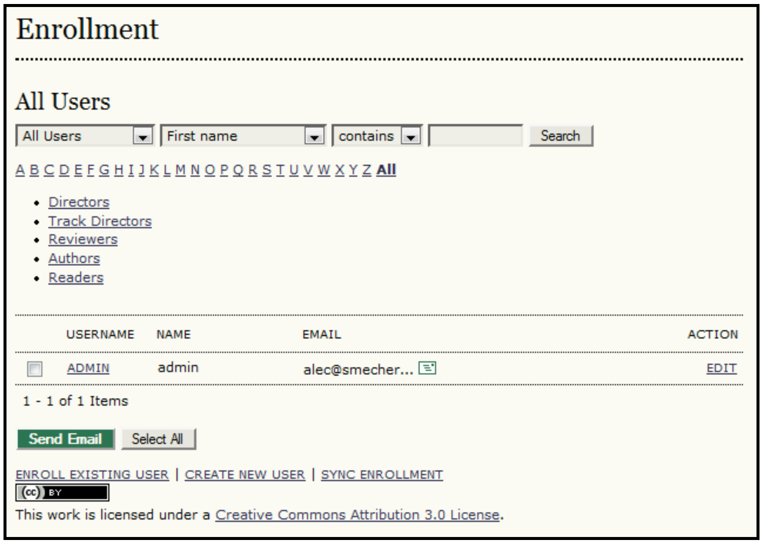


Figure 85: Roles

If the only account you see is your own (see figure above), you will need to create some new users and enroll them in various tasks. Users do have the option to create their own accounts (using the Account link at the top of the conference page), and you could ask them to do so. If you wish to begin creating new accounts immediately however (to begin assigning roles such as Track Directors), you can proceed by selecting the Create New User link.

Enroll a User from this Site in this Conference

Once you do have some user accounts in your conference site, you can also enroll them into additional roles, using the Enroll a User from this Site in this Conference link.

Figure 86: Enroll Existing User

Create New User

As the Conference Manager, you can create new users and assign them to any role you wish.

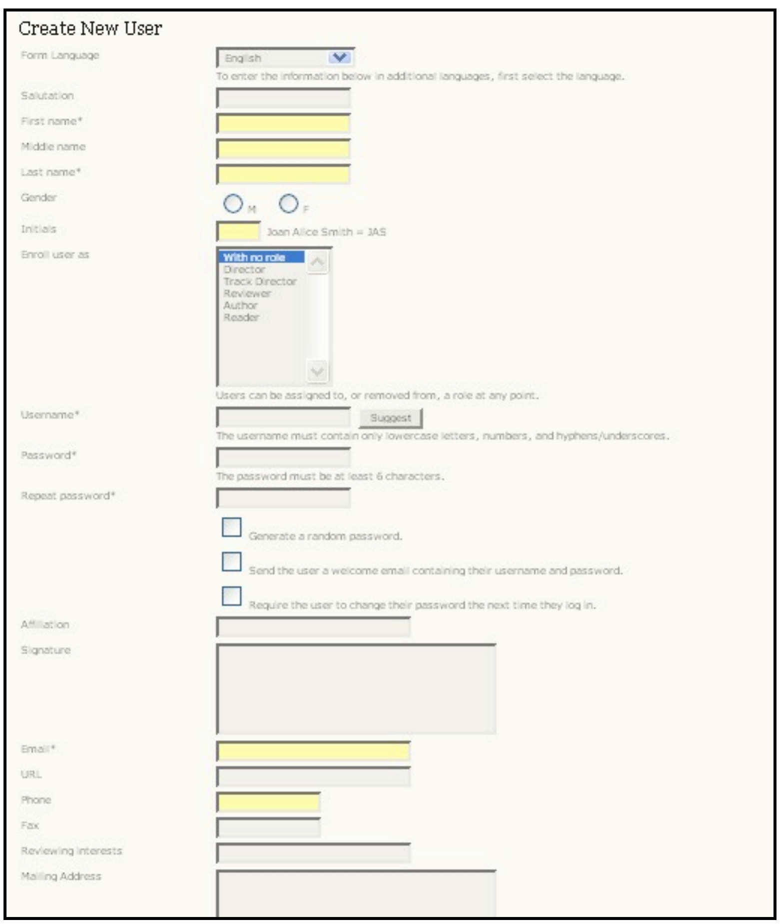


Figure 87: Create New User

Be sure to use the Save button to record your changes.

Synchronize Enrollment

You may also enroll all users enrolled in the specified role in the specified conference into the same role in this conference.

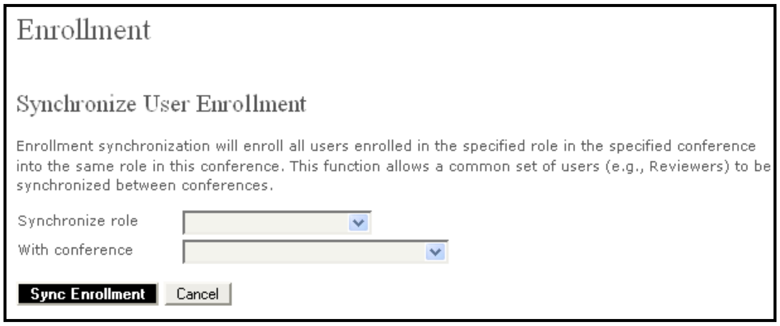


Figure 88: Synchronize Enrollment

Email Users

Returning to your list of user accounts, you can also take advantage of the Email Users option to send a message to selected people associated with your conference. First, select the user. Next, press the Send Email button. This will result in an email composition screen, in which you can add your message and send the email.

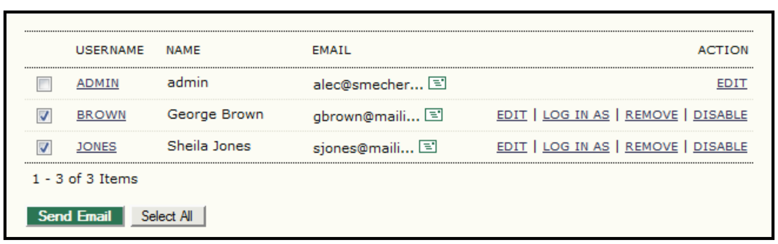


Figure 89: Email Users

Log In As a User

Another useful feature of OCS is the ability of the Site Administrator to temporarily log in as another user, to complete a required task or to provide some assistance. To do this, return to the list of users, and use the Log In As link next to the appropriate account.

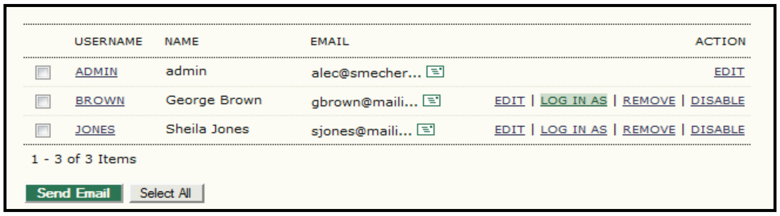


Figure 90: Log In As a User

Announcements

OCS allows you post announcements to your conference website. To set this up, return to the Conference Site Management page. Scroll up to the General Management menu items and choose Announcements. First, create a new Announcement Type, such as General.

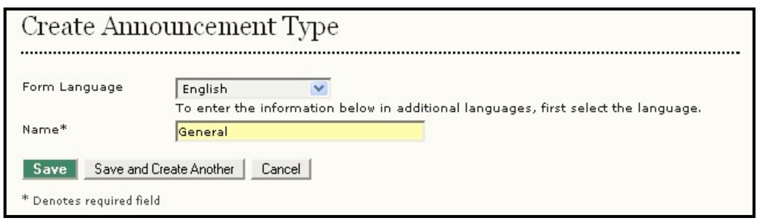


Figure 91: Create Announcement Type

Next, you can create and post an announcement using Create New Announcement.

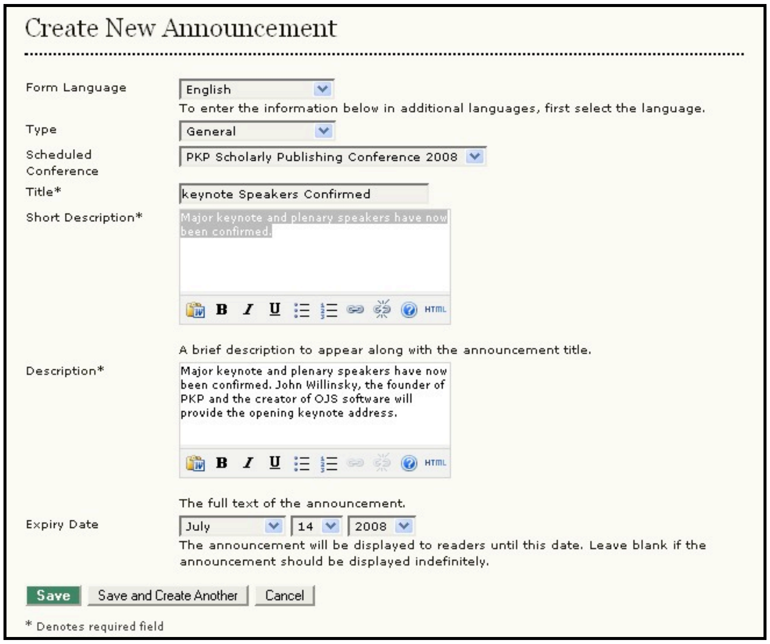


Figure 92: New Announcement

This announcement will now be visible on the conference website, and remain there until the expiry date selected.

Prepared Emails

Return to the General Management menu and select Prepared Emails. As a conference management system, OCS provides several pre-written messages to send out to your various users.

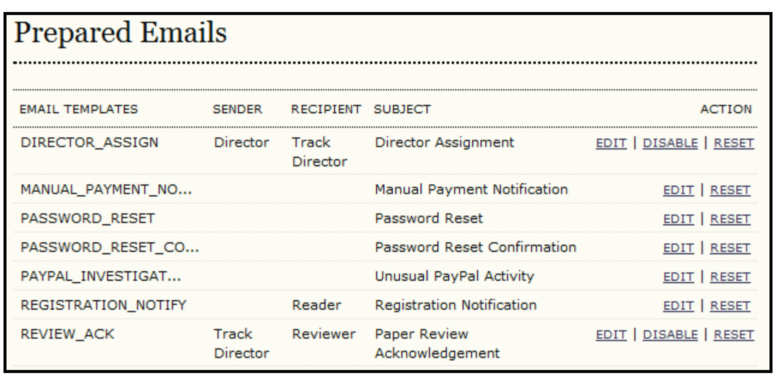


Figure 93: Prepared Emails

These messages can be modified in this section, using the Edit link next to each one.

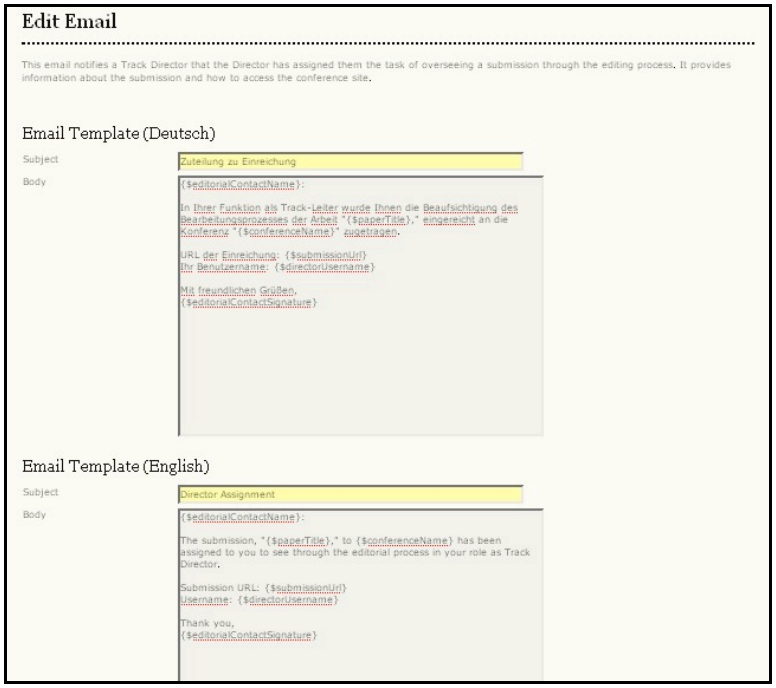


Figure 94: Editing Email Templates

When editing an email template, be careful not to change the embedded coding, which will automatically fill in the appropriate names and related information provided in the message (e.g., {$directorUsername}).

