



**DIGITALPAPERS**

Conference Management

**GUIDE FOR THE  
DIGITALPAPERS  
CONFERENCE MANAGEMENT SYSTEM  
USERS**

**CONFERENCE ADMINISTRATORS**

## **Disclaimer**

The DIGITALPAPERS Conference Management System (CMS) is a widely customizable and constantly evolving system. As such, the descriptions found on this guide might be slightly different from the ones on your system.

Please contact us if you need further help.

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## INTRODUCTION

The DIGITALPAPERS Conference Management System (CMS) allows the interaction between conference participants (Attendants, Authors, Reviewers) and the conference organizers. Authors can use this system to submit their abstracts or papers and view Reviewers' comments on their works, Reviewers can review submitted works, conference Attendees can register for the conference, and all users can send direct e-mails to conference organizers.

In order to perform any of these operations, users need to have a valid account to interact with the system. **The user account of the Main Conference Administrator is created upon system set.** Other users' accounts must be created by the users themselves or by System Administrators, as explained in this guide.

Creating an account should be an easy and simple process. Once an account has been created the user will be granted access to his personal area and to the interface that enables his interaction with the conference. It also keeps a log of all his actions within the system. This log can be used at any time for reference.

This brief guide explains Conference Administrators how to perform the main administration functions in the system. It is highly recommend that Conference Administrators read the "**System Overview and Basic Functions**" Guide to fully understand the system before reading this guide.

Conference Administrators are able to perform all the functions described in this guide. Some of the function may also be performed by Topic or Session Administrators. Please refer to the "**System Overview and Basic Functions**" Guide to understand which kind of Administrator roles are able to perform the functions described in this guide.

## 1. SETTING UP AND CONFIGURING THE SYSTEM

Conference Managers are responsible for setting up and configuring the CMS, namely for inserting the conference information in the system, opening and closing conference stages (abstract submission, abstract review, etc.) and defining registration periods. To do this, follow the steps below.

1) Log in to the CMS using your “Administrator” account and go to “Management” > “Options”; you will be taken to the Options page, with several tabs: General Options, Stages Options, Registration Options, Schedule Options and Revision Options

2) Click each tab to edit the corresponding information (see below)

3) After you’re finished editing a tab, press “Submit”

The options on each tab are the following:

The “General Options” tab has the following fields:

**Organization** – name of the organization hosting the conference;

**Organization e-mail** – valid e-mail address of the organization hosting the conference;

**Send from name** – name to appear as sender on all e-mails sent by the system;

**Maximum abstract words** – maximum number of words for abstracts (use 0 for no word limit);

**Banner** – image to be used as banner in the CMS.

The “Stages” tab shows a matrix with user roles (columns) and conference stages (rows). (Please see the “**System Overview and Basic Functions**” Guide for more information on user roles and stages). Checking a checkbox will grant users with a given user role the change access to their documents on a particular stage, and enable them to perform the set of functions associated to their user role on that stage. For instance checking the checkbox on the intersection Paper Submission / Author will allow authors to submit and update their papers, while checking Reviewer / Paper Review will allow reviewers to perform paper reviews.

The “Registration” tab is used to configure registration options, and is not available on STANDARD or FREE editions. For further information, please contact DIGITALPAPERS Support.

The “Schedule Options” tab is used to define the starting and finishing days of the event for programme scheduler; the “Programme published” options makes the programme available to all attendees.

## 2. CREATING A NEW USER ACCOUNT

Please proceed according to the steps below if you need to create a new user account:

- 1) Log in to the CMS using your account and go to “Management” > “Users”
- 2) Click on “Create” on the right side of the screen. A form for entering the user information will appear
- 3) Enter all the information regarding the new user. The fields e-mail, password/repeat password, first name, last name, institution and roles are mandatory
- 4) After you’re done press “Submit”. The user account will be created and a confirmation e-mail will be sent to the new user’s e-mail address

### 3. RESETTING USER PASSWORDS

- 1) Log in to the CMS using your account and go to “Management” > “Users
- 2) On the list of users select the user for which you want to set a new password
- 3) Click “Edit” on the right side of the screen. A form with all the information about that user will appear on the screen
- 3) Type the new password on the “Password” and “Repeat password” fields
- 4) Press “Submit”. The new password will be set for that user, and a confirmation e-mail will be sent to the user’s e-mail address

## 4. MANAGING USER ROLES

If you need to assign, remove, enable or disable a user role from an existing user account please proceed as explained below. To understand user roles please refer to the “**System Overview and Basic Functions**” Guide.

