



DIGITALPAPERS

Conference Management

**GUIDE FOR THE
DIGITAL PAPERS
CONFERENCE MANAGEMENT SYSTEM
USERS**

SYSTEM OVERVIEW AND BASIC FUNCTIONS

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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SYSTEM OVERVIEW

The DIGITALPAPERS System is a web based Conference Management System (CMS) that supports the management of any type of scientific events, whether it is a small seminar or a large conference. The CMS performs several tasks on the following categories of conference management:

- Management of participants and registrations
- Management of submissions / documents
- Management of program and venue

This CMS is provided as Software as a Service (SaaS), which means it is deployed over the internet with no need for any installation. The client (i.e. the event organizers) is provided with a right to use in the terms agreed, and the application is made available as a service. The main advantages of this are:

- The system is accessible everywhere to everyone with an internet connection;
- There's no need for local server installation;
- It has rapid scalability;
- System maintenance (backup, updates, security, etc) is included in the service (may depend on the version used);
- It has strong reliability.

System users, including conference administrators, interact with the system through an internet connection. Hence there is no need to install any type of software, as this interaction can be done using a common web browser (see "requirements" for details).

The system can be widely customizable so it can be adapted to the specificities of any event. This kind of customization is available on the CUSTOM version and must be arranged with the CMS developers. The STANDARD version also includes limited customization possibilities. The DIGITALPAPERS website (www.digitalpapers.org) will always present up to date information about each version features and comparison.

To use the system users need to have a user account, which can be created on the start page of the system (see "1. Creating a user account on the CMS" on the second half of this guide). The first Administrator account is created by the DIGITALPAPERS team. The details of this account are sent to the person appointed by the conference organizers, who will then be able to create more Administrator accounts and start setting up and managing the system (see the Administrators Guide for further details).

REQUIREMENTS

As an Internet based application, users have no need to install anything to use the DIGITALPAPERS CMS.

