

## BASIC FUNCTIONALITY FOR SCIENTIFIC PROGRAMME MANAGEMENT WITH SPMS – PRE-CONFERENCE

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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 covered the submission of abstracts, scheduling contributions, 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 presentations management, hotel accommodation, and refereeing.

This paper discusses the basic functionality from the delivery of the instance by one of the Regional SPMS Support Centres in Asia, Europe and the US, to the time immediately preceding the conference.

### REQUEST FOR/DELIVERY OF A CONFERENCE INSTANCE

#### *Request*

Requests for the setting up of SPMS conference instances for JACoW Collaboration Conferences should be addressed to the JACoW Chair and/or Coordinator, and be signed by the Conference Chair. Conference instances are delivered together with the JACoW Central Repository Data of profiles and affiliations. The text of the standard “pledge”, which is published at the JACoW website: <http://www.jacow.org>

*Scientific Programme Management System: SPMS Terms and Conditions*

is as follows:

1. The data supplied and collected with the SPMS system will under no circumstances be used for any other purpose than in connection with the organization of the conference in question (**conference and non-conference announcements to the whole repository are strictly forbidden**)
2. The e-mail utility may be used normally only *once* to announce the conference to those profile/account owners contained in the relative mailing lists, and *once* following the conference to announce the publication of the proceedings at the JACoW site
3. The data will not be provided to any external body for any purpose
4. Following the publication of the conference proceedings and repatriation of the data to the central repository, the link to the central repository will be cut and there will be no further maintenance of the system by central support
5. The email facility will not be used after the publication and announcement of the conference proceedings
6. The profiles and account information generated by the conference will be of the same quality as the data already in the repository (no dummy emails etc.)
7. Software installed using JACoW licenses will be uninstalled immediately after the conference

### *Delivery*

Instances are delivered by the Regional SPMS Support Centre Manager, currently Matt Arena ([arenam@fnal.gov](mailto:arenam@fnal.gov)) for the Americas, Ronny Billen ([ronny.billen@cern.ch](mailto:ronny.billen@cern.ch)) for Europe, and Takashi Kosuge ([takashi.kosuge@kek.jp](mailto:takashi.kosuge@kek.jp)) for Asia. See the SPMS documentation relating to setting up standard conference instances (<http://www.elettra.trieste.it>).

### *Basic Parameters*

SPMS Support Centre Managers deliver conference instances with some very basic parameters already set. The others need to be entered by the Administrator. Most are self explanatory.

System parameters are found in the Directory:

*Overall Database Administration / System Parameters.*

The SPMS documentation clearly describes the different system parameters. See <http://www.elettra.trieste.it> under Conference Organization with SPMS and System Parameters.

### *Authorize/Webpages*

The question of roles is discussed in the presentation on Roles (MODC01). Roles are activities assumed by individuals, or groups of individuals, within the organization of a conference. The SPMS is configured to confer privileges on the individuals or groups of individuals, to carry out the activities associated with the roles. A privilege allows access to pages or screens, called Web Pages.

Each Administrator can use the roles already delivered “by default”, or create new ones, and assign privileges, or access to SPMS pages/screens.

This is done via the Directory

*Overall Database Administration / Privileges, Roles & Users*

Privileges assigned via the Authorize screen apply to the *whole* SPMS. It has become necessary however for certain activities relating to the SPC (proposals/approval of re-classification of contributions, proposals/approval of presentation types (“upgrade” from “poster” to “contributed oral”) to refine the privileges and to limit them to Main Classifications. This is done via the screen:

### Scientific Program Administration / Classifications / Main Classifications / Experts

Check the Functional Roles and the Privileges first and if necessary modify the “default” settings using the Web Pages. In the “Authorize” screen, assign the roles/privileges to the individuals.

It is wise to take the time to think about the event, the roles that will apply, and to ensure that the SPMS reflects the requirements of the event.

*Advice: Clicking on a “Functional Role” in the centre column of the Authorize Screen produces an Excel Spreadsheet with the names and affiliations of the persons entered in the right hand column. This is useful to prepare correspondence using “mail merge” in Word. The author uses this for example for the preparation of individual invitations to SAB members, or to editors invited to participate in the work of a conference editorial office.*

Note that it is possible to address e-mails also to the persons entered with SPMS roles (see under E-mail).

### E-mail

E-mail functionality in SPMS is found in three areas with distinct applications:

1. System Parameters / Email
2. Editor/Proceedings Administration / Email
3. Overall Database Administration / Email Utility (Repository)

### System Parameters / Email

It is generally safer if the e-mail address in the “From” Email Address field matches the domain of the SMTP server, though not essential. The “Administrators’ Email Address” is normally that of the conference Administrator/Editor/Scientific Secretariat. This is normally the person sending out the Conference Announcement, and dealing with all correspondence with contributors. The rest of the parameters are self-explanatory.