- 1) Log in to the CMS using your account and go to “Management” > “Users”
- 2) On the list of users select the user for which you want add, remove or disable/enable a user role
- 3) Click “Edit” on the right side of the screen. A form with all the information about that user will appear
- 4) To add a role to the user press the “Add User Role” button on the “Account Information” tab; select the new role from the list, press “Submit” and then “Confirm”. A new tab, corresponding to that role, will appear. **Do not forget to enable the user role you have just created** (see below), otherwise the user won’t be able to perform any actions associated with that role
- 5) To remove or disable/enable a user role, select the tab corresponding to that user role and press the “Remove” or “Disable” buttons (**removing a user role will also remove all associations of the user with that role** – for instance removing the Reviewer role from a user will cause this user to disappear from the reviewer lists and lose all of the revisions he had made – this cannot be reversed. Disabling a user role will keep the associations of the user to that role but prevent the user to perform any actions associated to that particular role; disabling a role can be reversed by proceeding the same way and pressing the “Enable” button.



## 5. MANAGING CONFERENCE TOPICS

*Editing Topics and assigning or removing Topic Administrators*

To learn more about topics please refer to the “**System Overview and Basic Functions**” Guide

### A. Creating a conference Topic

- 1) Log in to the CMS using your account and go to “Management” > “Topics”; a list of conference topics will appear (if topics have been defined)
- 2) Click on “Create” on the right side of the screen
- 3) Enter the information regarding the topic you want to create and press “Submit”

### B. Deleting a conference Topic

- 1) Navigate to the topics list and select the topic you want to delete
- 2) Press “Delete” on the right side of the screen and confirm this action

### C. Editing a Topic or assigning and removing Topic Administrators

- 1) Navigate to the topics list and select the topic you want to edit or add/remove administrators to/from.
- 2) Press “Edit” on the right side of the screen
- 3) Go to the “Topic Information” tab and edit the information you want to change
- 4) Go to the “Topic Administrator” tab; on this tab you have two columns: on the left hand column you have the current topic administrators, and on the column on the right you have all the users that have topic administrator role but are not yet assigned to that topic. Drag and drop topic administrators between columns to assign or unassign them to/from the topic

***Please note:***

Only users that have the Topic Administrator role will appear on these columns. If you cannot find a user that you think should be on this list please check that user’s user roles as described in section 4. above.

## 6. CREATING OR DELETING SESSIONS

### *Editing Sessions and assigning or removing Session Administrators*

To learn more about sessions please refer to the “**System Overview and Basic Functions**” Guide.

***Please note:***

A session is always associated to a topic, so make sure some topics have been defined before trying to create any sessions.

### A. Creating a Session

- 1) Log in to the CMS using your account and go to “Management” > “Sessions”; a list of conference sessions will appear (if sessions have been defined)
- 2) Click on “Create” on the right side of the screen
- 3) Enter the information regarding the session you want to create and press “Submit”

### B. Deleting a conference Sessions

- 1) Navigate to the Sessions list and select the session you want to delete
- 2) Press “Delete” on the right side of the screen and confirm this action

***Please note:***

Deleting a session will also delete all related associations to the session, for instance the session administrators - this cannot be undone.

### C. Editing a Session or assigning and removing Session Administrators

- 1) Navigate to the Sessions list and select the session you want to edit or add/remove administrators to/from.
- 2) Press “Edit” on the right side of the screen
- 3) Go to the “Session Information” tab and edit the information you want to change
- 4) Go to the “Session Administrator” tab; on this tab you have two columns: on the left hand column you have the current session administrators, and on the column on the right you have all the users that have session administrator role but are not yet assigned to that session. Drag and drop session administrators between columns to assign or unassign them to/from that session

***Please note:***

Only users that have the Session Administrator role will appear on these columns. If you cannot find a user that you think should be on this list please check that user’s user roles as described in section 4. above.

## 7. MOVING ABSTRACTS / PAPERS BETWEEN STAGES

Documents are organized in stages in the CMS. These stages are related to the phase of the document workflow in the process (please see the section about Document Stages on the “**System Overview and Basic Functions**” Guide).

**Conference managers will need to move documents between stages as the conference organization progresses.** For instance, they will need to move a paper from the submission stage to the review stage once the submission is closed.

