

# SPMS ROLES AND CONFERENCE ORGANIZATION

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## Abstract

The Scientific Programme Management System (SPMS) was initially developed by the JACoW Collaboration to manage the contributions submitted for presentation at Particle Accelerator Conferences. It originally began with the submission of abstracts and finished with the production of the programme booklet. Later editorial modules were added, as well as modules dealing with registration of delegates and exhibitors. It can now manage all activities associated with the organization of an event, including hotel accommodation, and refereeing.

This paper discusses the various activities that are part of the organization of a conference, and how the SPMS is used to manage activities via roles with their related privileges.

## POSSIBLE DEFINITIONS FOR ROLES AND PRIVILEGES

A **role** is an activity assumed by an individual, or group of individuals, within the organization of an event. The SPMS is configured to confer privileges on the individuals, or groups of individuals, to carry out the activities associated with a role. A **privilege** allows access to pages or screens, called **Webpages** in SPMS jargon.

The SPMS Administrator has the privileges to create/assign “default” roles and assign the “default” privileges to carry out the activities.

The SPMS Administrator can create new roles and new privileges.

## ROLES AND PRIVILEGES

The SPMS conference instances are delivered with a set of “default” roles and privileges via the page:

*Overall Database Administration / Privileges, Roles and Users / **Functional Roles***

The Administrator (see further below), can delete or create new roles.

A set of “default” privileges for the “default” roles are delivered with the SPMS conference instances. The Administrator can delete or create new privileges. The “default” privileges are in the page:

*Overall Database Administration / Privileges, Roles and Users / **Privileges***

As described above, privileges give access to webpages. The “default” set of roles with the associated privileges are in the page:

*Overall Database Administration / Privileges, Roles and Users / **Webpages***

The table has three columns:

Left hand: Action

Centre: Application Name (name of the page in SPMS)

Privilege Required

All pages in the centre column are visible to the roles entered in the right hand column.

To assign a new “privilege”, or access to a page, select a page from the dropdown list, click on “Submit”, and in the next action set the suffix.

**Warning:** Adding a new page without assigning a privilege means the page is completely public and visible to all users.

Individuals, or groups of individuals, who will be assigned privileges are entered via the page:

*Overall Database Administration / Privileges, Roles and Users / **Authorize***

To assign a privilege to functional role, simply select the functional role from the popup **Functional Role** in the left hand column, and the privilege to be associated with the role in the popup below, **Privilege**.

To enter the names of the individuals, or groups of individuals to be assigned a privilege, select the **Functional Role** in the popup at the top of the right hand column, click on “Search for an Account” the individual in the Profiles Repository, and then click on “Add User”.

The top row of the centre column “Functional Role Maintenance” links to the Functional Roles table, allowing quick and simple viewing, addition, etc.

The centre column of the Authorize page lists the various functional roles. Clicking on any of the Functional Roles (bold, blue) will produce an excel spreadsheet showing all of the metadata pertaining to each individual listed in the right hand column with that Functional Role.

## MAIN ROLES AND ASSOCIATED ACTIVITIES

All roles are associated with various activities relating either to the administration of SPMS, or to the organization of the scientific programme, or to the local organization (registration, etc.). Table 2 below shows the overview, and the roles/activities are discussed in more detail further below.

Table 1: Common Roles and the Area of Activity

Role	Privileges
SPMS Database Administrator	All privileges in SPMS
Conference Administrator	All privileges in SPMS
Scientific Secretariat / Editor-	All privileges - normally also Conference

in-Chief	Administrator
Editorial Board	No particular privileges, except for Scientific Secretariat
Repository Manager	Management of all new profiles/new affiliation requests within <b>Central Repository</b>
Editor and Editor QA	Selection of screens in the Directory Editor/Proceedings Administration
Author Reception	Search functionality and screen to enter comments, correct titles, change processing status, etc.
Transparency Editor	Selection of screens in the Sub-directory Presentations Management
Presentations Manager	Selection of screens in the Sub-directory Presentations Management
Poster Session Manager	Access to screen "Poster Police"
Registration Manager/Exhibition Manager	All pages within Registration Module
Registration Staff	Read-only access to pages within the Registration Module
Accommodation Manager	All pages within Hotel Administration Module
Referee	Designated Privileges within Scientific Program Administration / Main Classifications / Experts
Organizing Committees (OC/SPC/LOC/SAB/EB)	Privileges assigned by the Scientific Secretariat for the various activities as they are required: invited oral proposals, reviewing Main and Sub-classifications, contributed oral presentations

