

OCS in an Hour

An Introduction to Open Conference Systems
Version 2.1

Last Updated: September 2, 2008



STANFORD
UNIVERSITY



SIMON FRASER UNIVERSITY
LIBRARY



CANADIAN CENTRE
FOR STUDIES IN PUBLISHING



ARIZONA STATE
UNIVERSITY



Faculty of Education
THE UNIVERSITY OF BRITISH COLUMBIA

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>

This work is licensed under the Creative Commons Attribution-Share Alike 2.5 Canada License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-sa/2.5/ca/> or send a letter to Creative Commons, 559 Nathan Abbott Way, Stanford, California 94305, USA.



Overview	4
OCS Features	4
A Quick Look.....	5
OCS Workflow Chart	7
System Requirements	8
Help Documentation	8
Community Contributions	8
Test-Drive OCS 2.1	9
Roles	9
Site Administrator.....	11
Getting Started.....	11
Site Management.....	12
Site Settings	12
Hosted Conferences	13
Languages	15
Authentication Sources	16
System Information	17
Expire User Sessions.....	17
Clear Data Caches	18
Clear Template Cache.....	18
Conference Manager.....	19
Website Management.....	19
Step 1: About the Conference	20
Step 2: Additional Website Content	23
Step 3: Website Headers, Footers, Lists and Navigation Bar	25
Step 4: Conference Style	28
Step 5: Logging and Auditing	29
Step 6: Conference Indexing	29
Scheduled Conferences	31
Setup	32
Step 1: Details	32
Step 2: Submissions.....	36
Step 3: Review.....	39
Conference Timeline.....	40
Conference Tracks.....	41
Organizing Team	42
Program	44
Import/Export Data	45
Stats & Reports	45
Registration	46
Registration Types	47
Registration Policies.....	48
Registration Information.....	48
Registration Expiry Reminders.....	48
Open Access Options for Registration Conferences	49

Scheduler	50
Payment Methods	52
Manual Payment	52
PayPal Payment.....	52
Accommodation	53
Roles	54
Enroll a User from this Site in this Conference.....	54
Create New User	55
Synchronize Enrollment.....	56
Email Users	56
Log In As a User	56
Announcements	57
Prepared Emails	58
Reading Tools	59
Reading Tool Settings.....	60
Versions	61
Contexts	62
Searches	63
Files Browser.....	63
Languages	64
Event Log	64
System Plugins	65
Registration Manager	67
Director	69
Assigning Submissions	69
Adding a Track Director	70
Archive Submission.....	72
Editing a Paper	73
Uploading Submission Galleys.....	73
Track Director.....	74
Requesting a Review	74
Responding to the Review	76
Reviewers	80
Reviewing a Submission	80
Authors.....	84
Registering as an Author	84
Submitting a Proposal	85
Step 1: Starting the Submission.....	86
Step 2: Entering the Submission's Metadata	87
Step 3: Uploading the Submission.....	89
Step 4: Uploading Supplementary Files	89
Step 5: Confirming the Submission	90
Responding to Reviews.....	91
Readers	93
Viewing the Conference Site	93
Registrants.....	95
Conclusion	98

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:

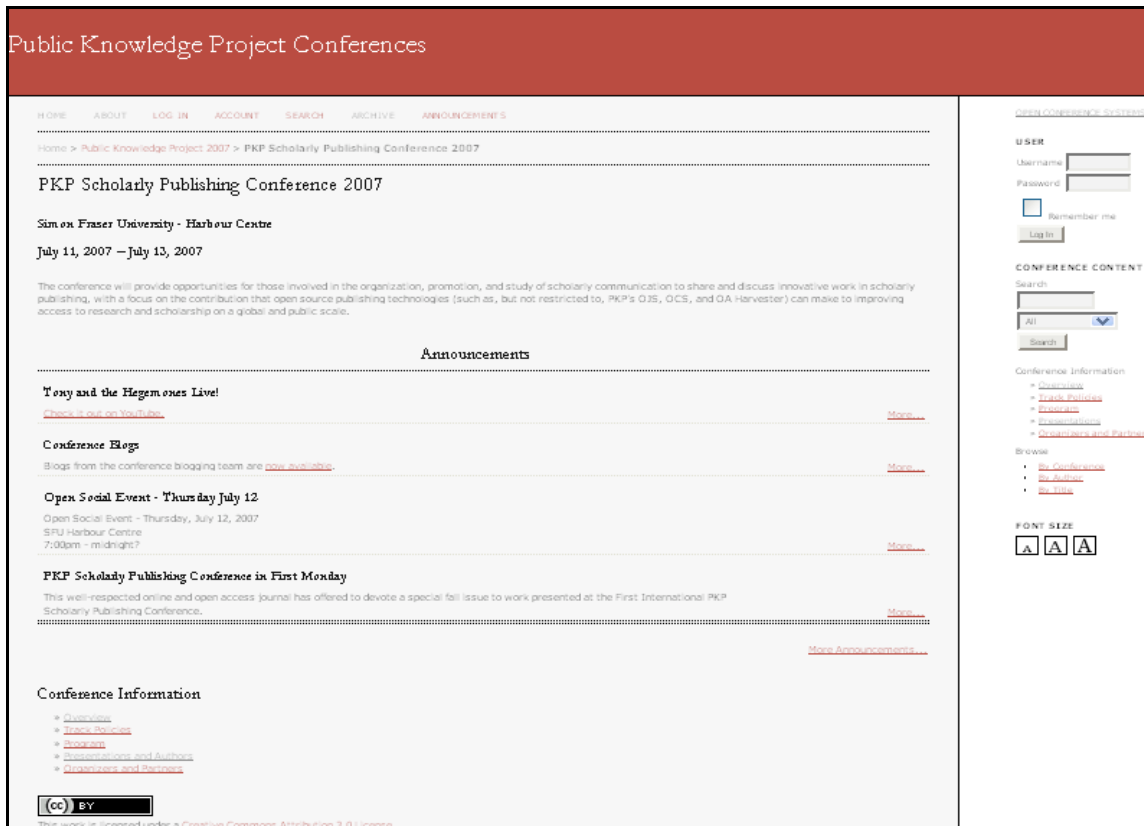


Figure 1: OCS Conference

OCS in an Hour

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

The screenshot displays the 'Public Knowledge Project Conferences' website. The main header is a red bar with the text 'Public Knowledge Project Conferences'. Below this is a navigation bar with links: HOME, ABOUT, LOG IN, ACCOUNT, SEARCH, ARCHIVE, and ANNOUNCEMENTS. The breadcrumb trail reads: Home > Public Knowledge Project 2007 > PKP Scholarly Publishing Conference 2007 > Presentations and Authors. The main section is titled 'Presentations and Authors' and features a search bar with a dropdown menu for 'Title' and a 'Search' button. Below the search bar is a 'Last name' dropdown menu with a list of letters from A to Z, and a 'Track' dropdown menu with 'All Tracks' selected. The main content area lists various sessions and workshops, each with a title, authors, and a link to the abstract. The sessions are categorized into Pre-Conference Session, Pre-Conference Workshops, Keynote, and Plenary Sessions. The Pre-Conference Session includes 'Transitioning to Open Access: Canadian Library Association (CLA) Preconference Session' by Heather Joseph, Heather Morrison, and Kathleen Shearer. The Pre-Conference Workshops include 'PKP Technical Workshop' by Alec Smecher and Kevin Stranack, 'OJS in an Afternoon Workshop' by Kevin Stranack, Jon Whipple, and Mia Quint-Rapoport, and 'PKP Software Plugin Session' by Alec Smecher and MJ Suhonos. The Keynote session is 'Keynote Presentation' by John Willinsky. The Plenary Sessions include 'Publishing Cooperatives' by Raym Crow, 'Google Scholar Digitization Initiatives' by Anurag Acharya, and 'PKP and Leading Edge Developments' by Alec Smecher, MJ Suhonos, Mark Jordan, and Kevin Stranack. On the right side of the page, there is a sidebar with links to 'OPEN CONFERENCE SYSTEMS', a 'USER' login section, a 'CONFERENCE CONTENT' section with a search bar and a dropdown menu, a 'Conference Information' section with links to Overview, Track Policies, Program, Presentations, and Organizers and Partners, a 'Browse' section with links to By Conference, By Author, and By Title, and a 'FONT SIZE' section with three buttons labeled A, A, and A.

Public Knowledge Project Conferences

HOME ABOUT LOG IN ACCOUNT SEARCH ARCHIVE ANNOUNCEMENTS

Home > Public Knowledge Project 2007 > PKP Scholarly Publishing Conference 2007 > Presentations and Authors

Presentations and Authors

Title contains Search

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: All Tracks

Pre-Conference Session

Transitioning to Open Access: Canadian Library Association (CLA) Preconference Session [ABSTRACT](#)

Heather Joseph, Heather Morrison, Kathleen Shearer

Pre-Conference Workshops

PKP Technical Workshop [ABSTRACT OOP](#)

Alec Smecher, Kevin Stranack

OJS in an Afternoon Workshop [ABSTRACT HTML](#)

Kevin Stranack, Jon Whipple, Mia Quint-Rapoport

PKP Software Plugin Session [ABSTRACT OOP](#)

Alec Smecher, MJ Suhonos

Keynote

Keynote Presentation [ABSTRACT MP3](#)

John Willinsky

Plenary Sessions

Publishing Cooperatives [ABSTRACT PPT MP3](#)

Raym Crow

Google Scholar Digitization Initiatives [ABSTRACT](#)

Anurag Acharya

PKP and Leading Edge Developments [ABSTRACT OOP](#)

Alec Smecher, MJ Suhonos, Mark Jordan, Kevin Stranack

OPEN CONFERENCE SYSTEMS

USER

Username

Password

☐ Remember me

CONFERENCE CONTENT

Search

All

Conference Information

- Overview
- Track Policies
- Program
- Presentations
- Organizers and Partners

Browse

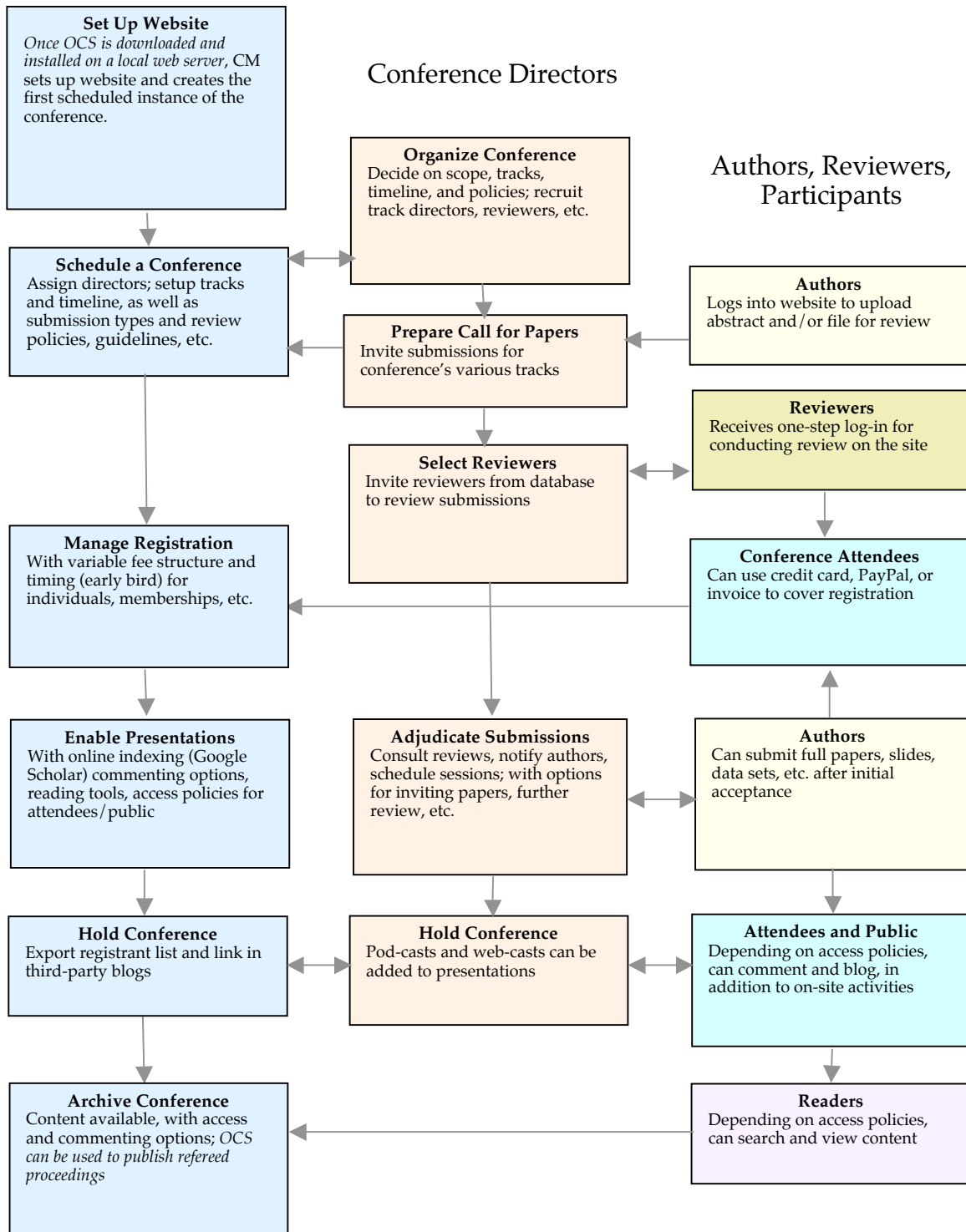
- By Conference
- By Author
- By Title

FONT SIZE

Figure 2: OCS Table of Contents

OCS Workflow Chart

Conference
Managers



System Requirements

A server environment meeting the following requirements is recommended:

- PHP \geq 4.2.x (including PHP 5.x); Microsoft IIS requires PHP 5.x
- MySQL \geq 3.23.23 (including MySQL 4.x) or PostgreSQL \geq 7.1 (including PostgreSQL 8.x)
- Apache \geq 1.3.2x or \geq 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'.