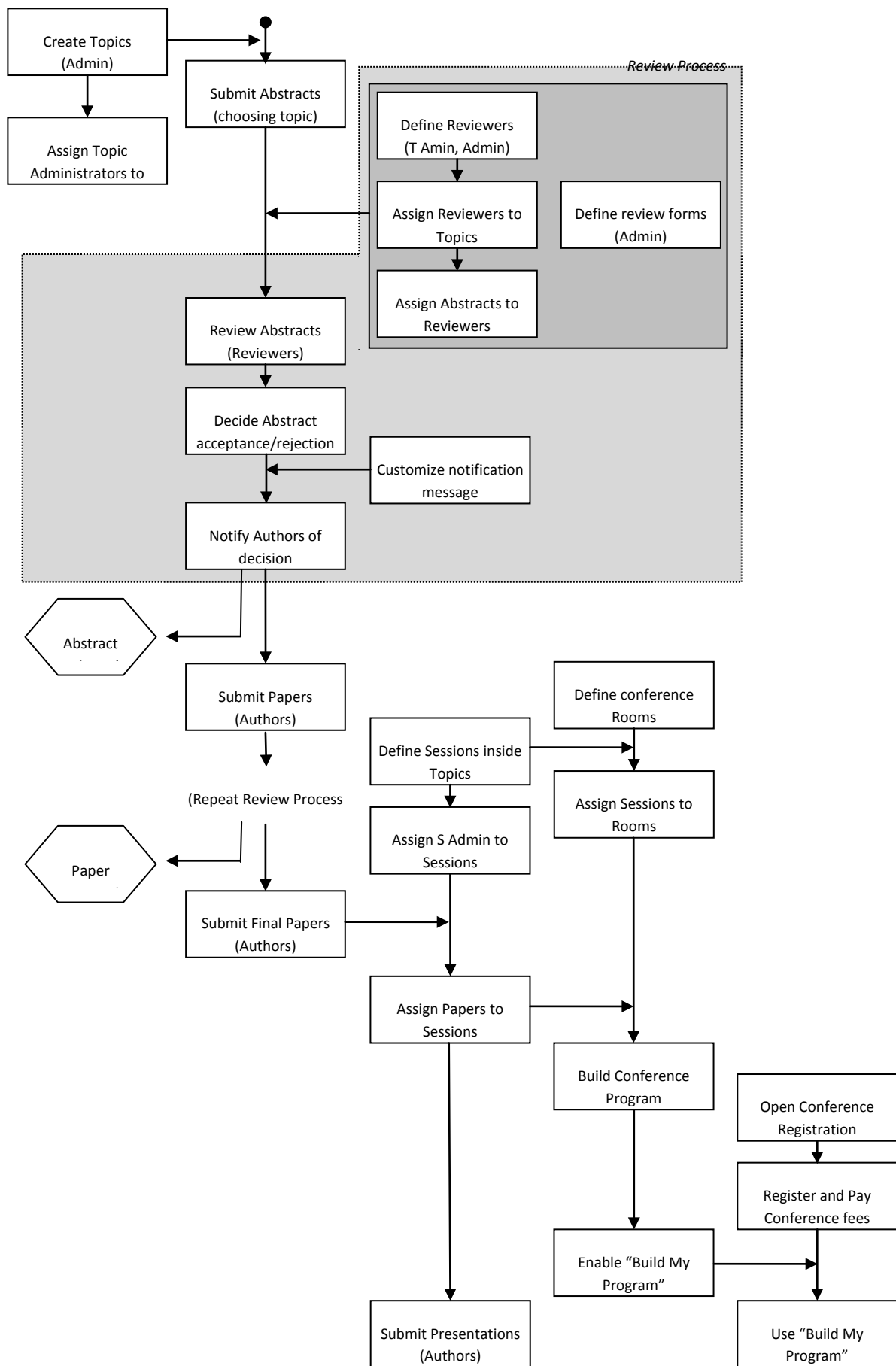
The only requirements to use all the functionalities offered by the system are a standard Internet connection and any web browser (e.g. Internet Explorer, Mozilla Firefox, Chrome, Netscape, Opera, or other). The best performance of the software is guaranteed for the following browser versions (or higher): Microsoft Internet Explorer 7.0, Mozilla Firefox 3 and Apple Safari 3.

In order to log in successfully you need to have cookies enabled in your browser. To do this, refer to your browser's documentation or contact us for further help.

CONCEPTS

This CMS assumes that all events follow a standard “event workflow”, which is depicted in the diagram below. This shows all the main processes that take place in a conference and that can be managed using the CMS.

In order to fully understand the diagram you need to be familiar with some concepts: users, documents and document stages, and functions of the system. These will be briefly explained below.



USERS

The term “User” refers to every person that interacts with the system, whether they are conference delegates, authors, conference site managers, etc.

Users relate with the system by means of “user accounts”. Each user account stores all the information related to that user, and is protected by a username (e-mail address) and a password (see “1. Creating a user account on the CMS” on the second half of this guide).

It is also by means of the user account that users upload (submit) their works and access important information, like the conference program or reviewer comments on their works.

Users may have different roles in the system, according to the tasks they perform in the conference and hence in the CMS. Each user may be assigned only one or several roles (e.g. author and attendee, author and co-author, etc.).

The DIGITALPAPERS CMS includes the following user roles:

