Managing Your Conference with PCS

Precision Conference Solutions

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Chapter 1 – Introduction

1.1 About This Manual

This manual is written for conference chairs and independent administrators who are managing the online submission and review process for their conference. The manual describes what you need to do during each phase of a conference to manage the process efficiently and on schedule.

This manual is organized into eight chapters. Chapter 1 introduces you to the PCS system and includes a Quick Start Guide, while chapters 2 to 8 describe the tasks and activities required to manage a typical conference. Six appendices provide supplementary information on using certain features of the system and pages within it.

1.2 Overview of the PCS System

The PCS system is a web-based software application that allows you to easily manage the online submission and review process for your academic conference. The system provides a common login page from which every user has access to a personal account. From this personal account, the user can act as author, reviewer, committee member, or chair of any of the supported conferences or tracks.

The system can support a number of different conferences or tracks that are managed by the same organization. Each conference or track is handled by a separate submission and review system. For example, a conference with Papers and Posters tracks would use two separate submission and review systems. Each system can have different chairs, different submission and review forms, and different configurations.

1.3 Quick Start Guide

This section describes what you need to do to set up the PCS system to the point where you're ready to accept submissions. PCS will have already performed the initial configuration of your system.

1.3.1 Getting Started

When you first log on, you'll be prompted to change your password and enter your personal information.

To get started:

1. Log on using your new password, then enter your personal information.

2. Click on the **chairing** link below the menu bar (the horizontal bar at the top of the page).
3. On your personal home page, click on **Chair [Conference Name]**, where *Conference Name* is the name of your conference.

The Conference Administration page will appear. It's also your administrator home page, and it's from here that most of your tasks are carried out. Take a moment to click on the links and familiarize yourself with what you can do from here. Most of the pages will show little or no information, since no papers have been submitted yet.

On the right side of the page, the system tracks and displays two pieces of information:

- **Phase –** The phase you've set the conference to.
- **Email address –** The address you've set email to be sent from.

To go back to your individual home page, click on the **myHome** link in the menu bar. That page is the starting point for carrying out the tasks required to manage a conference. From there can also do other things, like update your personal information, submit a paper, and volunteer to review a paper.

To go back to your administrator home page, click on the **adminHome** link in the menu bar. This link is visible when you're carrying out tasks such as editing settings and forms, reviewing submissions, and working with reports.

If you ever forget your user ID or password while logging on, follow the links on the screen to alert the system. It will send you the information in an email message.

1.3.2 Checking the Conference Settings

Permanent conference settings are provided on the Edit Global Settings page. Examples are the conference URL and email addresses. These settings are set initially and are generally valid for the entire conference. PCS will have provided initial settings; check them and modify any that need to be changed.

Usually, you'll have a single email address for all email related to the conference chair, in the format *chair@yourconference.org*. This email address can be used in all four places on this page that require an email address. However, if you wish, the addresses can be different.

The conference logo should not be larger than 200 pixels in any dimension, and it should appear on a *pure white* background. PCS will have set up the system using a logo from your conference web site, but if you have a better logo, you can provide it here.

To check the conference settings:

1. On your administrator home page, under Settings, click on **Edit Global Settings**.
2. Check the settings and modify anything that needs to be changed.

3. For information about a setting, click on the **info** link beside it.
4. When you're finished, click on **Submit changes**.

1.3.3 Setting Up Keywords

Keywords are words or terms that are used by authors to describe their submissions and by reviewers to describe their areas of expertise. (For example, an author submitting a paper on a recent study testing the effectiveness of a surgical device incorporating a camera might describe the paper using the keywords *Human computer interaction* and *Health and medicine*.) When authors make a submission, they see a set of keywords and select the ones that apply.

When reviewers volunteer to review, they provide their levels of expertise for each of these keywords. When it comes time for reviewers to be assigned to submissions, the system can assign them automatically by matching the keywords of the submissions with the reviewers' corresponding levels of expertise.

You can also organize the keywords into groups. Authors and reviewers then see the keywords presented in the groups that you've defined.

When the PCS system is being used by multiple conferences or tracks, each of which uses different keywords, all of the keywords are shared by all of the conferences and tracks. You can hide those keywords that your own conference or track won't use. Again, you can group the keywords in any way you wish.

To set up keywords:

1. On your administrator home page, under Settings, click on **Edit Forms**.
2. On the Edit Forms page, click on **Keywords**.
3. On the Set up the Keywords page, organize the keywords into the groups you want. You can also add or remove a group or make keywords hidden. Click on **Record Changes**.

If no keywords appear on the Keywords page, contact PCS and provide a list of keywords. Save it as a plain text file with one keyword per line:

```
keyword or phrase; short form
```

The short form should be separated from the full keyword with a semicolon. The short form should be no more than eight characters long.

If you have any questions or encounter difficulties at any point, don't hesitate to contact PCS. Send an email to support@precisionconference.com.

Your conference is now ready to accept submissions.

1.3.4 Using the Test Accounts

PCS will have set up two test accounts that you can use to test the system from the viewpoint of an author, a reviewer, and a committee member. You should use these accounts to check the system at various important times, such as when you start the Submissions phase and when you start the Reviewing phase.

To use these test accounts:

1. Go to your personal chairing page and click on **chairing** below the menu bar.
2. Click on **Log on as test author and reviewer**.
3. Click on **Log on as test committee member**.

1.4 About the Process

You'll recall that the conference site supports multiple tracks in a conference or multiple conferences in a society. For a particular track in a particular conference, any person can have multiple roles: author, reviewer, committee member, or chair. For example, a person can submit a paper and act as the conference chair, or a person can submit a paper and be a member of the program committee. The rest of this manual will discuss one track in one conference.

The following chapters describe the process of managing your conference. While every step of the process is important, it's particularly important that you test your setup each time you advance to the next phase. For example, after changing to the Submissions phase, log on using the test author account to make sure that submissions can be made properly. After moving into the Reviewing phase, log on using the test reviewer and committee member accounts to ensure that reviewers have access to the submissions they are assigned.

Here is a brief description of a typical conference timeline.

Submission deadline minus 5 weeks

- Set up system (Section 1.3)

Submission deadline minus 4 weeks

- Open system to submissions (sections 2.1–2.7)

Submission deadline minus 3 weeks

- Set up committee (Section 2.8)
- Recruit reviewers (Section 2.11)

Submission deadline

- Close system to submissions (Section 3.1)
- Assign reviewers (Section 3.5)

Submission deadline plus 3 days

- Set up review form (Section 4.1)
- Open system to reviewing (sections 4.2–4.4)
- Instruct the committee (sections 4.5–4.6)

Review deadline
- Collect author rebuttals (optional, Section 4.8)
- Have discussions among co-reviewers (optional, Section 4.9)

Committee meeting minus 1 week
- Close the system to reviewing (Section 5.1)
- Have committee prepare for meeting (sections 5.3–5.4)
- Prepare for meeting (sections 5.5–5.6)

Committee meeting
- Open system to committee meeting (sections 6.1–6.2)
- Enter decisions (sections 6.3–6.4)

Committee meeting plus 1 day
- Set up final submission form (Section 7.1)
- Notify authors of decisions (sections 7.2–7.5)
- Collect final submissions (Section 7.6)

Final submission deadline plus 1 week
- Close the system and download archives (Chapter 8)

Chapter 2 – The Submissions Phase

During the Submissions phase, you prepare the system to accept submissions, open your conference for submissions, then monitor the submissions as they start to come in. At the same time, you begin recruiting reviewers so that the review process can finish by the final conference deadline.

Some conferences have a single submission deadline by which all material must be submitted. Other conferences follow a two-stage submission process, whereby certain material – for example, an abstract, keywords, title, and authors' names – must be submitted by an early deadline and the full submission by a final deadline. The conference chair usually decides which process the conference will use.

Here is a checklist of what you'll do during the Submissions phase.

- set up the submission form
- change the conference phase to Early Submissions (optional)
- change the conference phase to Submissions
- test the submissions process
- link to the PCS site
- establish committee members and reviewers
- allow committee members to bid for papers
- declare chair conflicts
- start to recruit reviewers
- monitor submissions
- communicate with users, including configuring email templates
- diagnose problems reported by users

2.1 Setting Up the Submission Form

Your first major task is to set up the submission form. PCS provides a sample form, which consists of a series of instructions and questions, separated by information and editing options on a yellow-gold background. The information and options are available only to you; they aren't visible to the submitter.

You can use the sample form as is, or you can customize it by editing the items, duplicating them, "swapping them down" (exchanging one item with the next one), removing them, and/or inserting new ones. The form can ask various types of questions, and responses can be a short line of text, multiple lines of text, a single choice from among many, or multiple choices from among many.

The most basic submission form should allow the submitter to enter the title and authors' names as well as the submission document itself. More elaborate forms can allow the submitter to enter an abstract and keywords, provide additional electronic material (such as videos or source code), and answer other questions about the submission, such as its category (whether paper or poster) or expected audience.

To set up the submission form:

1. On your administrator home page, under Settings, click on **Edit Forms**.
2. On the Edit Forms page, click on **Submission Form**.
3. On the submission form, insert and edit the items you want. (For information and instructions, see the sections below.)

2.1.1 Items on the Form

The submission form can include the following types of items:

- Instructions
- Authors
- Abstract
- Keywords
- Submission document
- Additional files
- Secondary files
- Radio buttons
- Checkboxes
- Multi-level selection
- Single line of text input
- Small box of text input
- Large box of text input
- Table of questions

2.1.2 Inserting Items

Items that you insert appear above the current item. Some items might not be available to insert; this is because they already appear on the form and cannot appear more than once. Examples are the authors, abstract, keywords, submission document, and supporting files.

If you insert items that are set up as radio buttons, checkboxes, or multi-level selection (this includes the Secondary files item), their names should be *very* short because they'll appear in tables generated by the system (such as the Submissions page) and therefore need to fit into a small space.

To insert an item:

1. Below where you want to insert the item, click on **Insert new item here**.

2. In the Insert an Item window, type the name into the **Name of Item** text box, then choose a type from the **Type of Item** pull-down list. Click on **Insert this item**.
3. Back on the submission form, edit the new item. (See “2.1.3 Editing Items”.)

2.1.3 Editing Items

After inserting an item, you edit it to give it a name and add the required text. Some items have additional information that you can edit; these are described below.

Some items are also *required*: they must be answered before the submission form is accepted. A required item can have one of two deadlines: early (in the case of a two-stage submission process) or final. If the early-deadline questions aren’t answered, the system automatically prevents anything from being submitted after that deadline.

- **Instructions –** Shows the text of an item; it doesn’t ask a submitter to answer a question. Instructions differ from the other types of items in that the name isn’t shown and the text is at the left margin instead of indented. Instructions typically appear near the top of the submission form.

- **Authors –** Provides a table into which a submitter can enter the list of authors. You specify the number of rows in the table under Number of Authors. The table has four columns: Given name, Family name, Affiliations, and (optionally) Country. You specify the size and heading of each column under Columns of Author Data. If you want the Country column to appear, send an email to PCS at support@precisionconference.com.

- **Abstract –** Provides a large text box into which a submitter copies the submission abstract. The abstract can contain HTML tags.

- **Keywords –** Provides a list of keywords. Beside each keyword is a radio button and a checkbox. A submitter clicks on one radio button to select a primary keyword and any number of checkboxes to select additional keywords. (For details on setting up keywords, see “1.3.3 Setting Up Keywords”.)

- **The document –** Allows a submitter to provide the submission document from a file on their computer. You can restrict the types of files to Adobe PDF (.pdf), Microsoft Word (.doc), Rich Text Format (.rtf), Zip archive (.zip), and Postscript (.ps).

- **Additional files –** Allows a submitter to provide additional electronic files to support the submission. These are commonly video files (.mpg, .avi, or .mov), additional documents, source code, or archives. You can specify the maximum number of additional files as well as the description of each one.

- **Secondary files –** Appears as a radio button question on the form. Under **Options to Choose From**, specify the number of columns on the form and provide the options. Each option requires a long version (which appears on the form) and a short version (which will appear in tables generated by the system, such as the Submissions page). Only you and the program committee can see the short version. You can use more than eight characters, but we recommend no more than eight.

- **Radio buttons** and **Checkboxes –** Use a radio button question when a submitter must select a single option from a list; use a checkbox question when a submitter can select more than one option from a list. Under **Options to Choose From**, type the list of options and specify how many columns will appear on the form. Each option requires a long version (which appears on the form) and a short version (which will appear in tables generated by the system, such as the Submissions page). Only you and the program committee can see the short version. You can use more than eight characters, but we recommend using no more than eight.

- **Multi-level selection –** Used when a submitter must select two options, each from a list, and the second option is based on the first. Under **Options to Choose From**, provide the title of each group of options and type the descriptions. Each option requires a long version (which appears on the form) and a short version (which will appear in tables generated by the system, such as the Submissions page). Only you and the program committee can see the short version. You can use more than eight characters, but we recommend no more than eight. (Alternatively, you can upload all of the options in a file; send an email to PCS at support@precisionconference.com first to discuss the file format.)

- **Text input –** Used for free-form text input. You can restrict the text to a single line, a small text box, or a large text box. You can also limit the number of words in the submitter's response under **Word limit**.

To edit an item:

1. Click on **Edit this item**.
2. In the editing window, type the name into the **Item Name** text box.
3. Type the text into the **Item Text** text box. You can add instructions containing embedded HTML tags for formatting.
4. If the item is required, specify whether it's required by the early or the final deadline. (For details on checking the deadline, see "2.4 Verifying Conference Deadlines".)
5. If the item has additional information that you need to edit, see the item descriptions above.
6. When you're finished editing the item, click on **Record your changes**.

2.2 Changing to the Early Submissions Phase (Optional)

If your conference is following a two-step submission process, you're ready to accept early submissions. You do this by changing to the Early Submissions phase.

To change to the Early Submissions phase:

1. On the Edit Phase Settings page, under Current Phase, select **Early Submissions**. Then click on **Submit Changes**.
2. On the Edit Global Settings page, check that the dates for early and final submissions are provided.
3. On the submission form, check that you've indicated which items must be submitted by the early deadline and which by the final deadline. (For details, see "2.1.3 Editing Items".)
4. On the Edit Forms page, click on **Email Templates** and check that the correct message appears for the **submission confirmation email** template.

2.3 Changing to the Submissions Phase

When you're ready to open your conference for submissions, you advance the phase to Submissions. (If your conference is following a two-stage submission process, changing to the Submissions phase allows submitters to provide final material for their submissions, but it prevents submitters who haven't provided all of the early required material from submitting anything further. You can, however, permit late submissions. See "3.2 Permitting Late Submissions".)