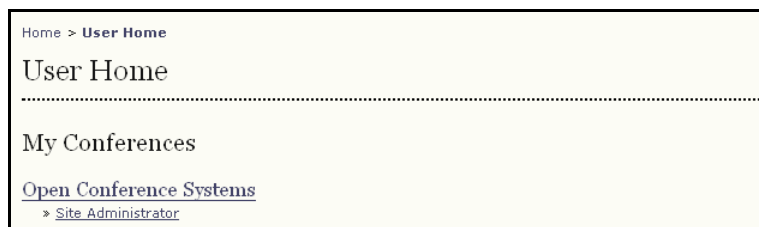


Figure 3: Selecting your role as Site Administrator

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.

Home > User > Site Administration > Site Settings

Site Settings

Form Language:

To enter the information below in additional languages, first select the language.

Site title*
☐ Title text:
☐ Title image:

Introduction

Conference redirect
☒ Do not redirect
 Requests to the main site will be redirected to this conference. This may be useful if the site is hosting only a single conference, for example.

About the Site description

Name of principal contact*

Email of principal contact*

Minimum password length*
 characters

Site style sheet

Register Site for Indexing (Metadata Harvesting)
 To have the contents of all conferences hosted on this site indexed within a globally distributed system of research databases, [register](#) your site's URL with the Public Knowledge Project metadata [project](#). This tool collects the metadata from each indexed item in this conference, enabling accurate and collective searching among the research sites that adhere to the [Open Archives Initiative Protocol for Metadata Harvesting](#).

[Click here](#) and enter <http://pkp.sfu.ca/ocs2/index.php/index/index/index> under **Site URL**, and <http://pkp.sfu.ca/ocs2/index.php/index/index/index> under **Base URL for OAI Archives**.

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).

Home > User > Site Administration > **Conference Settings**

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: English

To enter the information below in additional languages, first select the language.

Conference Title*

Conference description

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*

The conference's URL will be `http://pkp.sfu.ca/ocs2/cvs2/index.php/path/...`

☒ Enable this conference to appear publicly on the site

* Denotes required field

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.

Conferences			
CONFERENCE TITLE	PATH	ORDER	ACTION
PKP OAI HARVESTING TECHNOLOGIES CONFERENCE	pkpoi	↑ ↓	EDIT DELETE
PKP SCHOLARLY PUBLISHING CONFERENCE	spc	↑ ↓	EDIT DELETE
1 - 2 of 2 Items			
CREATE CONFERENCE IMPORT FROM OCS 1			

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.

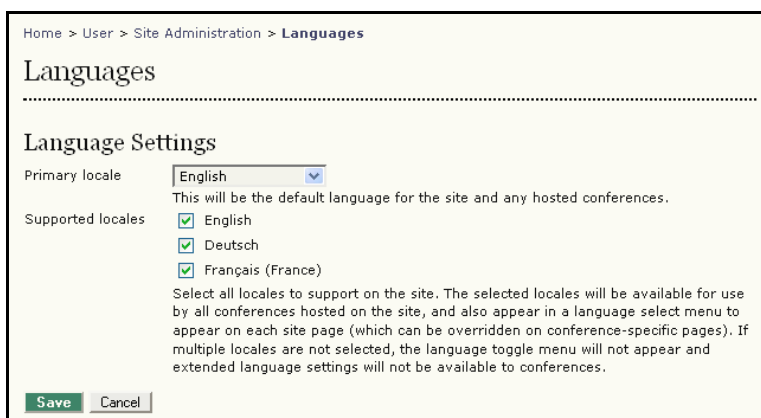
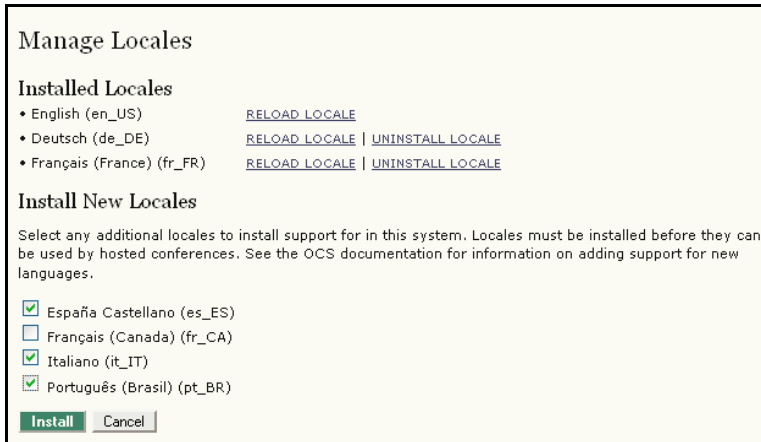


Figure 9: Languages

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.



Manage Locales

Installed Locales

- English (en_US) [RELOAD LOCALE](#)
- Deutsch (de_DE) [RELOAD LOCALE](#) | [UNINSTALL LOCALE](#)
- Français (France) (fr_FR) [RELOAD LOCALE](#) | [UNINSTALL LOCALE](#)

Install New Locales

Select any additional locales to install support for in this system. Locales must be installed before they can be used by hosted conferences. See the OCS documentation for information on adding support for new languages.

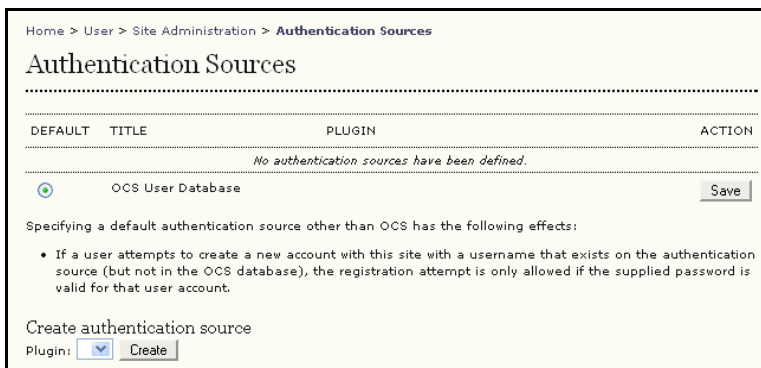
- ☒ España Castellano (es_ES)
- ☐ Français (Canada) (fr_CA)
- ☒ Italiano (it_IT)
- ☒ Português (Brasil) (pt_BR)

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.



Home > User > Site Administration > **Authentication Sources**

Authentication Sources

DEFAULT	TITLE	PLUGIN	ACTION
		No authentication sources have been defined.	
<input checked="" type="radio"/>	OCS User Database		<input type="button" value="Save"/>

Specifying a default authentication source other than OCS has the following effects:

- If a user attempts to create a new account with this site with a username that exists on the authentication source (but not in the OCS database), the registration attempt is only allowed if the supplied password is valid for that user account.

Create authentication source

Plugin:

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.

Home > User > Site Administration > System Information

System Information

OCS Version

Current version
2.1.0.0 (April 4, 2008 - 10:35 AM)

[Check for updates](#)

Version history

VERSION	MAJOR	MINOR	REVISION	BUILD	DATE INSTALLED
2.1.0.0	2	1	0	0	2008-04-04

OCS Configuration

[EDIT](#)

OCS configuration settings from config.inc.php.

```

general
installed                On
base_url                 http://pkp.sfu.ca/ocs2/cvs2
registry_dir             registry
session_cookie_name      OCSID
session_lifetime         30
scheduled_tasks          On
date_format_trunc        %m-%d
date_format_short        %Y-%m-%d
date_format_long         %B %e, %Y
datetime_format_short    %Y-%m-%d %I:%M %p
datetime_format_long     %B %e, %Y - %I:%M %p
time_format              %I:%M %p
  
```

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.

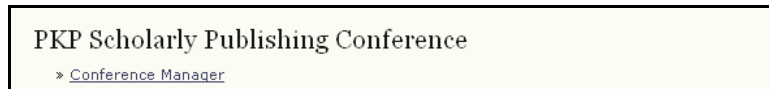


Figure 13: Logging in as Conference Manager

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

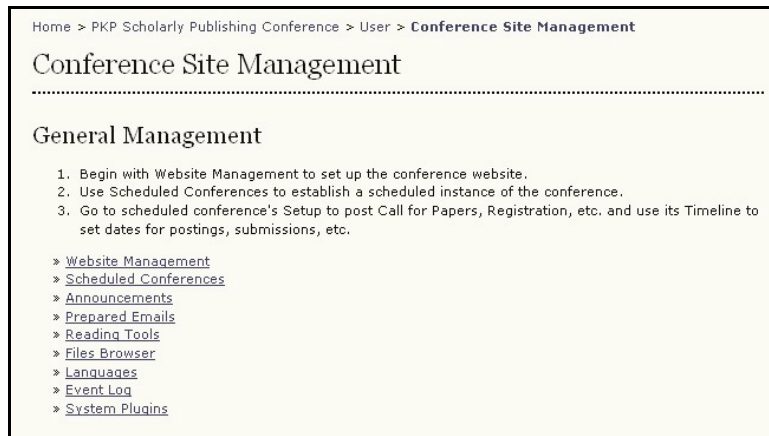


Figure 14: Conference Site Management

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.

1.1 Title	
Title*	<input type="text" value="PKP Scholarly Publishing Conference"/>

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.

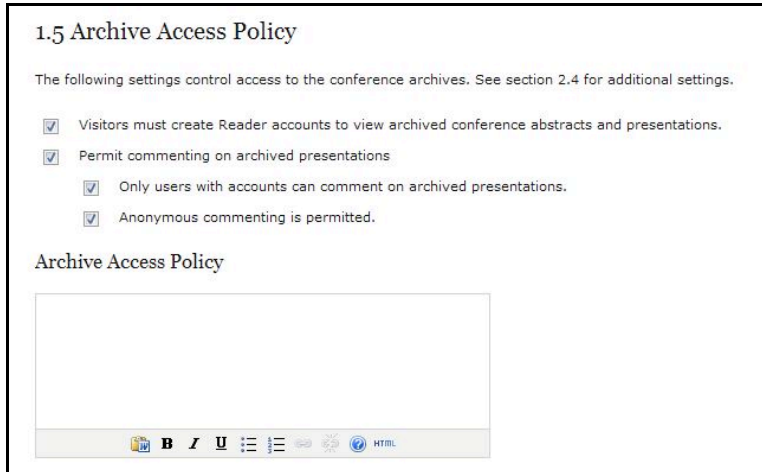
The screenshot shows a web interface for configuring the '1.5 Archive Access Policy'. At the top, the title '1.5 Archive Access Policy' is displayed. Below it, a note states: 'The following settings control access to the conference archives. See section 2.4 for additional settings.' There are four checkboxes, all of which are checked: 'Visitors must create Reader accounts to view archived conference abstracts and presentations.', 'Permit commenting on archived presentations', 'Only users with accounts can comment on archived presentations.', and 'Anonymous commenting is permitted.' Below these settings is a section titled 'Archive Access Policy' which contains a large, empty text area for editing the policy. At the bottom of the text area is a rich text editor toolbar with icons for bold, italic, underline, list, link, unlink, and HTML.

Figure 20: Archive Access Policy

1.6 Privacy Statement

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

The screenshot shows a web interface for configuring the '1.6 Privacy Statement'. The title '1.6 Privacy Statement' is at the top. Below it is a text area containing a default privacy statement: 'The names and email addresses entered in this conference site will be used exclusively for the stated purposes of this conference and will not be made available for any other purpose or to any other party.' Below the text area is a rich text editor toolbar with icons for bold, italic, underline, list, link, unlink, and HTML.

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.

1.7 Add Item to Appear in "About the Conference"

Title: Want to be involved in the conferences? Delete

Content: There are several chances for you to be involved in the conferences.

Title: Additional Services Delete

Content: All conference rooms provide special equipment for hearing impaired attendees. For further information, contact the Conference Organizer

Add About Item

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.

2.1 Scheduled Conference Redirect

By selecting a Scheduled Conference below, it is possible to redirect users who visit the Conference page directly to that Scheduled Conference. This is useful if, for example, this Conference only contains a single Scheduled Conference.

Redirect: Do not redirect

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.

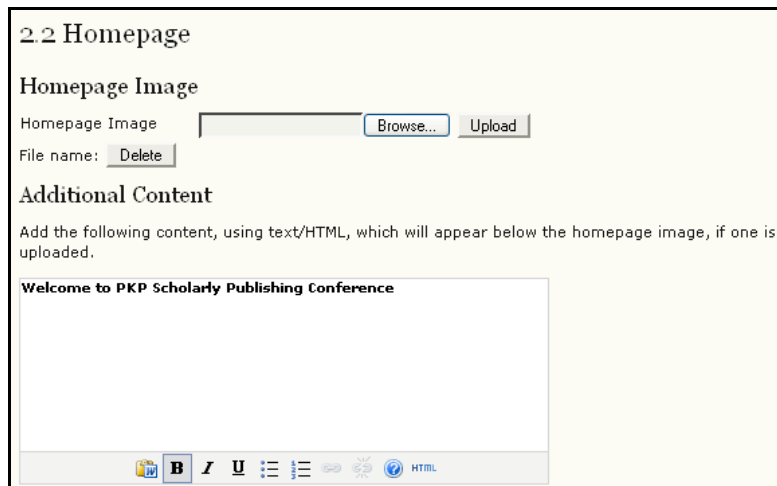


Figure 24: Homepage Image and Text

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.

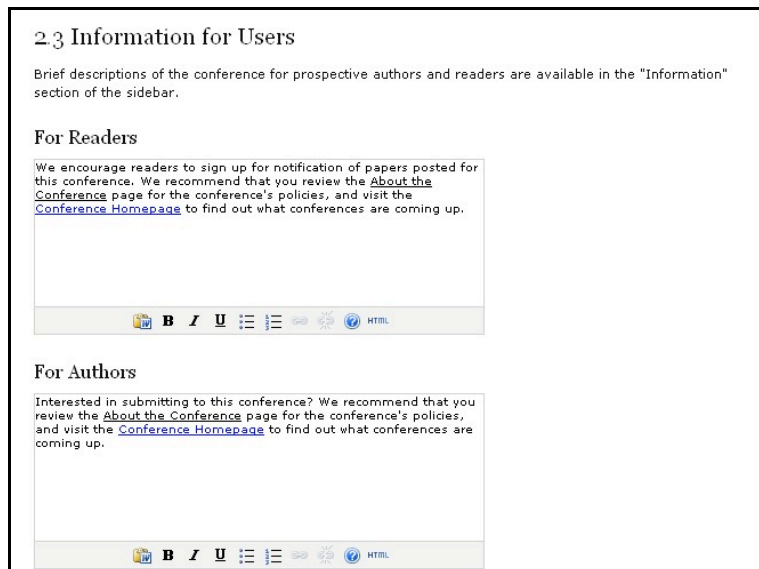


Figure 25: Information for Users

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.