### Editor/Proceedings Administration / Email

This group of e-mail screens provides a history, a possibility to contact persons with contributions, roles, and Session Chairs:

*Email History:* quite simply, here one can review all e-mails sent via the e-mail utility.

*Email Utility:* here’s where it is possible to send e-mails to selected groups of individuals with a contribution status within SPMS:

- contributions with a classification
- contributions with a processing status
- contributions with a presentation type
- contributions with contribution presentation type
- contributions with a presentation option
- etc.

*SPMS Roles:* here’s where it is possible to send e-mails to selected groups of individuals with a role within SPMS (Authorize screen).

*Session Chairs:* here’s where it is possible to send e-mails to Session Chairs, entered in the Sessions screen (Scientific Program Administration / Sessions).

### Overall Database Administration / Email Utility (Repository)

This e-mail utility is essentially

- a) to send conference announcements: only ONE ANNOUNCEMENT PER EVENT – select the conference series
- b) to be able reach countries/regions/affiliation types – but normally a conference instance should not be using this.

## SPC TASKS

### Introduction

It is advisable to enable the different SPC privileges as they are required, and not to offer all privileges simultaneously.

The main tasks for the SPC are described below.

### Proposals for, and Selection of, Invited Oral Presentations

The privilege to “propose invited orals” is built into SPMS. It is usually assigned to several “roles”, normally OC/SPC/SAB. It is necessary to ensure that the

System Parameters / PC

is correctly set to “Yes” for: Enable Abstract Edit and Enable PC Members to Propose Invited Orals.

Once all of the proposals have been submitted, it is necessary to close submission, by setting the System Parameters / PC back to “No”.

Next, decide the priorities that might be assigned to proposals for invited orals, via the screen

*Scientific Program Administration / Proposed Invited Oral Priority Codes*

The codes are normally First Priority, Second Priority, etc.

Once the priority codes are entered, via the “Authorize” screen, assign the privilege “set invited oral priority” for the persons who should have this privilege, normally SPC members. This allows the persons with this privilege to search over the whole set of proposals, and enter their priorities.

Note that assigning this privilege to **all** SPC members means that **all** SPC members can enter priorities for **all** Main Classifications.

An alternative would be to include this privilege in the screen

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

such that setting of oral priorities could be by Main Classification. A proposal for Matt Arena to consider .....

Once all of the priorities have been entered, the privilege to “accept/reject proposed invited orals” needs to be assigned to a role.

Again, it is not possible to assign this privilege by Main Classification. The “accept/reject proposed invited orals” ought to reserved for one or two persons per Main Classification via the “Experts” screen. Currently this is not possible, and it is perhaps wiser to allow only the Administrator to officially “accept” or “reject” proposals.

Once the final list of invited orals has been decided, the Administrator removes all third priority proposals, and prepares the invitations to the speakers. If one wishes to send formal invitations, download the report

General / Reports / All Orals

And merge the excel spreadsheet into a standard letter.

Once all invited speakers have accepted, remove all second priority proposals.

### Call for Papers

By the time the exercise of abstract submission is enabled, the Main and Sub-classifications should have been entered in SPMS.

Enable abstract submission after having ensured that the SPC has no privileges enabled.

Abstract submission (or “call for papers”) when the system parameter “Accepting Abstracts” is set to yes at

Overall Database Administration / System Parameters / Conference / User

The Administrator can decide whether the “search” function should be enabled, i.e. whether all submitting authors should be able to search over the whole SPMS to see other submissions. Search can be disabled if it is called into the Web Pages, and assigned only to the Administrator for example.

During abstract submission, the Scientific Secretariat checks each and every submission to verify that the formatting of the title, the abstract, the footnotes, etc. is correct. In the search screen, set “Require Initial QA” to “Yes”, and Search. Work systematically through each entry and

- a) Record QA Only (if no changes)
- b) Save Changes and Record QA (if changes made)

Follow the submission of abstracts via the

General / Reports / Conference Activity Charts

### Propose/Approve Classification Changes

Following the “call for papers”, the SPC normally reviews all contributions to ensure that the Main and Sub-Classifications are correct. This is important since the presentation of posters is normally according to main and sub-classification groupings. This task is normally completed prior to opening the next privilege to propose contributions for contributed oral presentation.