To change to the Submissions phase:

1. On the Edit Phase Settings page, under Current Phase, select **Submissions**. Then click on **Submit Changes**.
2. On the Edit Global Settings page, check that the date for final submissions is provided and is correct.
3. On the Edit Forms page, click on **Email Templates** and check that the correct message appears for the **submission confirmation email** template.

Note: At this time, you should be preparing to recruit reviewers. For details, see "2.11 Starting to Recruit Reviewers".

2.4 Verifying Conference Deadlines

After changing the conference phase, you must verify that the deadline(s) that were set initially are correct. You also need to check that you've indicated on the submission form which items must be submitted by the early deadline (if there is one) and which by the final deadline. This establishes that these items are required; if your conference is following a two-stage submission process and these items aren't submitted by the early deadline, the author won't be permitted to complete the submission. (See also "2.1.3 Editing Items".)

To verify the overall conference deadlines:

1. On the Edit Global Settings page, under Submission Settings, check the deadline(s) and make any necessary changes. Then click on **Submit Changes**.

To check the deadlines on the submission form:

1. On the Edit Forms page, click on **Submission Form**.
2. On the submission form, click on **Edit this item** above an item (for example, Authors, Abstract, Keywords, The Document).
3. In the window that pops up, under **Item Required?**, click on the appropriate radio button. The deadlines shown here reflect those on the Edit Global Settings page.

2.5 Testing the Submissions Process

Before going any further, you need to verify that the system is properly set up to accept submissions, that anonymity of submissions is correct, and that authors and submitters have the correct access rights to information in the system. If this process runs smoothly, you can go on to the next task; otherwise, you need to make the necessary changes and retest until the process is working properly.

To test the submissions process:

1. On the Edit Phase Settings page, under Current Phase, select **Submissions**. Then click on **Submit Changes**.
2. In a separate window, log on using the test author account. In the author's personal account, click on **new submissions**. On the New submissions page, click on **Make a new submission**. You'll be asked to confirm this; click on **Yes. Make a new submission.** Then click on **Continue with the submission right now.**
3. On the submission form, enter some test information. Be sure to provide only a preliminary submission. Then click on **Submit**.
4. On the Submission Confirmation page, check the status of the submission. If the system is configured properly – that is, if you were able to make a preliminary submission – you should see a message saying that your submission isn't yet complete and providing the date by which you need to provide the outstanding material.
5. Make a second dummy submission using the test author account.

2.6 Linking to the PCS Site

Once you've set up the PCS system correctly, created the submission form, and verified the configuration through test accounts, you need to provide a link from your conference site to the PCS submission site. The URL should be of the form

```
https://precisionconference.com/\~confName/
```

where *confName* is the name of your conference.

When users go to the logon page, this URL will automatically expand to a much longer one. However, don't give them the longer URL; give them the short one. The longer one wraps over two lines, and some users who cut and paste it won't cut it entirely; they'll then see a "Page not found" error in their browser. You'll save yourself time dealing with users' queries by providing the shorter URL.

2.7 Informing PCS

After opening your conference for submissions, be sure to send an email, informing PCS, to support@precisionconference.com.

2.8 Establishing Committee Members and Reviewers

Committee members are members of the program committee, and they're typically assigned a set of submissions to review. For each submission, a committee member acts as either a primary or a secondary reviewer.

- **Primary reviewer –** Has access to almost all information about a submission, including the authors' names, and can assign reviewers to it. (A Primary cannot assign himself or herself to a submission.) He or she monitors the progress of the reviews and writes the final report. A Primary is sometimes referred to as a coordinator.

- **Secondary reviewer –** Has limited access to information about a submission, cannot assign reviewers, and (at the discretion of the chair) cannot see the names of the other reviewers of the submission. A Secondary is sometimes referred to as an assistant coordinator.

The Primary and Secondary roles depend on the submission. A committee member can be Primary on some submissions and Secondary on others.

Each submission can have only one Primary, but it can have any number of Secondaries, and one or two Secondaries are often assigned to a submission. However, a submission doesn't need to have a Primary, and it doesn't need to have a Secondary.

Reviewers (also called *external reviewers* or *Externals*) review one or more submissions; they aren't members of the program committee. It's strongly recommended to recruit volunteer reviewers before the submission deadline. (For details, see "2.11 Starting to Recruit Reviewers".)

2.8.1 Adding Members to the Program Committee

You can add members to the program committee individually or in a batch.

1. To add a person to the committee, go to your administrator home page and click on **Committee**. On the Committee Members page, click on **Add a Committee Member** in the upper-right corner, then choose the name from the list that appears. (Or type a partial name into the text box, then choose the name from the list.)
2. To add a batch of members at once, go to your administrator home page. Under Miscellaneous, click on **Register a Batch of People at Once**. On the Register a Batch of People page, follow the instructions to submit a text file of the names.

2.8.2 Adding Reviewers to the System

You can add reviewers to the system individually or in a batch.

1. To add an individual reviewer, go to the Reviewers page. In the upper-right corner, click on **Add a Reviewer**.
2. To add a batch of reviewers at once, go to your administrator home page. Under Miscellaneous, click on **Register a Batch of People at Once**.

2.9 Allowing Committee Members to Bid for Papers

You can allow committee members to bid for the papers they want to review. Bidding consists of indicating a preference for each submission assigned for review. Bidding information is useful when you assign reviews yourself; the system can also use it to assign reviews automatically.

When bidding is enabled, the **Indicate your preferences and conflicts** link appears in each committee member's personal account. (Otherwise, the message "A link will become active here when submissions are assigned to you" is displayed.) When a member clicks on that link, a *bidding list* of all submissions is displayed.

The bidding list is displayed as a table, with each submission consisting of a row. For each submission, the bidding list includes the ID, title, match score, preference, and any information provided on the submission form, such as authors' names. The submission document isn't shown. The committee member indicates his or her preference for each submission in the Preference column by indicating *want*, *willing*, *reluctant*, or *conflict*.

To allow committee members to bid for papers:

1. On the Edit Phase Settings page, under Committee Settings, select **PC members have access to the system** and **PC members can provide reviewing preferences**. Click on **Submit Changes**.
2. On your administrator home page, under Miscellaneous, click on **Propagate review assignments**. On the Enable Reviewing Links page, click on **Propagate assignments to committee members' personal accounts**. The system displays a message box, showing the progress of this task; the box closes automatically when the task is finished.

3. To allow authors' names to appear in the bidding list, go to the Edit Global Settings page. Under Anonymity Settings, set **Hide author names from primary reviewers?** and **Hide author names from secondary reviewers?** to **no**. Then click on **Submit Changes**.

If committee members say that they cannot provide their preferences, you may not have enabled bidding correctly. To check the setup:

1. Log on using the test committee member account.
2. In the person's personal account, on the Reviews in Progress page, click on **Review (as PC member)**.
3. On the person's individual Committee Member page, under Actions, click on **Indicate your preferences and conflicts**. The Reviewing Preferences page will appear.

There are two ways that you can view the preferences that committee members have indicated. These are discussed below. Both are also available to the Primaries.

2.9.1 Viewing Preferences on the Committee Preferences Page

When you allow committee members to bid for the papers they want to review, the bidding information is collected on the Committee Preferences page. You can view this page only if you've enabled bidding, as described above.

The information on the Committee Preferences page is organized in a table, in which each row corresponds to a submission and each column corresponds to the name of a committee member. Under each name is an indication, in parentheses, of the number of submissions the person has been assigned as Primary (P) and Secondary (S). For example, *(3 P, 2 S)* denotes three Primary submissions and two Secondary submissions.

Under the name of each committee member are three columns, described below.

- **Pref –** Shows the preference the committee member has indicated for a submission: 2 (Want), 1 (Willing), 0 (Reluctant), or C (Conflict). Each preference is also colour-coded.

- **Stat –** Shows the status of the committee member with respect to the submission: P (Primary), S (Secondary), or . (a dot, indicating unassigned). You can change the person's status here.

- **Match –** Shows the match score between the submission and the committee member. When the system itself detects a conflict, the word *conflict* appears in red. (For a description of how the match score is calculated, see "Appendix C – The Match Score".)

You can click on any column to sort the information by that column, then click on the red triangle to reverse the sort order. Sorting is helpful when assigning submissions: you can find well-suited reviewers, high-bidding reviewers, or currently assigned reviewers by sorting on the Pref, Match, or Stat columns, respectively. (For details about sorting and other ways to manipulate the information, see “2.15 Manipulating the Table Pages”.) Keep in mind that making changes in large tables can take several seconds to process.

To view preferences on the Committee Preferences page:

1. On your administrator home page, under Reports, click on **Committee Preferences**. (This link appears only if you’ve enabled bidding.)
2. On the Committee Preferences page, to view the submissions by a committee member’s preferences, sort on the Pref column.
3. To view the submissions by a committee member’s role, sort on the Stat column. To change the role for a submission, click on it. A confirmation message will appear, and the new role will appear in white on a black background to indicate that you’ve changed it.
4. To rank the submissions by a committee member’s suitability, sort by the Match column.

2.9.2 Viewing Preferences on the Individual Preferences Pages

There are two kinds of individual preferences.

- When you’re monitoring a submission, you can see all committee members’ preferences for that submission. The Reviewing Preferences page lists each committee member, along with the person’s preference, role, and match score for the submission. This information corresponds to one row on the Committee Preferences page.

- When you’re monitoring the reviews assigned to a committee member, you can see all of the preferences that he or she has indicated. The Reviewing Preferences page lists each submission, along with the committee member’s preference, role, and match score. This information corresponds to the three columns under the person’s name on the Committee Preferences page.

Click on any column on the Reviewing Preferences page to sort by that column, then click on the red triangle to reverse the sort order. Sorting is helpful when assigning submissions: you can find high-bidding reviewers, currently assigned reviewers, or well-suited reviewers by sorting on the Pref, Stat, or Match columns, respectively. (For details about sorting and other ways to manipulate the information, see “2.15 Manipulating the Table Pages”.)

To view preferences on the individual preferences pages:

1. In the individual Submission window, under Administration, click on **Show committee and reviewer preferences for this submission**.
   OR
   In the individual Committee Member window, under Administration, click on **Show this reviewer’s preferences**.
2. On the Reviewing Preferences page, to find high-bidding reviewers, currently assigned reviewers, or well-suited reviewers, sort the reviewers by Pref, Stat, or Match, respectively. To change a person’s role for a submission, click in the Stat column.

2.9.3 Managing Individual Committee Members and Reviewers

In addition to working with committee members and reviewers as a group, you can work with them individually. On the Committee Members or Reviewers page, click on the person's name. In the Committee Member or Reviewer window, under Administration, the following options are available:

- **Show this reviewer's preferences** – You can see all of the preferences that the person has indicated and assign a submission to the person. (For details, see "2.9.2 Viewing Preferences on the Individual Preferences Pages".)

- **Permit late reviews** – After the reviewing deadline passes, reviewers (and, if you wish, committee members) are prevented from submitting or modifying reviews. However, you can permit a reviewer to submit late reviews for all of his or her assigned papers. There is currently no way to restrict that permission to specific papers.

- **Remove this committee member from the committee/Add this reviewer to the committee –** You can change the status of the committee member or reviewer. When a committee member is removed from the committee, the person becomes a reviewer. If the committee member is already assigned to review certain submissions, he or she becomes an ordinary reviewer of those submissions. When a reviewer becomes a committee member and already has submissions assigned, he or she becomes a Secondary on those submissions.

- **Remove this committee member/reviewer from the system –** You can completely remove the person from the system. (**Note:** Doing so also removes any reviews that the person has already submitted.) If you remove someone by accident, contact PCS to reinstate them. The person is removed from the list of committee members or reviewers for your conference, but the person's personal account remains since they might be using it to make or review submissions for another conference.

2.10 Declaring Chair Conflicts

If someone with administrative access to the system (such as one of the conference chairs or an employee of PCS) makes a submission, there is a risk that they'll see the identity of the people reviewing that submission. Even if the submitter-administrator is careful to avoid seeing the reviewers' names, the reviewers' anonymity may be *perceived* to be lost.

Chairs can avoid this situation by declaring conflicts with particular submissions. This means that they won't be able to see the names of the reviewers of those submissions, although they'll be able to see the reviews. Once a chair has declared a conflict, it can't be revoked except by contacting PCS; send an email to support@precisionconference.com. Reviewers will realize that the submitter is someone with administrative access to the system; however, there is no way to avoid this.

If they wish, committee members can also declare a conflict; this improves the information available to the chair when assigning reviews later on.

To declare a conflict:

1. On your administrator home page, under Miscellaneous, click on **Declare Chair Conflicts**.
2. On the Declare Chair Conflicts page, the name of the chair as well as the ID and title of each conflicting submission are presented in a table. Type one or more submission IDs into the **Submission IDs** text box, then click on **Declare conflict(s)**. The ID and title of each submission will be displayed.
3. To confirm the conflict(s), click on **Yes. I declare these conflicts**.

2.11 Starting to Recruit Reviewers

Before the submission deadline, you need to start recruiting reviewers. While you'll continue this process after the submission deadline passes, it's important to start this process beforehand. You need to allow about three weeks for reviewers to volunteer and register with the system.

If reviewers are registered before the submission deadline, the system can automatically assign them to submissions based on the match between each reviewer's declared expertise and the submissions' keywords. If only committee members are registered, the system can still automatically assign committee members to the submissions.

Be sure to ask permission of potential reviewers before registering them with the system; this prevents their surprise at receiving an email saying that they've been registered to review for the conference. After waiting for their permission, you can register them, but then you have to wait again for them to log on to provide their levels of expertise. All of this takes time, so the recruitment process should be started at least three weeks before the submission deadline.

A user's personal account is permanent; it's kept from year to year. If the person is already registered with the system, the time required for them to volunteer is greatly reduced, since they have already provided their contact information and levels of expertise. Furthermore, submitters who create an account will see that they can volunteer to review, and many will do so.

About three weeks before the submission deadline, ask the administrator of the overall system to send out a message to all persons registered with the system, asking them to log on and volunteer to review for your conference. Each volunteer reviewer then logs on and indicates the number of papers they're willing to review. Your own list of reviewers (on the Reviewers page) will be automatically updated as people volunteer for the conference. All volunteers appear in that list and are considered in the automatic assignment.

For details on recruiting reviewers, see “3.4 Recruiting Reviewers”.

2.12 Monitoring Submissions

Submissions will now be coming in, and you need to monitor them to ensure that they’re complete – for example, that authors’ names, keywords, and abstract are included. If submissions are incomplete, monitoring them now gives submitters time to provide all the required information before the reviewing deadline.

You can view the details of all submissions on the Submissions page, check an individual submission in the Submission window, and check for outstanding submissions on the Registrants page.

