

# OCS in an Hour

An Introduction to Open Conference Systems  
Version 2.1

Last Updated: September 2, 2008



STANFORD  
UNIVERSITY



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.....	
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:

The screenshot shows the homepage of the Public Knowledge Project Conferences. The header is red with the text "Public Knowledge Project Conferences". The navigation menu includes links for HOME, ABOUT, LOG IN, ACCOUNT, SEARCH, ARCHIVE, and ANNOUNCEMENTS. The main content area displays information about the "PKP Scholarly Publishing Conference 2007" at Simon Fraser University - Harbour Centre from July 11, 2007, to July 13, 2007. It features sections for "Announcements", "Conference Blogs", and "Open Social Event - Thursday July 12". On the right side, there is a sidebar with user login fields, a search bar, conference information links (Overview, Track Invites, Program, Presentations, Organizers and Partners), a browse section, and font size controls.

Figure 1: OCS Conference

## OCS in an Hour

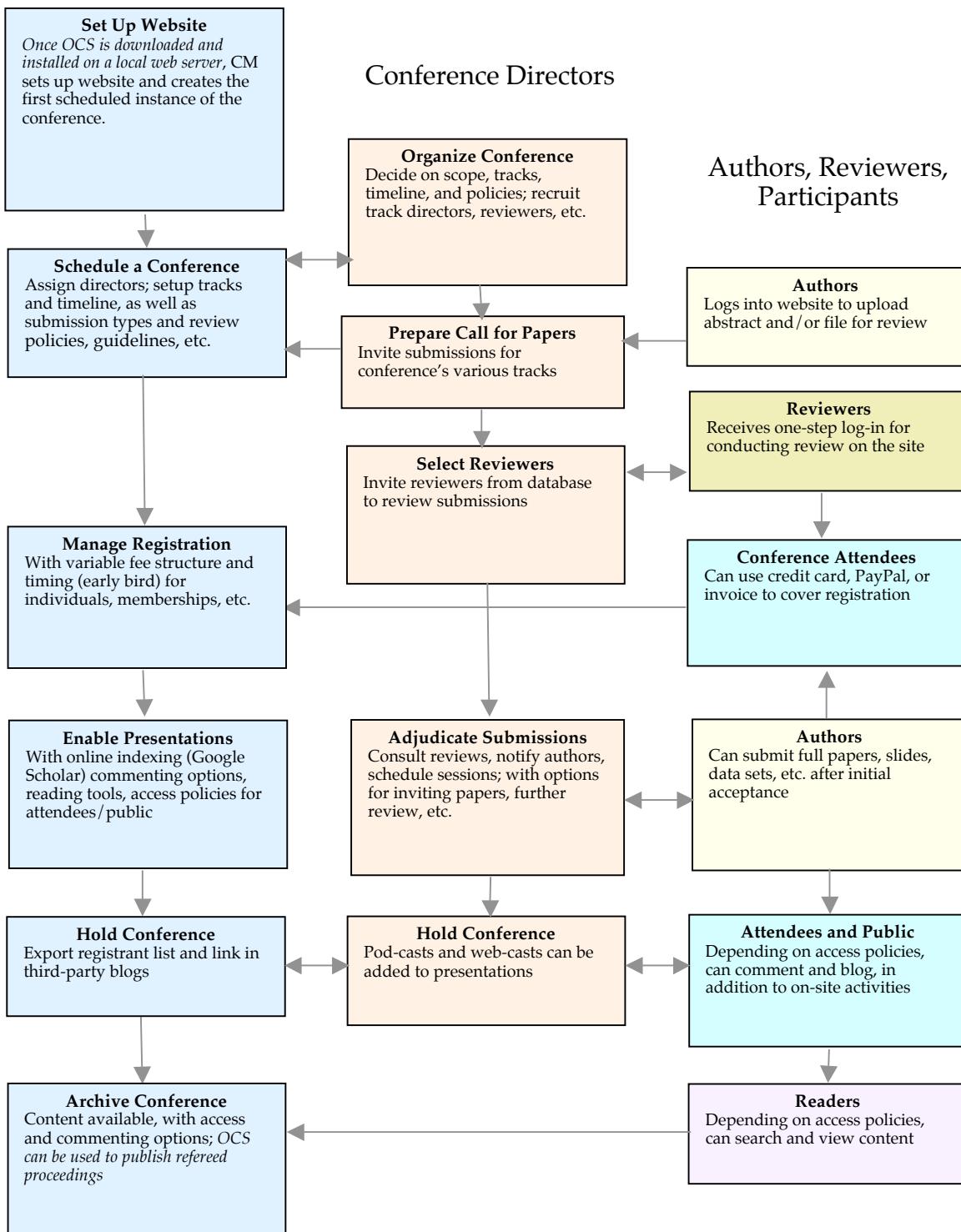
The next image shows its online Proceedings Table of Contents organized by Tracks:

The screenshot displays the "Public Knowledge Project Conferences" website. At the top, there is a red header bar with the site's name. Below it, a navigation menu includes links for HOME, ABOUT, LOG IN, ACCOUNT, SEARCH, ARCHIVE, and ANNOUNCEMENTS. The main content area shows the "Presentations and Authors" section. It features a search bar with dropdown menus for "Title" and "contains", and a "Search" button. A "Last name" dropdown menu lists letters from A to Z, with "All" selected. A "Track" dropdown menu shows "All Tracks" selected. The content is organized into several sections: "PreConference Session" (with a link to "Transitioning to Open Access: Canadian Library Association (CLA) Preconference Session" by Heather Joseph, Heather Morrison, Kathleen Shearer), "PreConference Workshops" (listing "PKP Technical Workshop" by Alec Smecher, Kevin Stranack, "OJS in an Afternoon Workshop" by Kevin Stranack, Jon Whipple, Mia Quint-Rapoport, and "PKP Software Plugin Session" by Alec Smecher, MJ Subhonos), "Keynote" (listing "Keynote Presentation" by John Willinsky), and "Plenary Sessions" (listing "Publishing Cooperatives" by Raym Crow, "Google Scholar Digitization Initiatives" by Anurag Acharya, and "PKP and Leading Edge Developments" by Alec Smecher, MJ Subhonos, Mark Jordan, Kevin Stranack). To the right of the main content, there is a sidebar titled "OPEN CONFERENCE SYSTEMS" containing "USER" login fields for Username and Password, a "Remember me" checkbox, and a "Log In" button. Below that is the "CONFERENCE CONTENT" section, which includes a search bar, a dropdown menu set to "All", and a "Search" button. Under "Conference Information", there are links for Overview, Track Policies, Program, Presentations, and Organizers and Partners. The sidebar also contains a "Browse" section with links for By Conference, By Author, and By Title, and a "FONT SIZE" section with three adjustable font size buttons.

Figure 2: OCS Table of Contents

# OCS Workflow Chart

Conference  
Managers



# System Requirements

A server environment meeting the following requirements is recommended:

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

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

# Help Documentation

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

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

Further documentation can also be found at  
[http://pkp.sfu.ca/ocs\\_documentation](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

## OCS in an Hour

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'.

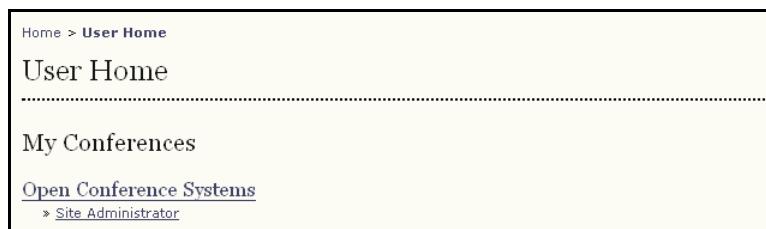


Figure 3: Selecting your role as Site Administrator

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.

The screenshot shows a web-based administration interface. At the top left, there is a breadcrumb navigation: Home > User > Site Administration. The main title is "Site Administration". Below it, a horizontal dotted line separates the title from the content. The first section is "Site Management", which contains four links: "Site Settings", "Hosted Conferences", "Languages", and "Authentication Sources". Another horizontal dotted line follows this section. The next section is "Administrative Functions", which contains four links: "System Information", "Expire User Sessions", "Clear Data Caches", and "Clear Template Cache".

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.

The screenshot shows the 'Site Settings' page in the Open Conference Systems administration interface. The page has a header 'Home > User > Site Administration > Site Settings'. The main content area is titled 'Site Settings' and contains several configuration sections:

- Form language:** English (dropdown menu)
- Site title\***: Open Conference Systems (with options to choose 'Title text' or 'Title image' and upload files)
- Introduction:** A rich text editor window.
- Conference redirect:** A dropdown menu set to 'Do not redirect' with a note explaining its purpose.
- About the Site description:** A rich text editor window.
- Name of principal contact\***: Open Conference Systems
- Email of principal contact\***: ocs@smeccher.bc.ca
- Minimum password length\***: 6 characters
- Site style sheet:** A file input field with 'Browse...' and 'Upload' buttons.

**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 [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 [Public Knowledge Project's harvesting](#).