The privilege to “propose classification changes” is normally assigned to the whole SPC such that all SPC members, normally with a responsibility for one main classification, can have a complete overview. This privilege is thus assigned

- via the system parameter:

Overall Database Administration / System Parameters / PC / Enable PC Re-classification

- via the “Authorize” screen, where it is possible to offer **all** SPC members the possibility to propose classification changes in **all** Main Classifications, or if preferred
- -via the “Experts” screen, when the privilege to propose re-classification or approve re-

classification can be restricted to individuals for each Main Classification.

The privilege to “approve abstract re-classification proposals” is normally assigned to the individuals via the “Experts” screen, thus limited to a limited number of persons.

### Propose/Approve New Presentation Type

Once the SPC is satisfied that all Main and Sub-classifications are correctly entered on all contributions, the privilege to propose a “change of presentation type” is enabled via the “Authorize” screen.

Contributions are normally submitted with various presentation type options, for example “poster”, or “oral if requested”, or “5-minute oral poster”. The privilege to “change presentation type” simply confers on SPC members the possibility to propose another presentation type, normally “contributed oral presentation”. This privilege is thus assigned via the system parameter

Overall Database Administration / System Parameters / PC / Enable PC Presentation

- via the “Authorize” screen, where it is possible to offer **all** SPC members the possibility to propose presentation changes in **all** Main Classifications, or if preferred
- -via the “Experts” screen, when the privilege to propose or approve new presentation changes can be restricted to individuals for each Main Classification.

**Note:** Privileges enabled via the Experts screen are not selectable by the persons concerned upon login, as for the privileges assigned via the Authorize Screen.

**Note:** Creating an “attribute” to be able to tag the status of invitations, for example: invited oral pending, invited oral accepted, invited oral declined, or contributed oral pending, contributed oral accepted, contributed oral declined via the screen

Scientific Program Administration / Attributes

is a quick and easy way to manage invitations.

**Note:** it is good to have entered the date of presentation, the session, the sequence number (programme code) of all oral presentations to be able to include the date of presentation in the invitations.

### SESSION / PROGRAMME CODES

A protocol for building programme codes should have been decided early on in the organization (for example, at the time of preparing the invitations for invited oral presentation).

Programme Codes are created via the screen

Scientific Program Administration / Sessions

Programme Codes are parts of the conference programme which take place: on a date, at a time, in a place, with a content (type of presentation: invited oral, poster, etc.).

Programme Codes are Session Codes plus sequence numbers, entered manually for orals, and automatically for posters.

Programme codes are unique identifiers and used for the upload of contributions to the proceedings.

They are produced

- a) Manually (session code plus sequence number) for oral presentations, via the search results and “edit” link

- b) Automatically for posters via

*Scientific Program Administration / Assign/Move Paper IDs*

### *Building Programme Codes*

The following screens need to be filled out prior to triggering the assignment of programme codes.

#### **Scientific Program Administration: Presentation Type (Sessions)**

The “Presentation Option Code” in this screen is normally one or two letters, indicating the type of presentation (invited oral, contributed oral, poster) of the session and its place in the conference programme throughout the day (before morning coffee, after morning coffee, afternoon, for example).

IPAC uses for invited orals: X, Y, Z, respectively before morning coffee, after morning coffee, in the afternoon. Normally one session, “X” for example, will be devoted to one Main Classification. If there are several sessions with different Main Classifications before coffee, the X can be expanded to XA, XB, XC, etc.

For contributed orals, IPAC uses “O” for a contributed oral, arranged into OA, OB, OC, OD, if there are four or more sessions during the day – again, an effort is made to separate the Main Classifications into different sessions.

Separating Sessions by Main Classification facilitates the production of a synoptic table with a colour scheme to better distinguish the scheduling of Main Classifications during the conference.

#### **Scientific Program Administration: Location Codes**

Via this screen, letters are assigned to each area, which can be auditoria or poster areas, together with the capacity. These are known as “location codes”. The capacity is used for the automatic assignment of poster programme codes when one Main Classification spreads across several poster areas. SPMS can thus fill up one poster area, prior to passing on to the next poster area.

#### **Scientific Program Administration: Combine Main and Sub-classifications**

Enter a Poster Session for each combination of Main plus Sub-classification. When the number of posters in a combination of Main plus Sub-classification exceeds the capacity of one area, enter the second area. SPMS will automatically fill one area, and move on to the next.

#### **Program Code Sort Order**

This screen is used to tell SPMS how to sort posters within one poster session area, or over several different areas.

For many years we have tried to facilitate the presentation of posters by individuals who have several posters, which can be in different Main plus Sub-Classifications and hence in different poster areas.