Reading Tools

Reading Tools are intended to assist both expert and novice readers of the conference papers in building a context for interpreting, evaluating and utilizing the research they are reading.

Reading Tools have been developed for a wide range of academic disciplines, and from which the Conference Manager can select, as well as update and edit, in supporting the reading environment for the papers. The Reading Tools also enable Readers to join relevant forums, as well as contact the author or share the item with another Reader.

The Tools provide Readers with access to the item's indexing information, print version, and author biographical statement. The Tools enable Readers to look up words in the item (by double clicking on any work in the HTML version of the item), to email the author or another Reader, or to comment on the article. All of these features can create a much more interact reading environment.

The Tools are also designed to take the first two keywords from the item and feed them into the search engines of open access databases and other resources grouped under Research Studies, Author's Other Works, Press and Media, Government Websites, Instructional Resources, Discussions and Forums, and other categories, depending on the set of Tools selected. Readers are also able to access background information on each of the selected resources. In each category, whether Studies, Media, on Instruction, the Tools provide multiple choices or databases to consult, while allowing the Reader to learn more about each database by providing a link to an About page for the resource.

The Conference Manager is able to activate, edit, or delete existing resources and add new ones as well.

The Reading Tools are turned off by default, but can be activated by selecting Reading Tools from the General Management menu on the Conference Site Management page.

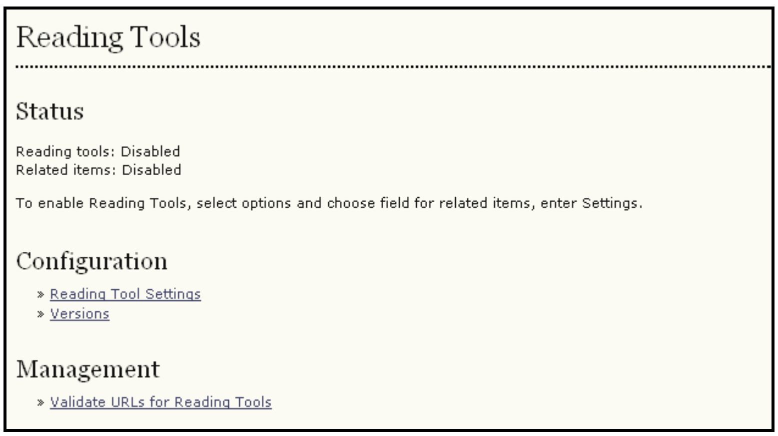


Figure 95: Reading tools

Reading Tool Settings

On the Reading Tools page, select Reading Tool Settings, check “Enable Reading Tools for designated tracks of conference”, and optionally pick the appropriate discipline for your conference. You can also enable optional tools, such as abstract and about the author links, links to indexing metadata, and so on.

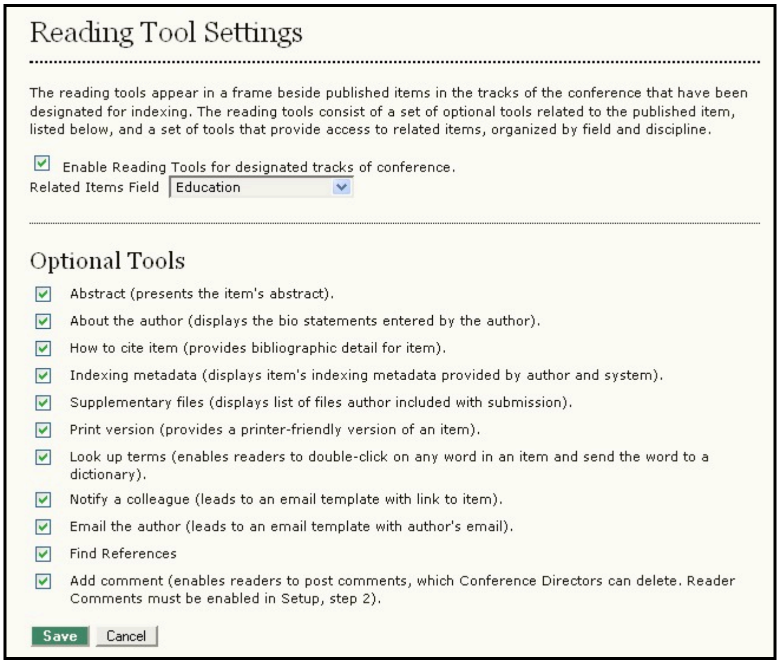
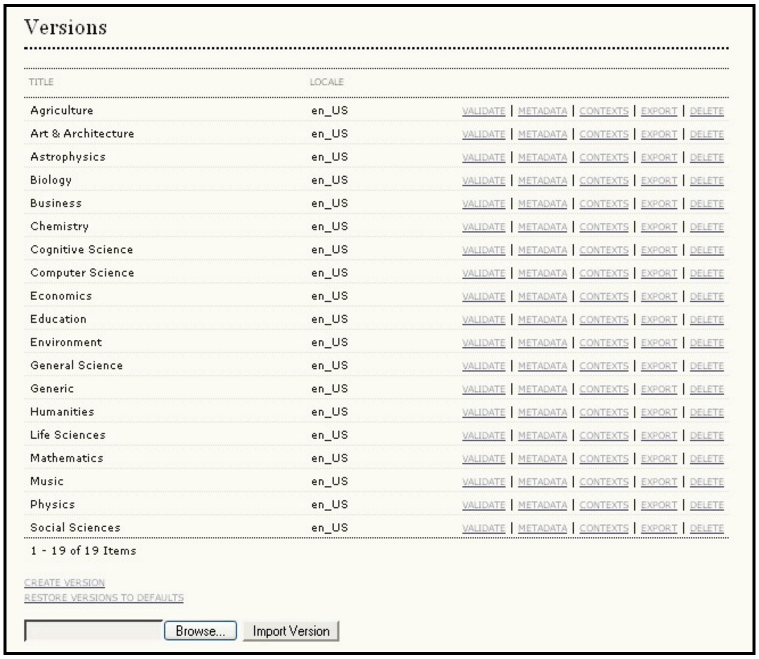


Figure 96: Reading Tool Settings

You can also modify the Reading Tool for your selected discipline by returning to the Reading Tools page and selecting Versions.

Versions

On clicking the Versions link you will be presented with a list of Reading Tools Versions. From this page you can edit any version, create new versions, and restore all versions to the default as shipped with the system.



Versions

TITLE	LOCALE	
Agriculture	en_US	VALIDATE | METADATA | CONTEXTS | EXPORT | DELETE
Art & Architecture	en_US	VALIDATE | METADATA | CONTEXTS | EXPORT | DELETE
Astrophysics	en_US	VALIDATE | METADATA | CONTEXTS | EXPORT | DELETE
Biology	en_US	VALIDATE | METADATA | CONTEXTS | EXPORT | DELETE
Business	en_US	VALIDATE | METADATA | CONTEXTS | EXPORT | DELETE
Chemistry	en_US	VALIDATE | METADATA | CONTEXTS | EXPORT | DELETE
Cognitive Science	en_US	VALIDATE | METADATA | CONTEXTS | EXPORT | DELETE
Computer Science	en_US	VALIDATE | METADATA | CONTEXTS | EXPORT | DELETE
Economics	en_US	VALIDATE | METADATA | CONTEXTS | EXPORT | DELETE
Education	en_US	VALIDATE | METADATA | CONTEXTS | EXPORT | DELETE
Environment	en_US	VALIDATE | METADATA | CONTEXTS | EXPORT | DELETE
General Science	en_US	VALIDATE | METADATA | CONTEXTS | EXPORT | DELETE
Generic	en_US	VALIDATE | METADATA | CONTEXTS | EXPORT | DELETE
Humanities	en_US	VALIDATE | METADATA | CONTEXTS | EXPORT | DELETE
Life Sciences	en_US	VALIDATE | METADATA | CONTEXTS | EXPORT | DELETE
Mathematics	en_US	VALIDATE | METADATA | CONTEXTS | EXPORT | DELETE
Music	en_US	VALIDATE | METADATA | CONTEXTS | EXPORT | DELETE
Physics	en_US	VALIDATE | METADATA | CONTEXTS | EXPORT | DELETE
Social Sciences	en_US	VALIDATE | METADATA | CONTEXTS | EXPORT | DELETE

1 - 19 of 19 Items

CREATE VERSION
RESTORE VERSIONS TO DEFAULTS

Browse... Import Version

Figure 97: Versions

Contexts

Selecting Contexts will show you some of the options that will be available for that version.

Contexts

METADATA CONTEXTS

TITLE	ABBREV	
Author's work	Other Works	↑ ↓ | METADATA | SEARCHES | DELETE
Look up terms	Look up terms	↑ ↓ | METADATA | SEARCHES | DELETE
Book searches	Book searches	↑ ↓ | METADATA | SEARCHES | DELETE
e-Journals	e-Journals	↑ ↓ | METADATA | SEARCHES | DELETE
Related theory	Related theory	↑ ↓ | METADATA | SEARCHES | DELETE
Related studies	Related studies	↑ ↓ | METADATA | SEARCHES | DELETE
Pay-per-view	Pay-per-view	↑ ↓ | METADATA | SEARCHES | DELETE
Online forums	Online forums	↑ ↓ | METADATA | SEARCHES | DELETE
Multimedia	Multimedia	↑ ↓ | METADATA | SEARCHES | DELETE
Teaching files	Instructional	↑ ↓ | METADATA | SEARCHES | DELETE
Relevant portals	Relevant portals	↑ ↓ | METADATA | SEARCHES | DELETE
Government policy	Gov Policy	↑ ↓ | METADATA | SEARCHES | DELETE
Media reports	Media reports	↑ ↓ | METADATA | SEARCHES | DELETE
Web search	Web search	↑ ↓ | METADATA | SEARCHES | DELETE

1 - 14 of 14 Items

CREATE CONTEXT

Figure 98: Contexts

Searches

Next, selecting Searches will show you the various resources that will be made available for each context. These resources will be made available to readers on the site.

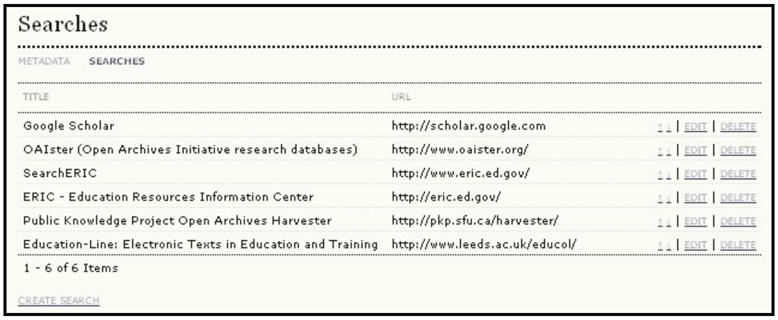


Figure 99: Searches

It is important to note that for the Searches, Contexts, and Versions, you are always able to remove entries, or add new ones, making the Reading Tools a highly flexible feature of OCS.

Files Browser

The Files Browser is an advanced feature that allows the files and directories associated with a conference to be viewed and manipulated directly.