2.12.1 On the Submissions Page

The Submissions page presents all of the submissions in a large table. This format allows you to easily check the status of the submissions as well as download papers and additional files. For a detailed description of how to manipulate information in a table, see “2.15 Manipulating the Table Pages”.

To monitor submissions on the Submissions page:

1. To sort the submissions, click on a column heading.
2. To view the status of the submissions, sort by the Submitted column. This allows you to see what has been submitted – the paper (**P**), submission information (**D**), and any additional files (**1**, **2**, etc.). You can also see which submissions are incomplete and need to be followed up.
3. To download a paper, click on the **P** in the Submitted column. To download associated information (title, authors, keywords, abstract, etc.) as tab-delimited text, click on the **D**. To download additional files, click on a number.
4. Use the Notes column to write notes to yourself about what is still needed for the submission to be complete. (For example, you can include the length of the submission and whether the formatting needs work to conform to the conference guidelines.)
5. Use the Upload Limit column to change the disk space required for the files accompanying a submission.
6. To change the columns that are displayed, click on **Show or Hide Columns** and use the Show or Hide Columns window.
7. To change the rows that are displayed, click on **Restrict Rows** and use the Restrict Rows window.
8. To change the view of the information, choose a view from the pull-down list at the top left of the page. Changing the view can be useful for verifying the submission.

2.12.2 In the Submission Window

If working with submissions in one large table becomes cumbersome, you can view individual submissions in the Submission window. You can also read the reviews that have been received.

To monitor a submission in the Submission window:

1. On the Submissions page, sort on the Paper column and click on the title you want.
   OR
   Sort on the ID column and click on the paper's ID number.
2. In the Submission window, you can see the submission's title, author(s), contact name, and decision (if made by now). You can also see the reviewers who have been assigned to the submission, their roles, expertise, and review scores.
3. To read a review, click on **See review**. To edit a review, click on **Edit review**.
4. To read the abstract, see the keywords, and see the answers to the test question(s), click on **show more information**.
5. To download and open the submission document and any associated files, click on the file name. (Documents are normally in PDF format.)

2.12.3 On the Registrants Page

If a person has registered to make a submission but hasn't made one, the person's name appears on the Registrants page rather than the Submissions page; the words *no submission* appear in the Submission title (if submitted) column. If you delete a submission from the Submissions page, the person's name remains on the Registrants page. You can reinstate that person if you wish.

The Registrants page is commonly used to extend the submissions deadline for a person who has never made a submission. (See also "3.2 Permitting Late Submissions".)

To extend the submissions deadline on the Registrants page:

1. Click on either the submission title or **no submission**.
2. In the Submission window, under Administration, click on **Permit late submission**.
3. After the author has submitted, return to this window and click on **Don't permit late submission**.

2.12.4 Managing Individual Submissions

As with committee members and reviewers, you can manage individual submissions. On the Submissions page, click on the submission title. In the Submission window, under Administration, you can do the following:

- **See final submission –** When the final submission has been received, this link is enabled. You can view the final submission as a PDF file, modify the submission, and download the information in the window as an Excel-compatible file.

- **Show committee and reviewer preferences for this submission –** You can view all committee members' preferences for this submission. (For details, see "2.9.2 Viewing Preferences on the Individual Preferences Pages".)

- **Mail to all reviewers of this paper –** Allows you to send an email message to all of the reviewers assigned to this submission.

- **Edit comments to authors –** During the committee meeting, comments to the authors are usually discussed and written. After the committee meeting, these comments are sent to the authors, along with the reviews of their papers, in notification messages. Both the chair and the Primary can send comments to authors. (See also "5.3.2 Recording Comments to the Authors" and "6.4 Recording Comments to the Authors".)

- **Permit late submission –** After the submission deadline passes (either early or final), authors are prevented from making submissions. However, you can permit late submissions. (For details, see "3.2 Permitting Late Submissions".)

- **Modify the submission –** If the author has already registered to submit, allows you to make the submission on his or her behalf. This can happen, for example, if the author has problems uploading the PDF of the submission (usually because the author has an unreliable internet connection). In this case, the author might send you the PDF by email, and you submit the PDF by modifying the submission.

- **View the submission profile –** Allows you to see certain specific information about the submission: contact author and email, author(s) and affiliation(s), secondary files, and keywords, as well as any information provided in response to radio button questions, multi-level selection questions, and test question.

- **Remove this submission –** You can completely remove the submission from the system. If you remove a submission by accident, contact PCS to reinstate it. The submission is removed from the list of submissions for your conference, but the author's personal account remains since they might be using it to make or review submissions for another conference.

- **Download the submission data shown above –** Downloads the information in the Submission window to your computer in an Excel-compatible format.

- **Download all reviews of this submission –** Downloads all of the reviews of this submission to your computer in an Excel-compatible format.

- **See the log of reviewer assignments and actions –** Displays a list of reviewer-related actions for this submission along with the times that they occurred. Examples of actions are the Primary assigning this submission to a reviewer and the reviewer agreeing by email.

2.13 Communicating with Users

As you begin receiving submissions and monitoring reviews, you'll start to communicate frequently with users. You can post messages on web pages and send mass emails to groups of users. If you provide instructions to users, be sure to run through them yourself as a test user to make sure that they work properly. Make any necessary changes before sending them to users.

2.13.1 Posting Messages on Web Pages

You can provide messages on the system pages to communicate information to your users. For example, you can list the deadlines for submissions on the login page and post messages at the top of reviewer pages, the submission form, the author's rebuttal page, and the author's or submitter's home page. These messages appear inside a box and can include HTML tags.

To post a message on a web page:

1. On the Edit Forms page, click on **Messages on Web Pages**.
2. On the Messages on Web Pages page, choose a page from the **This message appears at the top of the** pull-down list. (For example, to have the message appear at the top of the author's rebuttal page, choose **author rebuttal form**.)
3. Type your message into the text area below. You can also add one or more HTML tags.
4. Click on **Record This Message**. The Messages on Web Pages page will reappear, confirming that the message has been updated.

2.13.2 Configuring Email Templates

PCS will have set up four email templates for you to use to confirm submissions and to register, assign, and unassign reviewers. These templates are described below.

- **submission confirmation email –** Appears at the top of the confirmation email sent after an author makes a submission. Below your own message, an automatically generated message appears; it begins with "This email confirms your submission to [your conference name.]" and tells the author which of the required items are still missing from the submission.

- **reviewer registration email –** Sent to a new reviewer or committee member when you register them from the Reviewers page or Committee Members page. It includes logon instructions, including a user ID and password.

- **reviewer assignment email** – Sent to a reviewer or committee member who is assigned to a new submission, either by the administrator or the Primary. The Primary can personalize this email from their own account.

- **reviewer de-assignment email** – Sent to a reviewer or committee member who is removed from a submission, either by the administrator or the Primary. The Primary can personalize this email from their own account.

To configure an email template:

1. On the Edit Forms page, click on **Email Templates**.
2. Choose a template from the **This is the** pull-down list. Check the message and make any necessary changes. Then click on **Record This Email Template**.

2.13.3 Sending Messages by Email

You can also send email messages to different groups of users. For example, once you've propagated review assignments to committee members, you can send them a message, telling them that their assignments are available. No person sees the name or email address of any other member of the group.

Primary reviewers have access to these groups. Primaries can send email to the committee and to the reviewers of the submissions for which they're acting as Primary.

To send a message by email:

1. On your administrator home page, under Email, click on **Send Email to Groups**.
2. On the Send Email to Groups page, choose a group from the **To** pull-down list. To see the email addresses of people in this group, click on **Show this Mailing List**. If you choose a group of reviewers and you want to exclude committee members, click on the corresponding checkbox.
3. To copy the message to additional recipients, type their email addresses into the **CC** text box.
4. Type the subject and message into the Subject text box and Message area. You can include any of the variables listed at the bottom of the page.
5. When you've composed your message, click on **Preview All Emails** to view the recipients and your message.
6. Make any necessary changes, then click on **Send All Emails**.

2.14 Diagnosing Problems Reported by Users

When users encounter problems, they will send you problem reports to diagnose and solve. You can usually resolve problems quickly because you're more familiar with the system. Some typical reports are described below.

- **A user can't log on –** The user may be using the wrong password. The user should go back to the submission site and click on **Look it up here**, provide their email address, then click on **Get my UserID and Password**. The system will send them their logon information.

- **The user has multiple accounts under the same name –** This may be because he or she has used the system for more than one conference in earlier years. Merge the accounts.

- **A user has created an account but isn't receiving emails –** The user may be using an address that is different from the one he or she originally supplied to the system; the user should that original address. Alternatively, the user or their organization has an aggressive spam filter. In this case, send an email message to the system administrator of the remote system, asking that the precisionconference.com address be unblocked. Or ask the user to provide a different email address.

- **A submitter is being prevented from making a submission –** You may not have changed to the Submissions phase (see "2.3 Changing to the Submissions Phase"). Alternatively, the conference deadlines may not be correct (see "2.4 Verifying Conference Deadlines)".

- **A submission is too large –** On the Submissions page, under Upload Limit, type in an appropriate file size.

- **A committee member or reviewer can't see their review assignment(s) –** On the Reviews in Progress page, there is only the message "A link will become active here when submissions are assigned to you." **–** There are a number of possible reasons. (For details, see "4.2 Changing to the Reviewing Phase".)
  - You may not have changed to the Reviewing phase.
  - You may not have propagated review assignments.
  - Make sure you've clicked on the two links on the Enable Reviewing Links page and enabled the four options on the Edit Phase Settings page.

- **A committee member cannot provide preferences –** You may not have enabled bidding. (See "2.9 Allowing Committee Members to Bid for Papers".)

- **A committee member clicks on a preference on the Reviewing Preferences page, but a small window does not pop up, and it seems that the preference is not being recorded –** Pop-up windows and JavaScript may not be enabled on their computer.

To diagnose a problem reported by a user:

1. On your personal home page, under Chairing, click on **Search for one user** and search for the person by name or email address.
2. Log on as that user and try to reproduce the problem.
3. If you're able to diagnose or fix the problem, let the user know.

OR
If you can’t fix the problem, report it immediately to support@precisionconference.com.

2.14.1 Resolving Bounced and Unreceived Email

You’ll occasionally hear from people who didn’t receive an email message. This can happen because the person’s address is incorrect or because the person has a particularly aggressive spam filter. There are a number of things you can do to resolve or avoid these situations.

When someone reports that they haven’t received your message, you can check the log of sent email to find the missing message. The log is a record kept by the system of every email sent. (**Note:** If the chair has declared conflicts, this feature isn’t available because the chair might be able to see reviewer’s names in the log.)

When someone reports that your email to them, or their email to the system, is bouncing, it can be a result of aggressive spam filtering. This can occur when the sender’s address (specified on the Edit Global Settings page) isn’t the same as the account that sends the email (confName@precisionconference.com). Filtering can also occur when the IP address for precisionconference.com is close to that of a suspected spammer; in this case, the person’s spam filter indiscriminately blocks a whole range of addresses rather than a single address.

To check the email log for a missing email message:

1. On your administrator home page, under Reports, click on **Log of sent email**.
2. On the Email Log page, click on **Messages** and look through the entries to find the email you want. You can sort the information by any of the column headings.
3. Re-send the unreceived email from your personal account.

Note: Do *not* forward the message from the email log. It doesn’t resolve the problem – users need to be able to receive messages from the system.

To avoid spam filtering:

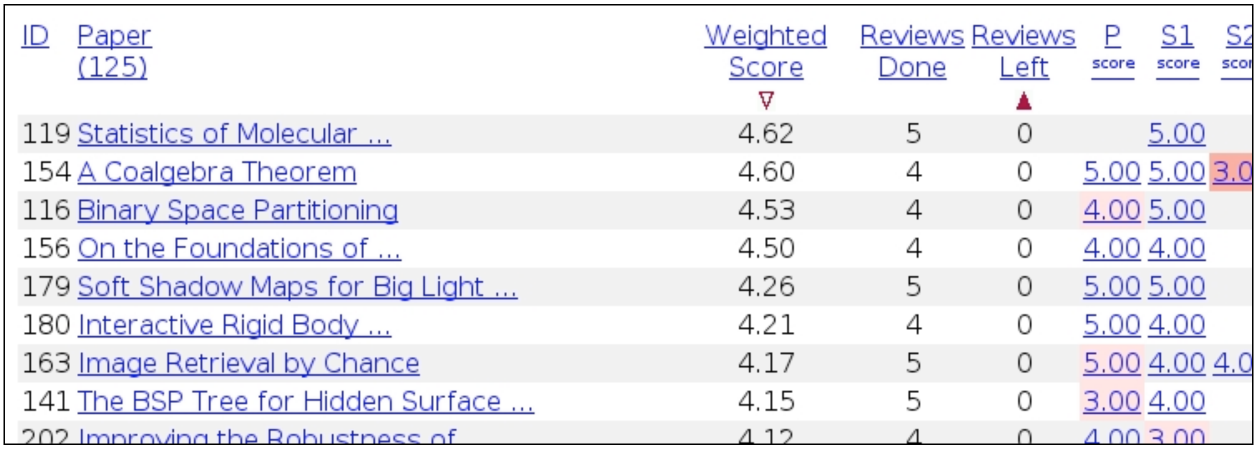
1. Send an email message to the system administrator of the remote system, asking that the precisionconference.com address be unblocked.
   OR
   Ask the user to provide a different email address.

2.15 Manipulating the Table Pages

Much of the information stored in the system is presented as tables. Some examples are the Submissions, Committee Members, and Reviewers pages. You can manipulate these tables in a variety of ways to find the information you want – for example, you can sort by columns, hide or show columns and rows, create different views of the information, and download the information in an Excel-compatible format.

2.15.1 Sorting by Columns

You can sort a table by any column. Clicking on a column heading reloads the table, sorted by that column, and a small red triangle appears below the column heading. The information is sorted in *ascending order* (numerically starting at *0* or alphabetically starting at *a*), which is indicated by the triangle pointing up. Clicking a second time on the column heading sorts the information in *descending order*, and the triangle changes to point down. (See the screenshot below.) Click on the triangle to reverse the sort order.



ID	Paper (125)	Weighted Score ▽	Reviews Done	Reviews Left ▲	P score	S1 score	S2 scor
119	Statistics of Molecular ...	4.62	5	0		5.00	
154	A Coalgebra Theorem	4.60	4	0	5.00	5.00	3.0
116	Binary Space Partitioning	4.53	4	0	4.00	5.00	
156	On the Foundations of ...	4.50	4	0	4.00	4.00	
179	Soft Shadow Maps for Big Light ...	4.26	5	0	5.00	5.00	
180	Interactive Rigid Body ...	4.21	4	0	5.00	4.00	
163	Image Retrieval by Chance	4.17	5	0	5.00	4.00	4.0
141	The BSP Tree for Hidden Surface ...	4.15	5	0	3.00	4.00	
202	Improving the Robustness of	4.12	4	0	4.00	3.00	

In addition, you can sort a table by two columns: a primary and a secondary. The information is sorted by the primary column, indicated by a solid red triangle. When a set of rows has identical values in the primary column, those rows are further sorted by the secondary column, which is indicated by an open red triangle.