[Click here](#) and enter <http://open.slu.ca/ojs2/index/index.php> under Site URL, and <http://open.slu.ca/ojs2/index/index.php> under Base URL for OAI harvester.

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).

## OCS in an Hour

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  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/cvss2/index.php/path/...](http://pkp.sfu.ca/ocs2/cvss2/index.php/path/)

Enable this conference to appear publicly on the site

**Save** **Cancel**

\* 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	pkpoai	↑ ↓	<a href="#">EDIT</a>   <a href="#">DELETE</a>	
PKP SCHOLARLY PUBLISHING CONFERENCE	spc	↑ ↓	<a href="#">EDIT</a>   <a href="#">DELETE</a>	
1 - 2 of 2 Items				
<a href="#">CREATE CONFERENCE</a>   <a href="#">IMPORT FROM OCS 1</a>				

Figure 7: Conferences

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

The screenshot shows the PKP Conference Systems homepage. At the top, there is a navigation bar with links for HOME, ABOUT, USER HOME, and SEARCH. Below the navigation bar, a breadcrumb trail indicates the current location: Home > Open Conference Systems. The main content area features two conference listings:

- PKP OAI Harvesting Technologies Conference**: A brief description stating "This conference will explore the development of OAI Harvesting Technologies, and how they will impact scholarly publishing." followed by a [VIEW CONFERENCE](#) link.
- PKP Scholarly Publishing Conference**: A brief description stating "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." followed by a [VIEW CONFERENCE](#) link.

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.

The screenshot shows the Site Administration > Languages page. The title is "Languages". Below it is a section titled "Language Settings".

**Primary locale:** English (selected). A note states: "This will be the default language for the site and any hosted conferences."

**Supported locales:** English, Deutsch, Français (France) (all selected).

A note below the supported locales says: "Select all locales to support on the site. The selected locales will be available for use by all conferences hosted on the site, and also appear in a language select menu to appear on each site page (which can be overridden on conference-specific pages). If multiple locales are not selected, the language toggle menu will not appear and extended language settings will not be available to conferences."

At the bottom are "Save" and "Cancel" buttons.

Figure 9: Languages

## OCS in an Hour

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.

The screenshot shows the 'Manage Locales' page. Under 'Installed Locales', it lists English (en\_US), Deutsch (de\_DE), and Français (France) (fr\_FR). Each entry has a 'RELOAD LOCALE' link next to it. Below this is a section titled 'Install New Locales' with a note about installing support for new locales. It lists four additional locales: España Castellano (es\_ES), Français (Canada) (fr\_CA), Italiano (it\_IT), and Português (Brasil) (pt\_BR). Each has a checkbox next to it; the first three are checked. At the bottom are 'Install' and 'Cancel' buttons.

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.

The screenshot shows the 'Authentication Sources' page. The URL is Home > User > Site Administration > Authentication Sources. The page title is 'Authentication Sources'. A table lists one source: 'OCS User Database' (selected as the default). A 'Save' button is next to it. Below the table, a note says 'No authentication sources have been defined.' A warning message states: '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.' At the bottom, there's a 'Create authentication source' button and a dropdown menu for '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.

The screenshot shows the 'System Information' page with the following content:

- 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 OCSSID
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:

A screenshot of a web page titled 'Conference Site Management'. It shows a breadcrumb trail: Home &gt; PKP Scholarly Publishing Conference &gt; User &gt; Conference Site Management. Below this, a section titled 'General Management' is shown with a list of sub-options: Website Management, Scheduled Conferences, Announcements, Prepared Emails, Reading Tools, Files Browser, Languages, Event Log, and System Plugins.

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.

## OCS in an Hour

Home > PKP Scholarly Publishing Conference > User > Conference Site Management > **Website Management**

### Website Management

---

#### Six Steps to a Conference Web Site

1. About the Conference  
Conference description, principal contact, copyright notice, etc.
2. Additional Website Content  
Homepage content, user information, and announcements
3. Website Headers, Footers, Lists and Navigation Bar  
Titles and logos, headers, footers, etc.
4. Conference Style  
Cascading Style Sheet and theme for conference pages
5. Logging and Auditing  
Email logs, event logs, etc.
6. Conference Indexing  
Search engines and metadata harvesting

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*	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).

**1.2 Conference Description**

This description outlines the overall scope and focus of the conferences scheduled on this site.

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) make to the field.



Figure 17: Conference Description

## 1.3 Principal Contact for Conference Website

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

**1.3 Principal Contact for Conference Website**

Name*	Mary Jones
Title	Conference Organizer
Affiliation	Simon Fraser University Library
Email*	maryjones@sfu.ca
Phone	604-291-1234
Fax	604-291-1235
Mailing Address	Simon Fraser University



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.

**1.4 Copyright Notice**

The Copyright Notice will also appear in the metadata accompanying posted conference materials and as a statement that authors need to agree to on submitting to the conference. The Public Knowledge Project recommends the use of a [Creative Commons](#) license, and provides a sample Copyright Notice below.

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



Require authors to agree to Copyright Notice as part of the submission process.  
 Post the Creative Commons license logo on the conference website.

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 the 'Archive Access Policy' configuration. It includes a note about controlling access to conference archives and links to section 2.4 for additional settings. There are two main sections of checkboxes:

- 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.
  - Anonymous commenting is permitted.

Below these sections is a large text area labeled 'Archive Access Policy' with a rich text editor toolbar at the bottom containing icons for bold, italic, underline, and other formatting options.

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 the 'Privacy Statement' configuration. It contains a text area with a pre-defined 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 this text area is a rich text editor toolbar with standard formatting icons.

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	
<input type="button" value="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	<input type="button" value="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.

## OCS in an Hour

**2.2 Homepage**

**Homepage Image**

Homepage Image    File name:

**Additional Content**

Add the following content, using text/HTML, which will appear below the homepage image, if one is uploaded.

**Welcome to PKP Scholarly Publishing Conference**

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.

**2.3 Information for Users**

Brief descriptions of the conference for prospective authors and readers are available in the "Information" section of the sidebar.

**For Readers**

We encourage readers to sign up for notification of papers posted for this conference. We recommend that you review the [About the Conference](#) page for the conference's policies, and visit the [Conference Homepage](#) to find out what conferences are coming up.

**For Authors**

Interested in submitting to this conference? We recommend that you review the [About the Conference](#) page for the conference's policies, and visit the [Conference Homepage](#) to find out what conferences are coming up.

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 2 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

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.

## OCS in an Hour

**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.

Figure 31: Navigation Bar

### 3.5 Lists

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

Figure 32: Lists

## OCS in an Hour

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 11<sup>th</sup> 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 6<sup>th</sup>, 7<sup>th</sup>, and higher pages:



Figure 33: Navigating Lists

## Step 4: Conference Style

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

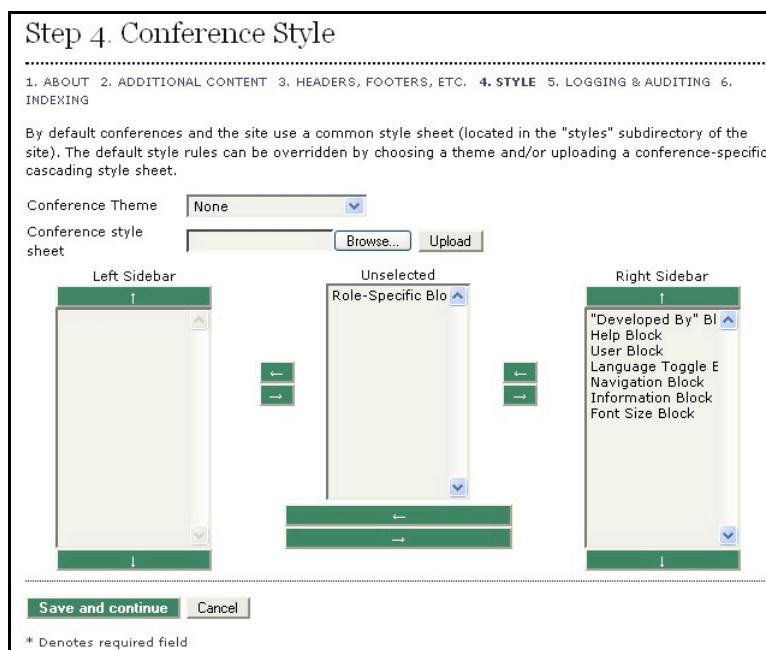


Figure 34: Conference Style

## Step 5: Logging and Auditing

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

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.

**Save and continue** **Cancel**

\* 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	PKP Scholarly Publishing Conference
Keywords	conference; publishing; academic; scholarly
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/csv2/index.php/lzcl/index> under **Site URL**, and <http://pkp.sfu.ca/ocs2/csv2/index.php/lzcl/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
<i>No events have been created.</i>			
<a href="#">CREATE A SCHEDULED CONFERENCE</a>			

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

Scheduled Conference Title\*: PKP Scholarly Publishing Conference 2

Acronym\*: pk

Path\*: pkpspc2008  
 The event's URL will be <http://pkp.sfu.ca/ocs2/cvs2/index.php/lzc/path...>

**Save** **Cancel**

\* 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.