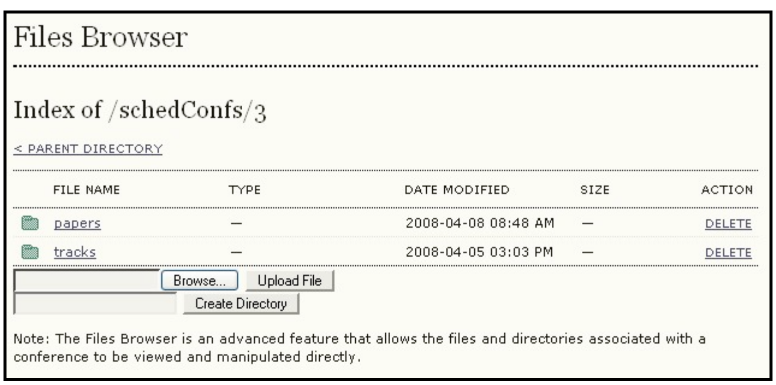


Figure 100: Files Browser

Note the ability to upload files directly and to create new directories. Also, although this feature may be used to delete directories and files, the delete function should not be used lightly, and you should understand that deleting a file here will not delete its database record.

Languages

Languages can be selected to be installed as new locales. Enabling two or more languages will allow users to toggle between languages on the right sidebar of interface; also, whenever a form allows for multilingual input, users will be able to switch between languages on the page itself.

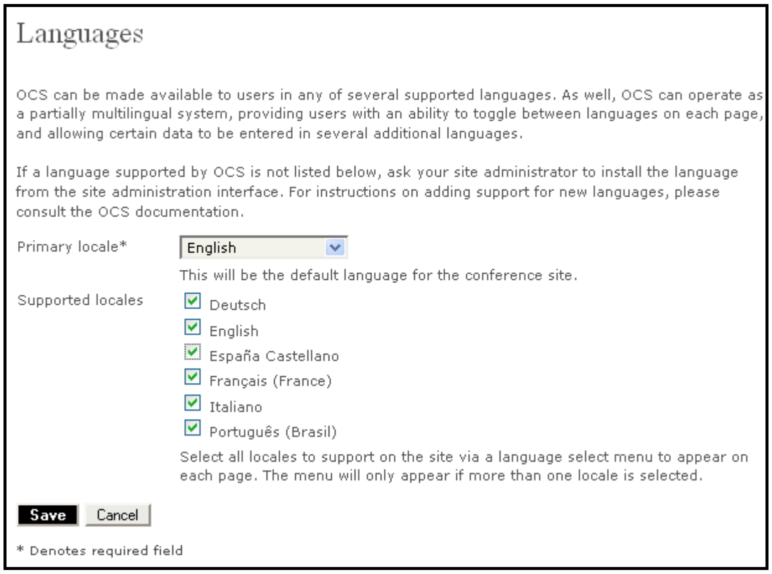
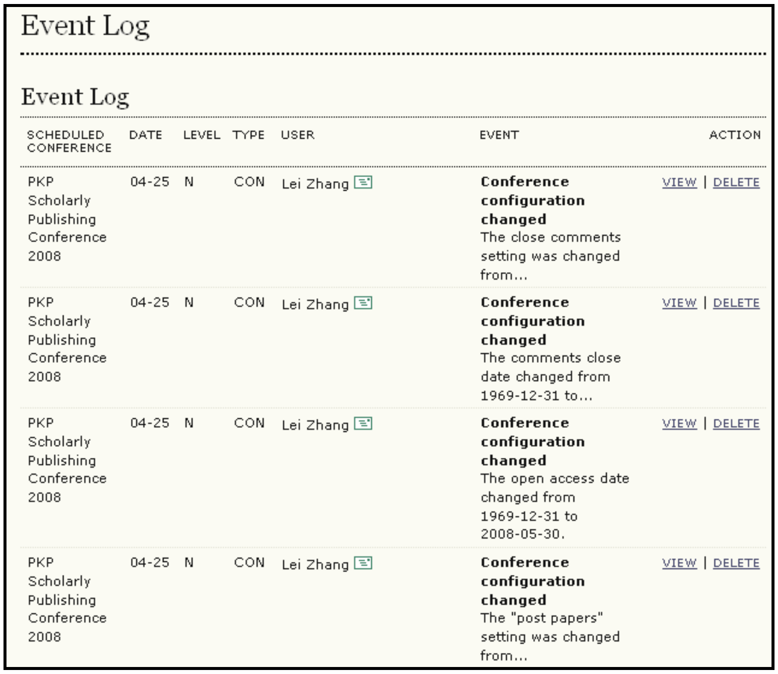


Figure 101: Languages

Event Log

The Event Log allows you to review changes made to the system.



Event Log

Event Log

SCHEDULED CONFERENCE	DATE	LEVEL	TYPE	USER	EVENT	ACTION
PKP Scholarly Publishing Conference 2008	04-25	N	CON	Lei Zhang	**Conference configuration changed** The close comments setting was changed from...	VIEW | DELETE
PKP Scholarly Publishing Conference 2008	04-25	N	CON	Lei Zhang	**Conference configuration changed** The comments close date changed from 1969-12-31 to...	VIEW | DELETE
PKP Scholarly Publishing Conference 2008	04-25	N	CON	Lei Zhang	**Conference configuration changed** The open access date changed from 1969-12-31 to 2008-05-30.	VIEW | DELETE
PKP Scholarly Publishing Conference 2008	04-25	N	CON	Lei Zhang	**Conference configuration changed** The "post papers" setting was changed from...	VIEW | DELETE

Figure 102: Event Log

System Plugins

System plugins allow OCS to expand its functionality without altering the core of the program. If you are interested in writing a plugin for OCS, please contact us using the OCS Development Forum at http://pkp.sfu.ca/support/forum.

As a Conference Manager, you can decide which plugins to add to your site, and which to leave out. As more plugins are contributed to OCS, they will appear in this section or on the forum at http://pkp.sfu.ca/support/forum/viewforum.php?f=28.

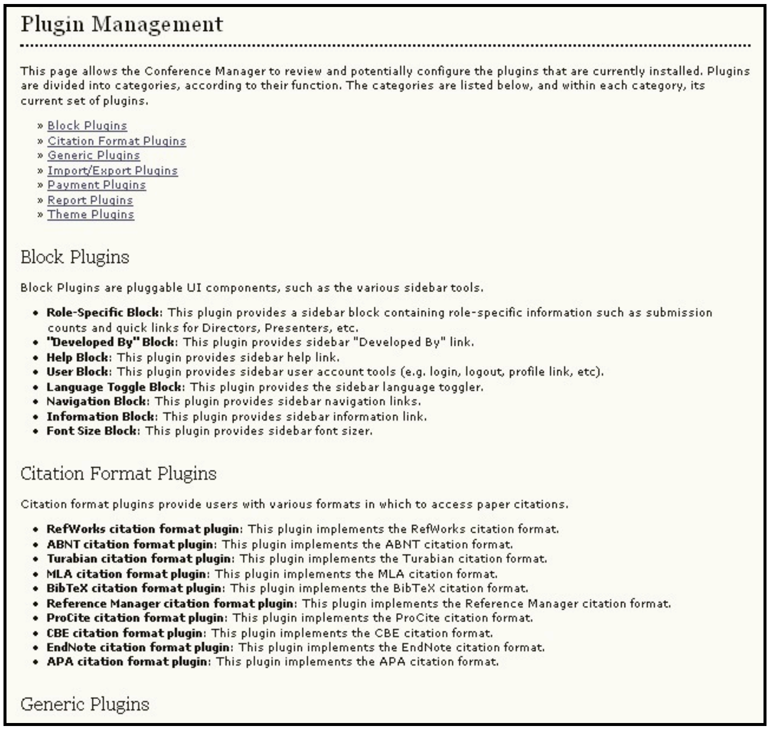


Figure 103: Plugins

Plugins are too wide-ranging to cover in this document; however, you should be able to look in the plugin's subdirectory (found in /plugins/{plugin category}/{plugin name}) for instructions and READMEs.

Registration Manager

Although not a separate Role in OCS, the Conference Manager may assign the task of registration management to another individual. The Registration Manager would be responsible for maintaining the list of registrants, following up on required payments, and any other communications with the registrants.

When logged in as a Conference Manager, the Registration Manager would choose Registrations from the user menu:

Figure 104: Registration Management

The resulting page will list all of the conference's registrants:

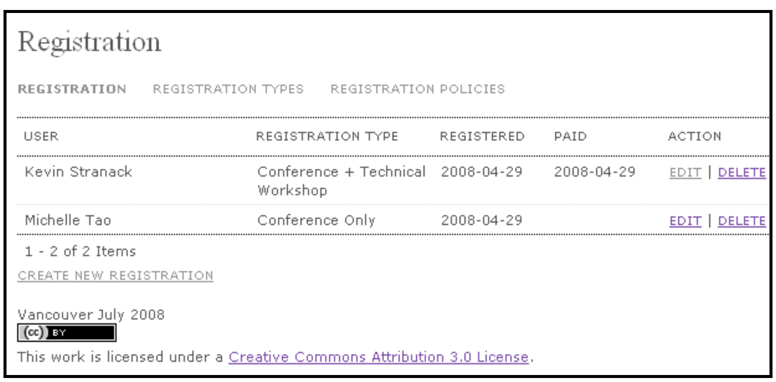


Figure 105: Registrants

From the list, you can quickly see their names, which Registration Types they have chosen, when they registered, and if they have paid. Choosing the Delete link will remove them from the system, and Edit will allow you to make changes to their registration:

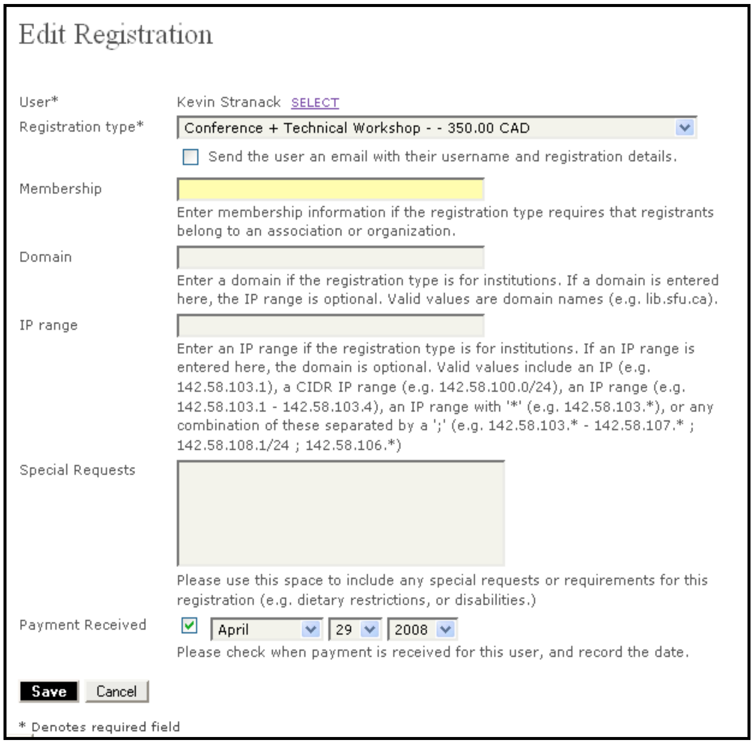


Figure 106: Registration Editing

From here, you can change their Registration Type, send them an email with their username and registration details, enter any membership information, add any authentication details for non-open access conferences, include any new special requests, and finally, mark them as paid. Use the Save button to record the changes.

Director

Once the conference website configuration is completed, the Director takes over, overseeing the submission, review, and publication of conference presentations and papers. In some cases, this may be the same person as the Conference Manager, or it may be a different individual.

Login to your OCS account and select your role as Director. This may be the only available role, or there may be others to choose from.