When you click on a column heading, it becomes the primary column; the column that was previously the primary becomes the secondary column. Thus, to have a primary sort by column A and a secondary sort by column B, click *first* on column B, then on column A. You can vary the sort order in both primary and secondary columns by clicking on the triangle. To sort by one column only (and to remove the open red triangle denoting a secondary column), click *twice* on the column heading.

Sorting is useful in a number of circumstances, such as:

- On the Committee Members and Reviewers pages, sort by Last Login to see who hasn't logged on for a while; sort by Free to see who is available to review; sort by Reviews Remaining to see who must still submit reviews; sort by Overall Expertise to see who has not provided their areas of expertise (in this case, the value shown is 0.00).

- On the Submissions page, sort by the Submitted column to see who has not submitted a document (a document appears as **P**); sort by Reviewer Match to see which submissions have poorly qualified reviewers (they will have a low score); sort by Reviews Left to see which submissions need more reviews before the committee meeting; sort by the P name column (this is AC name in some systems) to organize the table by Primary.

- On the Email Log page, sort by ID to see the most recently sent email at the top (with the highest ID number); sort by To to group all messages sent to a particular person.

2.15.2 Configuring Visible Columns

Sometimes, more columns are visible in a table than you need. Hiding columns enables you to reduce the amount of information and download times. And at different phases in the submission and review process, it may be useful to hide different columns. For example, before the submission deadline, it's useful to see the Paper, Contact Email, and Submitted columns, while after the deadline, it's more useful to see all of the reviewer columns (those columns with the headings P, S, and E).

To configure visible columns:

1. At the top of a table, click on **Show or Hide Columns**. (Do this only when the table has completely loaded; otherwise, you'll have to reload it and wait longer.)
2. A complete list of columns appears in the Show or Hide Columns window. Hidden columns are indicated by a red X, while visible columns are indicated by a green checkmark. To show a column, click on the X; to hide a column, click on the checkmark.
3. When you're done, click on **Record changes**.

2.15.3 Configuring Visible Rows

Hiding rows in a table is not done very often. However, it *is* useful when submissions belong to different categories (such as Posters, Short Papers, and Long Papers) because it enables you to show only those submissions in a particular category. The heading of the column that shows the category must match the name of the corresponding question on the submission form. For example, to show only rows pertaining to short papers, you can specify that the Category column be equal to the value *short papers*.

This feature is also useful for hiding rows in very large tables, such as the Log of sent email. For example, you can hide rows that correspond to older email by setting the ID column to be greater than the ID number of a recent email.

To configure visible rows:

1. At the top of a table, click on **Restrict Rows**.

2. In the Restrict Rows window, specify up to five conditions that a row must satisfy by selecting values from the Column and Relation pull-down lists and typing a value into the Value text box. (A condition is satisfied if the value in the row matches the relation to the column. For example, if you specify that a row must contain a value less than 99 and greater than 200 in the ID column, all the rows that appear in the table will have ID numbers between 100 and 200.)
3. Select a radio button to indicate whether the row must meet all of the conditions you specify or at least one condition.
4. When you're done, click on **Record changes**.

2.15.4 Creating Views

A *view* is a configuration of rows and columns of a table, created as described above. You can create as many views of the table as you need. The next time you load the table, you see the last view you used.

To create a view:

1. Choose **Create a new view** from the pull-down list in the upper-left corner of the table. In the Create a New View pop-up window, type a name for the new view and click on **Create the new view**. The new view replaces the previous view.
2. To modify the view, configure the sort columns, the visible columns, and the visible rows.
3. To rename the view, choose **Change name of current view** from the pull-down list.
4. To delete the view, choose **Delete the current view** from the pull-down list.
5. To switch to another view, choose it from the pull-down list.

2.15.5 Downloading Tables

Tables are not only usable in the system; you can also download them to your computer and use them offline or in other software applications. The files are downloaded in comma-separated values format, which consists of plain text with commas between the data in the table columns. Comma-separated values format is useful because you can load it into a normal text editor (such as emacs on Unix or Notepad on Windows) and edit it. This format is also compatible with Microsoft Excel, although you cannot load it directly; you must go through an import procedure.

To download a table and open it in Excel:

1. At the top of the table, click on **Download**. The table is downloaded to your computer.
2. Start up Excel.
3. From the Data menu, choose **Get External Data**, then **Import Text File**.
4. In the choose a File window, choose the file to import, then click on **Get Data**.

5. In the Text Import Wizard, click on **Next**. Click on the Comma checkbox to specify that the data you're importing contains commas and click on **Next**. Then click on **Finish** and **OK**. Allow a few moments for Excel to convert the data to its own internal format.

Chapter 3 – The Review Assignment Phase

In the Review Assignment phase, you focus on assigning committee members and reviewers to the submissions you've received. The final submission deadline has passed, and you close the conference for submissions; submitters can no longer submit anything unless you explicitly permit late submission. You assign reviewers to submissions using the system's automatic facility, then you check the assignments for quality, fine-tune where necessary, and even make manual assignments to improve the quality of the submission-reviewer match.

Here is a checklist of things you'll do during the Review Assignment phase.

- change to the Review Assignment phase
- permit late submissions and submit on behalf of authors (both optional)
- recruit reviewers
- assign reviewers to submissions automatically
- review the assignments and assign reviewers manually, if necessary

3.1 Changing to the Review Assignment Phase

After the deadline passes for final submissions, the conference goes into the Review Assignment phase. At this point, submitters can no longer submit anything, unless you explicitly permit late submission. (See "3.2 Permitting Late Submissions".)

To change to the Review Assignment phase:

1. On the Edit Phase Settings page, under Current Phase, select **Review Assignment**. Then click on **Submit Changes**.

3.2 Permitting Late Submissions

You can permit submissions after the deadline (either early or final) has passed. How you do this depends on whether an author has already registered to submit or not. To find out whether the author has registered, search for the author's name or submission title on the Registrants page.

If an author has already registered, the author's name and submission title will appear; if the author hasn't already made a partial submission, no title will appear. If the author hasn't already registered, you must temporarily re-enable submissions to register the author.

To permit a late submission for an author who has already registered:

1. On your administrator home page, click on **Registrants**.

2. On the Registrants page, click on the title of the submission you want. (If there is no submission title, click on **no submission**.) It's helpful if the author can provide you with the submission number. This is shown in the **ID** column.
3. In the Submission window, under Administration, click on **Permit late submission**.
4. After the author has submitted, return to this window and click on **Don't permit late submission**.

To temporarily re-enable submissions to register an author who hasn't already registered:

1. On the Edit Phase Settings page, under Author Settings, enable **Authors can submit any material** (if it isn't already enabled), then click on **Submit changes**.
2. To register the submission, go to the Chairing page, then click on **Search for one user**. On the page that appears, type the author's name or email address into the **Name or email** text box, then click on **Search**. When the person's name appears, click on **Log on**. On the author's New submissions page, click on **Make a new submission**.
3. If you can't find the author after you've tried all variants of the author's name, you must create an account for the author. On the login page, click on **Create your own account**. On the page that appears, type the author's email address into the Email address text box and click on **Create my account**. On the Chairing page, click on **Search for one user** and provide the email address, since that is all the information the system has on that newly registered user. Finally, log on as the author; on the author's New submissions page, click on **Make a new submission**.
4. On the Edit Phase Settings page, disable **Authors can submit any material**.
5. Enable late submissions, as described above.

3.3 Submitting on Behalf of an Author

An author may ask you to make a submission on his or her behalf. Before you can do this, the author must be registered. If the author isn't registered, follow the steps described in "3.2 Permitting Late Submissions". (You don't need to go through the process yourself to permit a late submission since you're making the submission as the administrator.)

To submit on behalf of an author:

1. Make sure the author is registered.
2. On the Registrants page, click on the title of the submission you want. (If the title isn't shown, click on **no submission**.)
3. In the Submission window, under Administration, click on **Modify the submission**.
4. On the submission form, modify the submission, then click on **Submit**.

3.4 Recruiting Reviewers

As described in "2.11 Starting to Recruit Reviewers", you need to start recruiting reviewers before the final submission deadline. However, it's often too difficult to recruit a large enough pool of reviewers at that time. Thus, the chair usually asks the Primary of each paper to recruit reviewers for that paper. When reviewers agree to review, the Primary must register them with the system before they can be assigned to submissions.

To recruit a reviewer, a Primary should do the following:

1. Ask the person for their agreement to review.
2. On the home page, click on **reviews in progress** below the menu bar. On the Reviews in Progress page, click on **Review (as PC member)**.
3. On the Committee Member page, beside the submission, click on **Manage Reviewers**. The Manage Reviewers of Submission page shows a personal view of this submission.
4. Type the person's name into the **Name** text box and click on **Assign**.
   OR
   Type a partial name and click on **Search**. Or simply click on **Show all reviewers**. On the Assign or Unassign a Reviewer to Submission page, find the name in the list and click on **assign**.
5. If the person is already registered with the system, they'll be assigned to the paper, and (if the administrator has set up the system to send them an email, advising them of this) the Notify the Reviewer page will appear. Edit, then send the email.
   OR
   If the person isn't registered with the system, the Register and Assign a New Reviewer page will appear. Provide the person's given and family names as well as email address. The system will then register the person, assign them to this submission, and send them an email using the template you've set up for this purpose. (Templates are discussed in "4.6 How a Primary Manages Reviewers".) The email will include logon instructions, including a user ID and password.

3.5 Assigning Reviewers to Submissions

Once you've found the submissions to be acceptable, you can assign reviewers to them. (In this section, *reviewers* includes committee members.) This is usually a multi-step process. You begin by assigning reviewers automatically, checking the quality of the assignments, reiterating the process, and/or manually fine-tuning the assignments. The goal is to find and set the most suitable committee member for a submission and vice versa. Then, if you wish, you repeat the process for external reviewers.

3.5.1 Assigning Reviewers Automatically

The system has an automatic reviewer-assignment facility that assigns reviewers to each submission. This facility uses two parameters: the number of reviewers per submission, which you define, and the number of submissions that a reviewer is willing to review, which is set by each reviewer.

In addition, the system compares the level of expertise the reviewer has provided for each keyword with the keywords selected by the submitter. (The submitter's keywords consist of one primary keyword and any number of other keywords.) The system then calculates a *match score*. This score is shown on the Submissions page for each reviewer. (For details of how this score is calculated, see "Appendix C – The Match Score".)

Thus, before you assign reviewers, they *must* have provided their levels of expertise. They do this on their home page by clicking on **reviewing preferences**, then **Areas of Expertise**. For each keyword, they select a level of expertise: Expert, Knowledgeable, Passing, or No Knowledge. They should be encouraged to do this at least a week before the submission deadline.

3.5.2 How the Automatic Reviewer Assignment Works

The automatic reviewer assignment usually begins with you making a series of iterations. In each iteration, you assign submissions to a subset of reviewers. For example, in the first iteration, you might assign each submission to one Primary; in the second iteration, you might assign it to one or two Secondaries; in the third iteration, you might assign it to three or more Externals. Alternatively, if the Primaries are responsible for recruiting external reviewers, it's sufficient to assign Primaries and Secondaries in two iterations.

Then the automatic reviewer assignment proceeds, in rounds. In each round, a single reviewer is assigned to a single submission, as follows:

1. For each submission that still needs reviewers, the system finds the reviewer who best matches the submission.
2. The system picks the worst-matched submission from Step 1 and assigns the corresponding reviewer to it.

This process is repeated until each submission has been assigned one reviewer. Then, if more than one reviewer per submission has been requested, the process is repeated until each submission has been assigned two reviewers, and so on. (For an example of this process, see "Appendix D – Example Automatic Reviewer Assignment".)

The goal of this strategy is to assign each submission at least one good reviewer. For example, if reviewer R for submission S is the worst match of all the best-matching reviewers found in Step 1, there is no better reviewer for submission S. If you were to make a different assignment in this round, in future rounds, reviewer R might no longer be available to review anything because he or she has too many assigned submissions. In that case, submission S will be assigned an even worse-matching reviewer.

3.5.3 Performing an Iteration

In each iteration, you specify a number of settings on the Assign Reviewers Automatically page. These settings are described below.

- **Which group of people is being assigned submissions? –** The group can be Primaries, Secondaries, Externals, or all.

- **How many such people (from the group you chose above) are assigned to each submission, in total? –** This is the number of people from the group you chose who'll be assigned to each submission. It's typical to assign one Primary, one or two Secondaries, and three or more Externals.

  Assignments that you made before this iteration are preserved. So, for example, if a submission has already been assigned one External and here you specify three Externals per submission, only two more Externals will be assigned, for a total of three.

- **What is the maximum number of submissions that a person can take on, in total? –** Each reviewer should have specified the number of submissions that he or she is willing to review. You can respect this maximum or override it. It's useful to override the maximum for committee members because they likely won't have specified a maximum. They'll expect assignments to be evenly distributed across the committee; they don't know the number of submissions.

  Even if you respect the maximum, there will still be people who won't have supplied this number. In these cases, provide a default maximum.

  If you want to override the maximum, you have two options: you can enter the maximum of every person in the group, or you can enter the maximum of a single person on the Committee Members or Reviewers page, as appropriate.

- **Which group of submissions is to be assigned reviewers? –** You can choose to assign reviewers to only a subset of the submissions, based on questions on the submission form. For example, there might be three categories of submissions – Posters, Short Papers, and Long Papers – and you want to assign reviewers to only Short Papers and Long Papers.

  To assign reviewers to a subset of submissions, choose **Assign reviewers to submissions for which ...**. This option lists all selection-type questions from the submission form, along with their possible answers. Choose the question and the set of answers that defines the subset of submissions. If there are no selection-type questions on the submission form, this option doesn't appear.

- **How is a submission/person match to be calculated? –** The automatic assignment process can incorporate the committee members' preferences, which they provide as described in "2.8 Establishing Committee Members and Reviewers". If a committee member doesn't provide a preference for a submission, the system assumes that their preference is **Willing**.