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- | | |
|----------------------------|--|
| Administrator | <ul style="list-style-type: none">• Users responsible for managing the CMS itself;• Typically they are also conference administrators or part of the organizing committee;• The Administrator role can only be assigned to a user by the DIGITALPAPERS team or by other Administrators;• Administrators have the sole responsibility of configuring and entering all the background information in the CMS (creating conference topics and assigning Topic Administrators to each Topic, defining conference rooms, assigning sessions to rooms, creating the detailed conference program, creating and triggering personalized e-mails to different users, etc.); Administrators are also able to create conference sessions, and assign Session Managers to each session;• Administrators are responsible for monitoring the progress of conference activities and tasks (i.e. abstract submission, paper review, user registration, etc.);• Administrators are also responsible for providing helping to other users using the system and reporting any errors that may occur to the DIGITALPAPERS team;• Administrators can create or delete new users, and they can assign or remove roles to existing users;• If needed, they can also assign documents to authors or co-authors, move documents between topics or between stages (i.e. a to move a paper from “paper review” to “paper accepted” - please see the “document flow diagram”); Administrators have access to all other functions that can be performed by other users, and to all works submitted to the system by Authors;• Administrators can control the stages in which documents are in (e.g. close paper submission and move all papers to paper review stages – please see the “document flow diagram”) and the functions that other users are able to perform on the system at any given time (e.g. they can enable or disable submission permissions to authors, or grant access to papers by reviewers), as well as opening and closing conference registration; |
| Topic Administrator | <ul style="list-style-type: none">• Users that are responsible for managing the conference topics created by the Administrators;• This role can be assigned to any user by an Administrator; |

	<ul style="list-style-type: none"> • Topic Administrators have access to all the documents submitted for the topic they are responsible for; • They are responsible for assigning papers to sessions and propose reviewers and the assignment of papers to reviewers (final decision is made by the Administrator); • They are able to propose the final decision towards abstracts/papers acceptance or rejection, to be confirmed by an Administrator; • Topic Administrators can monitor the progress of activities and tasks inside their Topic Area (i.e. abstract submission, paper review, etc.);
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Session Administrator	<ul style="list-style-type: none"> • Users responsible for conference sessions; • This role can be assigned to any user by an Administrator; • Session Administrators have access to all the documents assigned to the session they are responsible for;
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Reviewer	<ul style="list-style-type: none"> • Users responsible for classifying and reviewing abstracts and papers, according to a pre-defined review form; • This role can be assigned to any user by an Administrator; • Papers are assigned to Reviewers also by Administrators or Topic Administrators; • To ensure a neutral review process, the system cross-checks Reviewers with paper Authors, to make sure an Author is not assigned to review his own paper; this cross-checking is made using the e-mail addresses of both Reviewers and Authors; • Reviewers are able to see the list of works they have been assigned for reviewing;
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Author	<ul style="list-style-type: none"> • Users who are the primary authors of works submitted to the conference; • This role is automatically created by the system when a user submits an abstract; it can also be created by an administrator; • Authors are responsible for submitting new versions or instances of their works (i.e. full papers, reviewed papers, and so on) when required, according to the diagram presented in another section (please note: co-authors are not able to do this on the system); They are able to change their works if this is allowed by the system (please see the document flow diagram); • They are also able to see a list of all the works they have submitted as authors and the comments done by reviewers regarding each work; • Authors are also the recipients of any messages concerning the handling of their works (e.g. abstract acceptance, review comments) and hence must look for and act upon them (please note: co-authors do not receive these messages);
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Co-author	<ul style="list-style-type: none"> • Users who are co-authors of a work submitted by an author; • This role is automatically created if an author indicates another user as co-author of the paper; if the new user (i.e. the co-author) does not have an account in the system, it is also automatically created; • Co-authors are able to see a list of all the works they have been assigned to as co-authors;
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(Please note: co-authors are not able to perform most of the actions assigned to authors)

- Attendee**
- All users that are attending the event;
 - This role is automatically assigned to a user who registers and pays the conference registration;
 - This role is usually a cumulative one, as authors and co-authors are usually also attendees;
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- Registration Administrator**
- User responsible for managing payments and conference registrations;
 - Registration Administrators are responsible for checking that payments by have been dully received and entering that information on the system; based on that, they may cancel or confirm registrations;

When a role is assigned to a user, a notification e-mail is automatically sent by the system to this user. Users are also able to send messages to other users in the system, depending on their user roles.

All users are able to change their personal data after accessing the system.

In order to interact with the system, users need to log in to their accounts. After logging in, users have access to different options according to the roles that are assigned to them.

DOCUMENTS

The term “Document” refers to all the works that are submitted to the CMS by Authors, i.e. abstracts, papers or full papers.