Figure 107: Logging in as Director

This will take you to your Director Homepage.

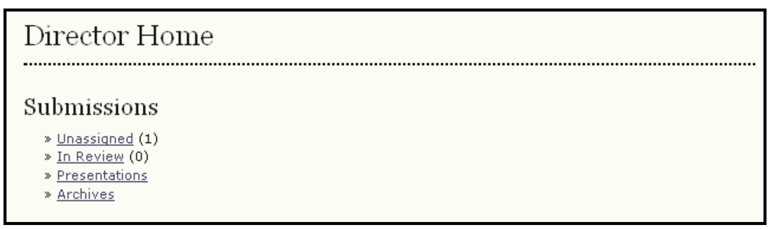


Figure 108: Director Homepage

Assigning Submissions

From here, you can quickly see how many unassigned submissions are in the queue (e.g., 1 in the example above), how many are in the review process, how many have been accepted (under Presentations), and an archive of all submissions.

Under Unassigned, you will see a list of the unassigned submissions.

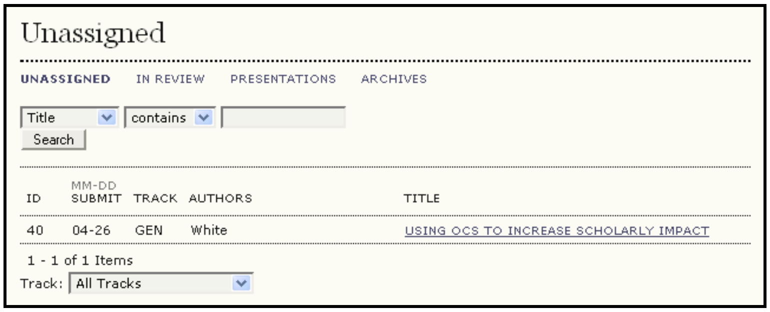


Figure 109: Unassigned Submissions

To assign a submission, click on its title. This will take you to the submission summary page, where you can quickly review the author names, title, submission files (if they were required upon the initial submission), and more.

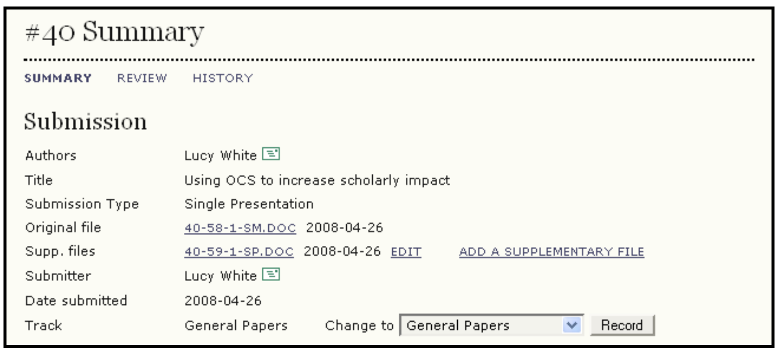


Figure 110: Summary Page

Scrolling down the page, you will see the section for adding yourself, a Track Director, or another Director to guide the submission through the review and editorial process. You can choose the best option for your own conference's workflow.

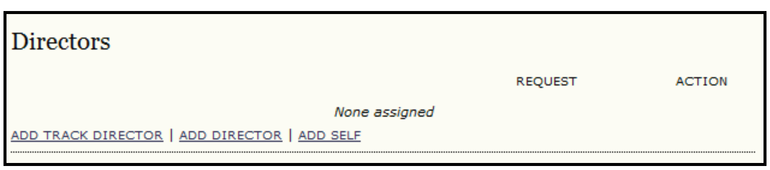


Figure 111: Selecting Directors

Adding a Track Director

To add a Track Director, click on the Add Track Director link.

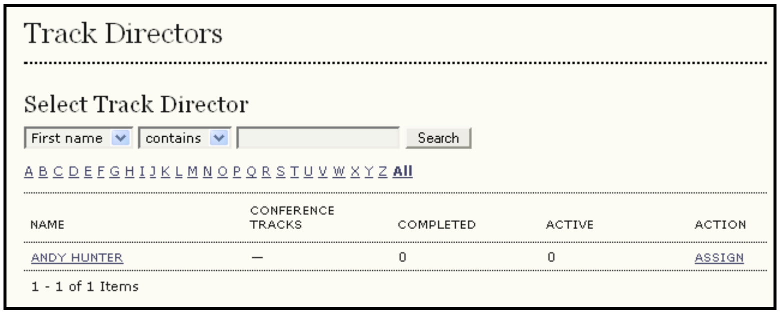


Figure 112: Selecting a Track Director

You may have a number of Directors to choose from, or only one (as in the example above). To select one, click the Assign link to the right of their entry, under Action. This will generate an email message from you, addressed to them, with the content filled in based on the prepared email template (see earlier section).

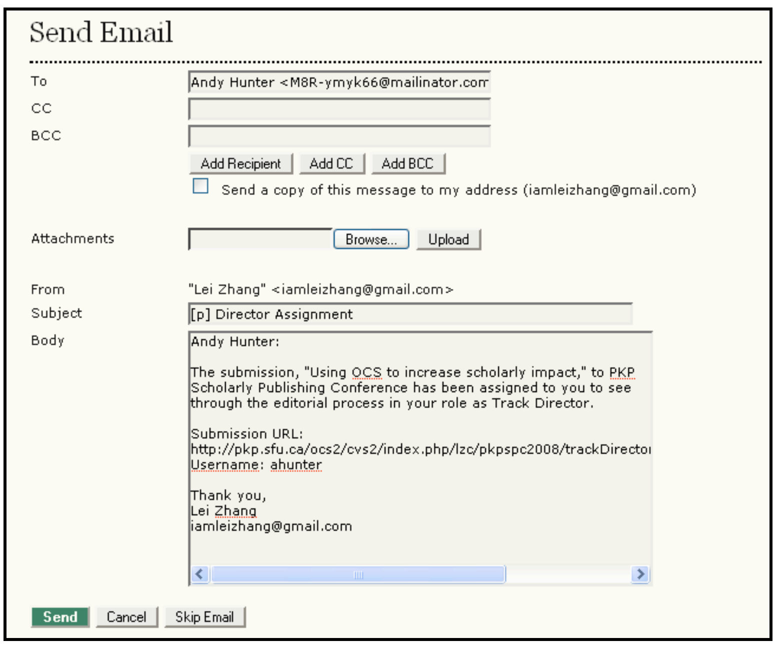


Figure 113: Send Mail

Upon sending the message, the Track Director is now assigned to the submission.

Figure 114: Assigned Track Editor

You are now able to continue reviewing the Submission Summary. The next section provides the Status of the submission, which is now considered to be In Review.

Figure 115: Status

Archive Submission

The Status section also provides you with the opportunity to reject the submission before it moves any further ahead in the process. Clicking the Archive Submission link will generate an email rejecting the submission.

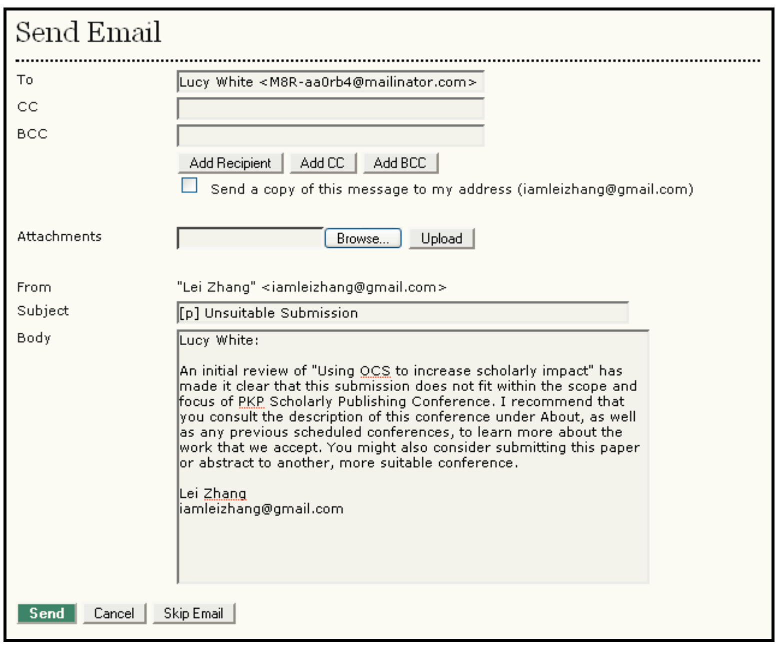


Figure 116: Archive Submission

Remember, all email templates can be modified in the Prepared Email Section by the Conference Manager. The archived submission can be restored by clicking Restore to Active List link.

Next, you can review the submission's metadata and make any necessary changes.

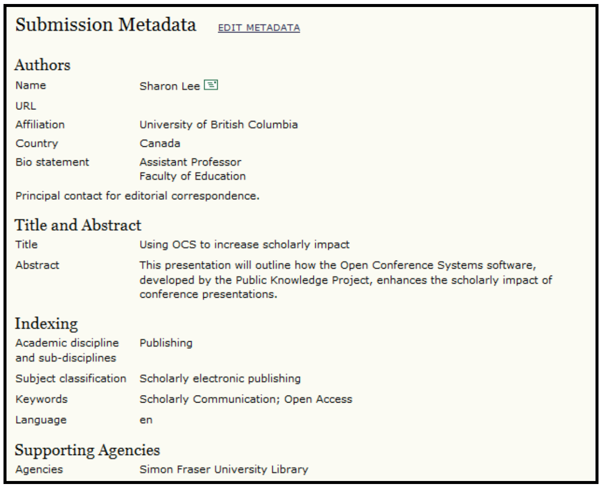


Figure 117: Submission Metadata

The submission is now ready for the Track Director to assign a Reviewer (see the Track Director section below).

Editing a Paper

Once the submission has been accepted, you will need to prepare it for publication on your website.

Uploading Submission Galleys

- Login as the Director
- Choose In Review
- Select the linked title of your sample submission
- Under Layout, select Galley and use the upload tool to upload a sample file

Track Director

Requesting a Review

The Track Director's responsibility is to guide the submissions in their track through the peer review process. To begin, login as a Track Director.

Figure 118: Logging in as Track Director

From the Track Director Homepage, select the linked title of the submission.

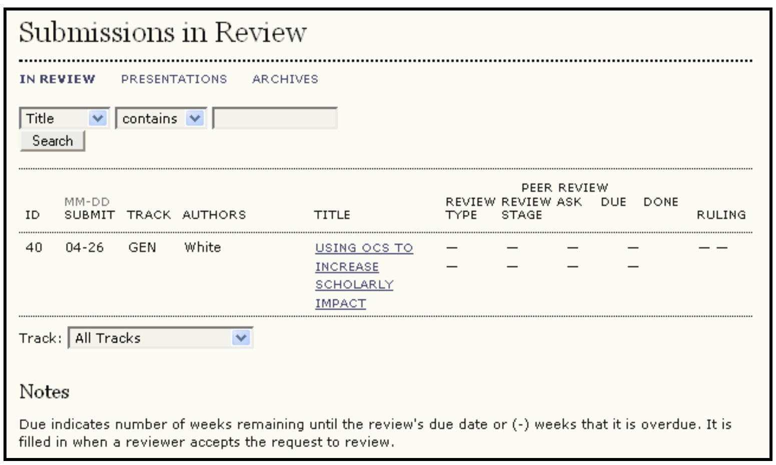


Figure 119: Submissions in Review

On the resulting page, the Track Director should review the submission information, and select a Reviewer.