2.4 Announcements

Announcements may be published to inform readers of conference news and events. Published announcements will appear on the Announcements page.

☒ Enable Conference Managers to add conference announcements.

☒ Display of the most recent announcements on the conference homepage.

Additional Information

Enter any additional information that should be displayed to readers on the Announcements page.

Please check the latest news and events







B
I
U





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.

2.5 Access to Conference Presentations

The date for allowing access to presentations is set in Conference Timeline, while access to archived conferences is controlled by the Conference Manager in Conference Setup.

☒ Provide open access to all visitors to the website.
☐ Require visitors to sign up with the website.
☐ Require registration to attend the conference.

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.

3.1 Conference Homepage Header

A graphic version of the conference's title and logo (as a .gif, .jpg, or .png file) can be uploaded for the homepage, which will replace the text version that otherwise appears.

Conference Title

☒ Title text

☐ Title image

Conference Logo

Logo image

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.

3.2 Website Header

A graphic version of the conference's title and logo (.gif, .jpg, or .png file), possibly a smaller version of the one used on the homepage

Conference Title

☒ Title text

☐ Title image

Conference Logo

Logo image

Alternate Header

Instead of title and logo, an HTML version of the header can be inserted.

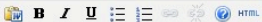


Figure 29: Website Header

3.3 Website Footer

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

3.3 Website Footer

This is the footer of your conference. To change or update the footer, paste the HTML code in the textbox below. Examples could be another navigation bar, a counter, etc. This footer will appear on every page.

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.

3.4 Navigation Bar

Navigation bar items can be added to the current set (Home, About, User Home, etc.) that appear at the top of the page.

Label name

☐ The label value is a literal string (e.g., "Conference Setup") rather than a localization message key (e.g., "manager.setup")

URL

☐ URL is an absolute URL (e.g., "http://www.example.com") rather than a path relative to the site (e.g., "/manager/setup")

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.

3.4 Lists

Enter the maximum number of items (for example, submissions, users, or editing assignments) that appear on each page of a list, and the number of pages links to display on each page.

Items per page	<input type="text" value="25"/>
Page links	<input type="text" value="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:

<input type="checkbox"/>	AWDAS	awdas awdas	awdas@awdas.com	EDIT LOG IN AS REMOVE DISABLE
<input type="checkbox"/>	ELANGO	elango ayyan	elangoar@yahoo...	EDIT LOG IN AS REMOVE DISABLE
<input type="checkbox"/>	KEMAL	kemal cardak	kemal_cardak...	EDIT LOG IN AS REMOVE DISABLE

1 - 25 of 256 Items 1 2 3 4 5 > >>

[Send Email](#) [Select All](#)

[ENROLL EXISTING USER](#) | [CREATE NEW USER](#) | [SYNC ENROLLMENT](#)

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.

Step 4. Conference Style

1. ABOUT 2. ADDITIONAL CONTENT 3. HEADERS, FOOTERS, ETC. 4. **STYLE** 5. LOGGING & AUDITING 6. INDEXING

By default conferences and the site use a common style sheet (located in the "styles" subdirectory of the site). The default style rules can be overridden by choosing a theme and/or uploading a conference-specific cascading style sheet.

Conference Theme None

Conference style sheet Browse... Upload

Left Sidebar

Unselected
Role-Specific Blo

Right Sidebar


[Save and continue](#) [Cancel](#)

* Denotes required field

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.



Step 5. Logging and Auditing

1. ABOUT 2. ADDITIONAL CONTENT 3. HEADERS, FOOTERS, ETC. 4. STYLE 5. LOGGING & AUDITING 6. INDEXING

Maintain a log of the following actions and materials for all conferences.

- ☒ Submission-related actions, recorded on submission's "History" page.
- ☒ Submission-related emails, recorded on submission's "History" page.
- ☒ Conference event logging.

* Denotes required field

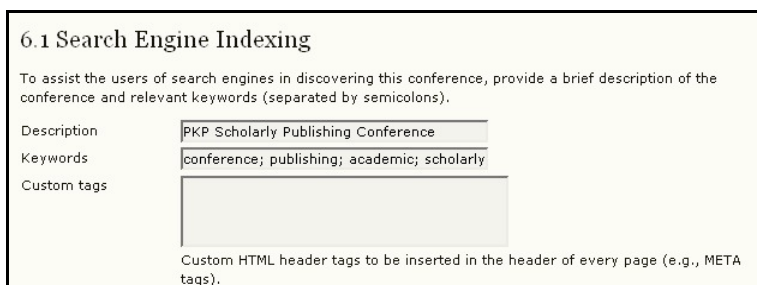
Figure 35: Logging and Auditing

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.



6.1 Search Engine Indexing

To assist the users of search engines in discovering this conference, provide a brief description of the conference and relevant keywords (separated by semicolons).

Description

Keywords

Custom tags

Custom HTML header tags to be inserted in the header of every page (e.g., META tags).

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.

6.2 Register Conference for Indexing (Metadata Harvesting)

To have the contents of this conference indexed within a globally distributed system of research databases, [register](#) your conference's URL with the Public Knowledge Project metadata [harvester](#). This tool collects the metadata from each indexed item in this conference, enabling accurate and collective searching among the research sites that adhere to the [Open Archives Initiative Protocol for Metadata Harvesting](#).

Note that if your site administrator has already registered this site with the PKP Harvester, your conference will be indexed automatically and you do not need to register your conference.

[Click here](#) and enter <http://pkp.sfu.ca/ocs2/cvs2/index.php/lzc/index> under **Site URL**, and <http://pkp.sfu.ca/ocs2/cvs2/index.php/lzc/index/oai> under **Base URL for OAI Archive**.

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.

Home > PKP Scholarly Publishing Conference > User > **Conference Site 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](#)
- > [Announcements](#)
- > [Prepared Emails](#)
- > [Reading Tools](#)
- > [Files Browser](#)
- > [Languages](#)
- > [Event Log](#)
- > [System Plugins](#)

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”.

SCHEDULED CONFERENCE	ACRONYM	ORDER	ACTION
No events have been created.			

[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.

Scheduling a Conference

Form Language:

To enter the information below in additional languages, first select the language.

Scheduled Conference Title*:

Acronym*:

Path*:

The event's URL will be <http://pkp.sfu.ca/ocs2/cvs2/index.php/lzc/path/...>

* Denotes required field

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.

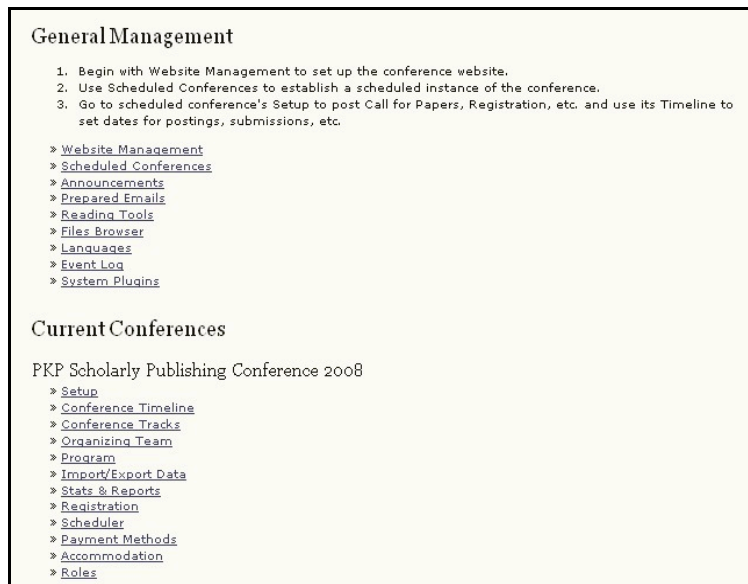


Figure 41: Current Conferences

Setup

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

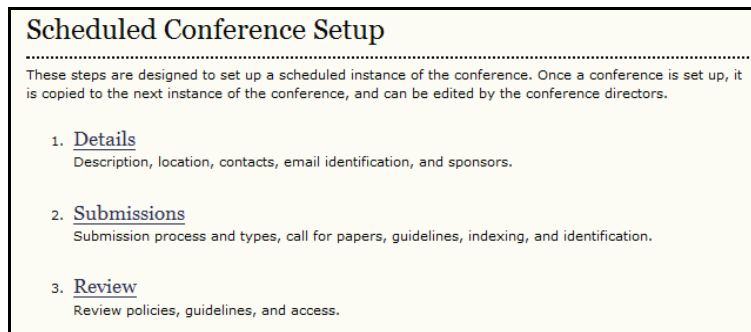


Figure 42: Scheduled Conference Setup

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.

1.1 Scheduled Conference Description

A brief description of the conference that can be used to publicize the event.

The conference will provide opportunities for those involved in the organization, promotion, and study of scholarly communication to share and discuss innovative work in scholarly publishing, with a focus on the contribution that open source publishing technologies (such as, but not restricted to, PKP's OJS, OCS, and OA Harvester) can make to improving access to research and scholarship on a global and public scale.

An overview of the theme, scope, and focus.

The conference will appeal to all segments of the scholarly communications community – software developers and technical support specialists; journal publishers and editors; and librarians and academics.

Developers will have an opportunity to participate in technical sessions and exchange information. All attendees will be able to attend a range of topical sessions on trends in scholarly communication and publishing, open access initiatives, open source software, and academic and library communities.

Figure 43: Scheduled Conference Description

1.2 Scheduled Conference Location

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

1.2 Scheduled Conference Location

Name of Location: Irving K. Barber Learning Center

Mailing Address: 1961 East Mall

City: Vancouver, BC

Country: Canada

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.

1.6 Sponsoring Organizations

The name of the organizations (e.g., scholarly associations, university department, etc.) sponsoring the conference, to appear on the conference homepage and may be accompanied by a note of acknowledgement.

Note

Institution: The University of British Columbia [Delete]

Mailing Address: 2329 West Mall Vancouver, BC Canada V6T 1Z4

URL: http://www.ubc.ca

Institution: Simon Fraser University [Delete]

Mailing Address: 8888 University Drive Burnaby, BC Canada V5A 1S6

URL: http://www.sfu.ca

[Add Sponsoring Organization]

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.

1.7 Sources of Support

Additional agencies or organizations that provide financial or in-kind support for the conference will appear on the conference homepage and may be accompanied by a note of acknowledgement.

Note

Contributor: Google [Delete]

URL: http://www.google.com

Contributor: Open Society Institute [Delete]

URL: http://www.soros.org/

[Add Contributor]

Figure 49: Sources of Support

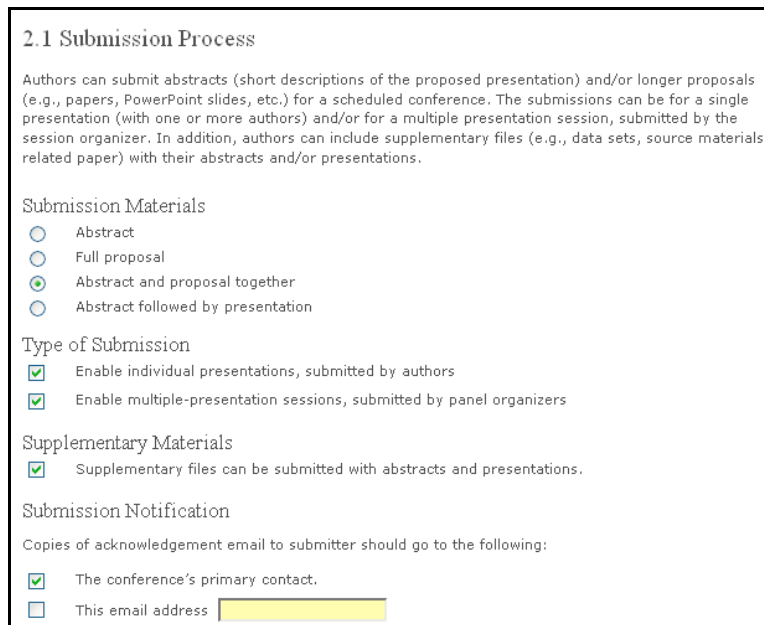
As with the Sponsoring Organizations above, you can add as many contributors as necessary, using the “Add Contributor” button.

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.

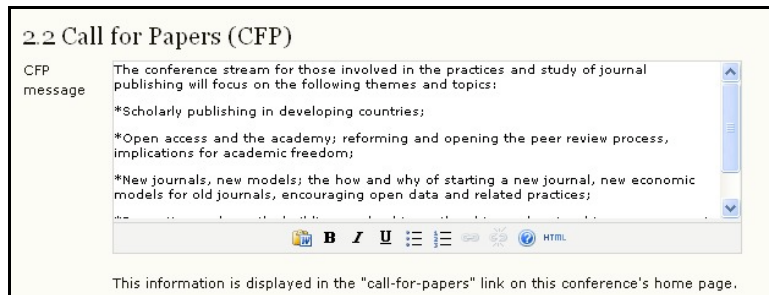


Figure 51: Call for Papers

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.

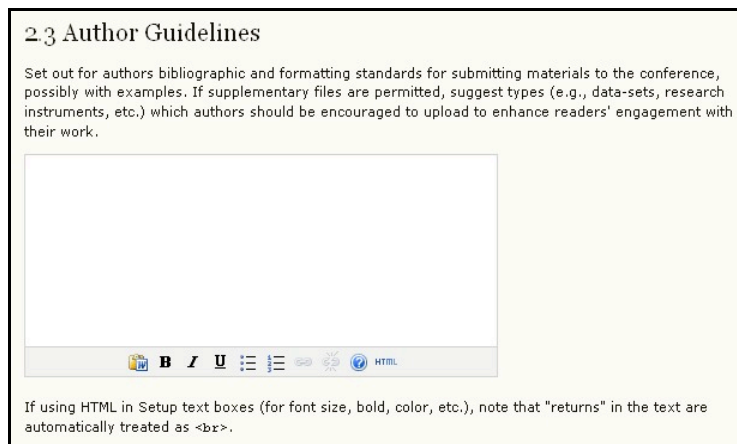


Figure 52: Author Guidelines

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.