## Management Roles

All conference instances are delivered with **Database Administrator Role** and **Conference Administrator privileges** (i.e. *all* privileges) assigned to:

- the person who will be running the conference instance of SPMS for the whole event – normally also the person in Europe and Asia

behind the **Scientific Secretariat** (SPC Secretariat and interface with all contributors throughout the entire process, from OC/SPC meetings through to publication of the proceedings) or the **Editor** for NA-PAC events – without the SPC Secretariat function, rather beginning with abstract submission, through to publication of the proceedings (see further below), and also to:

- Volker Schaa (publications/proceedings)
- Ivan Andrian (registration)
- Matt Arena, Ronny Billen and Takashi Kosuge, the three SPMS Regional Support Centres

The Database Administrator is normally the only person to adjust the system parameters, assign privileges, etc. The other persons listed above would normally only "tweak" settings and parameters if asked to do so.

## Scientific Secretariat

Scientific Secretariat (SS) is a European (EPAC) concept since Europe has always had a "**permanent**" Scientific Secretariat working closely with the OC/SPC/LOC and their Chairs right from the outset of the planning of the conference. This brings experience and continuity, and expertise, to the organization of all events.

The Scientific Secretariat participates in all meetings of the OC/SPC/LOC. It is the interface between, on the one hand, the organization of the scientific programme via the SPC, and on the other hand, all contributors including speakers and poster session presenters – and ensures that this fits into the local infrastructure.

Thus, via the role of Secretariat to the OC/SPC/LOC, participating in all meetings, it has a role that is essential to the overall coordination between these three committees.

The range of activities of the SS is thus vast, but it can also vary according to local setups, and overlap with responsibilities that are essentially LOC (student grant programme, registration, etc.) since the SS is normally **also** SPMS Administrator, JACoW Team Member, etc.

The SS basically sets up the SPMS via the System Parameters, and also the Authorize screen to assign the Privileges for all Functional Roles as necessary and as the conference moves through the different phases of its organization. The SS is thus central to the organization of activities such as:

- Proposals for Invited Orals and Invitations, tagging in SPMS
- Call for Papers
- Abstract QA (checking all abstracts)
- Reviewing Main and Sub-classifications
- Proposals for Contributed Orals and Invitations, tagging in SPMS
- Setting up SPMS for registration (delegates/exhibition/student grant applications) and follow-up
- Setting up SPMS for assignment of programme codes

- Preparing the Conference Programme and Synoptic Table
- Liaising with the LOC for all matters relating to the scientific programme of the conference and requirements at the venue
- Entering names of all individuals and groups of individuals with Functional Roles during the conference
- Organization of the Saltmines (Editors/Author Reception/Presentations/Poster Sessions) – including per diem, accommodation, etc.
- Production of the Proceedings

Traditionally, PAC had an SPC Chair and assistants, and an Editor who ran the SPMS mostly only from abstract submission, through to the publication of the proceedings. It did not participate in meetings of the OC/SPC/LOC or play a coordinating role. This has at times lead to problems of coordinating all activities.

### *Editorial Board*

With the introduction of electronic publication in the mid-nineties, the EPAC Organizers (OC/SPC/LOC) decided to set up an Editorial Board (EB) composed of

- the Scientific Secretariat
- the IT Manager responsible for setting up the server for the upload of proceedings, and the network and proceedings office soft and hardware setup
- LOC Chair (budget)
- SPC Chair (contents of proceedings)
- Volker Schaa (if necessary for scripting for final proceedings publication package)

The Editorial Board doesn't meet and there are no particular privileges in SPMS, but the members can be entered in the "Authorize" screen for purposes of e-mail.

### *Repository Manager*

A role that is not in the Conference instances is the SPMS Repository Manager, but it is useful to know that this role exists.