## OCS in an Hour

**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](#)

**Current Conferences**

PKP Scholarly Publishing Conference 2008

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

Figure 41: Current Conferences

# Setup

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

**Scheduled Conference Setup**

.....

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

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

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
<input type="button" value="W"/> <input type="button" value="B"/> <input type="button" value="I"/> <input type="button" value="U"/> <input type="button" value="L"/> <input type="button" value="A"/> <input type="button" value="C"/> <input type="button" value="HTML"/>	
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.

## OCS in an Hour

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	
Any undeliverable emails will result in an error message to this address.	
Bounce Address	<input type="text"/> 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	<input type="text"/>
Institution	<input type="text" value="The University of British Columbia"/> <input type="button" value="Delete"/>
Mailing Address	<input type="text" value="2329 West Mall Vancouver, BC Canada V6T 1Z4"/> <input type="button" value="Delete"/>
URL	<input type="text" value="http://www.ubc.ca"/> <input type="button" value="Delete"/>
Institution	<input type="text" value="Simon Fraser University"/> <input type="button" value="Delete"/>
Mailing Address	<input type="text" value="8888 University Drive Burnaby, BC Canada V5A 1S6"/> <input type="button" value="Delete"/>
URL	<input type="text" value="http://www.sfu.ca"/> <input type="button" value="Delete"/>
<input type="button" value="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	<input type="text"/>
Contributor	<input type="text" value="Google"/> <input type="button" value="Delete"/>
URL	<input type="text" value="http://www.google.com"/> <input type="button" value="Delete"/>
Contributor	<input type="text" value="Open Society Institute"/> <input type="button" value="Delete"/>
URL	<input type="text" value="http://www.soros.org/"/> <input type="button" value="Delete"/>
<input type="button" value="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.

<b>2.1 Submission Process</b>
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.
<b>Submission Materials</b>
<input type="radio"/> Abstract
<input type="radio"/> Full proposal
<input checked="" type="radio"/> Abstract and proposal together
<input type="radio"/> Abstract followed by presentation
<b>Type of Submission</b>
<input checked="" type="checkbox"/> Enable individual presentations, submitted by authors
<input checked="" type="checkbox"/> Enable multiple-presentation sessions, submitted by panel organizers
<b>Supplementary Materials</b>
<input checked="" type="checkbox"/> Supplementary files can be submitted with abstracts and presentations.
<b>Submission Notification</b>
Copies of acknowledgement email to submitter should go to the following:
<input checked="" type="checkbox"/> The conference's primary contact.
<input type="checkbox"/> This email address   <span style="background-color: #ffffcc;"> </span>

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.

**2.2 Call for Papers (CFP)**

CFP message

The conference stream for those involved in the practices and study of journal publishing will focus on the following themes and topics:

- \*Scholarly publishing in developing countries;
- \*Open access and the academy; reforming and opening the peer review process, implications for academic freedom;
- \*New journals, new models; the how and why of starting a new journal, new economic models for old journals, encouraging open data and related practices;

This information is displayed in the "call-for-papers" link on this conference's home page.

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.

**2.3 Author Guidelines**

Set out for authors bibliographic and formatting standards for submitting materials to the conference, possibly with examples. If supplementary files are permitted, suggest types (e.g., data-sets, research instruments, etc.) which authors should be encouraged to upload to enhance readers' engagement with their work.

If using HTML in Setup text boxes (for font size, bold, color, etc.), note that "returns" in the text are automatically treated as <br>.

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.

## OCS in an Hour

**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

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).	<input type="button" value="Delete"/>
2	The submission file is in Microsoft Word, RTF, or WordPerfect document file format.	<input type="button" value="Delete"/>
3	All URL addresses in the text (e.g., <a href="#">http://www.edu</a> ) are activated and ready to click.	<input type="button" value="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.	<input type="button" value="Delete"/>
5	The text adheres to the stylistic and bibliographic requirements outlined in the <a href="#">Author Guidelines</a> , which is found in About the Conference.	<input type="button" value="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.	<input type="button" value="Delete"/>
7	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 properties on save"; clicking <b>Save</b> .	<input type="button" value="Delete"/>

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:  
  
(E.g., History; Education; Sociology; Psychology; Cultural Studies; Law)

**Subject Classification**  
Title   
URL   
(E.g., Mathematics Subject Classification; Library of Congress Classification)

**Keywords**  
Provide examples of keywords or topics as a guide for authors:  
  
(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., 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

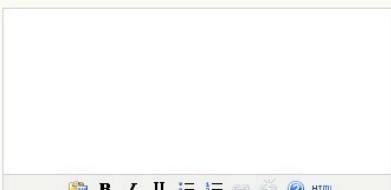
This section allows you to configure several aspects of your conference's peer review system, including additional instructions, email reminders, and the option for "one-click" review access, where reviewers do not need to login to the system to conduct their review. This option allows you to send Reviewers an

## OCS in an Hour

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**

<input checked="" type="checkbox"/> Accepted abstracts	April	18	2008
<input checked="" type="checkbox"/> Schedule	April	25	2008
<input checked="" type="checkbox"/> Accepted papers	April	18	2008
<input type="checkbox"/> Delay open access until	May	30	2008
<input checked="" type="checkbox"/> Close comments (activate Reading Tools)	April	25	2008
<input checked="" type="checkbox"/> Conference timeline (included in Conference Information)			

**Buttons:** 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	<a href="#">EDIT</a>   <a href="#">DELETE</a>   <a href="#">↑</a> <a href="#">↓</a>
1 - 1 of 1 Items		
<a href="#">CREATE TRACK</a>		
		
This work is licensed under a <a href="#">Creative Commons Attribution 3.0 License</a> .		

Figure 60: Conference Tracks

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

## OCS in an Hour

Track

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

Track title\* Editors and Publishers

Abbreviation\* ED (For example, General Papers=GEN)

Track Policy The conference track for those involved in the practices and study of journal publishing will focus on the following themes and topics:

**B** **I** **U** **HTML**

Indexing Submissions made to this conference track

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

Indicate that track is not peer-reviewed

Items can only be submitted by Directors and Track Directors.

Omit this track from Track Policies

Figure 61: Creating Tracks

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

Track Directors

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

Available Track Directors	This Track's Directors
None	None

**Assign Director >>** **<< Un-assign Director**

**Save** **Cancel**

\* Denotes required field

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
<i>No organizing team positions have been created.</i>	

[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.

## OCS in an Hour

### 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	<a href="#">EDIT</a>   <a href="#">MEMBERSHIP</a>   <a href="#">DELETE</a>   ↑ ↓

[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
This group has no members.	

[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
<a href="#">ADMIN</a>	<a href="#">ADD MEMBER</a>

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  Browse... Upload

**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. Letter to be held at Work Center for Dialogue and open to public.

**Save** **Cancel**

\* 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.

## OCS in an Hour

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 >>](#)

Items Published: 0  
 Total submissions: 0  
 Peer reviewed: 0  
 Accept (%): 0 (0%)  
 Decline (%): 0 (0%)  
 Days To Review: 0  
 Users: 0 (0 new)  
 Readers: 0 (0 new)  
 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](#)

  
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.

The screenshot shows a registration interface. At the top, there are tabs for 'REGISTRATION', 'REGISTRATION TYPES', and 'REGISTRATION POLICIES'. Below the tabs is a table with columns: USER, REGISTRATION TYPE, REGISTERED, PAID, and ACTION. A message in the table states, 'No registrations have been created.' Below the table is a 'CREATE NEW REGISTRATION' button with a '(cc) BY' icon. At the bottom, a note says, '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.

The screenshot shows a form titled 'Create New Registration Type'. It includes fields for 'Form Language' (set to English), 'Name\*' (Early Registration - Conference), 'Description' (with a note about early registration), 'Cost\*' (250), 'Currency\*' (Canadian dollar (CAD)), 'Code' (a placeholder field), 'Opens for Registration\*' (January 01 2008), 'Closes for Registration\*' (April 18 2008), 'Expiry date for access to conference's online content' (May 31 2008), 'Access\*' (Online and Physical), and 'Options' (checkboxes for validation via domain/IP, membership requirement, and public availability). At the bottom are 'Save', 'Save and Create Another', and 'Cancel' buttons, and a note that '\*' denotes required fields.

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 form titled "Registration Manager". It includes a note about entering contact information for the registration manager in English. The form fields are as follows:

Form Language	English
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

At the bottom of the form are standard rich text editor buttons for bold, italic, underline, and alignment, followed by an "HTML" button.

Figure 74: Registration Manager

## Registration Information

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

The screenshot shows a form titled "Registration Information". It contains a note about automatically placing registration types and fee structures under "Registrations" on the "About the Conference" page. Below this is a large text area labeled "Additional registration information." which is currently empty. At the bottom of the text area are rich text editor buttons and an "HTML" button. A note at the bottom states: "HTML can be used in textarea (for font size, color, etc.), with "returns" treated as <br>; 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

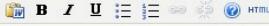
Use this section to provide "delayed open access" and/or "author self-archiving" (which increase readership and citation of content). The text for the selected policies will appear in About the Conference.