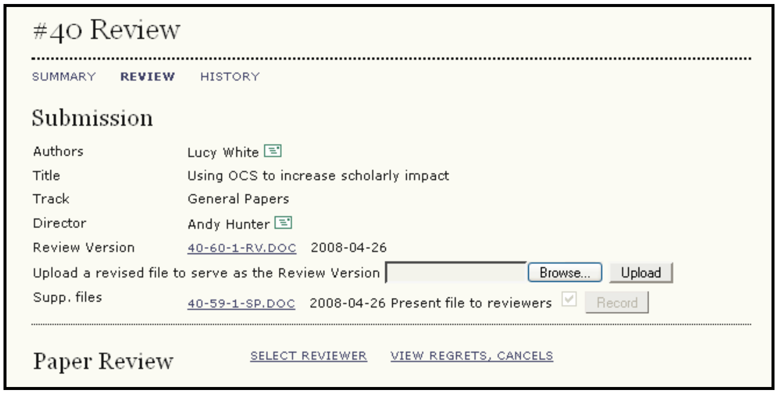


Figure 120: Selecting Reviewer

From the list of available reviewers, assign one using the Assign link.

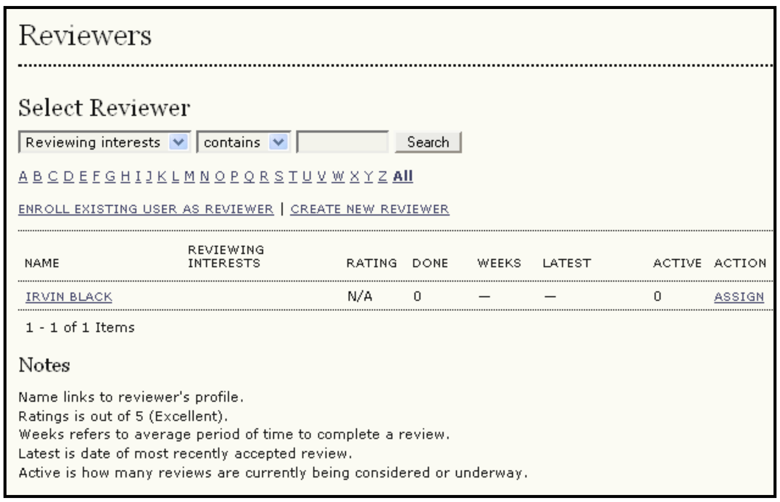


Figure 121: Assigning Reviewer

Next, use the email icon (under REQUEST in the figure below) to send the assigned reviewer a Request message.

Figure 122: Requesting the Review

Sending the message will set the review to being underway.

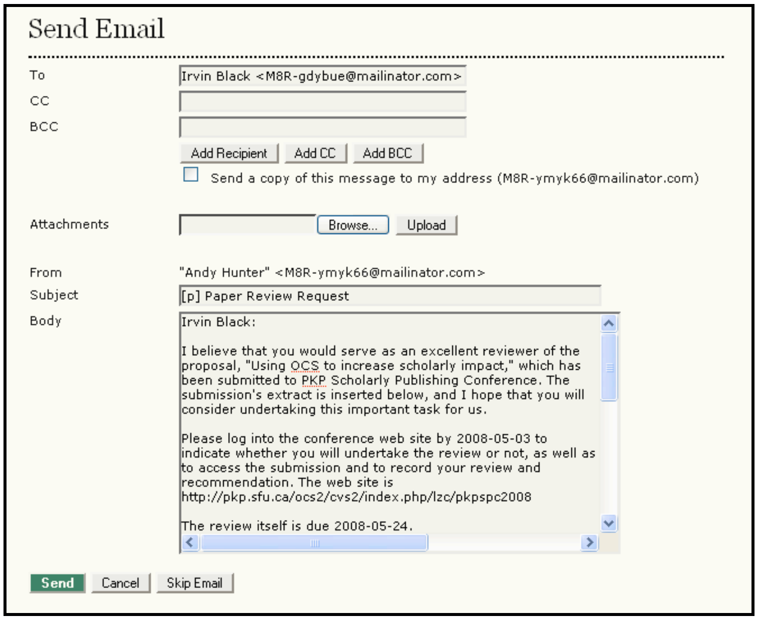


Figure 123: Request Review Message

Remember, it is possible to assign more than one reviewer to each submission.

Responding to the Review

The next step will be to await the Reviewer's recommendation for the submission. The Review may recommend that the submission be accepted, revised, submitted elsewhere, or declined.

Return to the submission by logging in, selecting Track Director, and clicking on the linked title of the submission.

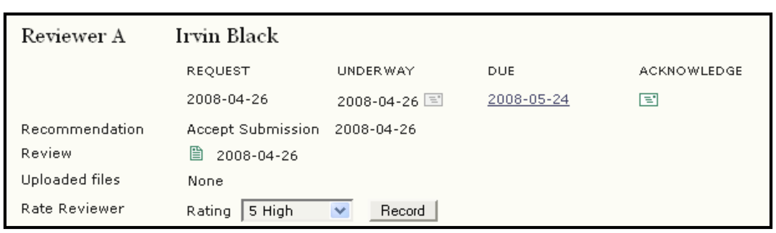


Figure 124: Reviewer Report

Use the Acknowledge email icon and send the message thanking the Reviewer for their contribution to the conference.

Next, look at the Reviewer's recommendation and click the Review icon to read the comments.

Depending on the configuration of the conference setup, you may also have the opportunity to rate the Reviewer's contribution on a scale of 1 to 5.

Under Director Decision, you can choose to accept the submission, send it back for revisions, or rejection. Use the email icon to notify the Author of your decision.

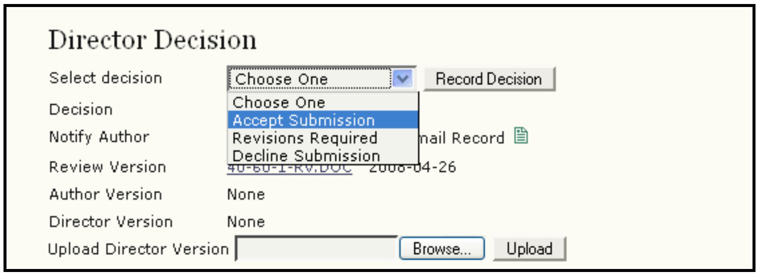


Figure 125: Director Decision

Use the Record Decision button to mark the review as complete. You will now have the option to accept the presentation file as it currently exists, or to move it to Layout for any required changes, such as conversion to PDF or HTML.

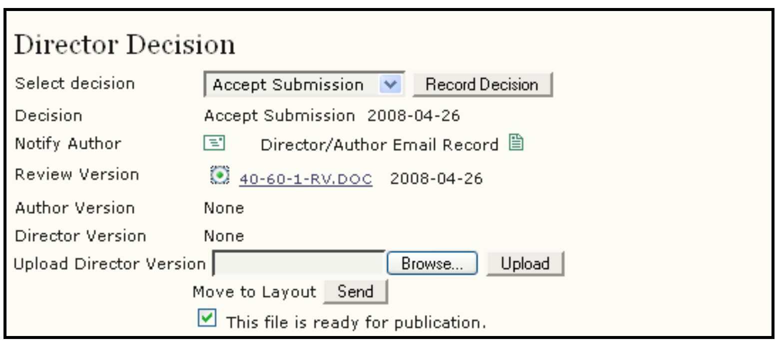


Figure 126: Move to Layout

If you have sent the submission to Layout, it will appear in this section.

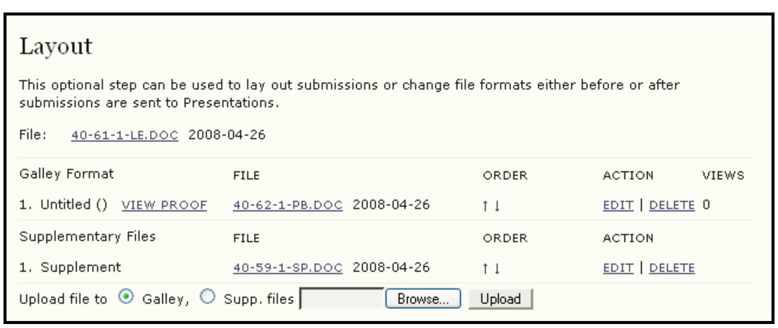


Figure 127: Layout

You can upload an edited version of the paper or presentation file as a Galley. This will automatically update the file visible on your website.

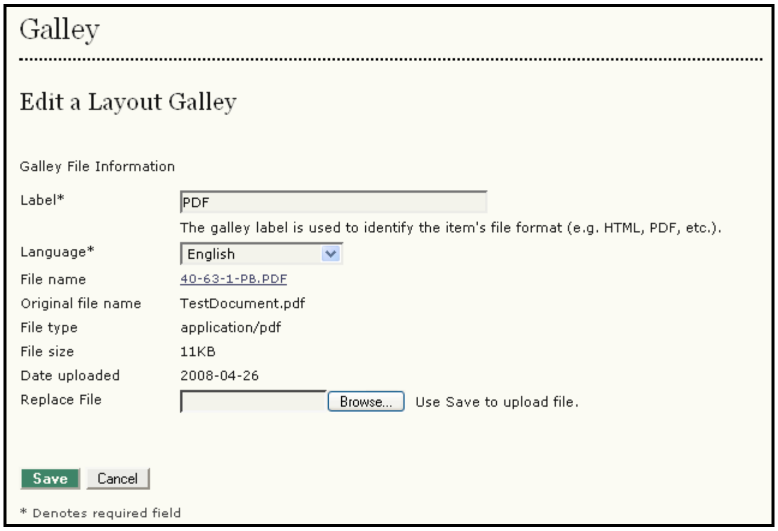


Figure 128: Galley Files

If changes are discovered at a later date, you can upload a revised version here, using the Edit link.

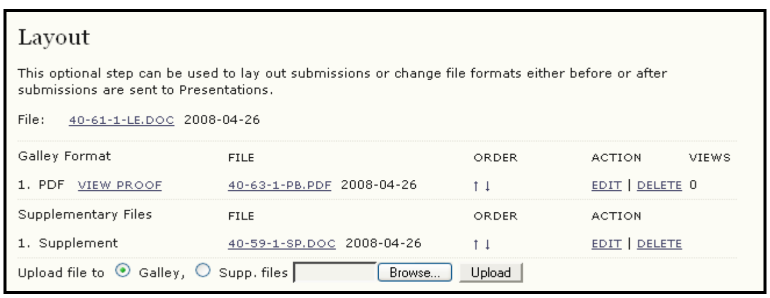


Figure 129: Edit Galley Files

Use the Complete button to move the submission to your list of accepted presentations.

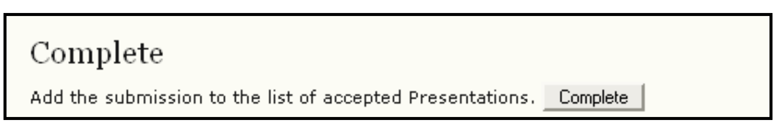


Figure 130: Complete

Then it is for the Conference Manager to schedule the presentation by Scheduler to set the date, time and location of the presentation.

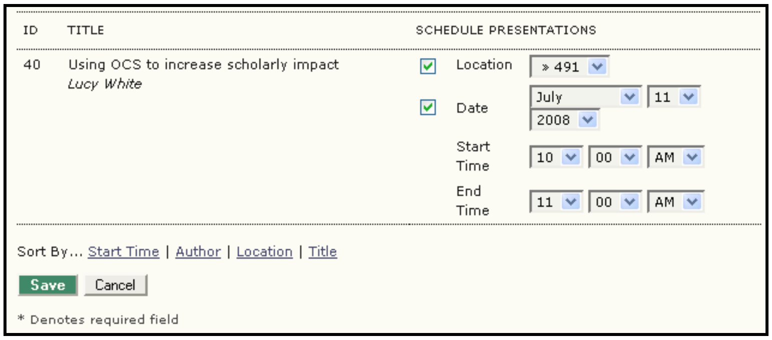


Figure 131: Scheduling Presentation

The presentation will now be visible on the conference web site, under Presentations and Authors.