TOPICS

Topics allow categorizing documents according to their theme. Documents are always assigned to a conference Topic, which must be chosen by the author upon submitting the abstract. The list of Topics is created by an Administrator prior to the submission period is open.

Topics are managed by users with the Topic Administrator role. Each Topic Administrator is only able to manage the documents assigned to their Topic.

The Topic to which a document is assigned may be changed by an Administrator at any time, if needed.

SESSIONS

Sessions refer to the time slots in which the conference is organized. In the CMS, sessions are used to group documents that are to be presented on the same time slot.

Sessions are managed by users with the Session Administrator role. Each Session Administrator is only able to manage the documents assigned to their Session.

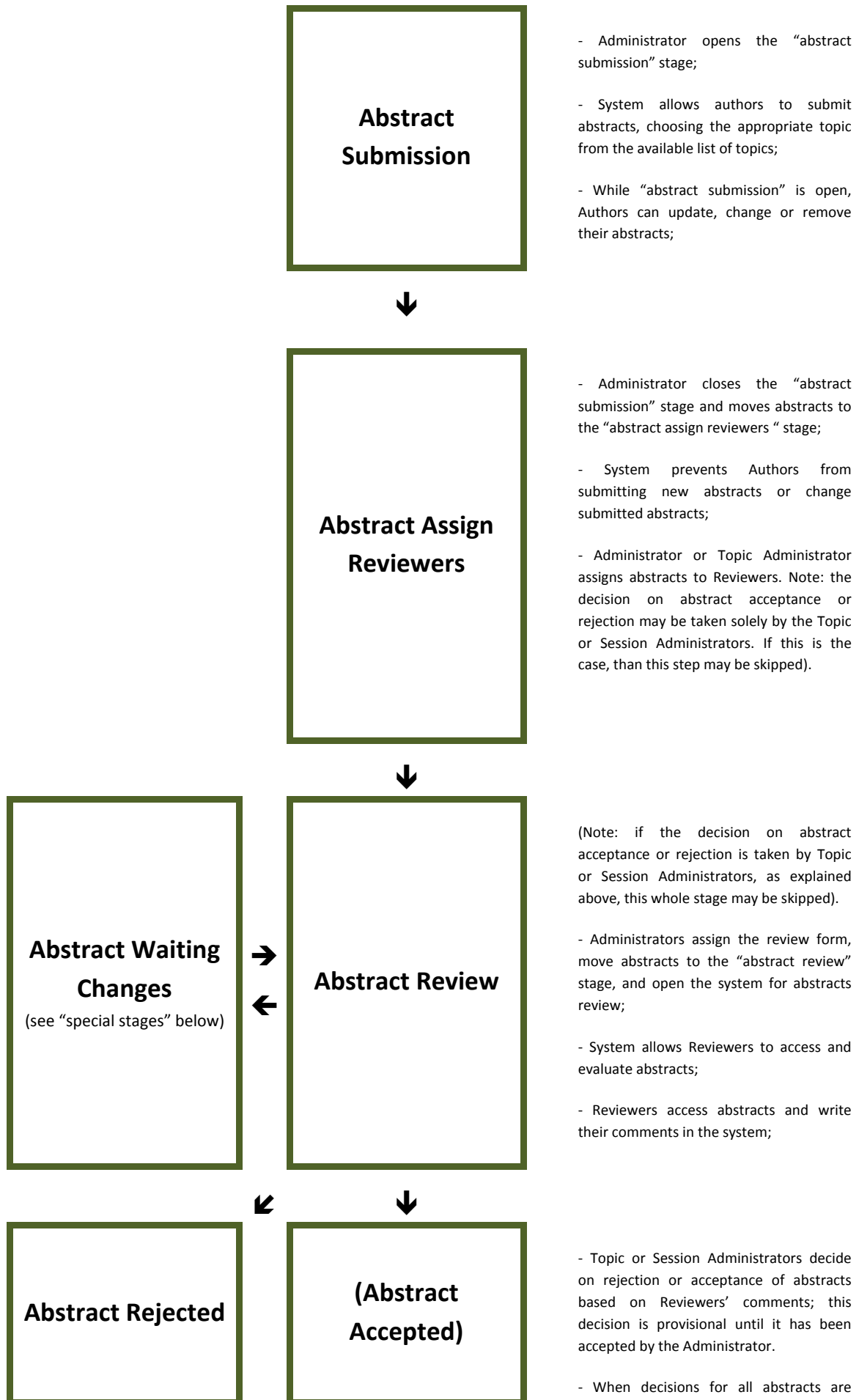
The Session to which a document is assigned may be changed by an Administrator at any time, if needed and will be later used for building the conference programme.