**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

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

**Author Self-Archiving Policy**

The following policy will be included in About the Conference.

  
HTML

HTML can be used in textarea (for font size, color, etc.), with "returns" treated as `<br>`; 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

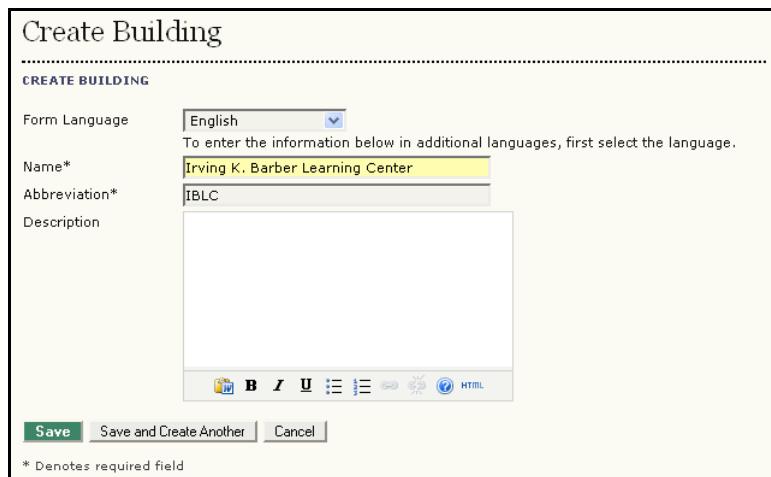
The Conference Manager can use Scheduler to make arrangements of times and locations regarding conference presentations and any other events.



The screenshot shows the 'Scheduler' interface. At the top, there's a header with the title 'Scheduler'. Below it is a descriptive text block: 'Conference Managers may schedule presentations and special events for times and locations using the Scheduler. In the pages below, the Conference Manager can define locations (buildings and rooms) and blocks of time, and assign presentations and events to each.' Underneath this, there are two main sections: 'Rooms & Events' and 'Scheduling'. 'Rooms & Events' contains links to 'Buildings & Rooms' and 'Special Events'. 'Scheduling' contains a link to 'Schedule Presentations'.

Figure 78: Scheduler

First define buildings and rooms for each building:



The screenshot shows the 'Create Building' form. It has a header 'CREATE BUILDING'. The form fields are: 'Form Language' (dropdown menu showing 'English'), 'Name\*' (text input field containing 'Irving K. Barber Learning Center'), 'Abbreviation\*' (text input field containing 'IBLC'), and 'Description' (a large text area). Below the form is a toolbar with icons for file operations (Save, Print, Copy, Paste, Find, etc.) and a 'HTML' button. At the bottom are buttons for 'Save', 'Save and Create Another', and 'Cancel'. A note at the bottom 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

---

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

Name\* July 11 2008

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 configuration page titled 'Payment Methods'. It contains a note: 'Enter the configuration details for the method of payment this conference website is able to accept.' Below this, under 'Conference Registration Payment Methods', there are two options: 'Manual Payment' (selected) and 'Paypal'. A note next to 'Paypal' says: '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 are 'Save' and 'Cancel' buttons, with 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.

**Save** **Cancel**

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

**Title**

**File**  **Browse...** **Upload**

**Accommodation Description**

Enter text describing conference accommodations in the field below.

[Rich Text Editor toolbar]

**Save** **Cancel**

\* 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.

The screenshot shows a search interface for users. At the top, there is a dropdown menu set to 'All Users', a search bar with 'First name' and 'contains' dropdowns, and a 'Search' button. Below the search bar is a horizontal navigation bar with letters A through Z and an 'All' option. Underneath this is a list of user roles: Directors, Track Directors, Reviewers, Authors, and Readers. A table then lists a single user: ADMIN, admin, alec@smecher... with an 'EDIT' link. Below the table, it says '1 - 1 of 1 Items'. At the bottom are buttons for 'Send Email' and 'Select All', along with links for 'ENROLL EXISTING USER', 'CREATE NEW USER', and 'SYNC ENROLLMENT'. A Creative Commons Attribution 3.0 license logo is at the bottom right.

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  Reviewer

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

Salutation:

First name\*:

Middle name:

Last name\*:

Gender:  M  F

Initials:  Joan Alice Smith = JAS

Enroll user as:  With no role

- Director
- Associate Director
- Reviewer
- Author
- Reader

Username\*:  Suggest

Password\*:  The password must contain only lowercase letters, numbers, and hyphens/underscores.

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 the sub-section "Synchronize User Enrollment". It contains a descriptive text about synchronization, two dropdown menus for selecting roles and conferences, and two buttons at the bottom: "Sync Enrollment" and "Cancel".

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.

Synchronize role: [dropdown menu]  
With conference: [dropdown menu]

**Sync Enrollment** **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.

The screenshot shows a table listing user accounts. The columns are USERNAME, NAME, EMAIL, and ACTION. There are three users listed: ADMIN (selected), BROWN, and JONES. The ACTION column for each user includes links for EDIT, LOG IN AS, REMOVE, and DISABLE. At the bottom left, there is a "Send Email" button and a "Select All" link.

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

1 - 3 of 3 Items

**Send Email** **Select All**

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@smecher...	<a href="#">EDIT</a>
<input type="checkbox"/> BROWN	George Brown	gbrown@maili...	<a href="#">EDIT</a>   <a href="#">LOG IN AS</a>   <a href="#">REMOVE</a>   <a href="#">DISABLE</a>
<input type="checkbox"/> JONES	Sheila Jones	sjones@maili...	<a href="#">EDIT</a>   <a href="#">LOG IN AS</a>   <a href="#">REMOVE</a>   <a href="#">DISABLE</a>

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

Name\*

[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.

## OCS in an Hour

Create New Announcement

---

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

Type: General

Scheduled Conference: PKP Scholarly Publishing Conference 2008

Title\*: keynote Speakers Confirmed

Short Description\*: Major keynote and plenary speakers have now been confirmed.

Description\*: A brief description to appear along with the announcement title.  
Major keynote and plenary speakers have now been confirmed. John Willinsky, the founder of PKP and the creator of OJS software will provide the opening keynote address.

Expiry Date: July 14 2008

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

**Save** | Save and Create Another | **Cancel**

\* 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	<a href="#">EDIT</a>   <a href="#">DISABLE</a>   <a href="#">RESET</a>
MANUAL_PAYMENT_NO...			Manual Payment Notification	<a href="#">EDIT</a>   <a href="#">RESET</a>
PASSWORD_RESET			Password Reset	<a href="#">EDIT</a>   <a href="#">RESET</a>
PASSWORD_RESET_CO...			Password Reset Confirmation	<a href="#">EDIT</a>   <a href="#">RESET</a>
PAYPAL_INVESTIGAT...			Unusual PayPal Activity	<a href="#">EDIT</a>   <a href="#">RESET</a>
REGISTRATION_NOTIFY	Reader		Registration Notification	<a href="#">EDIT</a>   <a href="#">RESET</a>
REVIEW_ACK	Track Director	Reviewer	Paper Review Acknowledgement	<a href="#">EDIT</a>   <a href="#">DISABLE</a>   <a href="#">RESET</a>

Figure 93: Prepared Emails

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

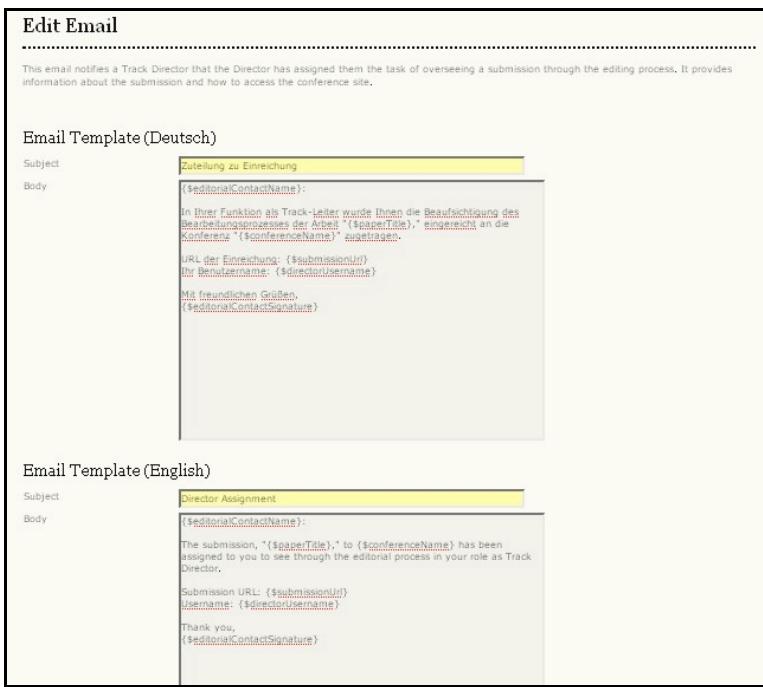


Figure 94: Editing Email Templates

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

## Reading Tools

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

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

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

The Tools are also designed to take the first two keywords from the item and feed them into the search engines of open access databases and other resources grouped under Research Studies, Author's Other Works, Press and Media, Government Websites, Instructional Resources, Discussions and Forums, and other categories, depending on the set of Tools selected. Readers are also able to access background information on each of the selected resources. In each category, whether Studies, Media, or 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.