Figure 132: Presentations and Authors

The presentation can also be viewed under Conference Schedule.

Figure 133: Conference Schedule

Reviewers

Reviewing a Submission

To begin reviewing a submission, log in as a Reviewer.

Figure 134: Logging in as Reviewer

From the Reviewer Homepage, select the linked title of the submission.

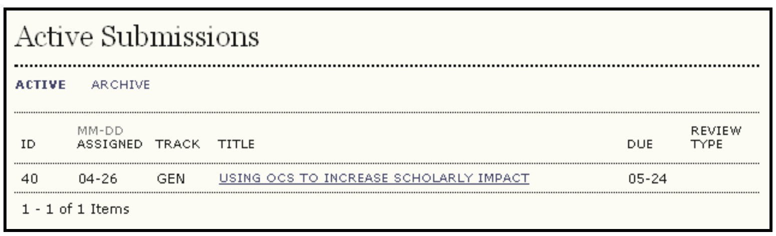


Figure 135: Selecting the Submission

In the first section, you can review the submission metadata.

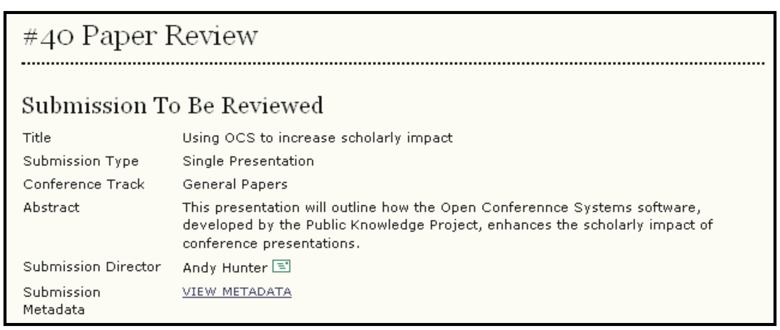


Figure 136: Submission Summary

Next, you can view the Review Schedule.

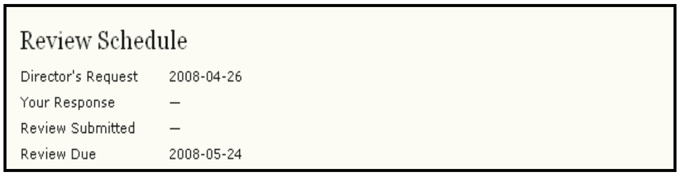


Figure 137: Review Schedule

Finally, you can see the Review steps you must follow to complete the review.

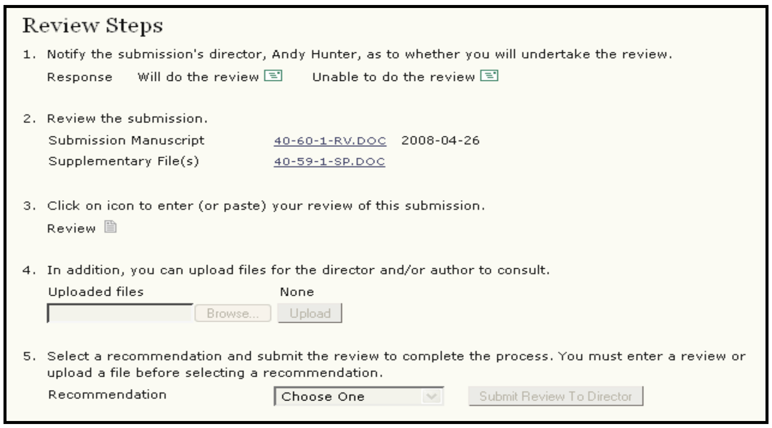


Figure 138: Review Steps

The first step is to use the email icon to inform the Track Director that you will do the review, or are unable to do the review.

Figure 139: Respond to Track Director

The second step is to review the submission. This could be an abstract or a full paper, depending on the submission policies of the conference.

The third step is to type your review. Use the Review icon to bring up two text boxes. This allows the Reviewer to communicate directly with both the Track Director and the Author or with the Track Director only.

Figure 140: Enter Review

The fourth step allows you to upload a separate file for the Track Director and/or the Author.

The fifth and final step is to advise the Track Director of your recommendation, which could be to Accept Submission, Revisions Required, Submit Elsewhere, Decline Submission, or See Comments. Use the dropdown menu to make your selection, and use the Submit Review to Director to submit it.

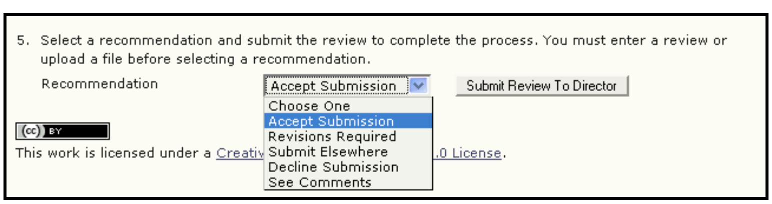


Figure 141: Select Recommendation

If the recommendation is to Accept Submission, Submit Elsewhere, Decline Submission, or See Comments, your job is finished. If the recommendation is for Revisions Required, you may be involved in another round of reviewing.

Authors

Registering as an Author

When an author is interested in submitting a proposal for your conference, they will need to visit your website, and select Proposal Submission.

Figure 142: Proposal Submission

This will take them to a login page, where they can enter their existing account information, or if they are new to your site, register for a user account before they can proceed.

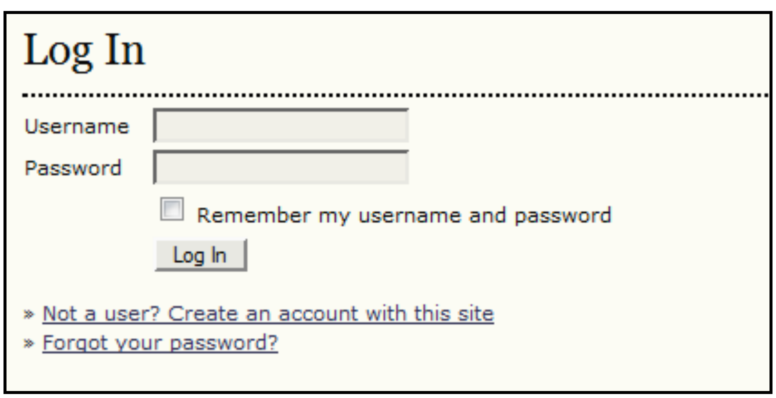


Figure 143: Log In

Registration requires filling in a few brief fields on the web form.

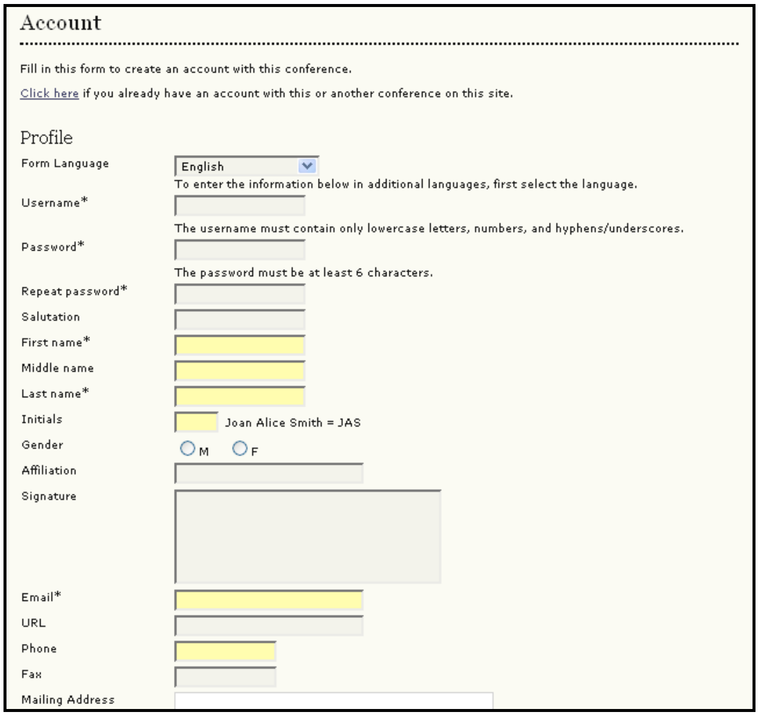


Figure 144: Author Registration

Upon completion of the form, they will be taken directly to the proposal submission section. They could also choose to logout and submit their paper at a later date.

Submitting a Proposal

To submit a proposal, the user will need to be logged in as an Author (see previous section). From the User Home page, under Roles, select Authors.

Figure 145: Logging in Author

Once logged in, the author should follow the steps by clicking on the link under “Start here to submit a paper to this conference”.

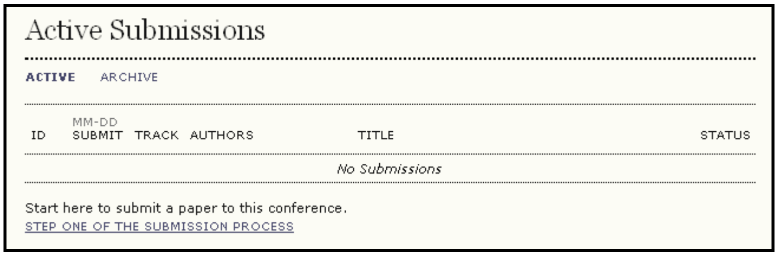


Figure 146: Start Here to Submit a Paper to This Conference

Step 1: Starting the Submission

First, the author must select the most appropriate track for their proposal.

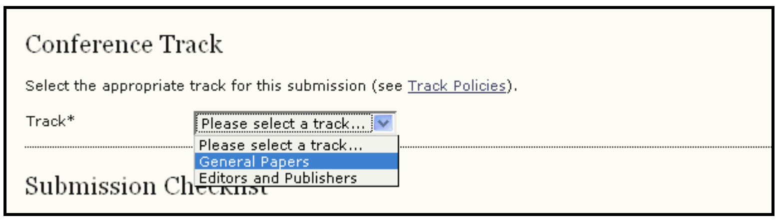


Figure 147: Selecting the Track

It also requires the author to agree to the submission checklist (setup previously by the Conference Manager).

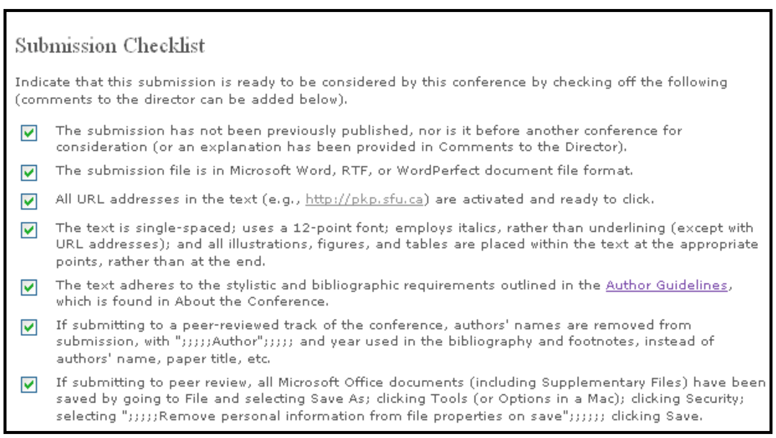


Figure 148: Submission Checklist

If any of the items are not checked, the submission cannot proceed. Next, the author must agree to the Copyright Notice (as setup previously).

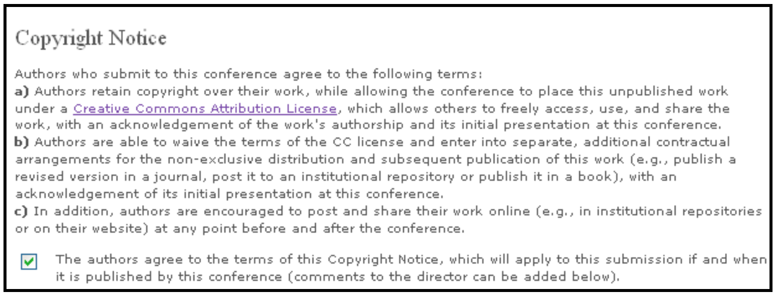


Figure 149: Copyright Notice

If the Notice is not checked, the submission cannot proceed. Finally, the author can add any additional comments.