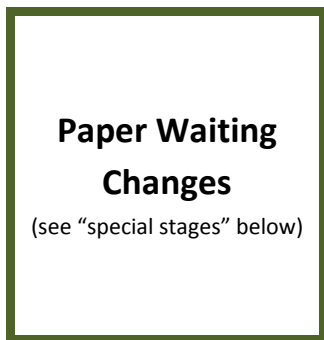
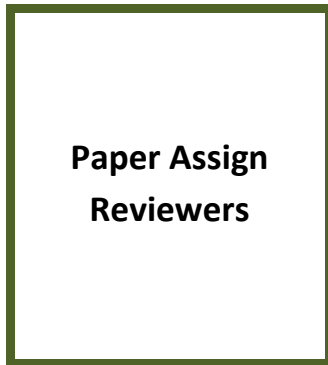
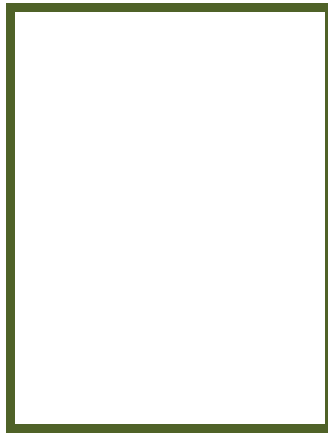
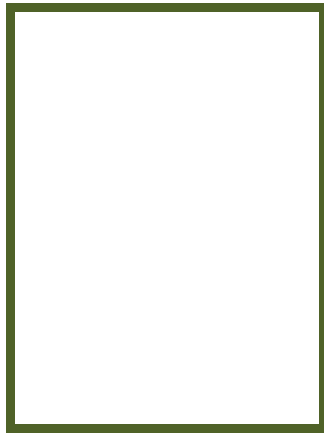
DOCUMENT STAGES

After being submitted as abstracts, documents in the system follow a process comprising several “Stages”. In each stage, different users are required to perform a set of functions in the system in order for the papers to advance to the next stage.

Administrators can move documents between stages.

The diagram below shows the document flow in the system. Each box stands for a document stage and the description gives an indication of the actions to be performed by the different users in that specific stage. The terms in brackets stand for “intermediate stages” that are not used in the system, which are shown only for a better understanding of the overall scheme.





taken, Administrators confirm Topic Administrators decisions and finalize the review process; the system sends personalized notifications to Authors, informing of the rejection or acceptance of their abstracts; this notification may be customized and include useful instructions on how to submit papers or specific event information;

- Documents are moved to the respective stages ("abstract rejected", "paper submission" or "poster accepted")

- System allows Authors to submit papers corresponding to accepted abstracts;

- While paper submission is open, Authors can update, change or remove their papers;