The Repository Manager receives an e-mail alert each time a new profile or a new affiliation request is created within the JACoW Central Repository. The Repository Manager verifies that they are not duplicates, ensures that the data is entered in the correct fields, etc. Conference instances are synchronized regularly with the Central Repository. The Repository Manager is therefore keeping the whole Repository, the shared resource, in good order.

It should be noted that all persons with responsibilities relating to the scientific programme of a conference should also feel responsible for the exactness of all data in profiles – since this is what will be used for the production of the programme booklet, abstracts brochure, author index, table of contents, etc.. They should not hesitate either to correct profile data, or to warn the Repository Manager of problems.

### *Editor and Editor QA*

These roles are assigned to what we now commonly call the "Saltmines" Team. The Editor privilege in SPMS is the interface used by Editors to "grab" papers to be processed. The Editorial module allows to download the author's contribution, to process, assign a status (green, yellow, red), and upload the new files.

The "QA" privilege allows editors to download the pdf file processed by an editor (editors do not normally QA their own papers), check it, QA OK it, or fail the QA, etc..

### *Transparency Editor*

The Transparency Editor has access to a special screen which shows all oral presentations. The Editor can download the .ppt files, or .pdf files if they exist, check them, and assign a status which is essentially OK for publication.

### *Author Reception*

During the Conference the place authors come with problems etc. is the Author Reception. We deliberately avoid allowing authors to enter the Proceedings Office so as not to disturb the editors while they are working.

The Author Reception role in SPMS is called "Sort, File, Edit" ... it's a leftover from the very early days of electronic publishing. Essentially the privileges associated with this role is the functionality allowing a search over all contributions, the possibility to edit titles, the possibility to change the status (for example from yellow to green), with comments.

The tasks of the Author Reception in recent years have evolved. With the "electronic dotting board", the earlier really time consuming tasks of running the original dotting board, filing authors copies of their contributions, etc., have disappeared. The Author Reception Staff therefore now continue to deal with questions from authors, but also to work their way through all of the processed papers to check that the titles and authors correspond with the titles and authors entered in SPMS. At IPAC'11, the Author Reception also did some "pre-QA" to speed up the job of the editors.

### *Presentations Manager*

The Presentations Manager privilege provides access to a screen showing the oral presentations that have been uploaded to the server. The Manager can download and test the files, prior to transferring them to the auditorium. There is also the possibility to e-mail speakers who are late uploading.

An "Agenda" has recently been added to SPMS functionality. Contributions uploaded can be hidden for larger conferences to prevent public access, or visible for smaller meetings such as the JACoW Team Meeting.

### *Poster Session Manager*

The Poster Session Manager (called "police" at some events) privilege allows access to a screen where the status of presentation of posters is recorded. The "default" in this screen is "posted, manned, quality OK". The

Manager updates the screen to show the actual status of presentation of all posters. This is an important job since only posters which are posted, manned and of satisfactory quality” are accepted for publication of the papers in the proceedings.

### *Registration Manager/Exhibition Manager*

The Registration and Exhibition Manager privileges allow access to the Registration Module. These privileges are assigned to the Managers of both the Delegate and Exhibition Registration

### *Registration Staff*

Registration Staff privilege offers read only access to the Registration Module.

### *Accommodation Manager*

The Accommodation Manager has privileges to all screens within the Accommodation Module. This Module is very little used, but could definitely be useful for events where all participants are housed in the same hotel.

### *Referee*

The only JACoW refereed event is the yearly Free Electron Laser Conference (FEL). While the

Administrator has privileges for access to all screens in the Refereeing Module, Referees are assigned the role of Referee, not via the “Authorize” screen, but via the screen:

*Scientific Program Administration / Classifications / Main Classifications / Experts*

The functionality for the refereeing module works for the first round of refereeing, but if a referee sends comments back to an author, and the author re-submits, the functionality breaks down ... A clearer definition of the required functionality is required in order that Matt can improve this. It is regretted that the FEL Editors rarely take this up seriously.

## CONCLUSIONS

From the above overview, it is clear that SPMS has been configured to suit the requirements of most events immediately. The “fine grained access” offers considerable flexibility and freedom to Administrators to design the Functional Roles and Privileges they wish.