



# Using OCS in Australia

*A Conference Administrator's Perspective  
by Peter L Jeffery*

# Context

---

- Commenced OCS -- February 2008
- Conference management since 1992
- Prior management system used and developed over 15 years [ jef07611 ]  
[see <http://www.aare.edu.au/confpap.htm> ]
- The conference to be managed using OCS comprised 600 presentations in 4 days in December 2008.
- Thus, preparation and revised operations to be completed in 10 months.

# Server and support

---

- Establish liaison with Kevin Stranack [reSearcher/Public Knowledge Project Librarian, Simon Fraser University]
- Purchase OCS service provision in Canada due no server support [php] available to client in Australia
  - Consequences in dates and times, and other factors
  - Benefits through very experienced support

# Basics of OCS

---

- Huge and sophisticated program, almost fully refined. Built on North American model of scholarly conferences as publications. Overlay of PKP ideals built into the program.
- Significant that OCS was built on journals/publishing base [OJS] by library oriented people. Conference presentations are not seen as a final refinement stage and collaboration, final versions are expected to be loaded prior to the event and can be public.
- Expectation of unified “proceedings” with a book like format [but digital] required revisions, formatting etc.

*AARE intent is/was that authors/researchers are entirely responsible for content and form of their work and submit “final authors drafts” [repository copies] at the event, after presentation and discussion.*

# Building the site

---

- Client conference's complexity:  
Education research encompasses many sub-discipline "tracks" -- thus 40 tracks.
- 40 "track directors" managing sections of content, all new to OCS.
- "track directors" not available to referee
  - denial of their expertise
  - size of available expert talent pool
- OCS definitions, terminology problems

# Reviewing

---

- An OCS terminology issue and more than that.
- “reviewing and refereeing” -- Australian conditions clash with OCS expectations. What are Australian conditions?
- Australian government requirements recently changed.

DEEWR does not require peer reviews to be blind: "For the purposes of the HERDC, an acceptable peer review process is one that involves an assessment or review of the research publication in its entirety before publication by independent, qualified experts. Independent in this context means independent of the author" (p. 28). The word "blind" does not appear anywhere in the HERDC specs - see

<http://www.dest.gov.au/NR/rdonlyres/8A941BE5-D558-4004-9C62-63CA08A34424/19678/2008HERDCSpecificationsFinalpdf.pdf>

- Client needs to abandon prior position to accept OCS model or maintain prior established Association and academic expectations?

# Admin. view of AARE on OCS

---

- Set-up AARE on OCS,  
<http://ocs.sfu.ca/aare/index.php/index/index/login?source=%2Faare%2Findex.php%2Findex%2Findex%2Fuser>
- Plain appearance, basic client data, encompasses on-going use of OCS
- Myriad of decisions about access, logs, etc. Administrator needs a complex mix of knowledge of client expectations, semi-technical website management, and learning and mostly accepting OCS / PKP imbedded ideals.
- Alternately, months of committee meetings to set-up.

# OCS terminology

---

- Site administrator
- Conference manager
- Director [s]
- Author [s]
- Reviewer [s]
- Track Directors
- Readers



# Training Track Directors

---

- Selection of track directors, need for 12 months commitment [did not happen in AARE 08 with resulting consequences in admin of OCS].
- Role of client's Planning Committee members in recruitment and training. They also new to OCS.
- Training video clip from Kevin Stranack
- Use of WebEx by Administrator to help users.  
<http://www.webex.com.au/>

# Administration Team

---

- Opening the conference and receiving proposals.  
[http://ocs.sfu.ca/aare/index.php/AARE\\_2008/AARE/manager/timeline](http://ocs.sfu.ca/aare/index.php/AARE_2008/AARE/manager/timeline)
- Decision to share admin duties with 3 experienced staff of PCO [Ruth Jeffery, Amanda Davies, Christopher Shilton]. AARE 2008 on OCS would not have been possible if only one person as administrator.  
Team meetings continuously as all are located in one workspace at the PCO office.
- “Problem” of academic involvement in administrative work.

# OCS is DIY

---



- OCS expects a senior academic to administer; very hands on high time demand. [approx. 5 hours per day].
- OCS expects academics to make their own proposals etc.
- AARE members expected to simply email their proposal for admin to load etc. under prior system. Everyone knows how to email.
- Senior academic members expect university admin staff to enter proposals etc. as soon as it involves on-line working “on the web”. Problem of replies from OCS including reviews not private to academic concerned
- Mismatch of expectations of the program and users leads to “problems” in usage of OCS.

# OCS Access

---

- OCS assumes authors are “at their desk” and connected by high capacity broadband.  
This is not necessarily true of busy academics.