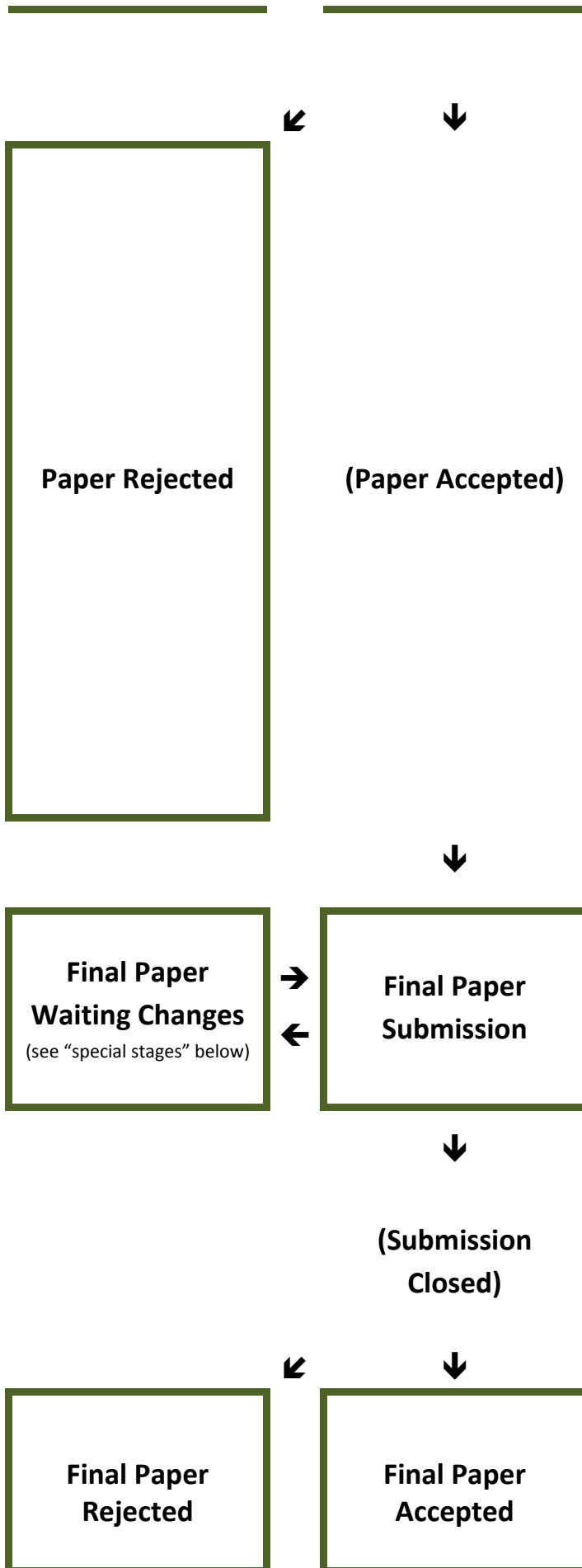
- Administrators close the "paper submission" stage, and move papers to the "paper assign reviewers" stage;

- System prevents Authors from submitting new papers or change submitted papers;

- Administrator or Topic Administrator assign papers to Reviewers;

- Administrators create and assign review form, move papers to the "paper review" stage, and open the system for paper review;

- System allows Reviewers to blind review papers, and to write their confidential comments to Authors and to Topic Administrators;



- Conference administrators close the review process, blocking the Reviewers' access to papers;

- Administrators and Topic Administrators decide on rejection or acceptance of papers based on Reviewers' comments;

- When decisions for all papers are taken, Administrators can finalize the review process and the system sends personalized notifications to Authors, informing of the review results; this notification may include blind comments written by Reviewers, if there are any, as well as instructions on how to proceed;

- Papers are moved to the next stage ("final paper submission");

- Topic Administrators are granted access to Reviewers' comments addressed to them;

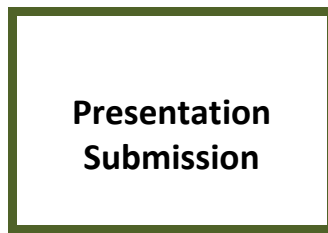
- Comments to Authors become available on Authors' accounts;

- System allows Authors to submit the final versions of their papers;

- While final paper submission is open, submitted papers can be updated, changed or removed;

- System blocks the submission or changing of papers;

- After paper submission has been closed, it is still possible to reject papers: that's the case for nonpaying authors, papers with wrong formatting, and so on. The decision on rejecting or accepting final papers is taken by Administrators or Topic Administrators, who can set that decision



on the system;

- Only Final Papers Accepted will appear on the conference schedule built by the system;

- System allows Authors to submit presentations corresponding to final papers accepted;

- While presentation submission is open, submitted presentations can be updated, changed or removed;

SPECIAL STAGES

Abstract Waiting Changes, Paper Waiting Changes, Final Paper Waiting Changes - in some special cases, Reviewers (or Administrators) might request specific changes to the documents submitted. In such cases these stages can be used. When the documents are in one of these stages, Authors can access the Reviewers' comments and submit new versions of their documents, which will be treated as "new versions" by the system. After being submitted these new versions can go back to the review stage and follow the normal process. These stages are optional.