To perform an iteration:

1. On your administrator home page, under Miscellaneous, click on **Assign Reviewers Automatically**.
2. On the Assign Reviewers Automatically page, specify the settings you want by clicking on the appropriate radio buttons and typing the appropriate numbers into the text boxes.
3. Under Actions, click on **Make assignments**. The assignments are made in a matter of seconds, and the Assignments Made page appears, showing a brief report.
4. If the report lists reviewers who weren't assigned any submissions because they haven't provided their levels of expertise, click on **Send email to these people** and send them a message, asking them to log on and provide this information.
   OR
   If you know their background well enough, log on as each person (as described in "2.14 Diagnosing Problems Reported by Users") and provide the information.

Note: This is a time-consuming process, one that takes place exactly when time is critical. This is why it's important that the committee members provide their levels of expertise before the submission deadline.

3.5.4 Checking the Quality of Assignments

After performing an iteration, you should check that the assignments are satisfactory. As much as possible, you need to ensure that committee members have roughly the same number of submissions to review. In addition, if they're considered expert in their field, they should be assigned submissions in their areas of expertise.

To check the quality of assignments:

1. Click on the Reload icon in your browser.
2. Look at the Submissions page. The quality of the assignments is shown in the Reviewer Match column. The number in this column is the average match score of all reviewers assigned to the submission. A score of 1.0 is best; a score of 0.0 is worst. Sort by this column to see poor reviewer assignments at the top.
3. Look at the Committee Members and Reviewers pages to see whether reviewers have roughly the same number of submissions assigned. The Free column shows how many more submissions a reviewer can take on. The Primary and Non-primary columns show how many submissions a reviewer has been assigned as Primary and non-Primary.
4. Go to the Reviewing Preferences page to compare the submissions assigned to reviewers with their stated preferences.
5. If you're satisfied with the quality of the assignments, continue with the next iteration. If you're not satisfied, you can either revert to the previous assignments and try again (for

details, see “3.5.5 Reverting to the Previous Assignments”) or move on to manually fine-tune the assignments (see “3.5.6 Adjusting the Assignments Manually”.

3.5.5 Reverting to the Previous Assignments

The system maintains a log of previous assignments that you can use to revert to any previous assignments. This is very useful for experimenting with different assignment parameters. The current set of assignments is recorded in the log twice: before an automatic assignment is made and before assignments are cleared.

For example, you might assign submissions to Primaries, then make several attempts to assign submissions to Secondaries. If these attempts don’t produce satisfactory results, you can revert to the Primary assignments, then attempt the Secondary assignments again with different parameters.

This feature is also useful when a submission wasn’t assigned the number of reviewers requested. This can occur if the submission didn’t provide any keywords or if all reviewers in the group being assigned were at their limit or couldn’t be assigned because they provided no keywords. In this case, you can revert to the previous assignments and try again with fewer reviewers per submission.

Alternatively, you can try to recruit more reviewers or override the limits that the reviewers have specified. However, you should try to avoid a situation where all reviewers have reached their limits. Otherwise, there will be many very poor reviewer/submission matches (visible in the Reviewer Match column of the Submissions page). It’s far better to have fewer reviewers per submission than to maximize the number of reviewers and get very poor matches as a result.

Note: Any manual assignments you make between automatic assignments (for example, from the Submission window) will be recorded in the log. If you revert to the set of assignments *from before* you made the manual assignments, these assignments will be *undone*.

To revert to the previous assignments:

1. On the Assign Reviewers Automatically page, under Actions, click on **Revert to the previous assignments**.

3.5.6 Adjusting the Assignments Manually

Once you’ve finished assigning reviewers automatically, check over the assignments and make any adjustments you think are necessary. Even if you’re satisfied with the automatic assignments, this step enables you to fine-tune each one. For example, you may decide to assign or remove a reviewer from a submission or switch the role of a committee member from Secondary to Primary.

To adjust an assignment manually:

1. To improve a submission, you can assign a better suited reviewer, unassign one who is a poor match, and/or match a reviewer with a different submission. (For details, see “3.5.8 Assigning or Removing Reviewers”.)
2. Check the preferences of the committee members and reviewers to find a person who hasn’t been assigned the maximum number of reviews. (See “2.9.1 Viewing Preferences on the Committee Preferences Page” and “2.9.2 Viewing Preferences on the Individual Preferences Pages”.) Then go back to the Submission window and assign the reviewer to the submission.

3.5.7 Assigning Submissions to Committee Members

Submissions can be assigned to individual committee members in two ways.

- The chair can make all assignments to the committee members and external reviewers, using the existing pool of reviewers.
- The chair can make assignments only to committee members and leave the reviewer assignments to the Primaries. The Primaries may recruit externally; they know the community and can therefore make better decisions. This method requires more work, but the work is distributed among more people.

To assign submissions to committee members:

1. On the Committee Members page, select a member. To sort members’ names in alphabetical or reverse alphabetical order, click on PC Member. To sort by other criteria, click on Overall Expertise, Free, Primary, Non-primary, Volunteered, and Reviews Remaining.
2. In the Committee Member window, type the submission ID into the **Submission number(s)** text box. (You can type one number or more than one.) Click on **Add / Remove**. The submission will be inserted into the list of Secondary submissions. If the submission has already been assigned to this reviewer, the assignment will be removed.

3.5.8 Assigning or Removing Reviewers

The chair or the Primary can also assign reviewers to individual submissions. Once reviewers have been assigned, they can be unassigned.

To assign a reviewer to a submission:

1. On the Submissions page, click on the submission title.
2. In the Submission window, enter the reviewer’s name in the **Name** text box. If you know the name under which the person registered, type it in. If you’re unsure of the name, type

a partial name and click on **Search** to choose from a list. To search the list of reviewers, click on **Show all reviewers** and choose the name from the list that appears.
3. Click on **Assign**. If the reviewer isn't already registered, you'll be prompted to register them, then assign them to this submission. To unassign them at any time, click on **Unassign**.

To assign a submission to a reviewer:

1. On the Reviewers page, click on the reviewer's name.
2. In the Reviewer window, type the submission ID into the **Submission number(s)** text box. (You can type one number or more than one.) Click on **Add / Remove**. The submission will be inserted into the list of submissions. If the submission has already been assigned to this reviewer, the assignment will be removed.
3. If you don't know the submission ID, click on **Add / Remove**. On the Find Papers for Reviewer page, locate the submissions you want (they're sorted by their match score), then click on **assign**.
4. On the Notify the reviewer page, click on **Send the notification** or **Do not send any notification**.
5. You can set up email to be sent automatically to each reviewer when submissions are added or deleted. On the Edit Global Settings page, under Reviewer Settings, set **Notify a reviewer by email upon a change in his or her assigned submissions?** to **yes**.

   Since many assignment changes are usually made in the first week after the submission deadline, it's best to wait to enable this option until the assignments are fairly settled. Then send everyone an email message, asking them to log on and look at their assignments. Afterwards, enable this option so that all future changes will be automatically communicated to the reviewers.

3.5.9 Changing between Primary and Secondary Roles

Another way to fine-tune review assignments is to change a committee member's role from Secondary to Primary and vice versa. When a committee member is first assigned to a paper, he or she is placed in a secondary role, but you can change it.

To change between primary and secondary roles:

1. On the Committee Members page, click on a member name.
   OR
   On the Submissions page, click on a submission.
2. In the Committee Member or Submission window, in the Role column, click on **secondary** to change the role from Secondary to Primary. To change the role from Primary to Secondary, click on **primary**.

Chapter 4 – The Reviewing Phase

After you have made your initial review assignments, the review process can begin. Here is a checklist of things you'll do during the Reviewing phase.

- set up the review form
- change to the Reviewing phase
- check the system configuration
- instruct the reviewers how to log on and send in reviews
- instruct the Primaries how to find and manage reviewers
- change a reviewer's assigned submissions
- allow authors to provide rebuttals (optional)
- facilitate discussions among co-reviewers
- follow up outstanding reviews

4.1 Setting Up the Review Form

Another major task in managing your conference is setting up the review form to enable people to send in their reviews. As with the submission form, PCS provides a sample review form. It includes a series of instructions and questions, separated by information and editing options on a yellow-gold background. The information and options are available only to you; they aren't visible to the reviewer.

You can use the sample form as is, or you can customize it by editing the items on it, duplicating them, "swapping them down" (exchanging one item with the next one), removing them, and inserting new items. The form can ask various types of questions, and responses can be a short line of text, multiple lines of text, a single choice from among many, or multiple choices from among many. You can make each item editable up until the review deadline so that reviewers can't change their reviews after that date.

You can also specify that questions be *hidden* from the authors so that the questions don't appear in the anonymous reviews that are sent to the authors after decisions have been made. Hidden questions are typically used to solicit confidential comments from the reviewer to the committee. A hidden question might also be used to ask a reviewer to describe his or her expertise; if this were seen by the authors, it might expose the identity of the reviewer or lead the authors to question the person's appropriateness.

In addition, you can create *multiple review forms* by restricting which reviewers see what questions. You can choose which question is shown to the Primary, the Secondaries, and the Externals or to any combination of these three groups. This allows you to create a view of the form for use by each group.

When a question is shared by multiple groups, it's generally not a good idea to create separate copies of the question and give a different copy to each group. It's more efficient to create one question and share it among the groups; this reduces errors and extra work when editing the review form.

To set up the review form:

1. On the Edit Forms page, click on **Review Form**.
2. On the Review of Submission form, click on the **primary**, **secondary**, or **external** checkboxes to see the items that are visible on the corresponding forms. Then click on **Update view**.
3. Insert and edit the items you want. (For information and instructions, see “2.1 Setting Up the Submission Form”. That section also applies to the review form.)

4.1.1 Items on the Form

The review form can include the following types of items, many of which will be familiar to you from the submission form:

- Instructions
- Rating scale questions
- Expertise scale question
- Radio buttons
- Checkboxes
- Single line of text input
- Small box of text input
- Large box of text input
- Table of items

Rating scale questions and the expertise question are not included on the submission form; they’re discussed below.

4.1.2 Rating Scale Questions

Rating scale questions gather numerical ratings that are used to calculate the overall score of a review. A review form can have multiple rating scale questions.

A rating scale question asks the reviewer to provide a response on a scale of 1 to `n`, where `n` is a value that you determine for that question. Like a radio button question, a rating scale question lists a number of options; you provide descriptions, such as *Strongly agree*, *Agree*, and so on, along with the numbers 1, 2, 3, and so on. (If you prefer not to show the numbers, you can hide them.) The reviewer responds to the question like a radio button question, choosing one option from the list.

The rating numbers can be ordered from highest to lowest (from 5 to 1) or from lowest to highest (from 1 to 5). Either the highest or the lowest number can be best; you determine this on the review form. The rating numbers on all rating scale questions are summed to get an overall score for the review (although usually, only one such question provides the overall score).

Each rating scale question is assigned a value, which is calculated from the rating numbers. A value of 0 indicates that the rating scale question should not be counted toward the overall review score. (In this case, you could just as well use a radio button question.) If you prefer to assign the question a different range of values than the range given by the rating numbers, it can be a number between 1 and 9.

There is one exception to this process: When you want to give a rating scale question different values for different reviewer groups (the Primary, the Secondaries, and the Externals), you must create a separate copy of the form for each group, then assign a different value to the rating scale question on each copy.

4.1.3 Overall Review Score

Each review has an overall score, which is calculated on the reviewer's answers to the rating scale question(s). Each rating scale question has a value (as described in "4.1.2 Rating Scale Questions"), and the overall score is the weighted sum of the values of the rating scale questions. The overall score of a review, r, is calculated as

$$r = \sum_i w_i\ v_i$$

where w_i is the weight of the i^{th} question and v_i is the value of the i^{th} question.

4.1.4 Expertise Scale Question

An *expertise scale question* gathers numerical ratings that are used to calculate an overall score for a submission. Only one expertise scale question can be included on a review form, although the question isn't required.

An expertise scale question asks the reviewer to provide his or her level of expertise on a scale of 1 to `n`, where `n` is a value that you specify for that question. As with rating scale and radio button questions, the expertise scale question lists a number of options; you provide descriptions, such as *Expert, Knowledgeable,* and so on, along with the numbers 1, 2, 3, and so on. (If you prefer not to show the numbers, you can hide them.) The reviewer responds to the question like a radio button question, choosing one option from the list.

The rating numbers can be ordered from highest to lowest (from 5 to 1) or from lowest to highest (from 1 to 5). Either the highest or the lowest number can be best; you determine this on the review form.

You assign a weight to each level of expertise, and these weights are used when computing an average score over all reviews of a paper, as discussed in "4.1.5 Overall Submission Score". To assign the weights, edit the expertise question and enter the weights in the Weight column. If the review form doesn't include an expertise question, all reviews will be weighted equally.

4.1.5 Overall Submission Score

An overall submission score is calculated from the overall review scores (as described in "4.1.3 Overall Review Score"). There are two situations, depending on whether or not the review form asks the reviewer to provide a level of expertise.

If the review form *does not* ask the reviewer for a level of expertise, the review scores are simply averaged. The overall submission score is calculated as

$$ { 1 \over k }\ \ \sum_i r_i $$

where r_i is the overall score of the i^{th} review.

If the review form *does* ask the reviewer for a level of expertise, the review scores are weighted according to expertise. You set the weight for each level of expertise, as described in "4.1.4 Expertise Scale Question". The overall submission score is calculated as

$$ { 1 \over \sum_i w_i }\ \ \sum_i w_i\ r_i $$

where w_i is the weight associated with the level of expertise of the i^{th} review and r_i is the overall score of the i^{th} review.

You can ask for the reviewer's level of expertise without necessarily using it in calculating the overall submission score: Simply set the weight of each level of expertise to 1.

You can choose to exclude the review of the Primary from the calculation of the overall submission score. This can be useful if the Primary does not provide a score or if the score provided by the Primary is hidden from the authors. To exclude the Primary's review from the calculation, go to the Edit Global Settings page and select **no** for the option **Count primary score in aggregate paper score**.

4.2 Changing to the Reviewing Phase

When you change to the Reviewing phase, you open the system to committee members and reviewers. If you've automatically assigned reviewers to submissions, you must propagate review assignments to the personal accounts of your reviewers and committee members before changing the phase.

To change to the Reviewing phase:

1. On your administrator home page, under Miscellaneous, click on **Propagate review assignments**. On the next page, click on **Propagate assignments to committee members' personal accounts** and **Propagate assignments to all other reviewers' personal accounts**. This activates the **Review** and **Review (as PC member)** links when a person goes to the **Reviews in Progress** page in their personal account. Until you do this, committee members and reviewers will only see the message "A link will become active here when submissions are assigned to you."
2. On the Edit Phase Settings page, under Current Phase, select **Reviewing**. Make sure that the following options are enabled in the R column:
   - **PC members can see assigned submissions**
   - **PC members can submit reviews**.
   - **Reviewers can see assigned submissions** and **Reviewers can submit reviews**.
3. Click on **Submit Changes**.
4. On the Edit Global Settings page, under Reviewer Settings, verify that the following are set to **yes**. (They – particularly the second one – might have been disabled while you were making the initial reviewer assignments.)
   - **Notify a reviewer by email when he or she is first registered?**
   - **Notify a reviewer by email upon a change in his or her assigned submissions?**
5. Click on **Submit changes**.