For moving documents between stages follow these steps:

- 1) Log in to your account on the CMS
- 2) On the “Management” menu choose “Documents” and set a stage on the “Stage” drop-down menu on the top left of the screen; a list with all the documents on that stage will appear.
- 3) Select (check) the document that you want to move to another stage
- 4) Click “Change stage to” on the right side of the screen
- 5) Select the new stage on the drop-down menu in the pop-up window that appears on the screen, click on “Submit” and then confirm your action. The document will be moved to the new stage

***Please note:***

No emails are sent to users while changing documents between stages. To inform contact authors or reviewers of document stage changes use the automatic operations (“Finalize Process”).

## 8. PUTTING AN ABSTRACT OR A PAPER UNDER REVIEW

Putting an abstract or paper under review is a process that involves several tasks: defining reviewers and assigning them to topics, assigning abstracts/papers to reviewers, and moving abstracts/papers to between stages.

### A. Defining reviewers

The first step to put an abstract or paper under review is to define which users can act as reviewers.

To become a reviewer, a user must already have a valid account on the CMS. After making sure that account has been created, you should proceed as described in “**4. Assigning new roles and removing/disabling/enabling existing roles from users**”, in order to assign and enable the user with the role “Reviewer”

### B. Assigning topics to reviewers

After you have told the system which users can perform reviews, you need to tell it under which topics a reviewer is able to make reviews. To do this:

- 1) Go to “Management” > “Users”, select (check) the user that you want to assign to a topic, and then press “Edit” on the right side of the screen
- 2) On the “Reviewer” tab press “Assign topic”. A field for inserting the topic will appear. Type the name of the Topic on this field or enter a space to see a list of available conference topics.
- 3) Select the Topic you want to assign that reviewer to and press submit. You must then confirm your action.

***Please note:***

You must define the conference Topics before performing this task. Please see section 5. above to learn how to do this.

You may also bulk assign Reviewers to Topics on Topics Management

### C. Assigning abstracts / papers to reviewers and putting them under review

After defining who are the reviewers and which topics they can review, you have to define which papers are going to be reviewed by each reviewer. To do this you should:

- 1) Move the abstract / paper to be reviewed to the “Abstract Assign Reviewers” / “Papers Assign Reviewers” stage (see section 7. above)
- 2) Go to the documents list screen (“Management” > “Documents” from the home screen) and set the stage to “Abstract Assign Reviewers” / “Papers Assign Reviewers” on the stage menu on the top left of the screen

- 3) A matrix-like table will appear, with a row for each reviewer and a column for each abstract or paper
- 4) Check the box on the intersection between the documents and reviewers you want to bind to each other and when you are done press the “Submit” button and then confirm

***Please note:***

You can only assign a paper to a Reviewer if they are under a same topic. For instance you can only assign a paper that was submitted to Topic A to a Reviewer that has been assigned to Topic A.

After you are done, move the abstract or paper to the “Abstract Revision” / “Paper Revision” stage (see section 7. above), so that the reviewer can have access to the document and perform the review

## 9. MAKING REVIEWERS' COMMENTS AVAILABLE TO AUTHORS

When the review period is over, conference managers should make the reviewers' comments available to the authors. This can be done following the steps below.

- 1) Log in to your account on the CMS
- 2) On the "Management" menu choose "Documents" and set the stage to "Abstract Revision" or "Paper Revision" on the "Stage" drop-down menu on the top left of the screen; a list with all the documents will appear.
- 3) Select (check) all the documents that are to be accepted (based on the results of the review or on any other criteria) and click on "Set decision > To accept" and confirm
- 4) Repeat the process above for the documents that are to be accepted as poster and click on "Set decision > To poster" and confirm
- 5) Repeat the process above for the documents that are to be rejected and click on "Set decision > To reject" and confirm
- 6) When a decision has been set for all documents, click on "Finalize process".

***Please note:***

Finalizing the review process is a very sensible task: it triggers the system to send e-mails to all authors notifying them of the decisions about their submissions and allowing them to see the reviewers' comments on-line. You should make sure the e-mail messages have been configured properly and that all reviews are finished before taking this action.

"Finalize process" operation has no effect on documents with decision set "To Wait".

Please contact the conference organizers if you have doubts concerning this task.

- 7) When the process is finalized all authors are notified about the review results and granted access to the reviewers' comments. The abstracts or papers are moved to the stages "Abstract refused" and "Paper submission" (respectively for rejected or accepted abstracts), "Paper refused" and "Final paper submission" (respectively for rejected or accepted papers) or "Accepted as Poster" (for abstracts accepted as poster)