The screenshot shows a configuration interface for 'Reading Tools'. At the top, there is a section titled 'Status' with the note 'Reading tools: Disabled' and 'Related items: Disabled'. Below this is a note: 'To enable Reading Tools, select options and choose field for related items, enter Settings.' Under 'Configuration', there are links to 'Reading Tool Settings' and 'Versions'. At the bottom, under 'Management', there is a link to 'Validate URLs for Reading Tools'.

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	<a href="#">VALIDATE</a>	<a href="#">METADATA</a>	<a href="#">CONTEXTS</a>
Art & Architecture	en_US	<a href="#">VALIDATE</a>	<a href="#">METADATA</a>	<a href="#">CONTEXTS</a>
Astrophysics	en_US	<a href="#">VALIDATE</a>	<a href="#">METADATA</a>	<a href="#">CONTEXTS</a>
Biology	en_US	<a href="#">VALIDATE</a>	<a href="#">METADATA</a>	<a href="#">CONTEXTS</a>
Business	en_US	<a href="#">VALIDATE</a>	<a href="#">METADATA</a>	<a href="#">CONTEXTS</a>
Chemistry	en_US	<a href="#">VALIDATE</a>	<a href="#">METADATA</a>	<a href="#">CONTEXTS</a>
Cognitive Science	en_US	<a href="#">VALIDATE</a>	<a href="#">METADATA</a>	<a href="#">CONTEXTS</a>
Computer Science	en_US	<a href="#">VALIDATE</a>	<a href="#">METADATA</a>	<a href="#">CONTEXTS</a>
Economics	en_US	<a href="#">VALIDATE</a>	<a href="#">METADATA</a>	<a href="#">CONTEXTS</a>
Education	en_US	<a href="#">VALIDATE</a>	<a href="#">METADATA</a>	<a href="#">CONTEXTS</a>
Environment	en_US	<a href="#">VALIDATE</a>	<a href="#">METADATA</a>	<a href="#">CONTEXTS</a>
General Science	en_US	<a href="#">VALIDATE</a>	<a href="#">METADATA</a>	<a href="#">CONTEXTS</a>
Generic	en_US	<a href="#">VALIDATE</a>	<a href="#">METADATA</a>	<a href="#">CONTEXTS</a>
Humanities	en_US	<a href="#">VALIDATE</a>	<a href="#">METADATA</a>	<a href="#">CONTEXTS</a>
Life Sciences	en_US	<a href="#">VALIDATE</a>	<a href="#">METADATA</a>	<a href="#">CONTEXTS</a>
Mathematics	en_US	<a href="#">VALIDATE</a>	<a href="#">METADATA</a>	<a href="#">CONTEXTS</a>
Music	en_US	<a href="#">VALIDATE</a>	<a href="#">METADATA</a>	<a href="#">CONTEXTS</a>
Physics	en_US	<a href="#">VALIDATE</a>	<a href="#">METADATA</a>	<a href="#">CONTEXTS</a>
Social Sciences	en_US	<a href="#">VALIDATE</a>	<a href="#">METADATA</a>	<a href="#">CONTEXTS</a>
1 - 19 of 19 Items				
<a href="#">CREATE VERSION</a>				
<a href="#">RESTORE VERSIONS TO DEFAULTS</a>				
<a href="#">Browse...</a> <a href="#">Import Version</a>				

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	<a href="#">1</a>	<a href="#">METADATA</a>	<a href="#">SEARCHES</a>
Look up terms	Look up terms	<a href="#">1</a>	<a href="#">METADATA</a>	<a href="#">SEARCHES</a>
Book searches	Book searches	<a href="#">1</a>	<a href="#">METADATA</a>	<a href="#">SEARCHES</a>
e-Journals	e-Journals	<a href="#">1</a>	<a href="#">METADATA</a>	<a href="#">SEARCHES</a>
Related theory	Related theory	<a href="#">1</a>	<a href="#">METADATA</a>	<a href="#">SEARCHES</a>
Related studies	Related studies	<a href="#">1</a>	<a href="#">METADATA</a>	<a href="#">SEARCHES</a>
Pay-per-view	Pay-per-view	<a href="#">1</a>	<a href="#">METADATA</a>	<a href="#">SEARCHES</a>
Online forums	Online forums	<a href="#">1</a>	<a href="#">METADATA</a>	<a href="#">SEARCHES</a>
Multimedia	Multimedia	<a href="#">1</a>	<a href="#">METADATA</a>	<a href="#">SEARCHES</a>
Teaching files	Instructional	<a href="#">1</a>	<a href="#">METADATA</a>	<a href="#">SEARCHES</a>
Relevant portals	Relevant portals	<a href="#">1</a>	<a href="#">METADATA</a>	<a href="#">SEARCHES</a>
Government policy	Gov Policy	<a href="#">1</a>	<a href="#">METADATA</a>	<a href="#">SEARCHES</a>
Media reports	Media reports	<a href="#">1</a>	<a href="#">METADATA</a>	<a href="#">SEARCHES</a>
Web search	Web search	<a href="#">1</a>	<a href="#">METADATA</a>	<a href="#">SEARCHES</a>
1 - 14 of 14 Items				
<a href="#">CREATE CONTEXT</a>				

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	<a href="http://scholar.google.com">http://scholar.google.com</a>	<a href="#">Edit</a>	<a href="#">Delete</a>	
OAIster (Open Archives Initiative research databases)	<a href="http://www.oaister.org/">http://www.oaister.org/</a>	<a href="#">Edit</a>	<a href="#">Delete</a>	
SearchERIC	<a href="http://www.eric.ed.gov/">http://www.eric.ed.gov/</a>	<a href="#">Edit</a>	<a href="#">Delete</a>	
ERIC - Education Resources Information Center	<a href="http://eric.ed.gov/">http://eric.ed.gov/</a>	<a href="#">Edit</a>	<a href="#">Delete</a>	
Public Knowledge Project Open Archives Harvester	<a href="http://pkp.sfu.ca/harvester/">http://pkp.sfu.ca/harvester/</a>	<a href="#">Edit</a>	<a href="#">Delete</a>	
Education-Line: Electronic Texts in Education and Training	<a href="http://www.leeds.ac.uk/educol/">http://www.leeds.ac.uk/educol/</a>	<a href="#">Edit</a>	<a href="#">Delete</a>	

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	—	<a href="#">DELETE</a>
tracks	—	2008-04-05 03:03 PM	—	<a href="#">DELETE</a>
<a href="#">Browse...</a> <a href="#">Upload File</a> <a href="#">Create Directory</a>				
<small>Note: The Files Browser is an advanced feature that allows the files and directories associated with a conference to be viewed and manipulated directly.</small>				

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 a configuration page titled 'Languages'. It includes a note about OCS supporting multiple languages and a dropdown menu for the primary locale set to 'English'. A list of supported locales is provided with checkboxes, all of which are checked: Deutsch, English, Español Castellano, Français (France), Italiano, and Português (Brasil). A note below the list says: '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 are 'Save' and 'Cancel' buttons, and a note that an asterisk denotes required fields.

Figure 101: Languages

# Event Log

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

Event Log						
SCHEDULED CONFERENCE	DATE	LEVEL	TYPE	USER	EVENT	ACTION
PKP Scholarly Publishing Conference 2008	04-25	N	CON	Lei Zhang	<b>Conference configuration changed</b> The close comments setting was changed from...	<a href="#">VIEW</a>   <a href="#">DELETE</a>
PKP Scholarly Publishing Conference 2008	04-25	N	CON	Lei Zhang	<b>Conference configuration changed</b> The comments close date changed from 1969-12-31 to...	<a href="#">VIEW</a>   <a href="#">DELETE</a>
PKP Scholarly Publishing Conference 2008	04-25	N	CON	Lei Zhang	<b>Conference configuration changed</b> The open access date changed from 1969-12-31 to 2008-05-30.	<a href="#">VIEW</a>   <a href="#">DELETE</a>
PKP Scholarly Publishing Conference 2008	04-25	N	CON	Lei Zhang	<b>Conference configuration changed</b> The "post papers" setting was changed from...	<a href="#">VIEW</a>   <a href="#">DELETE</a>

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>.