Submission Preparation Checklist

On making a submission to the conference, authors are required to check off items on the Submission Preparation Checklist. The checklist also appears in the Author Guidelines. The list below can be edited. All items on the list must be checked by the author before submission will be accepted.

Order	Item	Delete
1	The submission has not been previously published, nor is it before another conference for consideration (or an explanation has been provided in Comments to the Director).	Delete
2	The submission file is in Microsoft Word, RTF, or WordPerfect document file format.	Delete
3	All URL addresses in the text (e.g., http://www.utsi.ca) are activated and ready to click.	Delete
4	The text is single-spaced, uses a 12-point font; employs italics, rather than underlining (except with URL addresses); and all illustrations, figures, and tables are placed within the text at the appropriate points, rather than at the end.	Delete
5	The text adheres to the stylistic and bibliographic requirements outlined in the Author Guidelines , which is found in About the Conference.	Delete
6	If submitting to a peer-reviewed track of the conference, authors' names are removed from submission, with "[Author]" and year used in the bibliography and footnotes, instead of authors' name, paper title, etc.	Delete
7	If submitting to peer review, all Microsoft Office documents (including Supplemental Files) have been saved by going to File and selecting Save As; clicking Tools (or Options in a Mac); clicking Security; selecting "Remove personal information from file properties on save"; clicking Save.	Delete

Add Checklist Item

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.

2.4 Submission Indexing

OCS adheres to the [Open Archives Initiative](#) Protocol for Metadata Harvesting, which is the emerging standard for providing well-indexed access to electronic research resources on a global scale. Authors will use a similar template to provide metadata for their submission. The Conference Manager should select the categories for indexing and present authors with relevant examples to assist them in indexing their work, separating terms with a semi-colon (e.g., term1; term2). The entries should be introduced as examples by using "E.g.," or "For example,".

☒ **Academic Discipline and Sub-Disciplines**
Useful when conference crosses disciplinary boundaries and/or authors submit multidisciplinary items.
Provide examples of relevant academic disciplines for this conference:
Publishing, Library and Information Studies, Education
(E.g., History; Education; Sociology; Psychology; Cultural Studies; Law)

☒ **Subject Classification**
Title: LCC
URL: http://lcc.org
(E.g., Mathematics Subject Classification; Library of Congress Classification)

☒ **Keywords**
Provide examples of keywords or topics as a guide for authors:
Scholarly Communication; Open Access; Open Source; Librarianship
(E.g., Photosynthesis; Black Holes; Four-Color Map Problem; Bayesian Theory)

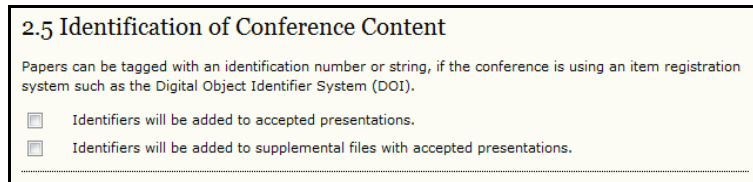
☐ **Coverage**
Refers to geo-spatial location, chronological or historical coverage, and/or characteristics of research sample.
Provide examples of relevant geo-spatial or geographical terms for this field:
(E.g., Iberian Peninsula; Stratosphere; Boreal Forest; etc.)
Provide examples of relevant chronological or historical terms for this field:
(E.g., European Renaissance; Jurassic Period; Third Trimester; etc.)
Provide examples of research sample characteristics for this field:
(E.g., Age; Gender; Ethnicity; etc.)

☐ **Type (Method/Approach)**
Provide examples of relevant research types, methods, and approaches for this field:
(E.g., Historical Inquiry; Quasi-Experimental; Literary Analysis; Survey/Interview)

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.



2.5 Identification of Conference Content

Papers can be tagged with an identification number or string, if the conference is using an item registration system such as the Digital Object Identifier System (DOI).

☐ Identifiers will be added to accepted presentations.

☐ Identifiers will be added to supplemental files with accepted presentations.

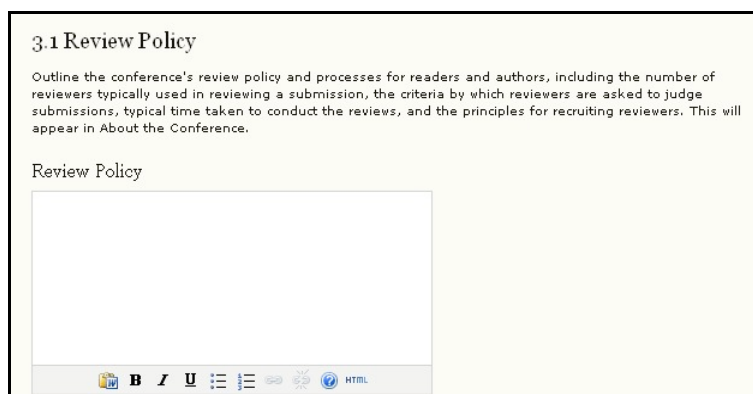
Figure 55: Identification of Conference Content

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.



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




Figure 56: Review Policy

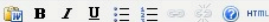
3.2 Peer Review

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.

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.

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

Figure 57: Peer Review

3.3 Director 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.

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.

Conference Timeline

The dates recorded here will be utilized for this scheduled conference, and can be posted on the website by checking "Conference timeline" at the bottom of the page.

Conference

First day of conference: July 11 2008

Last day of conference: July 14 2008

Website

Go Live (as a Current Conference): January 01 2008

Move to Conference Archive: July 15 2008

Submissions

Author registration opened: January 01 2008

Author registration closed: May 30 2008

Call for Papers posted: January 01 2008

Submissions accepted: January 01 2008

Submissions closed: May 30 2008

Reviews

Reviewer registration opened: January 01 2008

Reviewer registration closed: May 30 2008

Website Posting

☒ Accepted abstracts: April 18 2008

☒ Schedule: April 25 2008

☒ Accepted papers: April 18 2008

☐ Delay open access until: May 30 2008

☒ Close comments (activate Reading Tools): April 25 2008

☒ Conference timeline (included in Conference Information)

Save **Cancel**

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.

Conference Tracks

TRACK TITLE	ABBREVIATION	ACTION
General Papers	GEN	EDIT DELETE ↑ ↓

1 - 1 of 1 Items

[CREATE TRACK](#)

 CC BY

This work is licensed under a [Creative Commons Attribution 3.0 License](#).

Figure 60: Conference Tracks

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

The 'Track' form contains the following sections:

- Form Language:** A dropdown menu set to 'English'. Below it, a note says: 'To enter the information below in additional languages, first select the language.'
- Track title*:** A text input field containing 'Editors and Publishers'.
- Abbreviation*:** A text input field containing 'ED'. To the right, a note says: '(For example, General Papers=GEN)'.
- Track Policy:** A text area containing the text: 'The conference track for those involved in the practices and study of journal publishing will focus on the following themes and topics:'. Below the text area is a rich text editor toolbar with icons for bold, italic, underline, list, link, unlink, and HTML.
- Indexing:** A section with the text: 'Submissions made to this conference track'. Below it, a text input field for 'Describe submissions to this conference track as'. To the right, a note says: '(For example, "Peer-reviewed abstract", "Non-refereed paper", "Invited presentation", etc.)'. Below this is a checkbox labeled 'Indicate that track is not peer-reviewed'.
- Restrictions:** A checkbox labeled 'Items can only be submitted by Directors and Track Directors.'
- About:** A checkbox labeled 'Omit this track from Track Policies'.

Figure 61: Creating Tracks

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

The 'Track Directors' form contains the following sections:

- Track Directors:** A section with the text: 'Select from among the available Track Directors and "Assign Director" to this track.'
- Available Track Directors:** A list box containing 'None'.
- Assign Director >>:** A button to assign a director to the track.
- << Un-assign Director:** A button to unassign a director from the track.
- This Track's Directors:** A list box containing 'None'.
- Save:** A green button to save the changes.
- Cancel:** A button to cancel the changes.
- * Denotes required field:** A note at the bottom left.

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.

Organizing Team

For the [Organizing Team](#) in About the Conference:

☒ The system will generate a list of people under their assigned roles (Conference Director, Reviewer, etc.)

☐ The Conference Manager will create organizing team titles, and add the appropriate people under each title.

[Record](#)

TITLE	ACTION
No organizing team positions have been created.	

[CREATE ORGANIZING TEAM TITLE](#)

This work is licensed under a [Creative Commons Attribution 3.0 License](#).

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.

Create Title

Form Language: English

To enter the information below in additional languages, first select the language.

Title*:

[Save](#) [Cancel](#)

* Denotes required field

Figure 64: Create Title

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

Organizing Team

For the [Organizing Team](#) in About the Conference:

☐ The system will generate a list of people under their assigned roles (Conference Director, Reviewer, etc.)

☒ The Conference Manager will create organizing team titles, and add the appropriate people under each title.

[Record](#)

TITLE	ACTION
Conference Organizer	EDIT MEMBERSHIP DELETE

[CREATE ORGANIZING TEAM TITLE](#)

This work is licensed under a [Creative Commons Attribution 3.0 License](#).

Figure 65: Membership

On this page, you will choose Add Member.

Membership

[EDIT TITLE](#) [MEMBERSHIP](#)

NAME	ACTION
<i>This group has no members.</i>	

[ADD MEMBER](#)

This work is licensed under a [Creative Commons Attribution 3.0 License](#).

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.

Add Member

First name contains [Search](#)

[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](#)

NAME	ACTION
ADMIN	ADD MEMBER

This work is licensed under a [Creative Commons Attribution 3.0 License](#).

Figure 67: Select Members

Program

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

Program

When the conference program is ready to be presented to users, upload it here or enter it as plain text.

Program File

If the program is available as a file, upload it here.

Title

File

Plain Text Program

Enter a text-based version of your conference program here.

Day 1 - Wednesday, July 11, 2008

Pre-conference sessions and opening keynote session and reception. Latter to be held at Work Center for Dialogue and open to public.

* Denotes required field

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.

Import/Export Data

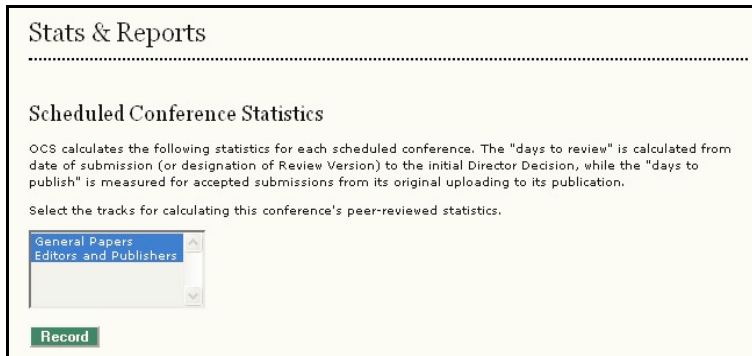
- [METS XML Export Plugin](#): Export Conferences in METS XML
- [Papers XML Plugin](#): Import and export papers
- [NLM XML Export Plugin](#): Export paper metadata in NLM Meeting Abstracts XML format for indexing.
- [Users XML Plugin](#): Import and export users

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.



Stats & Reports

Scheduled Conference Statistics

OCS calculates the following statistics for each scheduled conference. The "days to review" is calculated from date of submission (or designation of Review Version) to the initial Director Decision, while the "days to publish" is measured for accepted submissions from its original uploading to its publication.

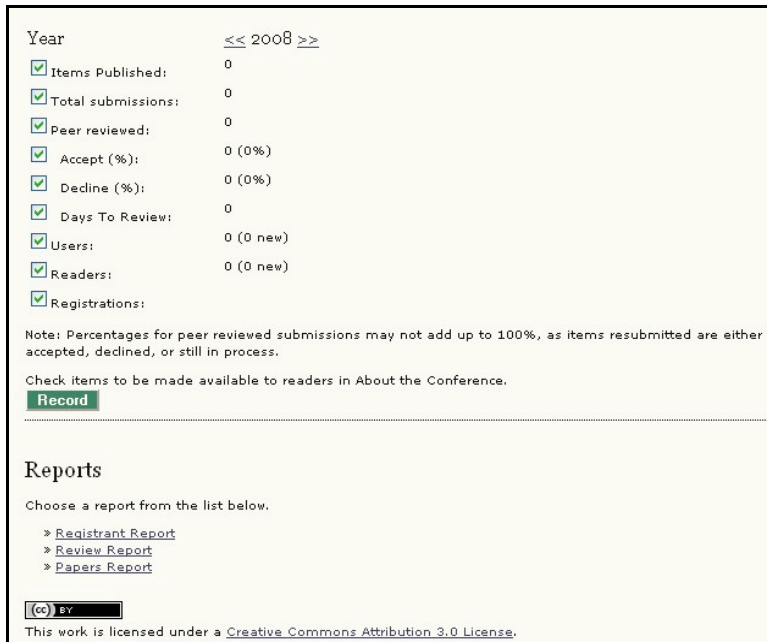
Select the tracks for calculating this conference's peer-reviewed statistics.

General Papers
Editors and Publishers

Record

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.



Year << 2008 >>

<input checked="" type="checkbox"/> Items Published:	0
<input checked="" type="checkbox"/> Total submissions:	0
<input checked="" type="checkbox"/> Peer reviewed:	0
<input checked="" type="checkbox"/> Accept (%):	0 (0%)
<input checked="" type="checkbox"/> Decline (%):	0 (0%)
<input checked="" type="checkbox"/> Days To Review:	0
<input checked="" type="checkbox"/> Users:	0 (0 new)
<input checked="" type="checkbox"/> Readers:	0 (0 new)
<input checked="" type="checkbox"/> Registrations:	

Note: Percentages for peer reviewed submissions may not add up to 100%, as items resubmitted are either accepted, declined, or still in process.


Check items to be made available to readers in About the Conference.

Record

Reports

Choose a report from the list below.

- > [Registrant Report](#)
- > [Review Report](#)
- > [Papers Report](#)

 BY

This work is licensed under a [Creative Commons Attribution 3.0 License](#).

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.