Since the Combine Main and Sub-classifications screen has already been set up, it is necessary to decide how to sort posters over one or several areas. This is done by entering a sort order, for example in descending order: Country / Town / Affiliation / Last and First names of the presenters.

## **PUBLICATIONS, REPORTS**

Volker’s JPSP scripts can be used to produce back matter for the programme booklet and abstracts brochure, with an author list if necessary.

Numerous reports are available in SPMS via

*General / Data Extracts*

*General / Reports*

It is well worthwhile checking out how to pipe SPMS data directly to the conference website. It’s nice to see abstract submission and paper upload “live”, as well as the oral presentations, list of participants, industrial exhibitors, etc. This was first proposed by Ivan Andrian and Stefano Deiuri for EPAC’08, and more recently successfully implemented also for IPAC’10 and ‘11. See:

[http://www.ipac-](http://www.ipac-2011.org/inicio.asp?apt=5&sub=11&sub2=10)

[2011.org/inicio.asp?apt=5&sub=11&sub2=10](http://www.ipac-2011.org/inicio.asp?apt=3&sub=30)

[http://www.ipac-](http://www.ipac-2011.org/inicio.asp?apt=7&sub=37&sub2=3)

[2011.org/inicio.asp?apt=7&sub=37&sub2=3](http://www.epac08.org/index.php?n=Main.IELayout)

<http://www.epac08.org/index.php?n=Main.IELayout>

<http://www.epac08.org/index.php?n=Main.IELayout>

## **PREPARING FOR FILE UPLOAD**

The IT Manager should have set up the file server for upload of contributions to the proceedings six to eight weeks prior to the deadline. The SPMS documentation describes what’s needed to set up the server such that contributions are uploaded to their respective directories.

For EPAC’08 and IPAC’10 the file upload scripts offered the processing of .ps files as they were uploaded, such that authors could a) see whether the .ps file converted correctly, and b) were warned if no .ps file had been uploaded. It was generally felt that this contributed to speedier processing by editors since more .ps files were uploaded than previously.

### *To enable file upload*

Set to “yes”, the system parameter:

*Overall Database Administration / System Parameters / User / Accepting File Uploads*

Next, in the same screen, enter a File Upload Threshold of, say 3. This should match the file upload weights to be entered in the screen

*Editor/Proceedings Administration / Presentation File Combinations*

The weights entered for the different file types work in conjunction with the “get next paper” in the screen used by editors when processing contributions (\_debug/editor.html). One would normally give a weight of say 2 to a PostScript file, 1 to a Source File, and 0 to a .pdf or other file types. In this way, uploads with a .ps and a source file would be proposed first. These weights can

be modified as the processing advances, for example reducing the threshold to 2, 1 or 0.

### *Prepare Maintenance Tables*

Check that the maintenance tables are set up correctly:

#### **File Types**

The screen

*Editor/Proceedings Administration / File Types*

is set by default to enable upload of the various file types. Of course this can be modified as things progress, for example the introduction in recent years of movie presentations.

#### **Platform Codes**

Again, the screen

*Editor/Proceedings Administration / Platform Codes*

is set by default for authors to select Intel PC, Linux, Macintosh and Unix, but this list can be refined as the Editor wishes.

#### **Processing Status Codes**

The screen

*Editor/Proceedings Administration / Processing Status Codes*

is the place to set the status of processing by editors.

It is worth recalling the “normal” processing status codes which are: green when a contribution (.ps file) could be successfully processed, yellow where the editor had to work in the source file, red where the editor could not process the files submitted. For each of the above an Email message can be entered in this table to inform the author of the processing status.

This table has recently been slightly modified,

- a) a purple dot now indicates that a paper has simply been **assigned to an editor**, without a processing status, and
- b) the e-mail to authors with yellow dot status now offers them to download the editor’s pdf file, and accept or reject the editor’s changes online. A report in SPMS allows the Author Reception staff to identify the papers where the authors have accepted the changes and set the status themselves to green. An e-mail is sent to the Administrator if the author rejects the changes.

## **CONCLUSIONS**

This paper, while not exhaustive, describes the setting up of SPMS for activities up to file upload of contributions. The SPMS setup for activities which take place during the conference is described in a separate presentation, TUCC03, this meeting.

## **USEFUL SITES/URLS**

JACoW site @CERN: <http://www.jacow.org>

Organizing IPACs: Background Documentation 2011 TM

JACoW Team Meeting SPMS @CERN:

<https://oraweb.cern.ch/pls/jacowtm/profile.html>

JACoW Documentation site @Elettra:

<http://www.elettra.trieste.it/SPMS/>