## OCS in an Hour

### 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:



The screenshot shows a user menu for the "PKP Scholarly Publishing Conference 2008". The menu items are listed as follows:

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

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	<a href="#">EDIT</a>   <a href="#">DELETE</a>
Michelle Tao	Conference Only	2008-04-29		<a href="#">EDIT</a>   <a href="#">DELETE</a>
1 - 2 of 2 Items				
<a href="#">CREATE NEW REGISTRATION</a>				
Vancouver July 2008 <small>(cc) BY</small> <small>This work is licensed under a <a href="#">Creative Commons Attribution 3.0 License</a>.</small>				

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:

## OCS in an Hour

Edit Registration

User*	Kevin Stranack <a href="#">SELECT</a>
Registration type*	<input type="text" value="Conference + Technical Workshop -- 350.00 CAD"/> <input type="button" value="▼"/>
	<input type="checkbox"/> Send the user an email with their username and registration details.
Membership	<input type="text"/> <input type="button" value="▼"/> Enter membership information if the registration type requires that registrants belong to an association or organization.
Domain	<input type="text"/> <input type="button" value="▼"/> 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	<input type="text"/> <input type="button" value="▼"/> 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	<input type="text"/> <input type="button" value="▼"/> Please use this space to include any special requests or requirements for this registration (e.g. dietary restrictions, or disabilities.)
Payment Received	<input checked="" type="checkbox"/> <input type="text" value="April"/> <input type="button" value="▼"/> <input type="text" value="29"/> <input type="button" value="▼"/> <input type="text" value="2008"/> <input type="button" value="▼"/> Please check when payment is received for this user, and record the date.
<input type="button" value="Save"/> <input type="button" value="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.

The screenshot shows a user interface for logging in. At the top, it says "User Home". Below that, it lists a "PKP Scholarly Publishing Conference" with three options: "Conference Manager", "PKP Scholarly Publishing Conference 2008", and "Director".

Figure 107: Logging in as Director

This will take you to your Director Homepage.

The screenshot shows the "Director Home" page. It has a header "Director Home" and a section titled "Submissions" with four categories: "Unassigned (1)", "In Review (0)", "Presentations", and "Archives".

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

The screenshot shows a search interface with a dropdown menu set to 'Title' and a search term 'contains'. Below the search bar is a table with one row. The columns are labeled 'ID', 'MM-DD', 'SUBMIT', 'TRACK', 'AUTHORS', and 'TITLE'. The data row shows ID 40, MM-DD 04-26, SUBMIT GEN, AUTHORS White, and TITLE USING OCS TO INCREASE SCHOLARLY IMPACT. Below the table, it says '1 - 1 of 1 Items' and '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.

The screenshot shows a summary page for submission #40. It includes tabs for 'SUMMARY', 'REVIEW', and 'HISTORY'. The 'SUMMARY' tab is active. The page displays the following details:

Submission	
Authors	Lucy White <a href="#">[edit]</a>
Title	Using OCS to increase scholarly impact
Submission Type	Single Presentation
Original file	<a href="#">40-58-1-SM.DOC</a> 2008-04-26
Supp. files	<a href="#">40-59-1-SP.DOC</a> 2008-04-26 <a href="#">EDIT</a> <a href="#">ADD A SUPPLEMENTARY FILE</a>
Submitter	Lucy White <a href="#">[edit]</a>
Date submitted	2008-04-26
Track	General Papers <a href="#">Change to</a> General Papers <a href="#">Record</a>

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.

The screenshot shows a table titled 'Directors' with two columns: 'REQUEST' and 'ACTION'. A note at the top says 'None assigned'. Below the table are three links: 'ADD TRACK DIRECTOR', 'ADD DIRECTOR', and '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	<input type="text"/>	Search	
<a href="#">A</a> <a href="#">B</a> <a href="#">C</a> <a href="#">D</a> <a href="#">E</a> <a href="#">F</a> <a href="#">G</a> <a href="#">H</a> <a href="#">I</a> <a href="#">J</a> <a href="#">K</a> <a href="#">L</a> <a href="#">M</a> <a href="#">N</a> <a href="#">O</a> <a href="#">P</a> <a href="#">Q</a> <a href="#">R</a> <a href="#">S</a> <a href="#">T</a> <a href="#">U</a> <a href="#">V</a> <a href="#">W</a> <a href="#">X</a> <a href="#">Y</a> <a href="#">Z</a> <a href="#">All</a>				
NAME	CONFERENCE TRACKS	COMPLETED	ACTIVE	ACTION
ANDY HUNTER	—	0	0	<a href="#">ASSIGN</a>

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: Andy Hunter <M8R-ymyk66@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] Director Assignment

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

[Send](#) [Cancel](#) [Skip Email](#)

Figure 113: Send Mail

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

**Directors**

---

REQUEST	ACTION
Track Director Andy Hunter 	<a href="#">DELETE</a>
<a href="#">ADD TRACK DIRECTOR</a>   <a href="#">ADD DIRECTOR</a>   <a href="#">ADD SELF</a>	

Figure 114: Assigned Track Editor

## OCS in an Hour

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	<a href="#">ARCHIVE SUBMISSION</a>
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

CC

BCC

[Add Recipient](#) [Add CC](#) [Add BCC](#)

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

Attachments

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 <a href="#">EDIT METADATA</a>	
<b>Authors</b>	
Name	Sharon Lee 
URL	
Affiliation	University of British Columbia
Country	Canada
Bio statement	Assistant Professor Faculty of Education
Principal contact for editorial correspondence.	
<b>Title and Abstract</b>	
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.
<b>Indexing</b>	
Academic discipline and sub-disciplines	Publishing
Subject classification	Scholarly electronic publishing
Keywords	Scholarly Communication; Open Access
Language	en
<b>Supporting Agencies</b>	
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

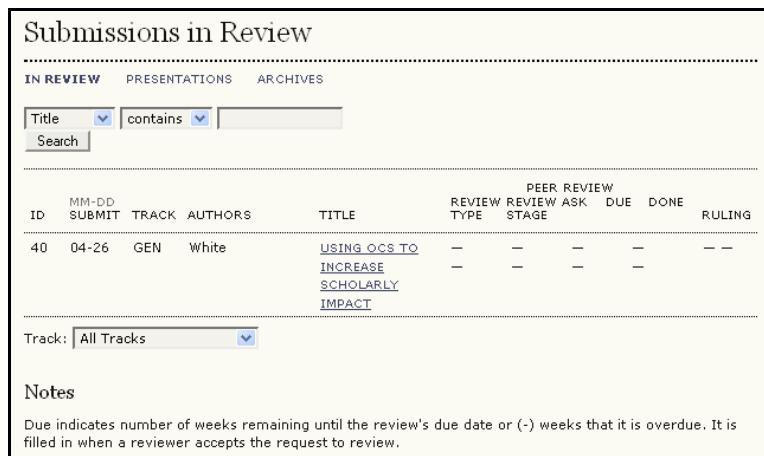
The Track Director's responsibility is to guide the submissions in their track through the peer review process. To begin, login as a Track Director.



The screenshot shows a login form for the PKP Scholarly Publishing Conference. The title "PKP Scholarly Publishing Conference" is at the top. Below it is a link "PKP Scholarly Publishing Conference 2008" followed by a "» Track Director" link. The "Track Director" link is underlined, indicating it is the target for Figure 118.

Figure 118: Logging in as Track Director

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



The screenshot shows the "Submissions in Review" page. At the top, there are tabs for "IN REVIEW", "PRESENTATIONS", and "ARCHIVES". Below the tabs is a search bar with dropdown menus for "Title" and "contains", and a "Search" button. The main table lists submissions with columns: ID, MM-DD SUBMIT, TRACK, AUTHORS, TITLE, and PEER REVIEW (TYPE, REVIEW, REVIEW ASK, DUE, DONE, RULING). One submission is listed:

ID	MM-DD SUBMIT	TRACK	AUTHORS	TITLE	PEER REVIEW TYPE	REVIEW	REVIEW ASK	DUE	DONE	RULING
40	04-26	GEN	White	<a href="#">USING OCS TO INCREASE SCHOLARLY IMPACT</a>	-	-	-	-	-	--

Below the table, a "Track:" dropdown menu is set to "All Tracks". A "Notes" section contains a note about the "Due" column. The note states: "Due indicates number of weeks remaining until the review's due date or (-) weeks that it is overdue. It is filled in when a reviewer accepts the request to review."

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

Supp. files 40-59-1-SP.DOC 2008-04-26 Present file to reviewers

---

Paper Review

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	REVIEWS INTERESTS	RATING	DONE	WEEKS	LATEST	ACTIVE	ACTION
IRVIN BLACK	N/A	0	—	—	0	0	<a href="#">ASSIGN</a>

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	<a href="#">CLEAR REVIEWER</a>	
REQUEST	UNDERWAY	DUE	ACKNOWLEDGE
		2008-05-24	

Figure 122: Requesting the Review

Sending the message will set the review to being underway.

## OCS in an Hour

The screenshot shows a 'Send Email' dialog box. The 'To' field contains 'Irvin Black <M8R-gdybue@mailinator.com>'. The 'Subject' field contains '[p] Paper Review Request'. The 'Body' field contains a message to Irvin Black requesting him to review a proposal. The message includes instructions to log into the conference website by 2008-05-03, a link to the website (<http://pkp.sfu.ca/ocs2/cvs2/index.php/lz/pkpspc2008>), and a note that the review is due 2008-05-24. At the bottom of the dialog are 'Send', 'Cancel', and 'Skip Email' buttons.