Invalid Document - Administrators or Topic Administrators can move documents in any stage to the "Invalid Document" stage. This is usually used to put documents that need to be discarded for some reason, but are to be kept in the system.

Please note that the diagram shown and the stages mentioned above refer to a generic conference workflow. They are intended for illustration purposes only, as your conference may follow a different process, and thus the stages in the system be slightly different. You may configure in "Options" whether the event will use three or two document types (abstract, paper and final paper or abstract and final paper only). Please contact us if you need further help.

MODULES AND FUNCTIONS

The system is organized by modules, each module comprising a different set of functions or options. Different types of users have access to different modules and functions, as explained in the "Users" section.

The first module is the **Management Module**. This module contains the management functions usually performed by Administrators, Topic Administrators or Session Administrators.

The second module is the "**My Documents**" module. It consists of functions performed by Authors/Co-Authors and Reviewers concerning the handling of documents in the system.

The module "**User Options**" contains functions related to personal user information.

The final ("**Payments**") module relates to the functions of payment (of the conference registration, gala dinners, social programs, and so on).

The table below lists all the functions or sets of functions inside each module and shows which users are able to perform such functions.

	Administrator	Topic Administrator	Session Administrator	Reviewer	Author	Co-author	Attendee	Registration Administrator
“Management” Module								
Users (Set of functions related to managing system users)	•							
Topics (Set of functions related to creating and managing conference topics)	•							
Sessions (Set of functions related to creating and managing conference sessions)	•	• ¹						
Registration (Set of functions related to managing registrations)								•
Documents (Set of functions related to managing documents)	•	• ¹	• ²					
Options (Options for controlling the system, e.g. open/close submissions, registrations, etc.)	•							
Reports (Set of functions to produce standard reports regarding conference status)	•							
Mail Templates (Customization of notification messages and other messages sent to users)	•							
Messages (Log table listing all messages sent by the user from the system, with detailed information)	•							
Programme (Set of functions to create the schedule of the event)	•							
Programme Locations (Set of functions related to creating and managing the list of conference rooms)	•							
“My Documents” Module								
Submit (Set of functions related to submitting or changing submitted works)	•				•			
Review (Set of functions related to reviewing works)	•			•				
View List (List documents related to the user)				•	•	•		
“User Options” Module								
Edit Personal Information	•	•	•	•	•	•	•	
Change Password	•	•	•	•	•	•	•	
Send Message	•	•	•	•	•	•	•	
Reminders	•	•	•	•	•	•	•	
My Programme On-line application that gathers information about the program from the system and lets	•						•	

users build their own program for the conference									
“Payments” Module									
User registration	•	•	•	•	•	•	•	•	

¹ Only within the topic administrated by this user

² Only within the session administrated by this user

BASIC FUNCTIONS

What we call here basic functions are the functions that are directly involved in running the conference according to the standard event workflow explained above.

Below is a list of the basic functions. Please refer to the detailed help if you need to learn how to work with those functions.

- Creating a list of conference topics and assign Topic Administrators to Topics (if applicable)
- Submitting works (abstracts, papers)
- Defining reviewers, assigning reviewers to topics, defining review forms and assigning works to reviewers
- Reviewing works
- Deciding on acceptance/rejection of works
- Customizing notification messages and send them to applicable users
- Defining sessions inside each conference topic, defining conference rooms, assigning sessions to rooms, assigning session administrators to sessions and assigning papers to sessions
- Building and enabling the conference schedule
- Opening conference registration
- Registering, paying conference fees and using the “My Program” application

ADVANCED FUNCTIONS

These are the functions that are not used for running the conference itself, but nevertheless account for the monitoring and better management of the conference.

