AN *INFORMAL* GUIDE
TO RUNNING A
SMALL CONFERENCE
IN

CMT

Conference Management Toolkit

Microsoft Research

Welcome!

Sponsored by Microsoft Research, the Conference Management Tool (CMT) is a scalable, web-based service for managing the workflow of an academic conference.

It centrally organizes abstract and paper submissions, reviews, decision making, camera-ready submissions and other aspects of conference management.

This guide will describe the key phases and actions in managing a small conference or workshop, starting from requesting a conference site, through paper submissions, peer reviews, decisions and notifications.

Let's get started!

A Small Conference

What is a small conference?

A small conference has up to a couple of hundred papers and does not take much effort to manage. The characteristics of a small conference are:

- Quick to set up
- Easy to manage
- A single track
- Small number of submissions

- A small number of Reviewers
- Easy-to-define conflicts
- Less email communication
- Straight-forward decision-making

CMT has an extensive list of features for managing very sophisticated workflows, yet only a subset of them are needed for managing small conference.

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A Small Conference (continued)

That said, a small conference can use any additional features on demand. Once a conference site is created, all of the features in CMT are at the Chair's disposal.

These instructions will get you started with the basics. Once you get your conference up and running, you may find that you would like to use some more of the features of CMT. Go right ahead – we encourage it.

If you would like to see a complete list of key features, click here.

Creating a Conference

You have made the right decision to have CMT be your conference management tool!

Let's get started!

Create an Account: First, you will need to create your user account in CMT, if you do not already have one. Click here for the instructions from the Help Center on creating a user account in CMT.

Fill Out Request Form: You will need to fill out a 'New Site Request' form in order to get a CMT site where your conference will be hosted.   You will need to have a few things ready to enter in the form:

- ✓ A conference website
- ✓ The dates of the conference
- ✓ Submission deadline date
- ✓ Valid emails for Co-Chairs (explained here)
- ✓ A valid short name of the conference (explained here)

Creating a Conference (continued)

Once you submit the request for your conference, it can take up to 72 hours for the conference site to be created.

Click here for the instructions from the Help Center on how to request a conference in CMT.

Congratulations! Your CMT conference has been created. CMT has sent you an email with the URL for your conference, which you can use for your call for papers in your conference website. Included in the email are links for instructional documents to peruse.

Now, let's set up the site for your needs.

Setting Up the Conference

This is a list of tasks that you will be performing to set up your conference. They are explained in their respective sections.

Inviting Reviewers: This explains how to invite people to be Reviewers. They have the option to accept or decline.

Conflicts of Interest: This explains different type of conflicts supported by CMT and how to enable them.

Creating Review Questions: This explains the different types of Review questions and how to add them. This step is very important for you to do, as there are no default questions.

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Inviting Reviewers

You have acquired a list of potential Reviewers and want to invite them to your conference.

Inviting a Reviewer will send out an invitation via email. They will have the option to accept or decline the invitation by clicking a link in their email. The link will stay active for 7 days, after which time it will expire.

They will become a reviewer **only if they accept the invitation.**

You have the option to invite them individually or in bulk. You can also send out reminder emails to those potential reviewers that have not responded yet.

Click here for the instructions on how to invite reviewers to your conference.

Conflicts of Interest

CMT provides two mechanisms of conflict detection between reviewers and authors in a conference: Individual-based conflict management and Domain-based conflict management.

When used together, conflicts inferred from conflicts domains and conflicts specified by authors and/or PC members will both be considered during paper assignment process.

Since managing conflicts of interest is one of the most important tasks for a conference Chair, we recommend familiarizing yourself with the 'CHAIR HOW-TO: Manage Conflicts' guide, here.

Creating Review Questions

A good reviewer will have a lot to say about a paper. Just saying, "I think this paper should be accepted," is not a good review. The reviewer should tell you why the paper should be accepted and give evidence to back that claim. Structuring your review questions with this in mind, will help.

You can create the review questions in many forms. For example, they can be multiple choice with and/or without a weighted value to each answer, an agreement, a text box, etc. Combining these forms will help you, the Chair, make a more informed decision on the submission.

Click here for more on creating reviewer questions in CMT.

Now you are ready to start managing your conference.

Managing the Conference

There are five phases of your conference you will need to manage.

Allowing Authors to Submit: This explains how to turn on the functionality to allow authors to submit papers.

Assigning Reviewers: This explains the different ways to administer Reviewer assignments.

Allowing Reviewers to Submit Reviews: This explains how to turn on the functionality to allow Reviewers to submit their reviews.

Decision on the Papers: This explains the different ways to change the paper status once your decision has been made.

Notifying Authors: The explains the different ways the Chair can notify authors of the decision on their papers.

Let's start the first phase and have those submissions roll in!

Allowing Authors to Submit Papers

To allow authors to submit new papers to the conference, Chairs need to enable the activity with proper end dates. Remember, it is not enough to change the 'Submission Status' to 'Enable.' You must ensure the deadline date is in the future and it matches your conference phase timeline or authors will not be able to submit their papers.

Papers can be in the form of an abstract or file, or both. CMT can be configured to accept Word documents, PDF documents, videos, PowerPoint documents, etc.

To learn how to allow authors to submit papers and configure the submission features, click here.

Remember, at the end of the submission phase, you need to change the 'Submission Status' to 'Completed.'

Assigning Reviewers

Once the Submission phase has been completed, you now have the task to assign those papers to your reviewers.

If your conference is small enough, you can assign them manually. Here is how.

If you want to use our handy Automatic Assignment Wizard instead, that is ok, too.

Just to let you know, in either case, you will have to email the Reviewers their assignments. Here is how.

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Allowing Reviewers to Submit Reviews

Much like you did at the start of the Submission phase, Chairs need to enable the Review Submission activity with proper end dates.

Remember, it is not enough to change the 'Review Submission Status' to 'Enable.' You must ensure the deadline date is in the future and matches your conference phase timeline or reviewers will not be able to submit their answers.

Reviewers have the option to answer the review questions in CMT itself or they can answer them off-line and upload them to CMT later. There is nothing you need to do to as the Chair to configure this, it is a feature that is ready-to-use and solely up to the reviewers if they want to use it. Here is how.

Remember, at the end of the Review Submission phase, you need to change the 'Review Submission Status' to 'Completed.'

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Decision on Submissions

We are now at the completion of the Review phase.

Based on the Reviewers' (and/or optional Meta-Reviewers') answers, you can now decide if a paper will be accepted or rejected.

Once you have your list of accepted papers, you will need to set the status of the papers in the Chair Console, accordingly.

To learn how to set the paper status, click here.

Notifying Authors

After you set all the paper statuses, you need to notify the authors. You can do that one of two ways.

You can email the authors manually. This will require you to sort the 'Status' column in the Chair Console for each set of emails sent. For example, filter the Status column for 'Reject,' then send out your emails for that status. When done, re-filter the 'Status' column for 'Accept' and then send out those emails.

Click here to see how to manually email authors.

The other way to notify authors is with the 'Author Notification Wizard.' This will send out all your emails at once, but you must configure email templates for each status.

This will show you show you how to use the Author Notification Wizard.

Conference Completed

Congratulations! You have successfully completed your conference hosted by CMT.

CMT is sophisticated enough to host the largest conferences in the world, some with more than twelve thousand papers.

As your conference grows, or you have more responsibility managing a larger conference, you can start using the more advanced features of CMT.

To learn more about managing larger conferences, click here for access to ***An Informal Guide to Running a Large Conference***.