Academics on field work in remote areas and deepest Africa have “problems”.

- Perfectly reasonable Canadian [night] maintenance periods are right in the middle of the east coast Australian day.
- Some spam filters difficulties.

# Summary data

---

- PCO maintained a database. We have a responsibility to client for the “event” regardless of software systems used. Logs at PCO - all emails are kept in perpetuity.
- OCS database  
[http://ocs.sfu.ca/aare/index.php/AARE\\_2008/AARE/manager/statistics](http://ocs.sfu.ca/aare/index.php/AARE_2008/AARE/manager/statistics)
- Logs in OCS  
[http://ocs.sfu.ca/aare/index.php/AARE\\_2008/AARE/director/submissions/submissionsInReview](http://ocs.sfu.ca/aare/index.php/AARE_2008/AARE/director/submissions/submissionsInReview)

# PCO database

---

- OCS not able to search by numbers, does search by authors or titles [reflects the library/academic basis of program operations].
- This year AARE paper codes used the OCS number as the final 3 digits. We added them to the abstracts one by one in metadata section of OCS.

# PCO adaptations

---

- PCO adjustments regarding failsafe numbering system.
- AARE paper codes system in AEI and on AARE website, Google etc.
- Details are documented in the following two slides.

## CONFERENCE PAPERS 2008 – PAPER CODE NUMBERS

- A guide to finding particular papers in the conference documentation.

This information is to help you understand the measures we have taken to protect your interests in regard to correct attributions and subsequent academic credits for your work. It is also intended to assist you to relate Program Book entries and abstracts on OCS. Coding of individual papers and refereed papers:

When proposals were entered into OCS the system assigned a 3 digit number to each. This number remained visible in OCS until the work was moved from “review” to “presentations”. The software program then suppressed the numbers. OCS will not search by these numbers.

AARE uses an alpha-numeric paper code numbering system comprising the first 3 letters of the proposer's surname, 08 to designate the year of the conference and 3 more digits [usually assigned by AARE Office]. This year the last 3 digits in AARE paper codes are the numbers given by the OCS software. These are unique for referencing purposes world wide.

AARE Office has entered into OCS the AARE paper code number [incorporating the OCS number] just in front of the title of the paper so that it shows when people consult the OCS abstracts in “presentations”. Many people will do this to find out more details of papers in the time-table and the Program Book at conference. Many people will find the unique code very helpful when checking works after the conference. Readers can cross-reference from the AARE Program Book [fully indexed by author, title, institution and paper code] to the abstracts in OCS. You can search in OCS by unique paper code number as well as author and title, but some symposia papers will not be found that way.

Papers that were proposed through OCS within symposia did not receive OCS numbers. Only the symposium received an OCS number. AARE Office has now given the symposium papers AARE paper codes for the Program Book and author credit purposes, but not within OCS. If a paper was put in as an individual proposal to OCS [and received an OCS number] as well as being part of a symposium [such as in the case of papers asking for full refereeing] then that paper has a paper code visible and searchable but other papers within symposia [that were not refereed] are only visible and searchable under the original symposium code. Papers in symposia have paper codes with running numbers starting with 901 within the symposium paper code assigned to the original proposer. Thus Symposium 22: CRA08246 comprises 4 papers one of which is refereed. That one paper has the paper code SPR08080 and © but 3 other papers in that symposium, MAT08965, NEI08966 and CRA08967 are only visible under symposium code CRA08246. These codes [ MAT08965, NEI08966 and CRA08967] are in the Program Book and its index along with all other details of all papers.

Contd.



- When papers are handed in at conference for the ACER Cunningham Library [Australian Education Index] and the AARE Conference Papers Collection or Digital Archive-Repository [Proceedings] they will be given the AARE paper codes according to the above principles if authors have not previously entered them.

These unique paper codes will be in the URL for each paper on AARE website and all search engines such as Google. Thus work will appear on the WWW like

<http://www.aare.edu.au/05pap/gil05258.pdf> .

These paper codes will now also be part of each paper in OCS with the exceptions noted above. In AARE authors retain copyright over their work see <http://www.aare.edu.au/pubdet.htm>

In OCS authors accepted Creative Commons copyright conditions see <http://creativecommons.org/>

Please direct all enquiries to AARE Office [aare@aare.edu.au](mailto:aare@aare.edu.au)

Peter L. Jeffery Administrator AARE on OCS, Compiler AARE Conference Papers Collections [Digital Archive].

# Views

---



- OCS levels of access and within them various “views”. Some confusion regarding these.
- OCS is a huge program so seeking information about proposals means a “lot of clicking about”.
- Some complaints about the process by busy academics but all told they must DIY.

