

OCS Quick Guide:

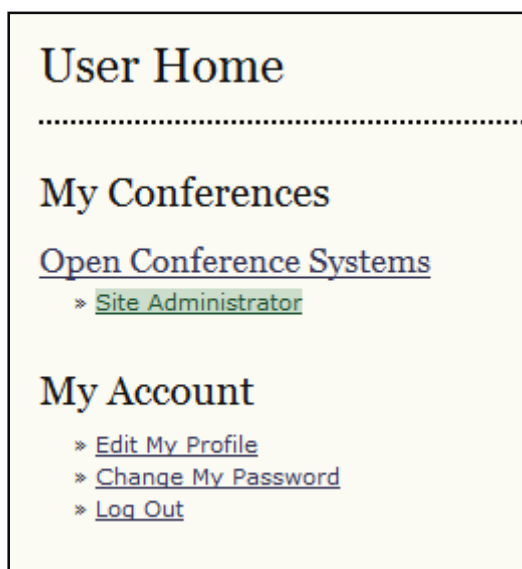
For One-Time Events and Director-Based Reviews

Open Conference Systems (OCS) is designed to be a complete, multiple conference management system, including a full peer review component. However, many users do not have such requirements, and plan to only use the software for a single event, with “reviews” conducted by a small group of conference directors. This document will walk you through how to configure and use your OCS installation to meet those needs.

If this is your first time using OCS, you will also want to have a copy of OCS in an Hour available, as this document is not intended to replace that manual, but to provide some alternatives not covered within it.

Part One: Setting Up Your Conference

After successfully installing OCS, login and select your role as Site Administrator:



Next, select Hosted Conferences:

Site Administration

Site Management

- » [Site Settings](#)
- » [Hosted Conferences](#)
- » [Languages](#)
- » [Authentication Sources](#)

Then, choose Create Conference:

Conferences

CONFERENCE TITLE	PATH	ORDER	ACTION
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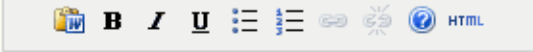
No conferences have been created.

[CREATE CONFERENCE](#) | [IMPORT FROM OCS 1](#)

From the resulting page, fill in the form:

Conference Settings

You will automatically be enrolled as the manager of this conference. After creating a new conference, enter it as a manager to continue with its setup and user enrollment.

Form Language	<input type="text" value="English"/>
	To enter the information below in additional languages, first select the language.
Conference Title*	<input type="text" value="Open Access Foundation"/>
Conference description	<div><p>The Open Access Foundation supports the growth of open access publishing.</p></div> <div></div>
	The conference description identifies the ongoing mission of this conference. It appears on the main conference page, as well as all of the conference's convention pages.
Path*	<input type="text" value="oaf"/>
	The conference's URL will be <code>http://localhost/conferences/index.php/path/...</code>
	<input checked="" type="checkbox"/> Enable this conference to appear publicly on the site
	<input type="button" value="Save"/> <input type="button" value="Cancel"/>

* Denotes required field

Use this page to describe the organization operating the conference. It might be a foundation, a university department, a society or association, etc.

The “path” simply requires a few characters that will become part of the URL. Do not enter a full URL here.

Once you’ve filled in the fields, press the Save button.

From the resulting page, select the User Home link in the navigation bar:

HOME ABOUT **USER HOME** SEARCH

Home > User > Site Administration > **Conferences**

Conferences

CONFERENCE TITLE	PATH
OPEN ACCESS FOUNDATION	oaf

1 - 1 of 1 Items

[CREATE CONFERENCE](#) | [IMPORT FROM OCS 1](#)

NOTE: If you ever do decide to use this OCS for a second organization, such as the Open Source Foundation, you could add it here.

Your account has now automatically been given the role of Conference Manager for the organization you just created. Select Conference Manager:

User Home

My Conferences

[Open Conference Systems](#)
 » [Site Administrator](#)

[Open Access Foundation](#)
 » [Conference Manager](#)

My Account

- » [Edit My Profile](#)
- » [Change My Password](#)
- » [Log Out](#)

You will now see a list of choices under General Management:

Conference Site Management

General Management

1. Begin with Website Management to set up the conference website.
2. Use Scheduled Conferences to establish a scheduled instance of the conference.
3. Go to scheduled conference's Setup to post Call for Papers, Registration, etc. and use its Timeline to set dates for postings, submissions, etc.