4.3 Checking the System Configuration

At this point, you need to ensure that the system is set up to give committee members and reviewers the correct access rights and to allow reviewers to remain anonymous. You can use the test accounts that the system has supplied and the dummy submissions you made earlier.

To check the system configuration:

1. Assign one of the dummy submissions to the test reviewer. Then log on using the test reviewer account. Take a look at the submission that has been assigned and use the review form to send in a review.
2. Assign one of the dummy submissions to the test committee member as Primary, and assign the other dummy submission to the test committee member as Secondary. Then log on using the committee member account. View the submissions and send in reviews. If you've allowed committee members to bid for papers (see "2.9 Allowing Committee Members to Bid for Papers"), indicate the person's preferences. Make sure that the Primary is able to assign and unassign reviewers.
3. Check that the three reviewer email templates are correctly configured. (For details, see "2.13.2 Configuring Email Templates".)

4.4 Instructing the Reviewers

Once you're satisfied that the reviewing process is set up correctly, let the reviewers know that they can start reviewing. You should send a message to all of the people (external reviewers and committee members alike) who have been assigned submissions, telling them where to log on and how to view the submissions assigned to them. In addition, they need to know what the reviewing deadline is and whom to contact in case of problems. (For details about sending email, see “2.13.3 Sending Messages by Email”.)

If you’ve disabled notification of reviewer registration (that is, on the Edit Global Settings page, you’ve changed the **Notify a reviewer by email when he or she is first registered?** option to **no**), newly registered reviewers won’t know their logon information. In this case, it’s essential that your email explain that they can obtain this information by clicking on the **Look it up here** link on the logon page.

When reviewers click on **Look it up here**, the system will ask them for their email address; it will then use this address to send them their user ID and password. Reviewers *must* provide the address at which they received your message. It’s the only address the system will recognize.

To instruct the reviewers:

1. On the Send Email to Groups page, choose **reviewers – assigned** from the **To** pull-down list.
2. Compose your message. Include the link to the PCS submission site and explain how the reviewers will log on. Once they’ve logged on, they should click on **reviews in progress** below the menu bar. On the Reviews in Progress page, external reviewers click on the **Review** link; committee members click on **Review (as PC member)**.
3. Give them the reviewing deadline and an email address to contact in case of problems.
4. Click on **Send All Emails**.

4.5 Instructing the Primaries

If each submission has a Primary who is responsible for finding external reviewers, you should instruct the committee members how to go about doing this.

To instruct the Primaries:

1. On the Send Email to Groups page, choose **program committee** from the **To** pull-down list.
2. Compose your message. You can copy the instructions for managing reviewers from “4.6 How a Primary Manages Reviewers” and paste them into the message.
3. Click on **Send All Emails**.

4.6 How a Primary Manages Reviewers

A Primary’s first job is to find reviewers for each submission they’re responsible for. If some reviewers have already been assigned by the system, the Primary should check them. If more reviewers are needed, he or she should solicit external reviewers. The Primary may have already begun this process; see the discussion in “3.4 Recruiting Reviewers”.

To manage reviewers, the Primary should do the following:

1. On the personal home page, click on **reviews in progress** below the menu bar. On the Reviews in Progress page, click on **Review (as PC member)**.
2. On the Committee Member page, beside the submission, click on **Manage Reviewers**. The Manage Reviewers of Submission page shows a personal view of this submission.

The Manage Reviewers of Submission page shows which reviewers have been assigned to a submission and provides links to the reviews. Here the Primary can add and remove reviewers as well as search for candidate reviewers.

To add a reviewer:

1. Type the person’s name into the **Name** text box and click on **Assign**.
   OR
   Type a partial name and click on **Search**. Or simply click on **Show all reviewers**. On the Assign or Unassign a Reviewer to Submission page, find the name in the list and click on **assign**.
2. If the person is already registered with the system, they’ll be assigned to the paper, and (if the administrator has set up the system to send them an email, advising them of this) the Notify the Reviewer page will appear. Edit, then send the email using the template set up for this purpose. (See “4.6.1 Editing Email Templates”.)
   OR
   If the person isn’t registered with the system, the Register and Assign a New Reviewer page will appear. Provide the person’s given and family names as well as email address, then click on **Register and assign this person**. The system will register the person, assign them to this submission, and send them an email using the template set up for this purpose. (See “4.6.1 Editing Email Templates”.) The email will include their logon information.

To remove a reviewer:

1. Type the person’s name into the **Name** text box and click on **Unassign**.
   OR
   Type a partial name and click on **Search**. On the Assign or Unassign a Reviewer to Submission page, find the name in the list and click on **unassign**.

   The person will be removed from the submission, and (if the administrator has set up the system to send them an email, advising them of this), the Notify the Reviewer page will appear. Edit, then send the email using the template set up for this purpose. (See “4.6.1 Editing Email Templates”.)

To search for candidate reviewers:

1. Click on **Show all reviewers** without typing any name into the **Name** text box. The Assign or Unassign a Reviewer to Submission page will appear.
2. To assign a reviewer to the submission, find the person's name in the list and click on **assign**. To unassign a reviewer, click on **unassign**.

The Assign or Unassign a Reviewer to Submission page lists all the reviewers registered with the system. The page is organized as a table, in which each row corresponds to a reviewer. The Primary can sort by the On Cmte column to find which reviewers are on the committee and sort by the Match Score column to bring good matches to the top. Clicking on the red triangle reverses the sort order. (For details about sorting and other ways to manipulate the information, see "2.15 Manipulating the Table Pages".)

If the table is large, making changes can take several seconds to process. The next time the Primary asks the system for a list of potential reviewers, the table reflects these changes.

The columns in the table are described below.

- **Reviewer –** The name of a reviewer. Clicking on the name displays the reviewer's profile, where you can change the email address, if necessary, and see more information. The number below the column heading indicates the number of reviewers in the list.

- **Email –** The email address of a reviewer. Click on it to send an email message.

- **Action –** To assign a reviewer to this submission, click on **assign**. To unassign a reviewer from this submission, click on **unassign**.

- **Match Score –** A score between 0.0 (poor) and 1.0 (excellent), which indicates the degree to which a reviewer's declared expertise matches the submission's keywords. A score of 0.0 indicates that a reviewer has provided no expertise information.

- **Free to Review** – The number of additional submissions (beyond those already assigned) that a reviewer is willing to review.

- **Currently Assigned –** The number of submissions already assigned to a reviewer.

- **On Cmte –** If a person is on the committee, the abbreviation *cmte* appears in the column.

4.6.1 Editing Email Templates

PCS provides generic templates for email that the Primary sends to reviewers, assigning them to submissions as well as unassigning them. Before sending the email messages, the Primary should edit these templates to ensure that they're appropriate to the conference.

As with other templates, email templates can contain variables. The `{acceptOrDeclineURL}` variable is particularly important. When an email is sent, inviting a person to review a submission, the variable is replaced by two links, one for accepting the assignment and one for declining it. When the potential reviewer clicks on a link, the Primary receives an email notification. Until then, the potential reviewer shows as *tentative* on the paper's list of reviewers. (See also "4.6.2 Making Tentative Reviewer Assignments".)

When a reviewer uses the system to volunteer to review a submission, the assignment is also tentative until the reviewer accepts or declines.

To edit an email template, the Primary should do the following:

1. On the Reviews in Progress page, click on **Review (as PC member)**.
2. On the Committee Member page, under Actions, click on **Edit your email templates**.
3. On the Edit Email Templates page, choose a template from the **This is the template for the** pull-down list.
4. Compose your message, including any of the variables listed at the bottom of the page. Be sure to include the `{acceptOrDeclineURL}` variable.
5. Click on **Record this template**.

4.6.2 Making Tentative Reviewer Assignments

Before reviewers are assigned to submissions, a Primary can make tentative assignments. These tentative assignments are usually made when the Primary knows that a reviewer will accept; the Primary can then go ahead and assign a submission to the reviewer. The system keeps track of this tentative status until the reviewer accepts or declines the review.

To make a tentative reviewer assignment, the Primary should do the following:

1. Make sure that the email template for assigning the submission has been edited. (See "4.6.1 Editing Email Templates".)
2. Assign the submission to the reviewer. (See the discussion of adding reviewers in "4.6 How a Primary Manages Reviewers".) If you send out the email using the template text, without making any changes, the review will be marked with an asterisk as having changed since you last looked at it.
3. If a reviewer has already accepted the assignment, when the Notify the reviewer page appears, remove the line "* I will not do this review." and the URL below it.
4. If you hear outside the system that a reviewer has agreed to accept (or decline) the review, go to the Committee Member page. Beside the reviewer's name, click on *tentative*. On the Change Reviewer's Tentative Status page, click on a link to **agree** (or **decline**) to review the submission.

The chair can also keep track of which assignments are tentative. To do this:

1. Under Reports, click on **Tentative Paper Assignments**.

2. On the Tentative Reviewers page, sort by ID to find a list of submissions with tentative reviewers; sort by tentative reviewer name to see who must still accept or decline. (For details on manipulating tables, see “2.15 Manipulating the Table Pages”.)

A reviewer can also use the system to indicate his or her decision to review. To do this, the reviewer should do the following:

1. On the Reviews in Progress page, click on **Review**. On the Reviewer page, *tentatively assigned* shows beside the submission under **Review status**.
2. Beside the submission, click on **Accept or decline this review**.
3. On the Change Tentative Status page, click on a link to **agree** or **decline** to review the submission. A message will confirm your decision, and the review status will change to *not received*.

4.7 Changing a Reviewer’s Assigned Submissions

The chair can change the review assignments in two ways.

1. On the Submissions page, click on a title. In the Submission window, to find a reviewer, follow the steps in “4.6 How a Primary Manages Reviewers”.
2. On the Committee Members page or Reviewers page, click on a name. In the Committee Member or Reviewer window, type one or more submission IDs into the **Submission number(s)** text box. Separate multiple IDs with commas. Then click **Add / Remove**. If the submission is not yet assigned, it will be assigned. If the submission is already assigned, it will be removed.
3. If you’ve collected preferences from the committee (see “2.9 Allowing Committee Members to Bid for Papers”, you can use the Committee Preferences page. The Stat column indicates a committee member’s role as P (Primary), S (Secondary), or . (a dot, indicating unassigned). Click on the **P** to change the role from Primary to Secondary, click on the **S** to change from Secondary to unassigned, or click on the dot to change from unassigned to Primary. (This method tends to be unwieldy, so it tends to be used only when making initial assignments.)

Note: If you unassign a reviewer who has already submitted a review for that submission, the review will be removed from the system. However, if you reassign the person to the same submission, the review will reappear.

4.8 Allowing Authors to Provide Rebuttals

Some conferences allow authors to submit rebuttals to the reviews they receive. In this case, there is a deadline for reviews, a deadline for rebuttals, then a certain amount of time for the committee (or all of the reviewers, or just the Primary) to read the rebuttals and have a discussion about them. The deadline for rebuttals is typically one week after the deadline for reviews and one to two weeks before the committee meeting.

Collecting rebuttals from the authors means that the authors are able to read the reviews of their papers. Once the authors have seen the reviews, the reviewers should not be able to modify them. Likewise, the authors can see reviewers' rebuttal comments. If the Primaries will be writing reports that incorporate reviewers' rebuttal comments, warn the Primaries not to write anything before the end of the rebuttal period. This includes drafts of the reports that they enter into the system.

To allow authors to read reviews and provide rebuttals:

1. Make sure that all reviews have been received.
2. On the Edit Phase Settings page, under Author Settings, enable the following options in the R column. (Make sure you don't change the phase.)
   - **Author can look at own submission**
   - **Author can see reviews of own submission**
   - **Author can provide rebuttal**
3. Click on **Submit Changes**.
4. To prevent authors from seeing the reviewer type, go to the Edit Global Settings page. Set **Include reviewer type in reviews?** to **no**, then click on **Submit Changes**.
5. Log on using the test reviewer account and make sure that you can provide a rebuttal. Then log on as the test committee member to ensure that the rebuttal is visible.

To read reviews and provide a rebuttal, an author should do the following:

1. Click on **submissions in progress** below the menu bar. On the Submissions in Progress page, two new items appear under Actions: **Look at the reviews** and **Submit a rebuttal**.
2. Click on **Look at the reviews**. On the Reviews of submission page, click on **review by** to read a review on-screen. To download the reviews to the computer, click on **Download all reviews in one text file**.
3. Go back to the Submissions in Progress page and click on **Submit a rebuttal**. On the Rebuttal of reviews page, type a rebuttal (maximum 500 characters), then click on **Submit the rebuttal**. The Rebuttal recorded page will confirm that the rebuttal has been recorded in the system.

A Primary can see the rebuttals provided by the authors of a submission, and the Primary's report will usually describe how the rebuttals have been taken into consideration.

To view a rebuttal, the Primary should do the following:

1. On the Committee Member page, under the submission title, the words *rebuttal submitted* will appear.
2. Beside the submission, click on **See reviews and rebuttal**.
3. On the Reviews of submission page, click on **Author's Rebuttal**.

Once the rebuttals have been discussed among the appropriate reviewers, and before the committee meeting, you, as chair, should disallow authors from seeing the reviews of their submissions. (The rebuttal will still be visible to the Primary.)

To prevent an author from seeing reviews:

1. On the Edit Phase Settings page, under Author Settings, disable **Author can see reviews of own submission**. Then click on **Submit Changes**.

After the rebuttal deadline has passed, you have the option of allowing the Secondaries and Externals to read the authors' rebuttals. You can then set up these reviewers to have a discussion about these rebuttals. (See "4.9 Facilitating Discussion among Co-reviewers".)

To allow the Secondaries and Externals to read authors' rebuttals:

1. On the Edit Phase Settings page, under Discussion Settings, enable **Secondaries and external reviewers can see rebuttals**. Then click on **Submit Changes**.

4.9 Facilitating Discussion among Co-reviewers

In most cases, you'll want the co-reviewers of a paper to reach consensus; this usually occurs after all of the reviews are in. You can set your conference to allow co-reviewers to discuss the papers they're reviewing. (**Note:** Authors never see the discussions of their papers.)