Registration

REGISTRATION REGISTRATION TYPES REGISTRATION POLICIES

USER	REGISTRATION TYPE	REGISTERED	PAID	ACTION
No registrations have been created.				

[CREATE NEW REGISTRATION](#)

This work is licensed under a [Creative Commons Attribution 3.0 License](#).

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.

Create New Registration Type

Form Language:

Name*:

Description:

Cost*:

Currency*:

Code:

Opens for Registration*:

Closes for Registration*:

☐ Expiry date for access to conference's online content:

Access*:

Options:

- ☐ Registrants can be validated via domain or IP authentication.
- ☐ Registrants must be members of a designated organization.
- ☐ Do not make this registration type publicly available.

Save Save and Create Another Cancel

* Denotes required field

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.

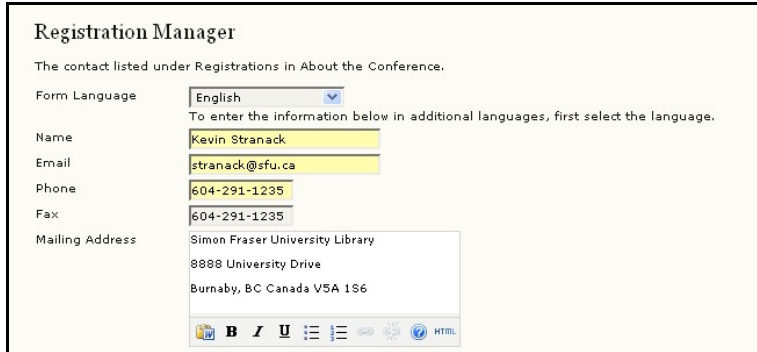
The screenshot shows a web form titled "Registration Manager". Below the title is a subtitle: "The contact listed under Registrations in About the Conference." The form contains several input fields: "Form Language" (a dropdown menu set to "English"), "Name" (text input with "Kevin Stranack"), "Email" (text input with "stranack@sfu.ca"), "Phone" (text input with "604-291-1235"), "Fax" (text input with "604-291-1235"), and "Mailing Address" (a larger text area with "Simon Fraser University Library", "8888 University Drive", and "Burnaby, BC Canada V5A 1S6"). At the bottom of the form is a rich text editor toolbar with icons for bold, italic, underline, list, link, unlink, and HTML.

Figure 74: Registration Manager

Registration Information

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

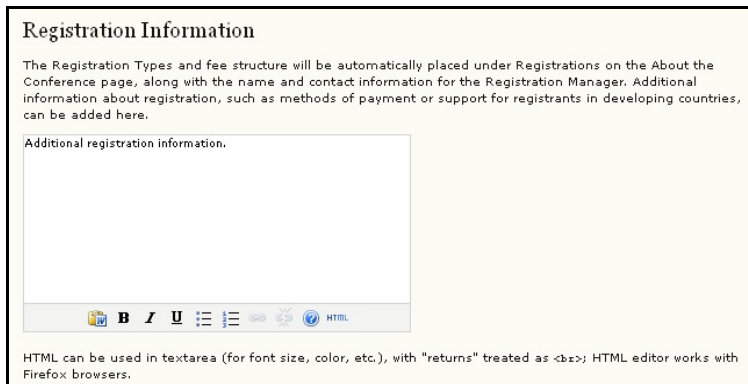
The screenshot shows a web form titled "Registration Information". Below the title is a subtitle: "The Registration Types and fee structure will be automatically placed under Registrations on the About the Conference page, along with the name and contact information for the Registration Manager. Additional information about registration, such as methods of payment or support for registrants in developing countries, can be added here." The form contains a large text area labeled "Additional registration information." At the bottom of the form is a rich text editor toolbar with icons for bold, italic, underline, list, link, unlink, and HTML. Below the toolbar is a note: "HTML can be used in textarea (for font size, color, etc.), with 'returns' treated as
; HTML editor works with Firefox browsers."

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.

Registration Expiry Reminders

Automated email reminders (available for editing by Conference Managers in OCS's Prepared Emails) can be sent to registrants both before and after a registration has expired.

☐ Notify registrants by email month(s) before registration expiry.

☐ Notify registrants by email week(s) before registration expiry.

☐ Notify registrants by email week(s) after registration expiry.

☐ Notify registrants by email month(s) after registration expiry.

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.

Open Access Options For Registration Conferences

Registration conferences can provide "delayed open access" and/or "author self-archiving" (which increase readership and citation of content). The selected policies will appear in About the Conference.

Delayed Open Access

☐ Users with Reader accounts will have the option of receiving the contents by email when a conference becomes open access.

The following statement will be posted in About the Conference under Delayed Open Access.

HTML can be used in textarea (for font size, color, etc.), with "returns" treated as
; HTML editor works with Firefox browsers.

Author Self-Archiving Policy

☐ The following policy will be included in About the Conference.

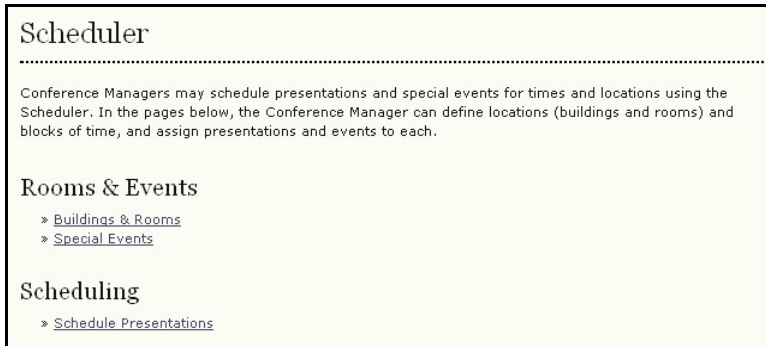
HTML can be used in textarea (for font size, color, etc.), with "returns" treated as
; HTML editor works with Firefox browsers.

Figure 77: Open Access Options for Registration Conferences

Remember to use the Save button to record your changes.

Scheduler

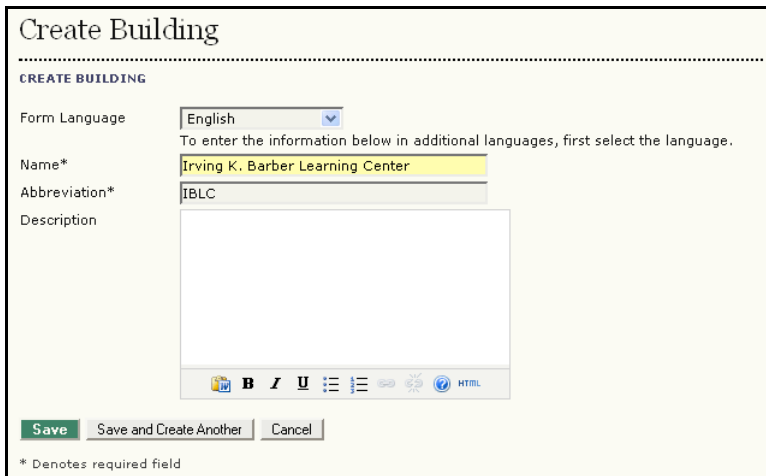
The Conference Manager can use Scheduler to make arrangements of times and locations regarding conference presentations and any other events.



The screenshot shows the 'Scheduler' page. At the top, the title 'Scheduler' is followed by a dotted line. Below this, a paragraph explains that Conference Managers can schedule presentations and special events for times and locations using the Scheduler, and that they can define locations (buildings and rooms) and blocks of time, and assign presentations and events to each. Under the heading 'Rooms & Events', there are two links: '> Buildings & Rooms' and '> Special Events'. Under the heading 'Scheduling', there is one link: '> Schedule Presentations'.

Figure 78: Scheduler

First define buildings and rooms for each building:



The screenshot shows the 'Create Building' form. The title 'Create Building' is followed by a dotted line. Below this, the text 'CREATE BUILDING' is displayed. The form has several fields: 'Form Language' with a dropdown menu set to 'English'; 'Name*' with the text 'Irving K. Barber Learning Center'; 'Abbreviation*' with the text 'IBLC'; and 'Description' with a large text area. Below the text area is a rich text editor toolbar with icons for bold, italic, underline, list, link, unlink, and HTML. At the bottom of the form are three buttons: 'Save', 'Save and Create Another', and 'Cancel'. A footnote at the bottom left states '* Denotes required field'.

Figure 79: Create Building

Create room

CREATE ROOM

Form Language: English
 To enter the information below in additional languages, first select the language.

Name*: Room 491
 Abbreviation*: 491
 Description:

Save Save and Create Another Cancel

* Denotes required field

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.)

Create Special Event

CREATE SPECIAL EVENT

Form Language: English
 To enter the information below in additional languages, first select the language.

Name*:
 Date*: July 11, 2008
 Start Time*: 10:00 AM
 End Time*: 11:00 AM
 Description:

Save Save and Create Another Cancel

* Denotes required field

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.

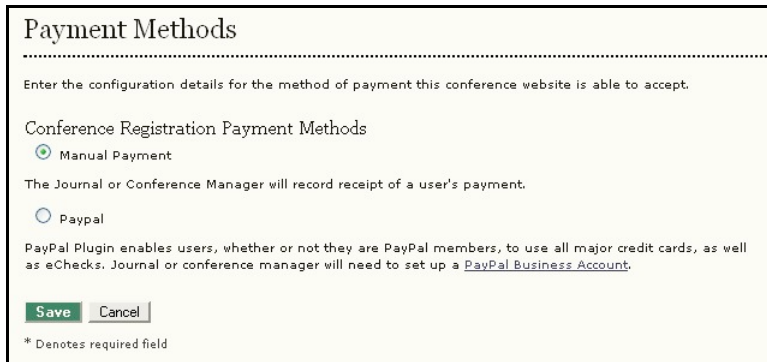
The screenshot shows a web form titled "Payment Methods" with a dotted line separator. Below the title, it says "Enter the configuration details for the method of payment this conference website is able to accept." The form is for "Conference Registration Payment Methods" and has two radio button options: "Manual Payment" (which is selected) and "Paypal". Below the "Manual Payment" option, it states "The Journal or Conference Manager will record receipt of a user's payment." Below the "Paypal" option, it states "PayPal Plugin enables users, whether or not they are PayPal members, to use all major credit cards, as well as eChecks. Journal or conference manager will need to set up a [PayPal Business Account](#)." At the bottom left, there are "Save" and "Cancel" buttons. At the bottom right, there is a note: "* Denotes required field".

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>).

Paypal

PayPal Plugin enables users, whether or not they are PayPal members, to use all major credit cards, as well as eChecks. Journal or conference manager will need to set up a [PayPal Business Account](#).

PayPal Settings

IPN URL*

This is the URL to PayPal's Instant Payment Notification (IPN) service. For testing, use <https://www.sandbox.paypal.com/cgi-bin/webscr>; for production systems, use <https://www.paypal.com/cgi-bin/webscr>.

Seller Account*

This is the PayPal account username for the sellers' account to be used, typically an email address.

* Denotes required field

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.

Accommodation

Enter information about accommodation, transportation, and other related logistics here. Several files including information like directions and forms may also be uploaded.

Files

Use this section to upload one or more files for registrants and potential registrants, such as maps, forms, etc.

Form Language
To enter the information below in additional languages, first select the language.

Title

File

Accommodation Description

Enter text describing conference accommodations in the field below.

* Denotes required field

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.

Enrollment

All Users

[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](#)

- [Directors](#)
- [Track Directors](#)
- [Reviewers](#)
- [Authors](#)
- [Readers](#)

USERNAME	NAME	EMAIL	ACTION
<input type="checkbox"/> ADMIN	admin	alec@smecer...	EDIT

1 - 1 of 1 Items

[ENROLL EXISTING USER](#) |
 [CREATE NEW USER](#) |
 [SYNC ENROLLMENT](#)

BY

This work is licensed under a [Creative Commons Attribution 3.0 License](#).

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.

Enrollment

First name contains Search

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

Enroll user as

USERNAME	NAME	EMAIL	ACTION
<input type="checkbox"/> ADMIN	, admin	alec@smecher.bc.ca	ENROLL USER
<input checked="" type="checkbox"/> BROWN	Brown, George	gbrown@mailinator...	ENROLL USER DISABLE
<input type="checkbox"/> JONES	Jones, Sheila	sjones@mailinator...	ENROLL USER DISABLE

1 - 3 of 3 Items

[Enroll Selected Users](#) [Cancel](#)

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.

Create New User

Form Language:

To enter the information below in additional languages, first select the language.

Salutation:

First name*:

Middle name:

Last name*:

Gender: ☐ M ☐ F

Initials:

Enroll user as:

Director
Track Director
Reviewer
Author
Reader

Username*: [Suggest](#)

The username must contain only lowercase letters, numbers, and hyphens/underscores.

Password*:

The password must be at least 6 characters.

Repeat password*:

☐ Generate a random password.

☐ Send the user a welcome email containing their username and password.

☐ Require the user to change their password the next time they log in.

Affiliation:

Signature:

Email*:

URL:

Phone:

Fax:

Reviewing interests:

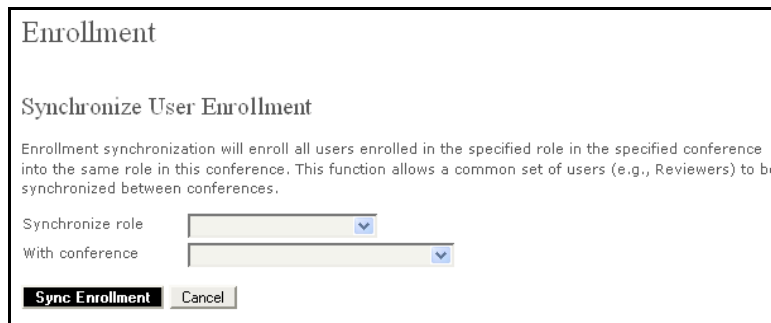
Mailing Address:

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.



The screenshot shows a dialog box titled "Enrollment" with a sub-header "Synchronize User Enrollment". Below the sub-header is a descriptive paragraph: "Enrollment synchronization will enroll all users enrolled in the specified role in the specified conference into the same role in this conference. This function allows a common set of users (e.g., Reviewers) to be synchronized between conferences." There are two dropdown menus: "Synchronize role" and "With conference". At the bottom are two buttons: "Sync Enrollment" and "Cancel".