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
2008-04-26	2008-04-26
REVIEW	DUE 2008-05-24
Recommendation	Accept Submission 2008-04-26
Review	2008-04-26
Uploaded files	None
Rate Reviewer	Rating: 5 High  Record

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.

The screenshot shows the 'Director Decision' interface. At the top, there is a dropdown menu labeled 'Select decision' with 'Choose One' selected. To its right is a button labeled 'Record Decision'. Below this, there is a list of fields: 'Decision' (set to 'Accept Submission'), 'Notify Author' (with a link to a 'Director/Author Email Record'), 'Review Version' (link to '40-60-1-RV.DOC'), 'Author Version' (None), 'Director Version' (None), and an 'Upload Director Version' input field with 'Browse...' and 'Upload' buttons. The 'Accept Submission' option is highlighted in blue.

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.

The screenshot shows the 'Director Decision' interface. The 'Select decision' dropdown is set to 'Accept Submission'. Below it, the 'Decision' field shows 'Accept Submission 2008-04-26'. The 'Notify Author' field contains a link to a 'Director/Author Email Record'. The 'Review Version' field shows a link to '40-60-1-RV.DOC'. The 'Author Version' and 'Director Version' fields are both set to 'None'. The 'Upload Director Version' input field has 'Browse...' and 'Upload' buttons. At the bottom, there are two buttons: 'Move to Layout' and 'Send'. A checked checkbox below them says '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.

The screenshot shows the 'Layout' interface. It starts with a brief description: 'This optional step can be used to lay out submissions or change file formats either before or after submissions are sent to Presentations.' Below this, there is a table with one row. The table has columns for 'Galley Format', 'FILE', 'ORDER', 'ACTION', and 'VIEWS'. The row shows '1. Untitled ()' with 'VIEW PROOF' and '40-62-1-PB.DOC' under 'FILE', '1 1' under 'ORDER', and 'EDIT | DELETE 0' under 'ACTION'. There is also a 'VIEWS' column with a value of '0'. At the bottom, there is an 'Upload file to' section with radio buttons for 'Galley' and 'Supp. files', and 'Browse...' and 'Upload' buttons.

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*	PDF
The galley label is used to identify the item's file format (e.g. HTML, PDF, etc.).	
Language*	English
File name	<a href="#">40-63-1-PB.PDF</a>
Original file name	TestDocument.pdf
File type	application/pdf
File size	11KB
Date uploaded	2008-04-26
Replace File	<input type="button" value="Browse..."/> 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:	<a href="#">40-61-1-LE.DOC</a> 2008-04-26			
Galley Format	FILE	ORDER	ACTION	VIEWS
1. PDF	<a href="#">VIEW PROOF</a>	40-63-1-PB.PDF	2008-04-26	↑ ↓ <a href="#">EDIT</a>   <a href="#">DELETE</a> 0
Supplementary Files	FILE	ORDER	ACTION	
1. Supplement	<a href="#">40-59-1-SP.DOC</a>	2008-04-26	↑ ↓ <a href="#">EDIT</a>   <a href="#">DELETE</a>	

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 type="button" value="▼"/>
		<input checked="" type="checkbox"/>	Date	July	<input type="button" value="▼"/>
				2008	<input type="button" value="▼"/>
			Start Time	10	<input type="button" value="▼"/>
				00	<input type="button" value="▼"/>
				AM	<input type="button" value="▼"/>
			End Time	11	<input type="button" value="▼"/>
				00	<input type="button" value="▼"/>
				AM	<input type="button" value="▼"/>
Sort By... <a href="#">Start Time</a>   <a href="#">Author</a>   <a href="#">Location</a>   <a href="#">Title</a>					
<input type="button" value="Save"/> <input type="button" value="Cancel"/>					
<small>* Denotes required field</small>					

Figure 131: Scheduling Presentation

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

Presentations and Authors	
<input type="button" value="Title"/> <input type="button" value="contains"/> <input type="text"/> <input type="button" value="Search"/>	<a href="#">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</a>
Track: <input type="button" value="All Tracks"/>	
<b>General Papers</b> Using OCS to increase scholarly impact <i>Lucy White</i>	
<a href="#">ABSTRACT PDF</a>	

Figure 132: Presentations and Authors

The presentation can also be viewed under Conference Schedule.

<a href="#">» Conference Locations</a> <a href="#">» Conference Schedule</a>
<b>Conference Locations</b> <ul style="list-style-type: none"> <li>Irving K. Barber Learning Center</li> </ul>
<b>Conference Schedule</b>
<b>2008-07-11</b>
<b>10:00 AM</b> <ul style="list-style-type: none"> <li><a href="#">USING OCS TO INCREASE SCHOLARLY IMPACT</a>            Building: Irving K. Barber Learning Center            Room: Room 491</li> </ul>
<b>09:00 AM</b> <ul style="list-style-type: none"> <li><a href="#">Opening Reception</a></li> </ul>

Figure 133: Conference Schedule

# Reviewers

---

## Reviewing a Submission

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

The screenshot shows a login form for the PKP Scholarly Publishing Conference. The top bar says "PKP Scholarly Publishing Conference". Below it is a link "PKP Scholarly Publishing Conference 2008" and a "Reviewer" link.

Figure 134: Logging in as Reviewer

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

The screenshot shows the "Active Submissions" section of the Reviewer Homepage. It has tabs for "ACTIVE" and "ARCHIVE". A table lists one submission: ID 40, Assigned 04-26, Track GEN, Title "USING OCS TO INCREASE SCHOLARLY IMPACT", Due 05-24, and Review Type. Below the table is the text "1 - 1 of 1 Items".

Figure 135: Selecting the Submission

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

The screenshot shows the "Submission To Be Reviewed" section of the Submission Summary page. It includes fields for Title (Using OCS to increase scholarly impact), Submission Type (Single Presentation), Conference Track (General Papers), Abstract (a brief description of the presentation), Submission Director (Andy Hunter), and a "VIEW METADATA" link.

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 <input checked="" type="checkbox"/> Unable to do the review <input type="checkbox"/>
2.	Review the submission. Submission Manuscript <a href="#">40-60-1-RV.DOC</a> 2008-04-26 Supplementary File(s) <a href="#">40-59-1-SP.DOC</a>
3.	Click on icon to enter (or paste) your review of this submission. Review <input type="button" value=""/>
4.	In addition, you can upload files for the director and/or author to consult. Uploaded files None <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="button" 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-ymyk66@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.

The screenshot shows a 'Review' interface. At the top, it says 'No Reviews'. Below that, there are two sections: 'For author and director' and 'For director', each with a large text input field. At the bottom left are 'Save' and 'Close' buttons, and at the bottom center is a note: '\* Denotes required field'.

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.

The screenshot shows a 'Select Recommendation' interface. It includes a note: '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.' Below this is a 'Recommendation' dropdown menu with options: 'Accept Submission' (selected), 'Choose One', 'Revisions Required', 'Submit Elsewhere', 'Decline Submission', and 'See Comments'. To the right is a 'Submit Review To Director' button. At the bottom left is a Creative Commons BY license notice: 'This work is licensed under a [Creative Commons BY License](#)'.

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.

Conference Information

- » [Overview](#)
- » [Call for Papers \(January 1, 2008 - May 30, 2008\)](#)
- » [Proposal Submission](#)
- » [Track Policies](#)
- » [Program](#)
- » [Presentations and Authors](#)
- » [Conference Schedule](#)
- » [Accommodation](#)
- » [Organizers and Partners](#)
- » [Timeline](#)

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.

Log In

---

Username

Password

Remember my username and password

» [Not a user? Create an account with this site](#)

» [Forgot your password?](#)

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	<input type="text" value="English"/>	To enter the information below in additional languages, first select the language.
Username*	<input type="text"/>	
Password*	<input type="password"/>	
Repeat password*	<input type="password"/>	
Salutation	<input type="text"/>	
First name*	<input type="text"/>	
Middle name	<input type="text"/>	
Last name*	<input type="text"/>	
Initials	<input type="text" value="Joan Alice Smith = JAS"/>	
Gender	<input type="radio"/> M	<input type="radio"/> F
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"/>	

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”.

## OCS in an Hour

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\*

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*	Lucy
Middle name	
Last name*	White
Affiliation	University of British Columbia
Country	Canada
Email*	M8R-aa0rb4@mailinator.com
URL	
Bio statement (E.g., department and rank)	Graduate Student Faculty of Education

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).

The screenshot shows a 'Submission Type' section with a dropdown menu. The menu has three options: 'Single Presentation' (which is highlighted in blue), 'Panel Presentation', and 'Panel Presentation'. The background of the dropdown menu is white, and the text is black.

Figure 152: Submission Type

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

The screenshot shows a 'Title and Abstract' section. It includes a 'Title\*' field containing 'Using OCS to increase scholarly impact' and an 'Abstract\*' field containing '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 toolbar with icons for bold, italic, underline, and other document operations.

Figure 153: Title and Abstract

Next, the author would add their preferred indexing terms.