- » [Website Management](#)
- » [Scheduled Conferences](#)
- » [Prepared Emails](#)
- » [Reading Tools](#)
- » [Files Browser](#)
- » [Languages](#)
- » [Event Log](#)
- » [System Plugins](#)

These will allow you to configure certain “site-wide” elements for the web site, including the style sheet, the header and footer, the prepared emails, and more. See OCS in an Hour for more details on these configuration options.

From the General Management menu, select Scheduled Conferences. A Scheduled Conference is an actual event, such as the 2010 Annual Meeting of the Open Access Foundation. From the resulting page, select Create Scheduled Conference:

Scheduled Conferences

SCHEDULED CONFERENCE	ACRONYM	ORDER	ACTION
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No events have been created.

[CREATE A SCHEDULED CONFERENCE](#)

Fill in the form with the name of your event:

Scheduling a Conference

A scheduled instance of the conference is created by entering a title (for example, if it is an annual conference, the name of the conference plus the year) and a URL path. You will be made a Conference Director and can designate other Conference Directors, who are able to manage the details of this event, beginning with the scheduling of the conference in Conference Timeline.

Scheduled Conference Title*

Acronym*

Path*

The event's URL will be <http://localhost/conferences/index.php/oaf/path/...>

* Denotes required field

The acronym and path should just be a few characters. Do NOT enter a complete URL. When you've finished, hit the Save button. From the resulting page, select the User Home link in the navigation bar:

[HOME](#) [ABOUT](#) [USER HOME](#) [SEARCH](#)

[Home](#) > [Open Access Foundation](#) > [User](#) > [Conference Site Management](#) > **Scheduled Conferences**

Scheduled Conferences

SCHEDULED CONFERENCE	ACRONYM	ORDER	ACTION
2010 ANNUAL MEETING OF THE OPEN ACCESS FOUNDATION	2010	↑ ↓	EDIT DELETE

1 - 1 of 1 Items

[CREATE A SCHEDULED CONFERENCE](#)

NOTE: If you ever decide to use this OCS for a second event, such as the 2011 Annual Meeting of the Open Access Foundation, you could add it here.

Select your role as Conference Manager to continue configuring this event:

User Home

Open Access Foundation

- » [Site Administrator](#)
- » [Conference Manager](#)

In addition to the General Management menu options you had seen previously, you now also have a variety of menu choices for your new “scheduled conference”. See OCS in an Hour for a detailed description of filling in these fields. You have now set up your OCS conference.

General Management

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- » [Website Management](#)
- » [Scheduled Conferences](#)
- » [Prepared Emails](#)
- » [Reading Tools](#)
- » [Files Browser](#)
- » [Languages](#)
- » [Event Log](#)
- » [System Plugins](#)

Current Conferences

2010 Annual Meeting of the Open Access Foundation

- » [Setup](#)
- » [Conference Timeline](#)
- » [Conference Tracks](#)
- » [Organizing Team](#)
- » [Program](#)
- » [Import/Export Data](#)
- » [Stats & Reports](#)
- » [Registration](#)
- » [Scheduler](#)
- » [Payment Methods](#)
- » [Accommodation](#)
- » [Roles](#)

Roles

- » [Directors](#)

Based upon this example, the conference URL will be:
<http://www.myconference.org/index.php/oaf/2010/>

Part Two: Director-Based Reviews

By default, OCS provides you with a complete peer review system for submissions. For some conferences, however, this may not be appropriate, and a simpler alternative is required. The following steps will show you how to create a director-based review system.

Step One: Setup

Login as the Conference Manager, and under Current Conferences, choose Setup:



Current Conferences

2010 Annual Meeting of the Open Access Foundation

- » [Setup](#)
- » [Conference Timeline](#)
- » [Conference Tracks](#)
- » [Organizing Team](#)
- » [Program](#)
- » [Import/Export Data](#)
- » [Stats & Reports](#)
- » [Registration](#)
- » [Scheduler](#)
- » [Payment Methods](#)
- » [Accommodation](#)
- » [Roles](#)

In Setup Step 1, fill in the details about the conference, such as an Overview, description, contacts, etc.:

Scheduled Conference Setup

These steps are designed to set up a scheduled instance of the conference. Once a conference is set up, it is copied to the next instance of the conference, and can be edited by the conference directors.

1. **Details**
Description, location, contacts, email identification, and sponsors.
2. **Submissions**
Submission process and types, call for papers, guidelines, indexing, and identification.
3. **Review**
Review policies, guidelines, and access.