To facilitate discussion among co-reviewers:

1. On the Edit Global Settings page, under Anonymity Settings, set **Hide reviewer names from co-reviewers?** to **yes** or **no**. If **yes**, each review and each message will be labelled "Reviewer i", where *i* is the number given to the reviewer. If **no**, each reviewer's name will appear on their own review and on their messages. Then click on **Submit Changes**.
2. On the Edit Phase Settings page, under Discussion Settings, enable the appropriate options to allow reviewers in various roles to see reviews. Typically, you enable:
   - **After completing, external reviewers can see *external and secondary and primary* co-reviews**
   - **After completing, secondaries can see all co-reviews**.
3. Enable **Co-reviewers can discuss submissions for which they can see the reviews**.
4. If authors have submitted rebuttals by this time, enable **Secondaries and external reviewers can see rebuttals**.
5. Click on **Submit Changes**.

You can also set up multiple discussion phases. While most conferences don't use this feature, it can be helpful because it allows you to group the messages in each discussion under separate headings, one for each phase.

To create multiple discussion phases:

1. On your administrator home page, under Miscellaneous, click on **Set Discussion Phases**.
2. On the Set Discussion Phases page, provide a name, start date and start time for each phase. Click on **Record these discussion phases**.

Once you've enabled these settings, either you, as chair, or the Primaries should send an email to all the reviewers, letting them know that discussion can begin.

At this point, not all of the reviews for a paper may be complete; some reviewers may still need to submit their reviews. These reviewers will typically not be able to participate in a discussion until they've submitted their reviews, but this depends on the options you've set.

Once the Primary of a paper has initiated discussion, the other reviewers can participate. When a message is posted to the discussion, all reviewers who can see the co-reviews will also receive a copy of the message by email.

To participate in a discussion, a reviewer should do the following:

1. On the Reviews in Progress page, click on **Review** or **Review (as PC member)**.
2. On the Reviewer or Committee Member page, beside a submission, click on **See reviews**.
3. On the Reviews of Submission page, the Primary's message appears under Discussion. Click on **Add a message to the discussion**.
4. On the Add a Message to the Discussion of Paper page, type the message, then click on **Send this message**.

4.10 Following Up Outstanding Reviews

As the deadline for reviews approaches, either the chair or the Primaries need to keep close tabs on which reviewers have sent in their reviews and which haven't. The Submissions, Committee Members, and Reviewers pages can be used for this. Reviewers whose reviews are outstanding should be sent reminder email messages – about one week before the review deadline, the day before the review deadline, and immediately after the review deadline.

To check the status of reviews of a paper, the chair should do the following:

1. On the Submissions page, sort by the Reviews Done and Reviews Left columns to check how many reviews have been received and how many are outstanding.
2. On the Committee Members and Reviewers pages, sort by the Reviews Remaining column to find those people who have reviews left to submit.

To send a reminder message to late reviewers:

1. On the Send Email to Groups page, choose **reviewers – assigned & not finished** from the **To** pull-down list. If you don't want the message to be sent to committee members, click on **Exclude committee members**.

2. Compose your message, including any of the variables listed at the bottom of the page. Then click on **Send All Emails**.

To check the status of reviews of a paper, a Primary should do the following:

1. On the Reviews in Progress page, the number of completed reviews appears in the Status column. Click on **Review (as PC member)**.
2. On the Committee Member page, beside a submission, click on **Manage reviewers**. On the Manage Reviewers of Submission page, the names of late reviewers appear in red.

To send a reminder message to late reviewers, a Primary should do the following:

1. To send a reminder to all reviewers, go to the Committee Member page. Under Actions, click on **Send email to your own reviewers**. On the Send Email to Your Own Reviewers page, choose **reviewers of submissions you coordinate – assigned & not finished** from the **To** pull-down list. Compose the message, including any of the variables listed at the bottom of the page. Then click on **Send All Emails**.
   OR
   To send a reminder to an individual reviewer, go to the Committee Member page. Beside a submission, click on **Manage reviewers**. On the Manage Reviewers of Submission page, click on the reviewer's name. In the Reviewer or Committee Member window, click on the person's email address.

Chapter 5 – The Before PC Meeting Phase

Now that most, if not all, of the reviews have been received, you can prepare for the PC meeting, where you'll discuss the reviews with the committee members and come to decisions about the submissions.

Here is a checklist of things you'll do during this phase.

- change and test the phase
- permit late reviews
- prepare for the committee meeting

5.1 Changing to the Before PC Meeting Phase

Once the review deadline has passed, you can advance to the Before PC Meeting phase. In this phase, reviewers no longer have access to the system, although committee members typically do.

To change to the Before PC Meeting phase:

1. On the Edit Phase Settings page, under Current Phase, select **Before PC Meeting**.
2. Under Reviewer Settings, verify that **Reviewers who first submit now are considered to be late** is enabled.
3. Click on **Submit Changes**.
4. Log on using the test reviewer account and make sure that the system is configured correctly according to the options you've set.

5.2 Permitting Late Reviews

Even though external reviewers are no longer able to submit or edit their reviews, there will likely be reviewers who still need to complete their reviews. You can permit this.

To permit all external reviewers to still submit or edit reviews:

1. On the Edit Phase Settings page, under Reviewer Settings, enable the following:
    - **Reviewers have access to the system**
    - **Reviewers can see assigned submissions**
    - **Reviewers can submit reviews**

To permit late reviews from an individual reviewer:

1. On the Reviewers page, click on the name of the reviewer.
2. In the Reviewer window, under Administration, click on **Permit late reviews**.

3. Go back to the Reviewers page and click on the Refresh button in your browser. The word **[EXTENDED]** now appears in front of the reviewer's name.
4. After the reviewer has submitted the outstanding review(s), go back to the Reviewer window and click on **Don't permit late reviews**.

5.3 Preparation by the Primaries

The Primaries typically prepare for the committee meeting by submitting a report on each of their assigned submissions. They can also write comments to the authors.

5.3.1 Submitting Reports on Submissions

Before the committee meeting, the Primaries typically read all the reviews of each assigned submission and form an opinion about the submission. The Primaries then record their opinions in a report. This report can be used in different ways: as a Primary's working notes during the committee meeting; as a meta review, which summarizes the external reviews for the author; or as just another review, indistinguishable from the others.

When notification messages are later sent to the authors, the Primary's report can be included or not. If the report has been used as working notes, it's usually not included. Alternatively, if only parts of the report have been used as working notes, they can be marked as being hidden from the author and the rest of the report included.

Each review sent to the authors will indicate whether it's from a Primary, Secondary, or external reviewer. However, if the Primary's report is meant to be indistinguishable from the other reviews, it's a good idea to override this.

To hide the reviewer type in reviews:

1. On the Edit Global Settings page, under Anonymity Settings, change **Include reviewer type in reviews?** to **no**. Then click on **Submit Changes**.

To submit a report, the Primary should do the following:

1. In the Committee Member window, beside the submission title, click on **Submit your report**.

The system treats reports like reviews, and you can edit the report form as you would a review form. (For details about editing items, see "2.1.3 Editing Items". While that section describes editing items on the submission form, it also applies to the review form.)

To edit the report form:

1. On the Edit Forms page, click on **Review Form**.

2. On the Review of Submission form, click on the checkboxes at the top to show only the **primary** review form. Click on **Update view**.
3. To hide a section of the report from the authors, click on **Edit this item**. In the editing window, under **Item Is Hidden From The Author?**, click on **hidden**. Then click on **record your changes**.

The Primaries can also edit any of the reviews of their assigned submissions – for example, if the Primary finds that a review is inappropriately worded. However, you can prevent review editing.

To prevent Primaries from editing reviews:

1. On the Edit Phase Settings page, under Decision Making Settings, disable **Primary can edit reviews**. Then click on **Submit Changes**.

5.3.2 Recording Comments to the Authors

The Primaries can record comments to the authors of individual submissions. (The chair can also do this; for details, see "6.4 Recording Comments to the Authors".) Comments are usually discussed and written at the committee meeting. For example, they can be sent to the authors of accepted submissions, setting out instructions for specific changes. Comments are not the same as the Primary's report.

After the committee meeting, these comments are sent to the authors, along with the reviews of their papers, in notification messages. The comments are usually described as "Comments from the Committee" and likely carry more weight than other suggestions that the authors see in the reviews themselves.

To allow the Primaries to record comments to authors:

1. On the Edit Phase Settings page, under Decision Making Settings, enable **Primary can write comments to authors**. Click on **Submit Changes**.

To record comments, a Primary should do the following:

1. On the Committee Member page, beside a submission, click on **Manage reviewers**.
2. On the Manage Reviewers of Submission page, under Administration, click on **Edit comments to authors**.
3. In the text box that appears at the top of the page, type in your comments. Then click on **Record Comments**.

The notification message template set up by PCS includes a variable that is automatically replaced by the comments to authors when you send the messages. However, you may not want to include the comments to authors – for example, if they were used as working notes during the committee meeting.

To not include comments to authors in the notification messages:

1. On your administrator home page, under Settings, click on **Edit Decision Settings and Notification Letters**.
2. On the Edit Decision Settings and Notification Letters page, choose a decision type from the **Edit the decision** pull-down list, then remove the `{commentsToAuthors}` variable from the template. Click on **Record Changes**.
3. For each other decision type, repeat step 2.

5.4 Preparation by the Committee

Before the committee meeting, you might want the committee members to be able to read all the reviews of all submissions and to form opinions about each submission.

To allow committee members to see all reviews and discussions:

1. On the Edit Phase Settings page, under Decision Making Settings, enable **All PC members can see all submissions and all anonymous reviews**. Click on **Submit Changes**.
2. To ensure that authors' names are hidden, go to the Edit Global Settings page. Under Anonymity Settings, set the appropriate **Hide author names ...** settings to **yes**. Then click on **Submit Changes**.

If a Primary has declared a conflict with a submission, he or she will be able to see the reviews of that submission but not the discussion. The Primary will be able to see all of the papers, all of the reviews, and all of the discussions for which he or she has no conflicts.

To see reviews and discussions, a committee member should do the following:

1. On the Committee Member page, under Actions, click on **See an anonymized view of all submissions**.
2. On the Submissions page, click on a title to see the paper.
   OR
   Click on a review score to see the review.

You can allow committee members to be included in discussions of submissions that they aren't reviewing. To do this:

1. On the Edit Phase Settings page, do the following:
   - Under Discussion Settings, enable **Committee members can see discussions and submit messages to discussions**.
   - Under Decision Making Settings, make sure that **All PC members can see all submissions and all anonymous reviews** is enabled.
2. Click on **Submit Changes**.

5.5 Preparation by the Chair

Before the committee meeting, you need to determine the categories into which submissions will be placed. You then assign each category an abbreviation for use in the system. PCS provides two categories:

- A – Accept
- R – Reject

You can create any number of categories. Some example categories might be:

- MA – Maybe accept
- MR – Maybe reject
- AP – Accept as poster
- U – Undecided

These categories can be used as working decisions for you and the committee during the committee meeting; they don't have to be used in the notification messages sent to the authors.

At this point, you need to establish these working decisions in the system. (You don't need to provide further information about these settings or edit the notification messages; you can do this after the committee meeting. See "7.2.2 Editing the Notification Message Templates".)

To establish the working decisions in the system:

1. On the Edit Decision Settings and Notification Letters page, type the abbreviations for the working decisions into the **Decision types** text box. Keep the abbreviations to a few characters at most. Click on **Record Changes**.

To record your working decision about a submission:

1. On the Submissions page, type the abbreviation for each working decision into the Decision column.
2. Sort by this column to see all of the submissions with the same decision. This is particularly helpful during the committee meeting. For example, if your working decisions are A, MA, MR, and R, you can sort in order of likelihood of acceptance because these decisions are themselves in alphabetical order.

5.6 Just before the Meeting

Just before the committee meeting takes place, there are two things that you need to do.

1. Make up proposed lists of “Strong Accepts” and “Strong Rejects”. You can present these lists at the meeting and, hopefully, ratify them after a brief discussion. This can make the committee meeting run more efficiently.
2. Download the Submissions page as well as the Summaries of Submissions and All Reviews. Even if the meeting will be connected to the system over the internet, it’s a good idea to have this information, either on your computer or in hard copy, in case the internet connection is lost.

Chapter 6 – The PC Meeting Phase

During the PC Meeting phase, you'll do the following:

- change the phase
- show an anonymized view of submissions
- record committee decisions
- record comments to the authors

6.1 Changing to the PC Meeting Phase

After you're fully prepared for the committee meeting, and just before the committee meets, you need to advance the conference phase.

To change to the PC Meeting phase:

1. On the Edit Phase Settings page, under Current Phase, select **PC Meeting**. Then click on **Submit Changes**.
2. Log on using the test committee member account and make sure the configuration is correct.

6.2 Showing an Anonymized View of Submissions

During the meeting, you'll project the list of submissions onto an overhead screen from your laptop. You can display a view of submissions that omits reviewers' names so that committee members don't initially see them. This anonymized view is useful when committee members are in conflict with one or more submissions.

To show an anonymized view of submissions:

1. Connect your laptop to the data projector.
2. On your administrator home page, beside **Submissions**, click on **(view for PC meeting)**.
3. If this link isn't visible, go to the Edit Phase Settings page. Under Administrator Settings, enable **Administrator can see larger anonymous view of all submissions and reviews**.
4. To allow each committee member to see the anonymous view on their own laptops (connected to the internet), under Decision Making Settings, enable **All PC members can see all submissions and all anonymous reviews**.
5. Click on **Submit Changes**.

For each submission:

1. On the Submissions (view for PC meeting) page, click on a submission title. The individual submission appears in a pop-up window. Only the title and authors' names are shown initially.
2. Any committee member associated with the paper should leave the room at this point.
3. Click **Reveal all information, including reviewer names** and start the discussion.

6.3 Recording Decisions

Each time the committee comes to an agreement about a submission, the chair records the decision in the system. (The chair should have already chosen the decision categories and abbreviations, as discussed in "5.5 Preparation by the Chair".)

To record a decision:

1. On the Submissions (view for PC meeting) page (or on the Submissions page), find the submission and type the abbreviation of the decision into the Decision column.
2. Press the Tab key or click outside the box to transmit the decision to the system. A small window will appear, acknowledging that the decision has been recorded. You can close this window, but it will simply reappear when you enter the next decision, so it can be advisable to move it to an unused corner of the screen.
3. To see all of the submissions with the same decision, sort by the Decision column.
4. To see the number of decisions made at any point, click on **Pop up a summary of decisions** at the bottom of the page. To update the summary, click on **Refresh**.
5. If there is no internet connection to the system, write down the decisions and enter them manually once a connection becomes available.

6.4 Recording Comments to the Authors

During the meeting, you can record comments to the authors of submissions. (The Primary can also do this; for details, see "5.3.2 Recording Comments to the Authors".)