The screenshot shows an 'Indexing' section. It includes fields for 'Academic discipline and sub-disciplines' (set to 'Publishing'), 'Subject classification' (set to 'Scholarly Electronic Publishing'), 'Keywords' (set to 'Scholarly Communication; Open Access'), and 'Language' (set to 'en'). Below the language field is a note: 'English=en; French=fr; Spanish=es. [Additional codes](#)'.

Figure 154: Indexing

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

**Supporting Agencies**

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

Agencies	Simon Fraser University Library
----------	---------------------------------

Figure 155: Supporting Agencies

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

## Step 3: Uploading the Submission

**Step 3. Uploading the Submission**

.....

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

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

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

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

**Submission File**

No submission file uploaded.

Upload submission file

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.

## OCS in an Hour

**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

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	MM-DD	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.

Director Decision	
Decision	Rewritten 2008-04-08
Notify Director	<input type="button"/> Director/Author Email Record <input type="button"/> 2008-04-08
Director Version	<a href="#">6-6-1-DR.DOC</a> 2008-04-08 <a href="#">6-6-2-DR.DOC</a> 2008-04-08
Author Version	None
Upload Author Version	<input type="text" value="C:\Documents and Settings\..."/> <input type="button"/> Browse... <input type="button"/> Upload

Figure 162: Upload Author Version

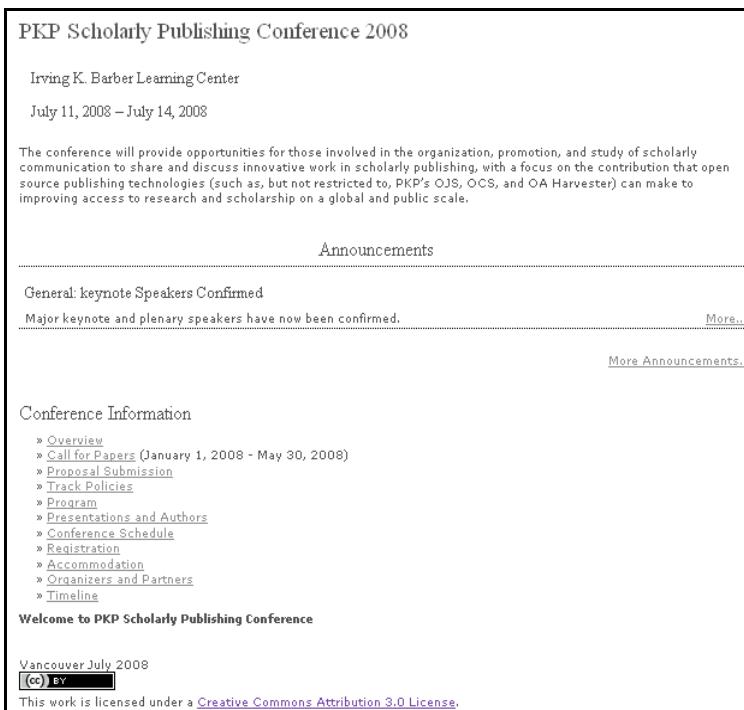
If the conference is set up to only collect abstracts or if you submitted the paper or presentation file during the initial submission process, that will be the end of your tasks. However, if the conference is set up to first collect your abstract and requires you to later submit your paper or presentation 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.



The screenshot shows the homepage of the PKP Scholarly Publishing Conference 2008. At the top, it displays the conference name, location (Irving K. Barber Learning Center), and dates (July 11, 2008 – July 14, 2008). Below this is a brief description of the conference's purpose: "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." A "Announcements" section follows, featuring a link to "General keynote Speakers Confirmed" (with a "More..." link) and a "More Announcements.." link. The "Conference Information" section lists various conference components: Overview, Call for Papers (January 1, 2008 - May 30, 2008), Proposal Submission, Track Policies, Program, Presentations and Authors, Conference Schedule, Registration, Accommodation, Organizers and Partners, and Timeline. At the bottom, there is a "Welcome to PKP Scholarly Publishing Conference" message, a "Vancouver July 2008" note, a Creative Commons Attribution 3.0 license logo, and a statement that the work is licensed under a Creative Commons Attribution 3.0 License.

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

Password\*  The password must be at least 6 characters.

Repeat password\*

First name\*

Middle name

Last name\*

Initials  Joan Alice Smith = JAS

Affiliation

Signature

Email\*

URL

Phone

Fax

Mailing Address

Country  ▾

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

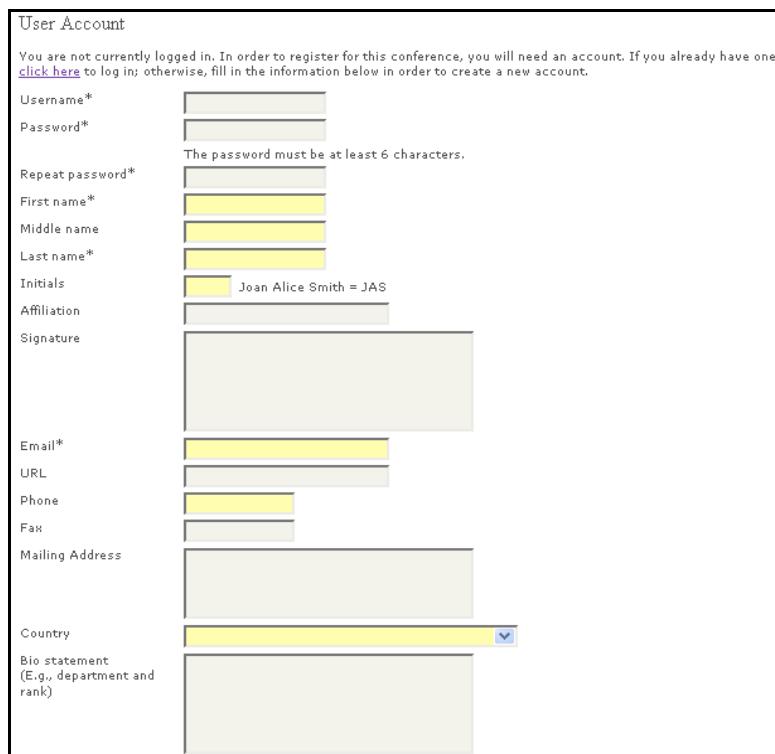


Figure 165: User Account Information

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	<a href="mailto:stranack@sfu.ca">stranack@sfu.ca</a>
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](#).

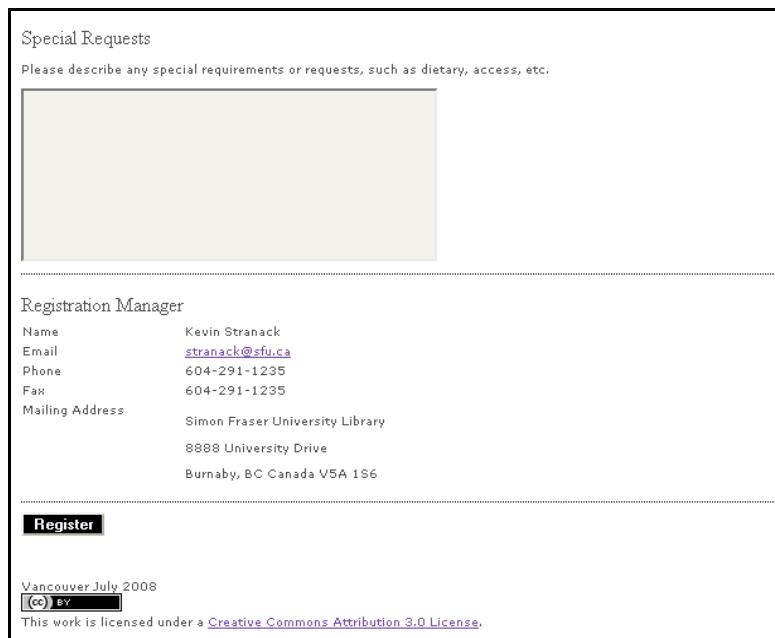


Figure 166: Special Requests

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:

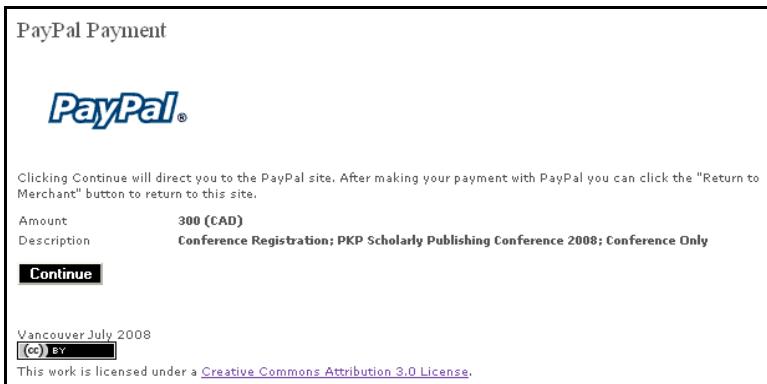


Figure 167: Paypal Payment

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](mailto:pkp-support@sfu.ca)