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.



	USERNAME	NAME	EMAIL	ACTION
<input type="checkbox"/>	ADMIN	admin	alec@smecher...	EDIT
<input checked="" type="checkbox"/>	BROWN	George Brown	gbrown@maili...	EDIT LOG IN AS REMOVE DISABLE
<input checked="" type="checkbox"/>	JONES	Sheila Jones	sjones@maili...	EDIT LOG IN AS REMOVE DISABLE

1 - 3 of 3 Items

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.

USERNAME	NAME	EMAIL	ACTION
<input type="checkbox"/> ADMIN	admin	alec@smecer...	EDIT
<input type="checkbox"/> BROWN	George Brown	gbrown@maili...	EDIT LOG IN AS REMOVE DISABLE
<input type="checkbox"/> JONES	Sheila Jones	sjones@maili...	EDIT LOG IN AS REMOVE DISABLE

1 - 3 of 3 Items

[Send Email](#) [Select All](#)

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.

Create Announcement Type

Form Language English

To enter the information below in additional languages, first select the language.

Name* General

[Save](#)
[Save and Create Another](#)
[Cancel](#)

* Denotes required field

Figure 91: Create Announcement Type

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

Create New Announcement

Form Language:
To enter the information below in additional languages, first select the language.

Type:

Scheduled Conference:

Title*:

Short Description*:

Description*:
A brief description to appear along with the announcement title.

Expiry Date:
The announcement will be displayed to readers until this date. Leave blank if the announcement should be displayed indefinitely.

* Denotes required field

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.

Prepared Emails				
EMAIL TEMPLATES	SENDER	RECIPIENT	SUBJECT	ACTION
DIRECTOR_ASSIGN	Director	Track Director	Director Assignment	EDIT DISABLE RESET
MANUAL_PAYMENT_NO...			Manual Payment Notification	EDIT RESET
PASSWORD_RESET			Password Reset	EDIT RESET
PASSWORD_RESET_CO...			Password Reset Confirmation	EDIT RESET
PAYPAL_INVESTIGAT...			Unusual PayPal Activity	EDIT RESET
REGISTRATION_NOTIFY		Reader	Registration Notification	EDIT RESET
REVIEW_ACK	Track Director	Reviewer	Paper Review Acknowledgement	EDIT DISABLE RESET

Figure 93: Prepared Emails

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

Edit Email

This email notifies a Track Director that the Director has assigned them the task of overseeing a submission through the editing process. It provides information about the submission and how to access the conference site.

Email Template (Deutsch)

Subject

Zuteilung zu Einreichung

Body

{editorialContactName}:

In Ihrer Funktion als Track-Leiter wurde Ihnen die Beaufsichtigung des Beaufsichtigungsprozesses der Arbeit "{paperTitle}" zugewiesen an die Konferenz "{conferenceName}" ausgelassen.

URL der Einreichung: {submissionUrl}

Ihr Benutzername: {directorUsername}

Mit freundlichen Grüßen,

{editorialContactSignature}

Email Template (English)

Subject

Director Assignment

Body

{editorialContactName}:

The submission, "{paperTitle}," to {conferenceName} has been assigned to you to see through the editorial process in your role as Track Director.

Submission URL: {submissionUrl}

Username: {directorUsername}

Thank you,

{editorialContactSignature}

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.

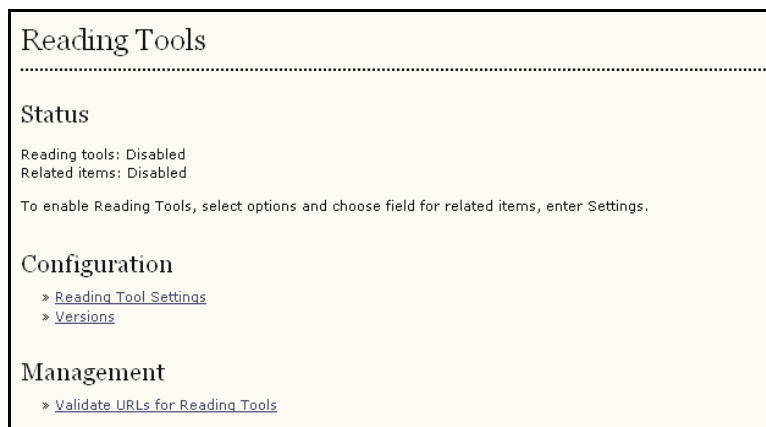


Figure 95: Reading tools

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.

Reading Tool Settings

The reading tools appear in a frame beside published items in the tracks of the conference that have been designated for indexing. The reading tools consist of a set of optional tools related to the published item, listed below, and a set of tools that provide access to related items, organized by field and discipline.

☒ Enable Reading Tools for designated tracks of conference.

Related Items Field

Optional Tools

- ☒ Abstract (presents the item's abstract).
- ☒ About the author (displays the bio statements entered by the author).
- ☒ How to cite item (provides bibliographic detail for item).
- ☒ Indexing metadata (displays item's indexing metadata provided by author and system).
- ☒ Supplementary files (displays list of files author included with submission).
- ☒ Print version (provides a printer-friendly version of an item).
- ☒ Look up terms (enables readers to double-click on any word in an item and send the word to a dictionary).
- ☒ Notify a colleague (leads to an email template with link to item).
- ☒ Email the author (leads to an email template with author's email).
- ☒ Find References
- ☒ Add comment (enables readers to post comments, which Conference Directors can delete. Reader Comments must be enabled in Setup, step 2).

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.

OCS in an Hour

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						
<input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="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	1	METADATA	SEARCHES	DELETE	
Look up terms	Look up terms	1	METADATA	SEARCHES	DELETE	
Book searches	Book searches	1	METADATA	SEARCHES	DELETE	
e-Journals	e-Journals	1	METADATA	SEARCHES	DELETE	
Related theory	Related theory	1	METADATA	SEARCHES	DELETE	
Related studies	Related studies	1	METADATA	SEARCHES	DELETE	
Pay-per-view	Pay-per-view	1	METADATA	SEARCHES	DELETE	
Online forums	Online forums	1	METADATA	SEARCHES	DELETE	
Multimedia	Multimedia	1	METADATA	SEARCHES	DELETE	
Teaching files	Instructional	1	METADATA	SEARCHES	DELETE	
Relevant portals	Relevant portals	1	METADATA	SEARCHES	DELETE	
Government policy	Gov Policy	1	METADATA	SEARCHES	DELETE	
Media reports	Media reports	1	METADATA	SEARCHES	DELETE	
Web search	Web search	1	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.

Searches		
METADATA SEARCHES		
TITLE	URL	
Google Scholar	http://scholar.google.com	⬆ ⬇ EDIT DELETE
OAIster (Open Archives Initiative research databases)	http://www.oaister.org/	⬆ ⬇ EDIT DELETE
SearchERIC	http://www.eric.ed.gov/	⬆ ⬇ EDIT DELETE
ERIC - Education Resources Information Center	http://eric.ed.gov/	⬆ ⬇ EDIT DELETE
Public Knowledge Project Open Archives Harvester	http://pkp.sfu.ca/harvester/	⬆ ⬇ EDIT DELETE
Education-Line: Electronic Texts in Education and Training	http://www.leeds.ac.uk/educol/	⬆ ⬇ EDIT DELETE
1 - 6 of 6 Items		
CREATE SEARCH		

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.



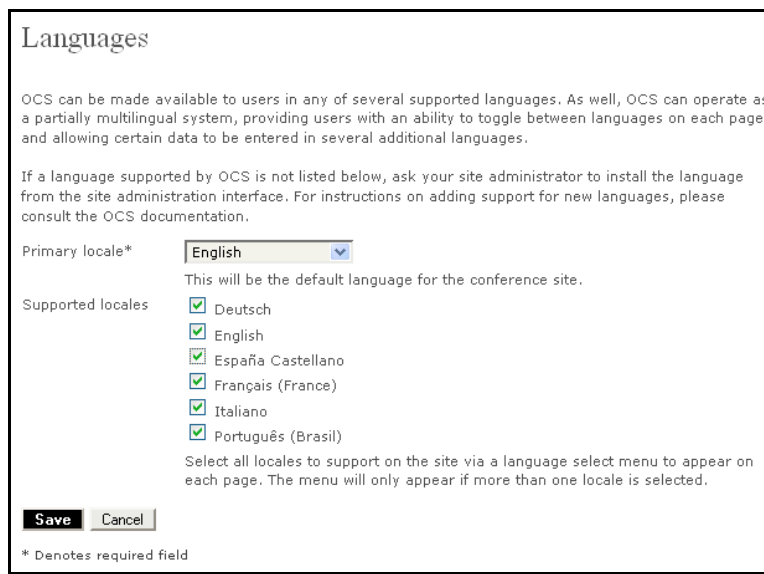
Files Browser				
Index of /schedConfs/3				
< PARENT DIRECTORY				
FILE NAME	TYPE	DATE MODIFIED	SIZE	ACTION
 papers	—	2008-04-08 08:48 AM	—	DELETE
 tracks	—	2008-04-05 03:03 PM	—	DELETE
<input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Upload File"/>				
<input type="button" value="Create Directory"/>				
Note: 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.



The screenshot shows the 'Languages' configuration page in OCS. It includes a title 'Languages', an introductory paragraph about multilingual support, and instructions for administrators. The 'Primary locale*' is set to 'English' in a dropdown menu. Below, under 'Supported locales', there is a list of languages with checkboxes: Deutsch, English, España Castellano, Français (France), Italiano, and Português (Brasil). All these checkboxes are checked. A note at the bottom of the list states: 'Select all locales to support on the site via a language select menu to appear on each page. The menu will only appear if more than one locale is selected.' At the bottom left, there are 'Save' and 'Cancel' buttons. A footnote at the very bottom says '* Denotes required field'.

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>.

Plugin Management

This page allows the Conference Manager to review and potentially configure the plugins that are currently installed. Plugins are divided into categories, according to their function. The categories are listed below, and within each category, its current set of plugins.

- » [Block Plugins](#)
- » [Citation Format Plugins](#)
- » [Generic Plugins](#)
- » [Import/Export Plugins](#)
- » [Payment Plugins](#)
- » [Report Plugins](#)
- » [Theme Plugins](#)

Block Plugins

Block Plugins are pluggable UI components, such as the various sidebar tools.

- **Role-Specific Block:** This plugin provides a sidebar block containing role-specific information such as submission counts and quick links for Directors, Presenters, etc.
- **"Developed By" Block:** This plugin provides sidebar "Developed By" link.
- **Help Block:** This plugin provides sidebar help link.
- **User Block:** This plugin provides sidebar user account tools (e.g. login, logout, profile link, etc).
- **Language Toggle Block:** This plugin provides the sidebar language toggler.
- **Navigation Block:** This plugin provides sidebar navigation links.
- **Information Block:** This plugin provides sidebar information link.
- **Font Size Block:** This plugin provides sidebar font sizer.

Citation Format Plugins

Citation format plugins provide users with various formats in which to access paper citations.

- **RefWorks citation format plugin:** This plugin implements the RefWorks citation format.
- **ABNT citation format plugin:** This plugin implements the ABNT citation format.
- **Turabian citation format plugin:** This plugin implements the Turabian citation format.
- **MLA citation format plugin:** This plugin implements the MLA citation format.
- **BibTeX citation format plugin:** This plugin implements the BibTeX citation format.
- **Reference Manager citation format plugin:** This plugin implements the Reference Manager citation format.
- **ProCite citation format plugin:** This plugin implements the ProCite citation format.
- **CBE citation format plugin:** This plugin implements the CBE citation format.
- **EndNote citation format plugin:** This plugin implements the EndNote citation format.
- **APA citation format plugin:** This plugin implements the APA citation format.

Generic Plugins

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:

Registration				
REGISTRATION REGISTRATION TYPES REGISTRATION POLICIES				
USER	REGISTRATION TYPE	REGISTERED	PAID	ACTION
Kevin Stranack	Conference + Technical Workshop	2008-04-29	2008-04-29	EDIT DELETE
Michelle Tao	Conference Only	2008-04-29		EDIT DELETE
1 - 2 of 2 Items				
CREATE NEW REGISTRATION				
Vancouver July 2008				
				
This work is licensed under a Creative Commons Attribution 3.0 License .				

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:

Edit Registration

User*

Kevin Stranack [SELECT](#)

Registration type*

Conference + Technical Workshop - - 350.00 CAD

☐ Send the user an email with their username and registration details.

Membership

Enter membership information if the registration type requires that registrants belong to an association or organization.

Domain

Enter a domain if the registration type is for institutions. If a domain is entered here, the IP range is optional. Valid values are domain names (e.g. lib.sfu.ca).

IP range

Enter an IP range if the registration type is for institutions. If an IP range is entered here, the domain is optional. Valid values include an IP (e.g. 142.58.103.1), a CIDR IP range (e.g. 142.58.100.0/24), an IP range (e.g. 142.58.103.1 - 142.58.103.4), an IP range with '*' (e.g. 142.58.103.*), or any combination of these separated by a ';' (e.g. 142.58.103.* - 142.58.107.* ; 142.58.108.1/24 ; 142.58.106.*)

Special Requests

Please use this space to include any special requests or requirements for this registration (e.g. dietary restrictions, or disabilities.)

Payment Received

☒ April 29 2008

Please check when payment is received for this user, and record the date.

Save

Cancel

* Denotes required field

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.

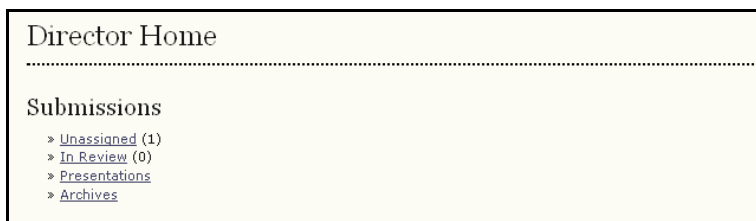


Figure 108: Director Homepage

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.

OCS in an Hour

Unassigned

UNASSIGNED IN REVIEW PRESENTATIONS ARCHIVES

Title contains Search

ID	MM-DD SUBMIT	TRACK	AUTHORS	TITLE
40	04-26	GEN	White	USING OCS TO INCREASE SCHOLARLY IMPACT

1 - 1 of 1 Items

Track: All Tracks

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.