In Setup Step 2.1, you must decide how you wish to accept submissions:

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
- Post abstracts once the abstract review has been completed

The first option (Abstract) will allow authors to submit an abstract only. No further documents can be submitted. If you plan to judge a submission by its abstract alone, and only post the abstract to the web site, this is the best option.

The second option (Full Proposal) will allow authors to submit a longer proposal, such as a separate paper (often a Word document) or presentation (often a Powerpoint document). No abstract will be provided. Use this option if you wish to judge the submission based upon more detail and have the option of posting the proposal document to the web site.

The third option (Abstract and Proposal Together) allows the author to submit both an abstract and a separate proposal document. This option provides the option of posting both an abstract and a proposal document to the web site upon acceptance.

The fourth option (Abstract Followed by Presentation) allows authors to first submit an abstract. If the abstract is accepted, they will then have the option of later submitting a full paper or presentation. This option will also allow you to post both the abstract and the full paper/presentation to the web site.

You should also check the checkbox to post the abstracts upon completion of the review. This helps to automate the posting process.

This document will be based upon the fourth option: Abstract Followed by Presentation.







To complete Setup Step 2, review the appropriate section of OCS in an Hour.

In Setup Step 3, under Review Policy, you may want to state that papers will be reviewed by a team of expert directors (as opposed to blind reviewers):

3.1 Review Policy

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.

Review Policy

 **B** *I* U      HTML

Since you will have no non-director “reviewers”, section 3.2 is not necessary and can be bypassed:

3.2 Peer Review

The Review Guidelines provide reviewers with criteria for judging a submission's suitability for acceptance to the conference, as well as any special instructions for preparing an effective and helpful review.

Allow reviewers weeks to review submissions.

Reviewers will have access to the submission file only after agreeing to review it.

Enable one-click reviewer access.

Note: With this option, in which reviewers do not need to log in to the site, directors are not able for security reasons to modify email addresses or add CCs or BCCs prior to sending request to reviewers.

Automated email reminders are sent to reviewers:

Who have not responded to a review request within days.

Who have not submitted a review within days after its due date.

Note: To activate these options, the site administrator must enable the `scheduled_tasks` 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.

Directors are able to rate reviewers on a five-point scale.

Finally, check off the Director Decision box in step 3.3, to keep all authors informed of your decision:

3.3 Director Decision

When using the Notify Author email, include the email addresses of all co-authors for multiple-author submissions, and not just the submitting user.

Next, from the Conference Manager menu, choose Conference Tracks:

Current Conferences

2010 Annual Meeting of the Open Access Foundation

- » [Setup](#)
- » [Conference Timeline](#)
- » [Conference Tracks](#)
- » [Organizing Team](#)

This will take you to the Conference Track page:

Conference Tracks

TRACK TITLE	ABBREVIATION	ACTION
General Papers	GEN	EDIT DELETE ↑ ↓

1 - 1 of 1 Items

[CREATE TRACK](#)

Use the Create Track link to create a new track for your conference:

Track

Track title*

Abbreviation* (For example, General Papers=GEN)

Track Policy

Indexing Describe submissions to this conference track as
(For example, "Peer-reviewed abstract", "Non-refereed paper", "Invited presentation", etc.)

Indicate that track is not peer-reviewed

Restrictions Items can only be submitted by Directors and Track Directors.

About Omit this track from Track Policies

Track Directors

Select from among the available Track Directors and "Assign Director" to this track.

Available Track Directors	<input type="button" value="Assign Director >>"/>	This Track's Directors
<input type="text" value="None"/>	<input type="button" value="<< Un-assign Director"/>	<input type="text" value="Jane Tech"/>

Fill in the form, and assign an existing Track Director to this track (for details on creating users and enrolling them as Track Directors, see OCS in an Hour).

At this point, continue filling in the configuration options (e.g., Conference Timelines, Organizing Team, etc.) as outlined in OCS in an Hour.