Below you’ll find a list of advanced functions. Please refer to the detailed help if you need to learn how to work with those functions.

- **E-mailing**
The system sends automatic e-mail messages to the users when any of the following events occurs:
 - A user account is created (message is sent to the new user);
 - A new role is assigned to the user (message is sent to that user);
 - A new document is submitted by an Author (message is sent to the Author and Co-authors);
 - A document is assigned to a reviewer (message is sent to reviewer, with the list of papers he has been assigned);

Besides these, the following customized messages can be sent by the system upon a request by Administrators:

- Message alerting Reviewers to finish their reviews;
- Message alerting Authors who have not submitted their works in due time;
- Message alerting an Author that the presenting Author has not paid the registration yet;
- Message alerting an Author that the presenting Author has more than one presentation;
- Message confirming the payment of the registration;

Finally, apart from these automatic messages, the system also allows sending personalized e-mails (like regular e-mail messages) to specific users or groups of users (e.g. all Authors, all Reviewers, etc.)

- **Exporting information** – for a detailed information analysis and management, the system allows the exportation of lists (users, documents, etc) in CSV format.



USER INTERFACE

The Digital Papers CMS has a simple and easy-to-use interface. This section presents the basic elements of this interface.

Whichever Module of the system you are using, there are some common elements that are explained below:

- **Main Area**

This is the white area in the centre of the screen. This area usually displays a list of information related to the item you are dealing with (documents, users, and so on).

On the bottom left side of the list you will find a search icon  that you may use to search information on the list. There is also a refresh icon  that will reload the list. This may be useful if you update the information being displayed.

On the bottom centre of the list there is a navigation space to help you navigating through the list. It shows the total number of pages in the list, and the number of the page you are now; you may use the arrows to advance or go back in the page.

In some cases the top of the list displays some options that allow you to filter the information appearing on the lists

- **Navigation Bar**

Above the list there is a bar that helps your navigation through the system: it shows your path to the place you are now (e.g. "Home > Documents"). To go back, you can click on any of the previous places in your path.

- **Options Area**

The area to the right of the main area is the area where the options for editing the items on the lists. If options Edit, Delete, Submit, etc. are available for the items being displayed they will be shown on this area of the interface.

BASIC FUNCTIONS

The CMS allows the interaction between conference participants (Attendants, Authors, Reviewers) and the conference organizers. This means that Authors can use the 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 these operations, users need to have a valid account to interact with the system.

Creating an account should be an easy and simple process (please see below). 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 how to perform the basic functions in the system.

1. CREATING A USER ACCOUNT ON THE DIGITAL PAPERS CONFERENCE MANAGEMENT SYSTEM (CMS)

Before performing any other operation related to the conference you need to create an account on the CMS.

To do this:

- 1) Go to the CMS link that was provided to you by the conference organizers and click on "New user?"
- 2) Fill in the form with your personal information
- 3) After you're done press "Submit" and your account will be created.

Please note:

All information requested in the form is mandatory, except for "Title", "Middle Names", "Telephone" and "Fax". Don't forget to give your consent to information processing and storage, and to validate the form by entering the text that appears on the image.

2. EDITING YOUR PERSONAL INFORMATION ON THE CONFERENCE MANAGEMENT SYSTEM (CMS)

To edit your personal information on the CMS you should:

- 1) Log in to your account on the CMS
- 2) On the "User Options" menu choose "Edit Personal Information"
- 3) Edit the information you wish to change and then click on the "Update Information" button to save your changes

3. SENDING AN E-MAIL TO THE CONFERENCE ORGANIZERS OR TO THE CMS SUPPORT

To send an e-mail message to any of the above:

- 1) Log in to the CMS using your account and go to “User options” > “Send message”
- 2) Select the recipient of your message from the “To” drop-down menu, write the subject and message and hit submit. A message will be sent to the recipients you have chosen.