#40 Summary

SUMMARY REVIEW HISTORY

Submission

Authors Lucy White

Title Using OCS to increase scholarly impact

Submission Type Single Presentation

Original file [40-58-1-SM.DOC](#) 2008-04-26

Supp. files [40-59-1-SP.DOC](#) 2008-04-26 [EDIT](#) [ADD A SUPPLEMENTARY FILE](#)

Submitter Lucy White

Date submitted 2008-04-26

Track General Papers Change to General Papers Record

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.

Directors

	REQUEST	ACTION
None assigned		

[ADD TRACK DIRECTOR](#) | [ADD DIRECTOR](#) | [ADD SELF](#)

Figure 111: Selecting Directors

Adding a Track Director

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

Track Directors

Select Track Director

First name ▼ contains ▼ Search

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

NAME	CONFERENCE TRACKS	COMPLETED	ACTIVE	ACTION
ANDY HUNTER	—	0	0	ASSIGN

1 - 1 of 1 Items

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).

Send Email

To

CC

BCC

☐ Send a copy of this message to my address (iamleizhang@gmail.com)

Attachments

From "Lei Zhang" <iamleizhang@gmail.com>

Subject

Body

Andy Hunter:

The submission, "Using OCS to increase scholarly impact," to PKP Scholarly Publishing Conference has been assigned to you to see through the editorial process in your role as Track Director.

Submission URL:
<http://pkp.sfu.ca/ocs2/cvs2/index.php/lzc/pkpspc2008/trackDirector>
 Username: [ahunter](#)

Thank you,
 Lei Zhang
 iamleizhang@gmail.com

Figure 113: Send Mail

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

Directors

Track Director	REQUEST	ACTION
Andy Hunter	2008-04-26	DELETE

[ADD TRACK DIRECTOR](#) | [ADD DIRECTOR](#) | [ADD SELF](#)

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.

Status		
Status	Paper in review	ARCHIVE SUBMISSION
Initiated	2008-04-26	
Last modified	2008-04-26	

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.

Send Email

To

Lucy White <M8R-aa0rb4@mailinator.com>

CC

BCC

Add Recipient

Add CC

Add BCC

☐

Send a copy of this message to my address (iamleizhang@gmail.com)

Attachments

Browse...

Upload

From

"Lei Zhang" <iamleizhang@gmail.com>

Subject

[p] Unsuitable Submission

Body

Lucy White:

An initial review of "Using OCS to increase scholarly impact" has made it clear that this submission does not fit within the scope and focus of PKP Scholarly Publishing Conference. I recommend that you consult the description of this conference under About, as well as any previous scheduled conferences, to learn more about the work that we accept. You might also consider submitting this paper or abstract to another, more suitable conference.

Lei Zhang
iamleizhang@gmail.com

Send

Cancel

Skip Email

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.


Submission Metadata EDIT METADATA	
Authors	
Name	Sharon Lee 
URL	
Affiliation	University of British Columbia
Country	Canada
Bio statement	Assistant Professor Faculty of Education
Principal contact for editorial correspondence.	
Title and Abstract	
Title	Using OCS to increase scholarly impact
Abstract	This presentation will outline how the Open Conference Systems software, developed by the Public Knowledge Project, enhances the scholarly impact of conference presentations.
Indexing	
Academic discipline and sub-disciplines	Publishing
Subject classification	Scholarly electronic publishing
Keywords	Scholarly Communication; Open Access
Language	en
Supporting Agencies	
Agencies	Simon Fraser University Library

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.

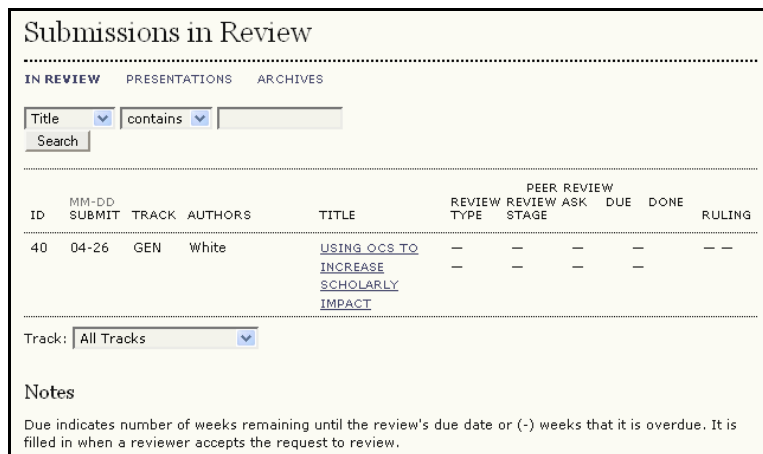



Figure 119: Submissions in Review

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

#40 Review


SUMMARY **REVIEW** HISTORY

Submission

Authors Lucy White 

Title Using OCS to increase scholarly impact

Track General Papers

Director Andy Hunter 

Review Version [40-60-1-RV.DOC](#) 2008-04-26

Upload a revised file to serve as the Review Version

Suppl. files [40-59-1-SP.DOC](#) 2008-04-26 Present file to reviewers ☒



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

Figure 120: Selecting Reviewer

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

Reviewers

Select Reviewer

Reviewing interests  contains 

[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](#)

[ENROLL EXISTING USER AS REVIEWER](#) | [CREATE NEW REVIEWER](#)

NAME	REVIEWING INTERESTS	RATING	DONE	WEEKS	LATEST	ACTIVE	ACTION
IRVIN BLACK		N/A	0	—	—	0	ASSIGN

1 - 1 of 1 Items

Notes

Name links to reviewer's profile.
 Ratings is out of 5 (Excellent).
 Weeks refers to average period of time to complete a review.
 Latest is date of most recently accepted review.
 Active is how many reviews are currently being considered or underway.

Figure 121: Assigning Reviewer

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

Reviewer A	Irvin Black	CLEAR REVIEWER
REQUEST	UNDERWAY	DUE
		2008-05-24
		ACKNOWLEDGE
		

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.






Reviewer A	Irvin Black			
	REQUEST	UNDERWAY	DUE	ACKNOWLEDGE
	2008-04-26	2008-04-26 	2008-05-24	
Recommendation	Accept Submission	2008-04-26		
Review	 2008-04-26			
Uploaded files	None			
Rate Reviewer	Rating	5 High 		

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.

Director Decision

Select decision: Choose One Record Decision

Decision: Choose One

Notify Author: Accept Submission Revisions Required Decline Submission 40-60-1-RV.DOC 2008-04-26 Mail Record

Review Version: 40-60-1-RV.DOC 2008-04-26

Author Version: None

Director Version: None

Upload Director Version: Browse... Upload

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.

Director Decision

Select decision: Accept Submission Record Decision

Decision: Accept Submission 2008-04-26

Notify Author: Director/Author Email Record

Review Version: 40-60-1-RV.DOC 2008-04-26

Author Version: None

Director Version: None

Upload Director Version: Browse... Upload

Move to Layout Send

☒ This file is ready for publication.

Figure 126: Move to Layout

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

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: 40-61-1-LE.DOC 2008-04-26

Galley Format	FILE	ORDER	ACTION	VIEWS
1. Untitled ()	40-62-1-PB.DOC 2008-04-26	1	EDIT DELETE 0	
Supplementary Files	FILE	ORDER	ACTION	
1. Supplement	40-59-1-SP.DOC 2008-04-26	1	EDIT DELETE	

Upload file to: Galley Supp. files Browse... Upload

Figure 127: Layout

OCS in an Hour

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.

Galley

Edit a Layout Galley

Galley File Information

Label* The galley label is used to identify the item's file format (e.g. HTML, PDF, etc.).

Language*

File name

Original file name

File type

File size

Date uploaded

Replace File Use Save to upload file.

* Denotes required field

Figure 128: Galley Files

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

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: [40-61-1-LE.DOC](#) 2008-04-26

Galley Format	FILE	ORDER	ACTION	VIEWS
1. PDF	40-63-1-PB.PDF	2008-04-26	1 EDIT DELETE	0

Supplementary Files	FILE	ORDER	ACTION
1. Supplement	40-59-1-SP.DOC	2008-04-26	1 EDIT DELETE

Upload file to ☒ Galley, ☐ Supp. files

Figure 129: Edit Galley Files

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

Complete

Add the submission to the 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.

ID	TITLE	SCHEDULE PRESENTATIONS			
40	Using OCS to increase scholarly impact <i>Lucy White</i>	<input checked="" type="checkbox"/>	Location	> 491	
		<input checked="" type="checkbox"/>	Date	July 11, 2008	
			Start Time	10:00 AM	
			End Time	11:00 AM	

Sort By... [Start Time](#) | [Author](#) | [Location](#) | [Title](#)

[Save](#) [Cancel](#)

* Denotes required field

Figure 131: Scheduling Presentation

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

Presentations and Authors

Title contains Search

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: [All Tracks](#)

General Papers

Using OCS to increase scholarly impact
Lucy White

[ABSTRACT PDF](#)

Figure 132: Presentations and Authors

The presentation can also be viewed under Conference Schedule.

[> Conference Locations](#)
[> Conference Schedule](#)

Conference Locations

- Irving K. Barber Learning Center

Conference Schedule

2008-07-11

10:00 AM

- [USING OCS TO INCREASE SCHOLARLY IMPACT](#)
Building: Irving K. Barber Learning Center
Room: Room 491

09:00 AM

- Opening Reception

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.

Active Submissions					
ACTIVE		ARCHIVE			
ID	MM-DD ASSIGNED	TRACK	TITLE	DUE	REVIEW TYPE
40	04-26	GEN	USING OCS TO INCREASE SCHOLARLY IMPACT	05-24	
1 - 1 of 1 Items					

Figure 135: Selecting the Submission

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

#40 Paper Review

Submission To Be Reviewed

Title	Using OCS to increase scholarly impact
Submission Type	Single Presentation
Conference Track	General Papers
Abstract	This presentation will outline how the Open Conference Systems software, developed by the Public Knowledge Project, enhances the scholarly impact of conference presentations.
Submission Director	Andy Hunter
Submission Metadata	VIEW METADATA

Figure 136: Submission Summary

Next, you can view the Review Schedule.

Review Schedule	
Director's Request	2008-04-26
Your Response	—
Review Submitted	—
Review Due	2008-05-24

Figure 137: Review Schedule

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

Review Steps	
1. Notify the submission's director, Andy Hunter, as to whether you will undertake the review.	
Response	Will do the review Unable to do the review
2. Review the submission.	
Submission Manuscript	40-60-1-RV.DOC 2008-04-26
Supplementary File(s)	40-59-1-SP.DOC
3. Click on icon to enter (or paste) your review of this submission.	
Review	
4. In addition, you can upload files for the director and/or author to consult.	
Uploaded files	None
	<input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Upload"/>
5. Select a recommendation and submit the review to complete the process. You must enter a review or upload a file before selecting a recommendation.	
Recommendation	<input type="text" value="Choose One"/> <input type="button" value="Submit Review To Director"/>

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.

Send Email	
To	Andy Hunter <M8R-yzyk66@mailinator.com>
CC	<input type="text"/>
BCC	<input type="text"/>
	<input type="button" value="Add Recipient"/> <input type="button" value="Add CC"/> <input type="button" value="Add BCC"/>
	<input type="checkbox"/> Send a copy of this message to my address (M8R-gdybue@mailinator.com)
Attachments	<input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Upload"/>
From	"Irvin Black" <M8R-gdybue@mailinator.com>
Subject	[p] Able to Review
Body	<p>Andy Hunter:</p> <p>I am able and willing to review the submission, "Using OCS to increase scholarly impact," for PKP Scholarly Publishing Conference. Thank you for thinking of me, and I plan to have the review completed by its due date, 2008-05-24, if not before.</p> <p>Irvin Black</p>
<input type="button" value="Send"/> <input type="button" value="Cancel"/> <input type="button" value="Skip Email"/>	

Figure 139: Respond to Track Director

OCS in an Hour

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.

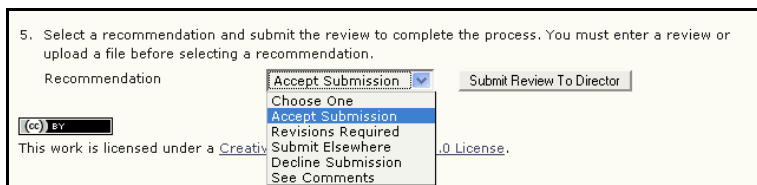


Figure 141: Select Recommendation

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.

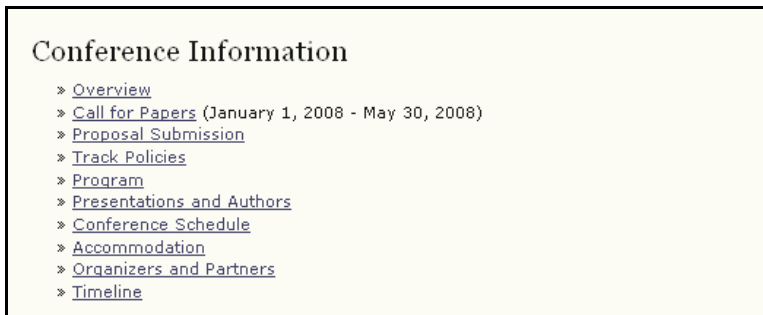


Figure 142: Proposal Submission

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.

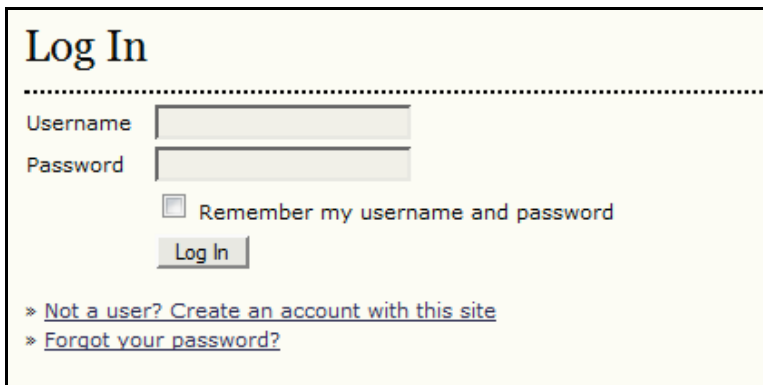


Figure 143: Log In

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

Account

Fill in this form to create an account with this conference.
[Click here](#) if you already have an account with this or another conference on this site.