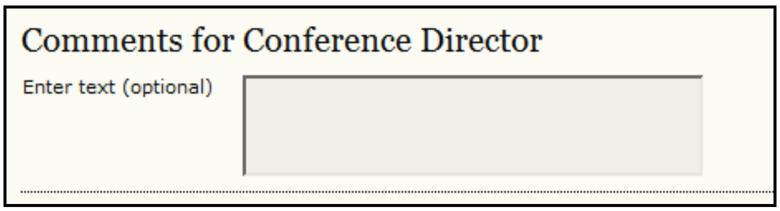


Figure 150: Author Comments

When this first stage is completed, the author selects Save and Continue to move on to Step 2.

Step 2: Entering the Submission's Metadata

Information about the author is automatically pulled in from the user's account.

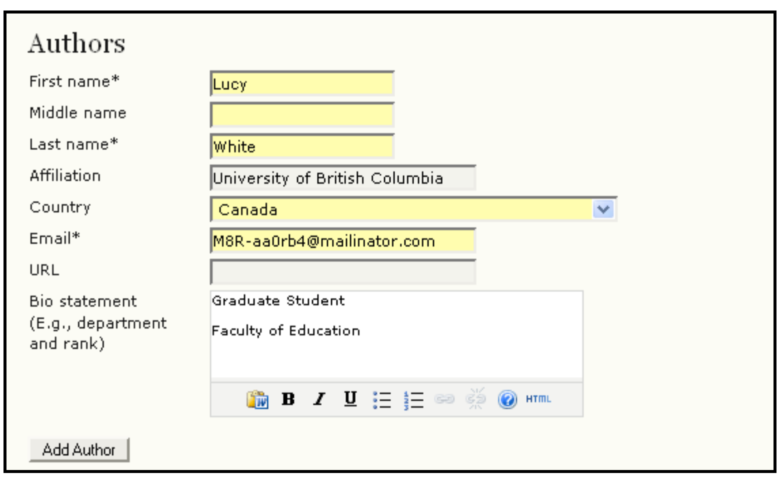


Figure 151: Author Information

Using the Add Author button, additional authors can be added to the submission. However, the author filling in the form (in the above example, Lucy White), will be considered the primary author.

Next, the author must specify the type of submission (e.g., Single presentation, Panel Presentation).

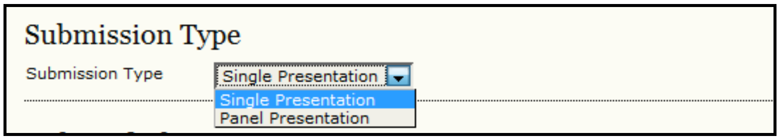


Figure 152: Submission Type

The next section allows the author to enter the title and abstract for their proposal.

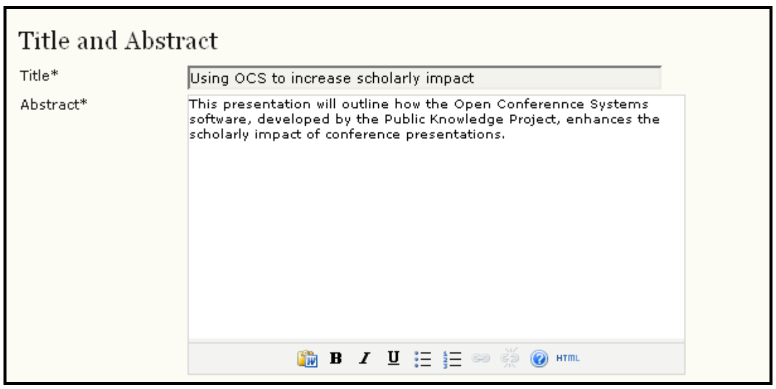


Figure 153: Title and Abstract

Next, the author would add their preferred indexing terms.

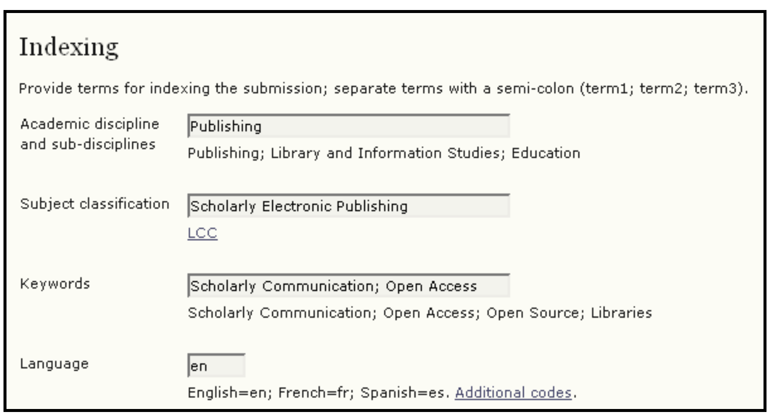
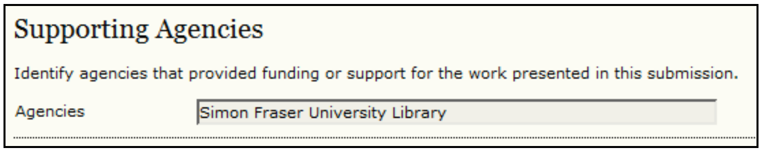


Figure 154: Indexing

Finally, the author would enter any supporting agencies that provided funding for their research.


Supporting Agencies

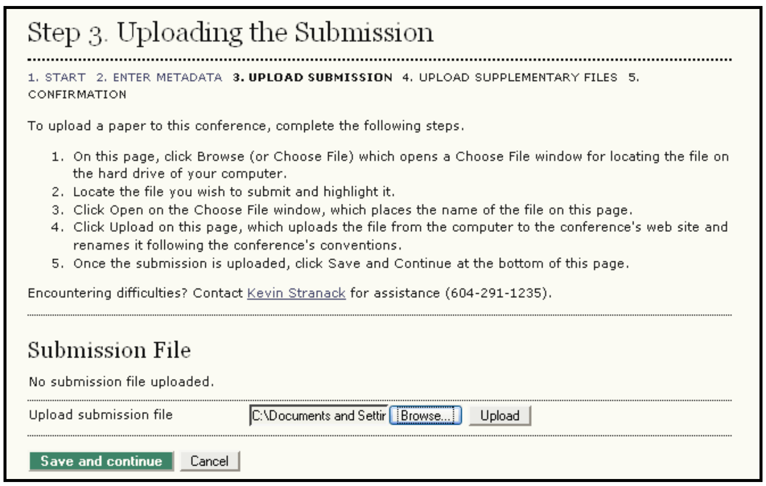
Identify agencies that provided funding or support for the work presented in this submission.

Agencies: Simon Fraser University Library

Figure 155: Supporting Agencies

When this stage is completed, the author selects Save and Continue to complete their submission (if the conference is set up to initially only accept abstracts) or move on to Step 3, to upload their submission file.

Step 3: Uploading the Submission


Step 3. Uploading the Submission

1. START 2. ENTER METADATA **3. UPLOAD SUBMISSION** 4. UPLOAD SUPPLEMENTARY FILES 5. CONFIRMATION

To upload a paper to this conference, complete the following steps.

1. On this page, click Browse (or Choose File) which opens a Choose File window for locating the file on the hard drive of your computer.
2. Locate the file you wish to submit and highlight it.
3. Click Open on the Choose File window, which places the name of the file on this page.
4. Click Upload on this page, which uploads the file from the computer to the conference's web site and renames it following the conference's conventions.
5. Once the submission is uploaded, click Save and Continue at the bottom of this page.

Encountering difficulties? Contact Kevin Stranack for assistance (604-291-1235).

Submission File

No submission file uploaded.

Upload submission file: C:\Documents and Settir | Browse... | Upload

Save and continue | Cancel

Figure 156: Uploading the Submission

Use the upload tool and select Save and Continue.

Step 4: Uploading Supplementary Files

If permitted in the conference setup, authors may also be given the option to upload supplementary files, such as data sets.

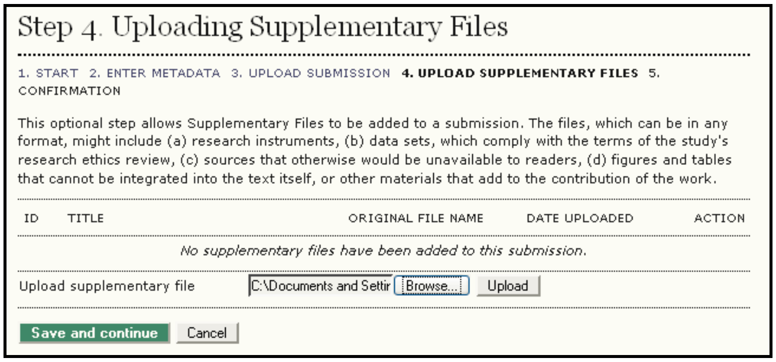


Figure 157: Uploading Supplementary Files

The author is required to fill in metadata about the supplementary files.

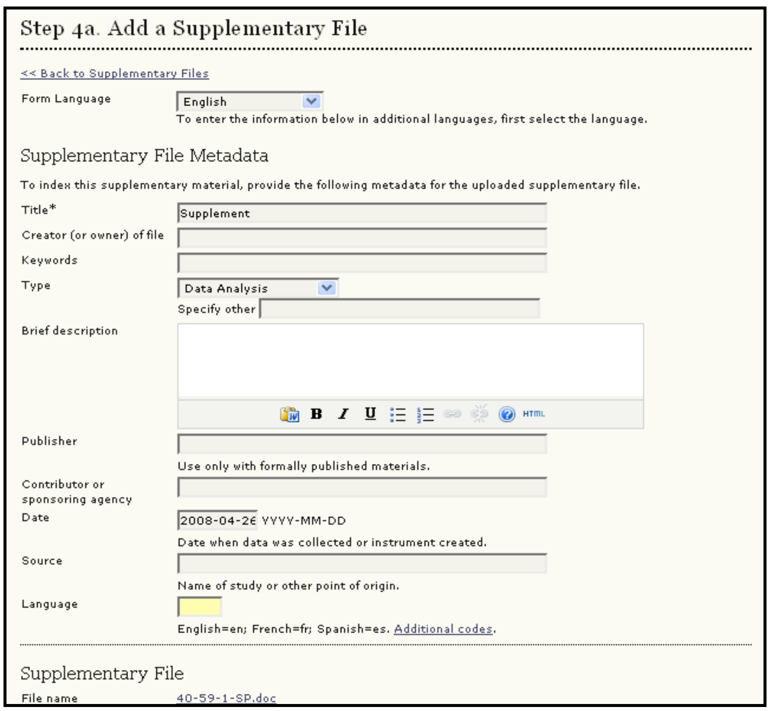


Figure 158: Add a Supplementary File

Step 5: Confirming the Submission

Finally, the author is given the opportunity confirm their submission.

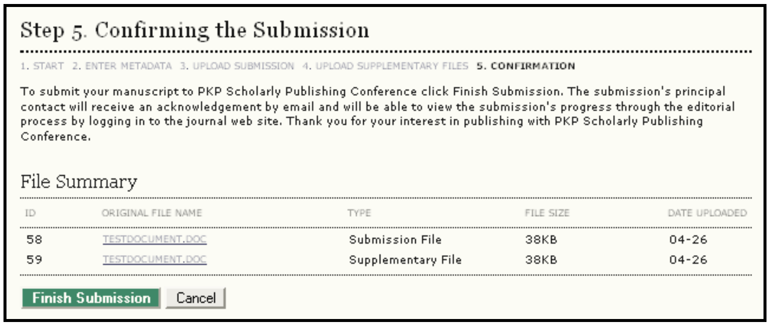


Figure 159: Confirming the Submission

Upon selecting the Finish Submission button, the author needs to click on Active Submissions to have the information sent to the conference for consideration.