Step Two: Incoming Submissions

Now that your site has been successfully setup, submissions will start coming in (review OCS in an Hour for information on how authors make their submissions). Your Track Directors will receive an email when a new one comes into their track, and they will login to OCS as a Track Director to manage them (for details on enrolling yourself and others as Directors or Track Directors, see OCS in an Hour):

User Home

Open Access Foundation

[2010 Annual Meeting of the Open Access Foundation](#)
» [Track Director](#)

Then, they'll see the new submission:

Submissions in Review

IN REVIEW PRESENTATIONS ARCHIVES

In Track:


ID	MM-DD SUBMIT	TRACK	AUTHORS	TITLE	PEER REVIEW				RULING
					REVIEW TYPE	REVIEW STAGE	ASK DUE	DONE	
2	11-02	tech	Writer	QUIS AUTEM VEL EUM IURE REPREHENDERIT...	—	—	—	—	—

Click on the linked title to go to the submission record:

#2 Abstract Review


SUMMARY **ABSTRACT REVIEW** PAPER REVIEW HISTORY

Submission

Authors Joe Writer 

Title Quis autem vel eum iure reprehenderit qui in ea voluptate velit

Track Technology

Director Jane Tech 

Abstract Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt. Neque porro quisquam est, qui dolorem ipsum quia dolor sit amet, consectetur, adipisci velit, sed quia non numquam eius modi tempora incidunt ut labore et dolore magnam aliquam quaerat voluptatem. Ut enim ad minima veniam, quis nostrum exercitationem ullam corporis suscipit laboriosam, nisi ut aliquid ex ea commodi consequatur? Quis autem vel eum iure reprehenderit qui in ea voluptate velit esse quam nihil molestiae consequatur, vel illum qui dolorem eum fugiat quo voluptas nulla pariatur?



Abstract Review

[SELECT REVIEWER](#) [VIEW REGRETS, CANCELS](#)

Director Decision

Select decision

Decision None

Notify Author  Director/Author Email Record 

From here, the Track Director will read the abstract, *ignore the Abstract Review section* (as this is a Director-based review – see OCS in an Hour for the normal review process), and make their decision.

If the decision is to accept, the author will then be able to submit a full paper or presentation file.

If the decision is to revise, the author will be given the opportunity to revise their abstract, based upon comments from the Track Director, or to decide against proceeding with the submission.

If the decision is to reject, the author will be informed that their abstract does not fit in with the requirements of the conference.

Once the decision is made, the Notify Author button must be used to inform the author of the decision:

Send Email

To:

CC:

BCC:

Send a copy of this message to my address (jane_tech@mailinator.com)

Attachments:

From: "Jane Tech" <jane_tech@mailinator.com>

Subject:

Body:

Note: Because we decided to post abstracts upon acceptance on page 10 above, the abstract will now automatically appear on the web site, under Presentations and Authors:

Presentations and Authors

Title contains

Last name [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [All](#)

Track:

Technology

Quis autem vel eum iure reprehenderit qui in ea voluptate velit [ABSTRACT](#)

Joe Writer

At this point, if accepted, the author will be able to upload their final paper or presentation file. Once this is done, it will be available for the Track Director to post:

Director Decision

Select decision

Decision None

Notify Author Director/Author Email Record 2008-11-02

Review Version [2-2-1-RV.DOC](#) 2008-11-02

Author Version None

Director Version None

Upload Director Version

Click on the link (2-2-1-RV.DOC) to download the file and review it. If it is acceptable, format it into a PDF (if necessary), using software such as Adobe Acrobat or CutePDF.

Once you have the PDF or Powerpoint file ready to post, scroll down to the Layout section, and upload it as a Galley, using the upload tool:

Layout

This optional step can be used to lay out submissions or change file formats either before or after submissions are sent to Presentations.

File: None

Galley Format	FILE	ORDER	ACTION	VIEWS
	<i>None</i>			

Supplementary Files	FILE	ORDER	ACTION
	<i>None</i>		

Upload file to Galley, Supp. files

The file will now appear alongside the abstract on the web site:

Quis autem vel eum iure reprehenderit qui in ea voluptate velit

Joe Writer

Last modified: 2008-11-02

Abstract

Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt. Neque porro quisquam est, qui dolorem ipsum quia dolor sit amet, consectetur, adipisci velit, sed quia non numquam eius modi tempora incidunt ut labore et dolore magnam aliquam quaerat voluptatem. Ut enim ad minima veniam, quis nostrum exercitationem ullam corporis suscipit laboriosam, nisi ut aliquid ex ea commodi consequatur? Quis autem vel eum iure reprehenderit qui in ea voluptate velit esse quam nihil molestiae consequatur, vel illum qui dolorem eum fugiat quo voluptas nulla pariatur?

Full Text: [PDF](#)

That completes the submission, director-based review, acceptance, and posting of the paper/presentation.