# Registration business

---

- Client declined PayPal [default in OCS] as AARE uses DirectOne.
  - [PayPal requires client to collect from them, DirectOne banks monies directly into client's account].
- Client's registration form link placed in header on every page of AARE on OCS by Kevin Stranack with template changes  
<http://www.aare.edu.au/secure/conf2008.htm>

# AARE 2008 site

---

- Green template and logo assistance from Kevin Stranack saved Admin from need to seek CSS expertise or learn it myself!
- Demonstration of “green” site  
[http://ocs.sfu.ca/aare/index.php/AARE\\_2008/AARE/director](http://ocs.sfu.ca/aare/index.php/AARE_2008/AARE/director)
- See role here is Director and “presentations” and “archive” do not tally on screen at present.

# Exploring OCS “live status”

---



- Needed to check OCS' appearance to the public as it was being set up in March before opening for proposals.
- To publish the site temporarily, change the "go live" date in the timeline. Make it current, show off the site, and then reset it to a future date.

Easy when you know how.

# Chasing 'blind' reviewing

---

Conference Manager, the Conference Director, and the Track Directors all have access to author names and paper titles. Assign any people you wish to these roles, but they will be disqualified from being blind reviewers.

Reviewers only make recommendations, and the Track Directors make the ultimate decision (presumably based upon the reviewer recommendation) about the paper.

Select one person to act as the Track Director for each Track. Although they will not be able to act as a Reviewer, they will have the final say over whether a paper is accepted or not -- so it is a very important position.

Alternatively, reduce the responsibility of Track Directors, having them simply ensure that papers are sent to their appropriate tracks, and be **REQUIRED** to accept the Reviewer decision.

# Reviewer's woes

---

- Clash with expectations of another software system for conferences – reviewers go chasing stuff to review in response to broadcast messages sent out through OCS.
- OCS sends reviewers a specific link to the paper when they are asked to review. The 'other system' apparently expects reviewers to “go and look for the paper” on their site.
- Confusion from some. OCS system is better.



# Entering all potential reviewers

---

- AARE Office's collected "experts" from 2007 asked to allow their names to be placed in OCS.
- 443 contacted by email outside of OCS, then Chris at AARE office added about 343 to the OCS system for 2008.
- PCO monitoring indicates TDs used 243 reviewers.



# *“OCS in an Hour”*

---



*There is a book!*

# “Logging in as”

---

- A strategy for helping people with their submissions is:
  1. Login as Admin and choose role as Conference Manager
  2. Go to the list of Authors, find the author wanting to submit, and use the "login as" link to temporarily become that person
  3. Make the submission. The system will think it is the author, not admin. doing the work
  4. When done, use the "logout as..." link to return to admin account.
- This procedure is acceptable while connected by phone to the person concerned and in certain other circumstances , but not ethically comfortable.

# Appraisal of operations

---

- During the operational months leading to the event we spent time assisting people.
- Advice was not to use Schedule feature of software with so many streams in client's conference.

# Long term storage

---

- Terminology again – “archive” special meaning in OCS, cf AARE Digital Archive - repository is new jargon.  
<http://www.aare.edu.au/confpap.htm>
- The question is how long will the material in OCS be stored there?
- Of course Google and Google Scholar will have it all and so will institutional repositories.
- Overlapping “world library” entries. Researchers finish up having to check versions.

# Collecting for “proceedings”

---

- Full papers are not in OCS if proposed and admitted for abstract only category [1000 word abstracts]. Includes work in progress, student material, keynotes' papers, etc.

The quality of some non-refereed papers is superior to some reviewed papers.

- AARE decided that the non-refereed papers will be included in the conference papers collection 2008. All presented papers will be placed as usual into the AARE digital archive, and all presenters will be strongly encouraged to hand in copies of their papers on CD and in hardcopy if they wish their papers to be included in the collection and in the AEI.
- Digital indexing will ensure world wide availability. Authors retain copyright or have Creative Commons License if in OCS.

# Concluding

---

- Why attend a conference if everything is available prior to the event?  
Are we just reading aloud round the class?
- When will we use Webex or similar to completely eliminate assembly of people, commuting, etc?
- What is the difference between an OCS conference and a journal?
- Why meet together -- to discuss -- not just to “present” papers.
- What is the “final version” of a conference paper?

Answer - The final version of the conference paper is the one presented [discussed with peers] at conference and handed in immediately after the event for the Proceedings.



**The End**

**Using OCS  
in Australia**

**a report by**

**Peter L Jeffery**

*All enquires to  
[peter@professionalresources.com.au](mailto:peter@professionalresources.com.au)*