Profile

Form Language: English (dropdown menu)
 To enter the information below in additional languages, first select the language.

Username*: [text input]
 The username must contain only lowercase letters, numbers, and hyphens/underscores.

Password*: [text input]
 The password must be at least 6 characters.

Repeat password*: [text input]

Salutation: [text input]

First name*: [text input]

Middle name: [text input]

Last name*: [text input]

Initials: [text input] Joan Alice Smith = JAS

Gender: ☐ M ☐ F

Affiliation: [text input]

Signature: [text input]

Email*: [text input]

URL: [text input]

Phone: [text input]

Fax: [text input]

Mailing Address: [text input]

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.

PKP Scholarly Publishing Conference

PKP Scholarly Publishing Conference 2008

[» Author](#)

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”.

Active Submissions

ACTIVE ARCHIVE

ID	MM-DD SUBMIT	TRACK	AUTHORS	TITLE	STATUS
No Submissions					

Start here to submit a paper to this conference.
[STEP ONE OF THE SUBMISSION PROCESS](#)

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.

Conference Track

Select the appropriate track for this submission (see [Track Policies](#)).

Track* Please select a track... ▼

- Please select a track...
- General Papers
- Editors and Publishers

[Submission Checklist](#)

Figure 147: Selecting the Track

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

Submission Checklist

Indicate that this submission is ready to be considered by this conference by checking off the following (comments to the director can be added below).

- ☒ The submission has not been previously published, nor is it before another conference for consideration (or an explanation has been provided in Comments to the Director).
- ☒ The submission file is in Microsoft Word, RTF, or WordPerfect document file format.
- ☒ All URL addresses in the text (e.g., <http://pkp.sfu.ca>) are activated and ready to click.
- ☒ The text is single-spaced; uses a 12-point font; employs italics, rather than underlining (except with URL addresses); and all illustrations, figures, and tables are placed within the text at the appropriate points, rather than at the end.
- ☒ The text adheres to the stylistic and bibliographic requirements outlined in the [Author Guidelines](#), which is found in About the Conference.
- ☒ If submitting to a peer-reviewed track of the conference, authors' names are removed from submission, with ";;;;;Author";;;; and year used in the bibliography and footnotes, instead of authors' name, paper title, etc.
- ☒ If submitting to peer review, all Microsoft Office documents (including Supplementary Files) have been saved by going to File and selecting Save As; clicking Tools (or Options in a Mac); clicking Security; selecting ";;;;;Remove personal information from file properties on save";;;;; clicking Save.

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).

Copyright Notice

Authors who submit to this conference agree to the following terms:

a) Authors retain copyright over their work, while allowing the conference to place this unpublished work under a [Creative Commons Attribution License](#), which allows others to freely access, use, and share the work, with an acknowledgement of the work's authorship and its initial presentation at this conference.

b) Authors are able to waive the terms of the CC license and enter into separate, additional contractual arrangements for the non-exclusive distribution and subsequent publication of this work (e.g., publish a revised version in a journal, post it to an institutional repository or publish it in a book), with an acknowledgement of its initial presentation at this conference.

c) In addition, authors are encouraged to post and share their work online (e.g., in institutional repositories or on their website) at any point before and after the conference.

☒ The authors agree to the terms of this Copyright Notice, which will apply to this submission if and when it is published by this conference (comments to the director can be added below).

Figure 149: Copyright Notice

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

Comments for Conference Director

Enter text (optional)

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.

Authors

First name*

Middle name

Last name*

Affiliation

Country

Email*

URL

Bio statement
(E.g., department and rank)

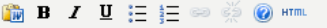


Figure 151: Author Information

OCS in an Hour

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).

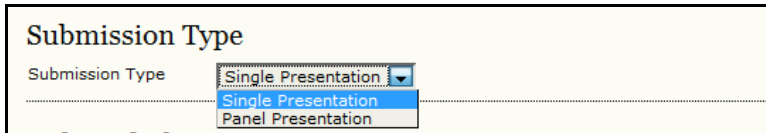
A screenshot of a web form titled "Submission Type". It contains a label "Submission Type" followed by a dropdown menu. The dropdown menu is open, showing three options: "Single Presentation" (highlighted in blue), "Single Presentation", and "Panel Presentation".

Figure 152: Submission Type

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

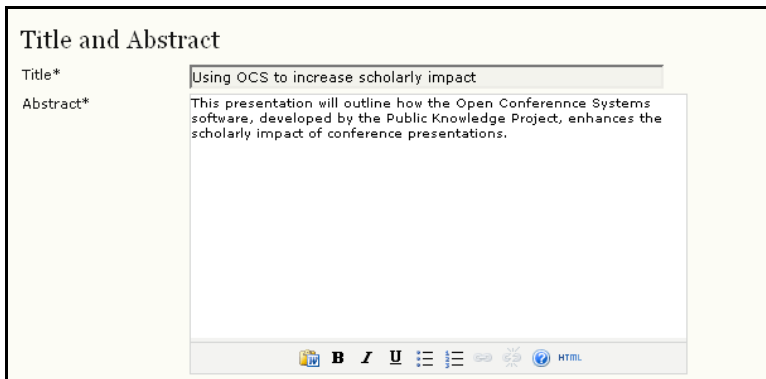
A screenshot of a web form titled "Title and Abstract". It has two main input fields. The "Title*" field contains the text "Using OCS to increase scholarly impact". The "Abstract*" field contains the text "This presentation will outline how the Open Conference Systems software, developed by the Public Knowledge Project, enhances the scholarly impact of conference presentations." Below the abstract field is a rich text editor toolbar with icons for bold, italic, underline, list, link, and HTML.

Figure 153: Title and Abstract

Next, the author would add their preferred indexing terms.

A screenshot of a web form titled "Indexing". It includes instructions: "Provide terms for indexing the submission; separate terms with a semi-colon (term1; term2; term3)." There are four main sections: "Academic discipline and sub-disciplines" with a text input containing "Publishing" and a list of suggestions below; "Subject classification" with a text input containing "Scholarly Electronic Publishing" and a link "LCC" below; "Keywords" with a text input containing "Scholarly Communication; Open Access" and a list of suggestions below; and "Language" with a text input containing "en" and a list of language codes below.

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

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

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.

Step 4. Uploading Supplementary Files

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

This optional step allows Supplementary Files to be added to a submission. The files, which can be in any format, might include (a) research instruments, (b) data sets, which comply with the terms of the study's research ethics review, (c) sources that otherwise would be unavailable to readers, (d) figures and tables that cannot be integrated into the text itself, or other materials that add to the contribution of the work.

ID	TITLE	ORIGINAL FILE NAME	DATE UPLOADED	ACTION
No supplementary files have been added to this submission.				

Upload supplementary file

Figure 157: Uploading Supplementary Files

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

Step 4a. Add a Supplementary File

[<< Back to Supplementary Files](#)

Form Language
To enter the information below in additional languages, first select the language.

Supplementary File Metadata

To index this supplementary material, provide the following metadata for the uploaded supplementary file.

Title*

Creator (or owner) of file

Keywords

Type
Specify other

Brief description

Publisher

Contributor or sponsoring agency

Date
Date when data was collected or instrument created.

Source

Language
English=en; French=fr; Spanish=es. [Additional codes.](#)

Supplementary File

File name

Figure 158: Add a Supplementary File

Step 5: Confirming the Submission

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

Step 5. Confirming the Submission

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

To submit your manuscript to PKP Scholarly Publishing Conference click Finish Submission. The submission's principal contact will receive an acknowledgement by email and will be able to view the submission's progress through the editorial process by logging in to the journal web site. Thank you for your interest in publishing with PKP Scholarly Publishing Conference.

File Summary

ID	ORIGINAL FILE NAME	TYPE	FILE SIZE	DATE UPLOADED
58	TESTDOCUMENT.DOC	Submission File	38KB	04-26
59	TESTDOCUMENT.DOC	Supplementary File	38KB	04-26

[Finish Submission](#) [Cancel](#)

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.

Active Submissions

Submission complete. Thank you for submitting your work to PKP Scholarly Publishing Conference.

[» Active Submissions](#)

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.

Active Submissions

ACTIVE ARCHIVE

ID	MIN-DO SUBMIT	TRACK	AUTHORS	TITLE	STATUS
40	04-26	GEN	White	USING OCS TO INCREASE SCHOLARLY IMPACT	Awaiting assignment

1 - 1 of 1 Items

Start here to submit a paper to this conference.
[STEP ONE OF THE SUBMISSION PROCESS](#)

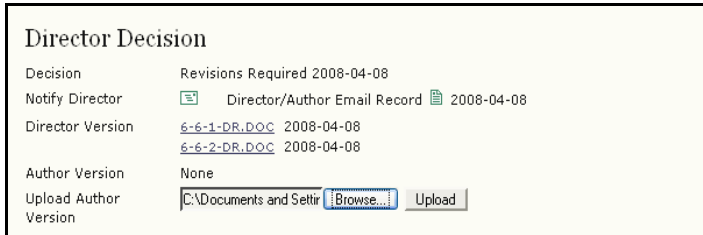
Figure 161: Status of Submissions

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.



The screenshot shows a web interface titled "Director Decision". It contains several rows of information and controls:

- Decision**: Revisions Required 2008-04-08
- Notify Director**: A checkbox (checked) followed by "Director/Author Email Record" and a document icon with the date "2008-04-08".
- Director Version**: Two entries, each with a link (e.g., [6-6-1-DR.DOC](#)) and the date "2008-04-08".
- Author Version**: None
- Upload Author Version**: A text input field containing "C:\Documents and Settings\...", followed by a "Browse..." button and an "Upload" button.

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.

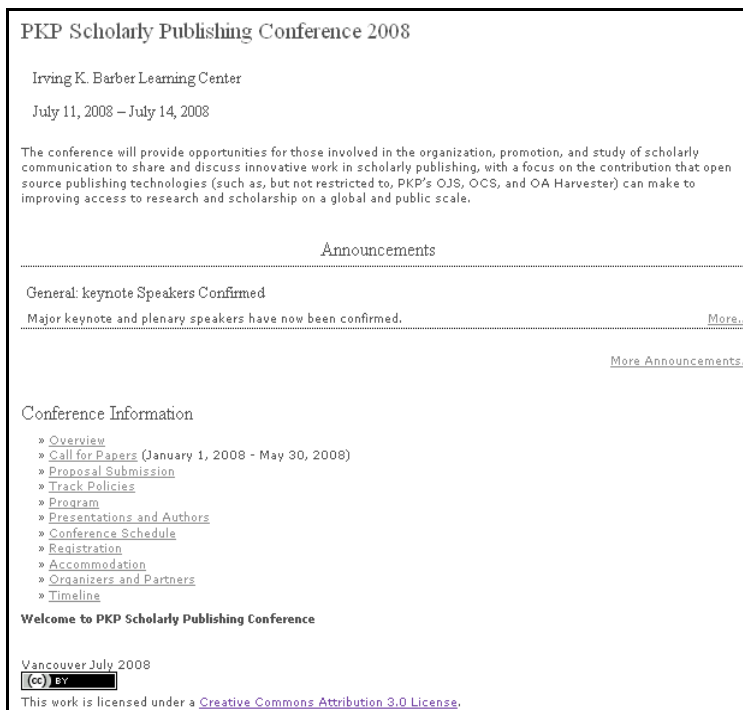


Figure 163: Conference Information

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.

OCS in an Hour

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	<input type="radio"/> 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	<input type="radio"/> 300 CAD (Registration Closed 2008-04-18)
This option includes early registration for both the conference and the technical workshop.	
Conference Only	<input checked="" type="radio"/> 300 CAD (Closes 2008-07-11)
Conference + Technical Workshop	<input type="radio"/> 350 CAD (Closes 2008-07-11)
This option is for regular registration to the conference and the technical workshop.	
Fee Code <input type="text"/> 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:

OCS in an Hour

User Account

You are not currently logged in. In order to register for this conference, you will need an account. If you already have one, [click here](#) to log in; otherwise, fill in the information below in order to create a new account.

Username*	<input type="text"/>
Password*	<input type="password"/>
	The password must be at least 6 characters.
Repeat password*	<input type="password"/>
First name*	<input type="text"/>
Middle name	<input type="text"/>
Last name*	<input type="text"/>
Initials	<input type="text" value="Joan Alice Smith = JAS"/>
Affiliation	<input type="text"/>
Signature	<input type="text"/>
Email*	<input type="text"/>
URL	<input type="text"/>
Phone	<input type="text"/>
Fax	<input type="text"/>
Mailing Address	<input type="text"/>
Country	<input type="text" value="v"/>
Bio statement (E.g., department and rank)	<input type="text"/>

Figure 165: User Account Information

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

Special Requests

Please describe any special requirements or requests, such as dietary, access, etc.

Registration Manager

Name	Kevin Stranack
Email	stranack@sfu.ca
Phone	604-291-1235
Fax	604-291-1235
Mailing Address	Simon Fraser University Library 8888 University Drive Burnaby, BC Canada V5A 1S6

Register


Vancouver July 2008

This work is licensed under a [Creative Commons Attribution 3.0 License](#).

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:

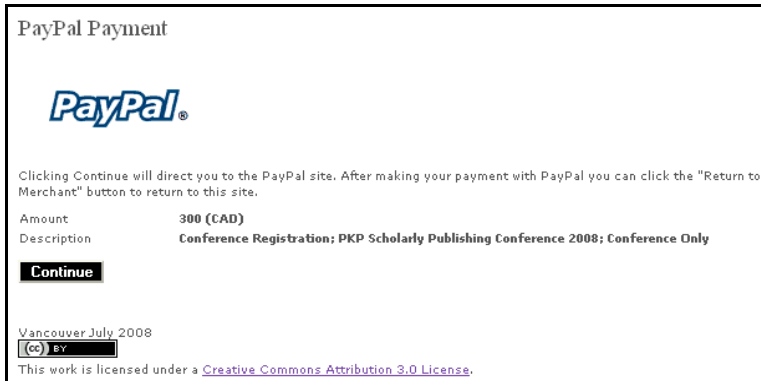


Figure 167: Paypal Payment

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 is 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