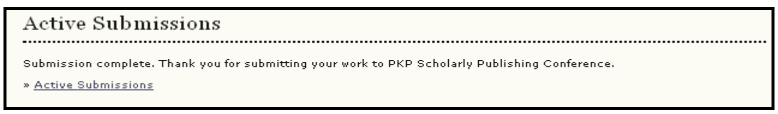


Figure 160: Active Submissions

After the proposal has been successfully submitted, the author can log in again to see the status of their proposal. In the example below, the proposal is currently Awaiting Assignment. They can also submit another proposal, if desired.

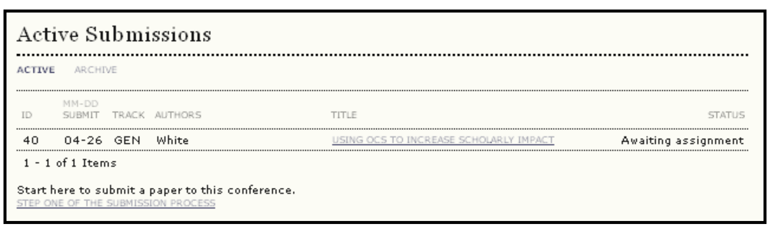


Figure 161: Status of Submissions

Responding to Reviews

You can return to your account at any time to see the progress of your submission. The status will change from Awaiting Assignment to Paper in Review. You will be notified via a system email of the decision.

Your submission may be declined for the conference, or it may be suggested that you submit it to another conference. Your submission may also be sent back for revisions based on Reviewer comments, in which case you would need to make the changes and resubmit for final approval. Lastly, your submission may be accepted without revisions.

If resubmitting the revised submission, the author should use “Browse” and “Upload” buttons next to Upload Author Version under Director Decision on the Review Page.

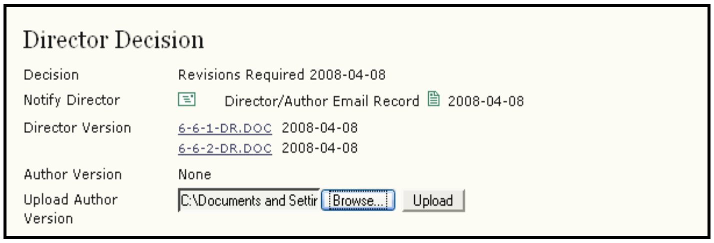


Figure 162: Upload Author Version

If the conference is set up to only collect abstracts or if you submitted the paper or presentation file during the initial submission process, that will be the end of your tasks. However, if the conference is set up to first collect your abstract and requires you to later submit your paper or presentation files (see the Setup section for the Conference Manager), you will be asked to do so (see the Author’s Step 3: Uploading the Submission).

Readers

Viewing the Conference Site

Once all of the configuration steps have been completed, a fully functional conference site will be available to Readers. Initially the site will primarily consist of information describing the conference, including the Announcements, Overview, Call for Papers, Proposal Submission, Track Policies, Program, Presentations and Authors, Conference Schedule, Registration, Accommodation, Organizers and Partners, and Timeline.

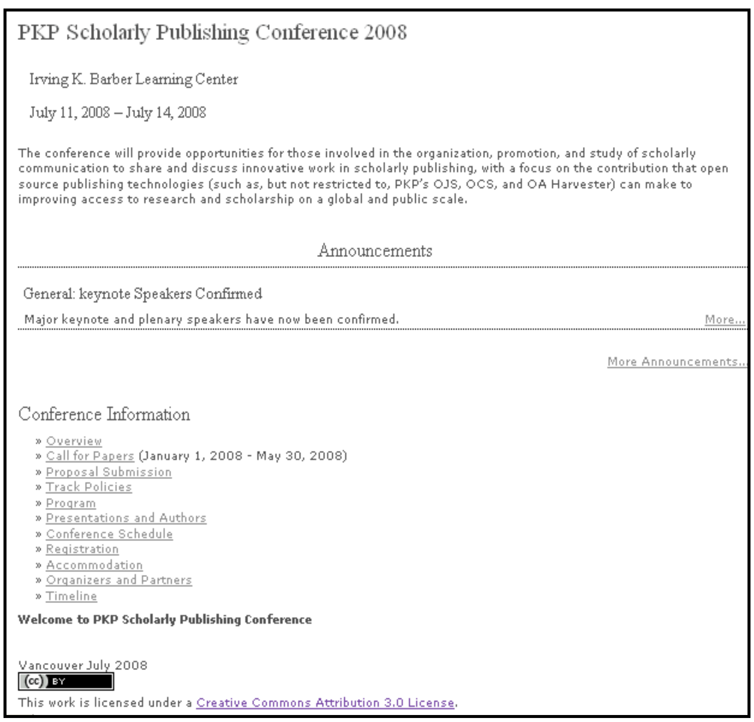


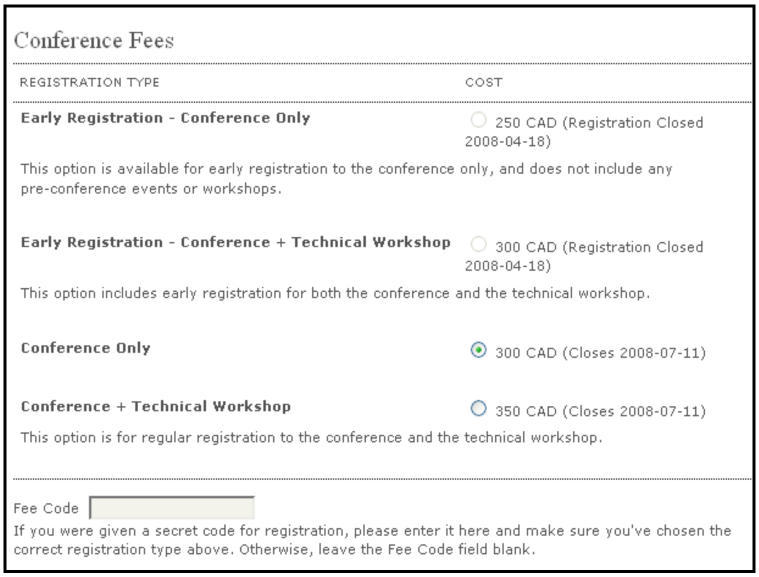
Figure 163: Conference Information

Once you begin to accept submissions, however, the Presentations and Authors section will also begin to contain the full papers or presentation files for your Readers.

If your conference is open access, the papers will be available to a global audience. If you have chosen a closed access conference, only your registered readers will be able to read the papers.

Registrants

Anyone interested in registering to attend the conference will need to use the Registration link on the conference web site. First they will see any registration information that has been posted (see Scheduled Conference Setup), and a list of conference fees:


Conference Fees

REGISTRATION TYPE	COST
Early Registration - Conference Only	250 CAD (Registration Closed 2008-04-18)
This option is available for early registration to the conference only, and does not include any pre-conference events or workshops.	
Early Registration - Conference + Technical Workshop	300 CAD (Registration Closed 2008-04-18)
This option includes early registration for both the conference and the technical workshop.	
Conference Only	300 CAD (Closes 2008-07-11)
Conference + Technical Workshop	350 CAD (Closes 2008-07-11)
This option is for regular registration to the conference and the technical workshop.	

Fee Code

If you were given a secret code for registration, please enter it here and make sure you've chosen the correct registration type above. Otherwise, leave the Fee Code field blank.

Figure 164: Conference Fees

The above figure demonstrates how some fee options (e.g., Early Registration) can be automatically disabled based on the date (see Registration setup options).

A new registrant would choose from the available options. Notice the option to include a fee code, which would have been provided to the registrant at an earlier date. This may be a special code designated for registrants who are also speaking at the conference or, for some other reason, will receive a discount or fee waiver.

Next, they would fill in their personal information:

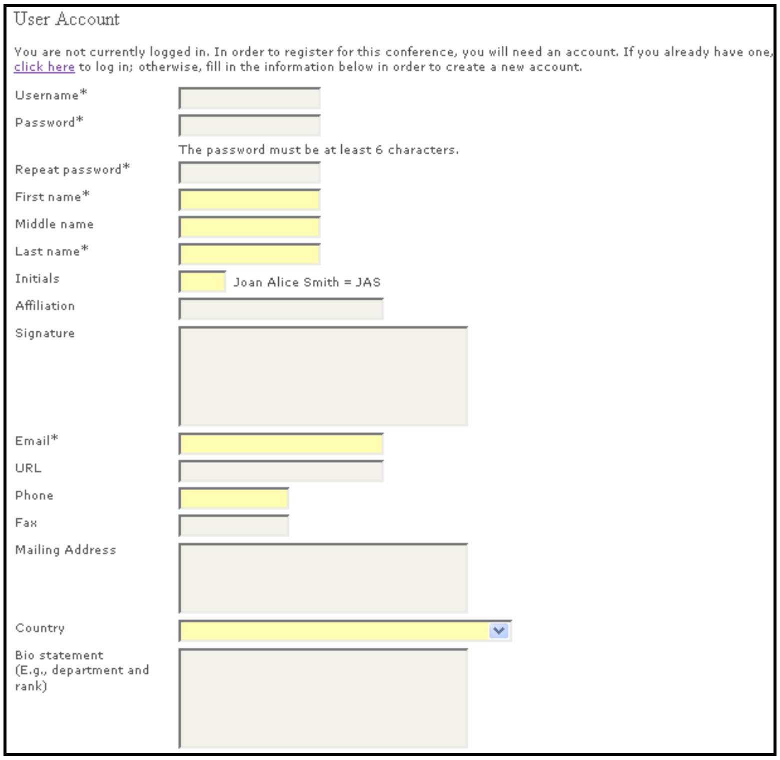


Figure 165: User Account Information

They would also have the option to enter any special requests, such as dietary restrictions:

Figure 166: Special Requests

Contact information for Registration Manager, and finally, the Register button are also provided.

If the Manual Payment option has been selected, the registrant would submit a cheque or money order to the Registration Manager, and the registration process would be completed.

If the PayPal Payment option was chosen, a page will display directing the registrant to the secure PayPal site:

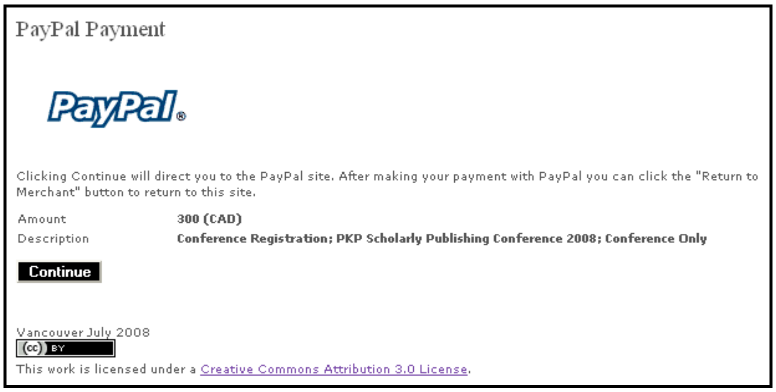


Figure 167: Paypal Payment

Selecting Continue takes the registrant to the Conference PayPal account, allowing them to make their payment online, and completing the registration process.

Conclusion

If you have followed all of the steps outlined in this document, you should now have a working conference management system in place.

As new features are added to OCS, and the software in upgraded, we will be updating this document.

If you have any suggestions for revisions or additional content to add to *OCS in an Hour*, please let us know at: pkp-support@sfu.ca