To record your comments to the authors of a submission, the chair should do the following:

1. On the Submissions (view for PC meeting) page (or on the Submissions page), click on the submission title.
2. In the Submission window, under Administration, click on **Edit comments to authors**.
3. In the text box that appears at the top of the page, type in your comments. Then click on **Record Comments**.

Chapter 7 – The Final Submissions Phase

After the committee meeting, you will have made decisions about the conference submissions. You need to inform the authors of these decisions. In the case of accepted submissions, you may need to collect final versions of those submissions.

During the Final Submissions phase, the following major tasks are carried out:

- set up the final submission form
- compose the notification messages
- change and test the phase
- allow communication between author and Primary
- send the notification messages
- monitor and collect final submissions (if not done by the publications chair)

In many cases, a conference will want to collect the final version of each accepted paper. Once all final versions have been submitted, the chair can download them in a single archive. The chair can also download all of the data collected on the submission forms (authors' names, submission titles, and so on).

You should also supply the archive and data to the publisher of your printed proceedings. PCS itself doesn't publish proceedings.

Some conferences do not collect the final version of submissions. If this applies to your conference, you can skip sections 7.1, 7.3, and 7.6 below.

7.1 Setting Up the Final Submission Form

After the committee meeting, you should set up the final submission form to collect the final versions of accepted submissions.

The final submission form can contain the same types of questions that were available on the initial submission form. It's customary to collect the title, authors, abstract, and a PDF document. Some conferences also collect the name and email address of the presenting author, any audiovisual requirements, and an archive of the document source (in Word or Latex, for example, with individual image files). An archive of the document source can be very useful to the publisher of the printed proceedings.

To set up the final submission form:

1. On the Edit Forms page, click on **Final Submission Form**.
2. On the Final Version of Submission page, make the necessary changes. (For details, see "2.1 Setting Up the Submission Form". That section also applies to the final submission form.)

7.2 Composing the Notification Messages

You can now compose the notification messages. First you need to configure the decisions, then you can edit the message templates.

7.2.1 Configuring the Decisions

For each decision, you need to provide certain information.

To configure the decisions:

1. On the Edit Decision Settings and Notification Letters page, choose a decision type from the **Edit the decision** pull-down list.
2. Under **Settings for**, provide the necessary information:
    - **The decision that is shown to the submitter** – If the decision is **A**, for example, you'd likely type *accepted*. If the decision is **R**, you might type *rejected*.
    - **May a final version be submitted?** – If you want the author to submit a final version, click on **yes**. Otherwise, click on **no**.
    - **What the submitter is asked to submit for the final version** – Provide a noun phrase that describes what the author is to submit as a final version. Examples include *final version, final poster, final paper*. (If the answer above is *no*, you don't need to type anything.)
3. Click on **Record Changes**.
4. For each additional decision, repeat steps 2 to 4.

To see the decision for a submission, an author should do the following:

1. On the Submissions in Progress page, check the Status column for the wording that the chair provided above for **The decision that is shown to the submitter**. For example, if the chair provided *accepted*, the word **accepted** appears here. If the chair provided *accepted as poster*, **accepted as poster** appears.
2. If the paper is accepted, check the Actions column for the next step. For example, if the Status column shows **accepted**, it might show **Submit the final version**; if the Status column shows **accepted as poster**, it might show **Submit the final poster**.

7.2.2 Editing the Notification Message Templates

PCS provides generic templates for Accept and Reject decisions; you should edit these, or create new ones, before sending the notification messages.

As with other templates, notification message templates can include several variables. When the messages are sent, these variables are replaced by submission-specific information, such as the author’s name, the submission number, and anonymous reviews. Two variables are particularly important.

- `{anonymousReviews}` – This is replaced with all of the reviews of a submission. Reviewer names don’t appear on these reviews.
- `{commentsToAuthors}` – This is replaced with any comments to the authors that you or the Primary provided. (See “6.4 Recording Comments to the Authors” and “5.3.2 Recording Comments to the Authors”.) If you didn’t record any comments, you don’t need to include this variable. If you used the Comments to Authors field for notes that the authors shouldn’t see, do *not* include this variable.

To edit a notification message template:

1. On the Edit Decision Settings and Notification Letters page, choose a decision type from the **Edit the decision** pull-down list.
2. Under **Notification Letter**, edit the template for this notification message, including any of the variables at the bottom of the page. The `{anonymousReviews}` and `{commentsToAuthors}` variables are usually placed at the end of the message.

   Note: These last two variables are particularly important; don’t forget about them.

3. Click on **Record Changes**.

7.3 Changing to the Final Submissions Phase

Now that you’ve configured the decisions and finalized the templates for the notification messages, you’re ready to advance the conference phase.

To change to the Final Submissions phase:

1. On the Edit Phase Settings page, under Current Phase, select **Final Submissions**.
2. The following options are typically enabled:
   - **Author can look at own submission**
   - **Author can see reviews of own submission**
   - **Author can see own decision**
   - **Author can submit final version of own accepted submission**
   - **Author can communicate anonymously with own submission’s Primary**
3. Click on **Submit Changes**.
4. Log on using the test author account and make sure the system is configured properly.

7.4 Allowing Communication between Author and Primary

When you enable the option **Author can communicate anonymously with own submission's Primary** (as described above), you allow authors to exchange email messages with their Primaries and finalize their submissions.

To communicate with the Primary, an author should do the following:

1. On the Submissions in Progress page, under Actions, click on **Send email to the submission coordinator**.
2. On the Send Message to Anonymous Coordinator page, compose the message, then click on **Send the message**. A copy of the message will be sent to the Primary.

To communicate with an author, a Primary should do the following:

1. On the Committee Member page, beside the submission, click on **Send mail to author**.
2. On the Send Anonymous Email to Contact Author page, compose the message, then click on **Send the message**. A copy of the message will be sent to the author.

7.5 Sending the Notification Messages

After advancing the phase, you can send the notification messages to the authors. Each type of decision will have its own message based on the templates you configured earlier (see "7.2.2 Editing the Notification Message Templates").

To prepare the notification messages:

1. On the Edit Phase Settings page, under Administrator Settings, make sure that **Administrator has post-PC meeting links enabled** is enabled.
2. On your administrator home page, under Email, click on **Send Notification Letters**.

The following options (shown on the Send Notifications page under Options), are available to include in notification messages:

- **Show review rating –** Used to show the overall review score, which will appear on a separate line at the top of each anonymous review. If the review contains only one rating scale question, you do not need to include this option. However, if the review combines more than one question to give an overall rating, include it.

- **Show expertise rating –** Used to show the reviewer's expertise, which will appear on a separate line at the top of each anonymous review. The expertise may also be visible in one of the questions on the review form; to hide such a question from the author, you must edit the review form.

- **Include primary review –** Used to include the Primary's anonymous review along with the other anonymous reviews in the message. This option is usually enabled.

- **Include secondary review(s) –** Used to include the anonymous review of each Secondary along with the other anonymous reviews in the message. This option is usually enabled.

- **BCC to primary –** Used to send a "blind copy" of the message to the Primary for that paper. The Primary's email address will not be disclosed to the author.

To test the notification messages:

1. For each type of decision, send two test emails to the administrator. In each test email that you receive, make sure that the reviews are anonymous and don't show any questions that should be hidden from the authors.
2. Under Options, select one or more options that you wish to enable.
3. Under All Submissions, select two papers for each decision type.
4. Click on **Check notification letters by sending ONLY to the administrator**. The address in parentheses is the chair's address, specified on the Edit Global Settings page. To see the test emails, you can check either the Log of Sent Email or your own personal email account.

After you've verified that the system sent the messages correctly, you can send the actual messages. To do this:

1. On the Send Notifications page, select the checkbox beside each paper for which you wish to send a message. (To select all of the checkboxes, click on **Select all checkboxes**.) **Note:** Be very sure of this step; the system doesn't prompt you for confirmation.
2. Click on **Send notifications to authors**. A copy of each message will be sent to the chair's email address. The Send Notifications Confirmation page will appear, advising that the messages have been sent. When you return to the Send Notifications page, the word **sent** will replace the checkboxes beside the papers.
3. To re-send a message (if for some reason an author didn't receive it), click on **Show checkboxes for already-sent letters**. Then select the checkbox. Make sure you've chosen the appropriate options, then send the message again.

If reviewers haven't already been shown the reviews, you can send all of the reviews of each paper to the reviewers of that paper. To do this:

1. On the main page of the system, click on **Send Reviews to All Reviewers**.
2. On the Send Reviews to All Reviewers page, type the message to appear at the top of your email. Then click on **Preview the emails**.
3. Make any necessary changes, then click on **Send the emails.**

7.6 Monitoring and Collecting the Final Submissions

The conference chair typically doesn't monitor and collect the final submissions. Instead, the task is usually delegated to a *publications chair*. The publications chair is someone who shouldn't have access to the reviews; the person simply collects the final files and data. He or she is often a committee member.

Once you've established who the publications chair will be, send an email to PCS, giving the person's name and email address. PCS will then set up the publications chair privileges.

7.6.1 Monitoring and Collection by a Publications Chair

The publications chair monitors the final submissions as they're uploaded by the authors. Once all of the final submissions are in, he or she can download them into an archive and hand it off to the publisher of the printed proceedings.

To carry out these tasks, the publications chair should do the following:

1. Log on to the system.
2. On the publications chair's personal home page, click on **chairing** below the menu bar.
3. On the Publications Chairing page, click on **Chair publications for [Conference Name]**.

To look at all of the data for the original submissions:

1. On the Publications Chairing page, click on **Original submission data**. A file will be downloaded in comma-separated values format; this file can be opened using OpenOffice or a spreadsheet program such as Excel.

To look at all of the data for the final submissions:

1. Click on **Final Submissions**. On the Final Submissions page, the information is organized as a table; click on a column heading to sort by that column. For example, sort by the Submitted column to see which submissions have yet to be finalized. Click on the red triangle to reverse the sort order. (For details about sorting and other ways to manipulate the information, see "2.15 Manipulating the Table Pages".)
2. To download this table of data, click on **Download**. A comma-separated values file will be downloaded.

To create an archive of the final submission data:

1. Click on **Archive of final submissions**.
2. On the Create an Archive page, click on **Create the archive**. This creates the archive on the PCS server.

3. On the Create Archive of Final Submissions page, click on **[conference_name]_final_submissions.zip** to download the archive. When prompted, enter the user ID and password provided above that link.
4. When the Create Archive of Final Submissions page reappears, click on **remove it from the PCS server**.

7.6.2 Monitoring and Collection by the Committee Chair

It may be that the conference chair is the person who monitors and collects the final submissions. In this case, you can carry out these tasks from your administrator home page.

To monitor the submissions as they're finalized:

1. Click on **Final Submissions**. On the Final Submissions page, sort by the Submitted column to see which submissions aren't yet finalized.
2. To download the data on this page, click on **Download**.

To download a different report on the final submissions (suitable to provide to the publisher) in comma-separated values format:

1. Under Reports and beside List of Final Submissions, click on **Version 1** or **Version 2**.
   - Version 1 organizes the data by author (name, affiliation, and contact email) and includes the decision, final title and abstract.
   - Version 2 organizes the data by submission and includes the decision, contact email, whether the final document has been submitted, title, authors' names, country of first author, keywords, abstract, and presenting author.

To create an archive of the final submission information:

1. Under Reports, click on **Create an archive of submissions and reviews**.
2. On the Create an Archive page, select **final submissions archive**, then click on **Create the archive**.
3. On the Create Archive of Final Submissions page, click on **[conference_name]_final_submissions.zip** to download the archive. When prompted, enter the user ID and password provided above that link.
4. When the Create Archive of Final Submissions page reappears, click on **remove it from the PCS server**.

Chapter 8 – Closing the System

Once all of the final submissions have been collected, you can close the system.

To close the system:

1. Change the phase. On the Edit Phase Settings page, under Current Phase, select **Closed**. Then click on **Submit Changes**.
2. Download an archive of submissions and reviews. Under Reports, click on **Create an archive of submissions and reviews**. On the Create an Archive page, select **submission and review archive**. Select the files you want to include in the archive. Usually, all of the submissions (PDFs, .doc files, etc.) are archived, but movies (MPG, AVI, GT, MP4 files, etc.) are not because they're too large. Then click on **Create the archive**.
3. Download all final submissions, if this hasn't been done already. (For details, see "7.6 Monitoring and Collecting the Final Submissions".)
4. Inform PCS that the system is closed.

Note: PCS does not keep an archive of the original submissions or the final versions. However, it *does* keep all of the settings, forms, and templates so that they can be reused if you manage next year's conference with PCS.

Appendix A – Columns on the Submissions Page

The Submissions page shows all of the submissions as a table, with one submission per row. The columns in the table are described below. Keep in mind that some columns are specific to the submission form and change with the form. Only the checkbox, radio button, and short-text answer items on the submission form have a corresponding column.

For more information about the submission form, see "2.1 Setting Up the Submission Form". For details on manipulating the information on this page, see "2.15 Manipulating the Table Pages".

- **ID –** The ID number of a submission. The submitter knows this number, so you can use it in email messages.

- **Paper –** The title of a submission. (The total number of submissions received appears below this in parentheses.) Click on a paper to display the Submission window, where you can manage most aspects of the submission. (For details, see "2.12.4 Managing Individual Submissions".)

- **Contact Author –** The name of a submitter.

- **Contact Email –** The email address of a submitter. Click on the address to send a message to the submitter.

- **Submitted –** Indicates what files and other information have been submitted.

  - **P** (for *Paper*) – Click to download the document in PDF format.
  - **D** (for *Data*) – Click to download the submission data in Excel-compatible format.
  - **1**, **2**, and so on – Click to download the extra files in Excel-compatible format.

  Right after the submission deadline, you can sort by this column to see what has been submitted. Submissions with no accompanying files then appear at the top of the column; click on the red triangle to reverse the sort and bring submissions with accompanying files to the top.

- **Secondary files, Radio buttons, Multi-level selection, Test Question –** These columns are the selection-type questions that appear on the submission form, questions the submitter responds to by clicking on radio buttons or checkboxes. These columns can be useful if, for example, submissions fall into different categories (such as Long Papers, Short Papers, and Posters) and you ask the submitter to specify the category on the submission form: You can see all submissions of a certain category together by sorting by these columns. (Alternatively, use the Restrict Rows feature to show only the rows for a particular category.)

- **Decision –** The decision for a submission. You create and configure decision types on the Edit Decision Settings and Notification Letters page.

After you type the decision into the text box, the system records the decision as soon as you move the cursor to the next box (or click outside the text box), and a small window pops up to confirm this. This immediate update reduces the risk of you making many changes and then losing them by forgetting to submit them. The confirmation window is necessary for the immediate update to work, so if you're making several updates, it's easier to keep the window open instead of closing it after recording each decision. You can also minimize the window or replace it with an icon.

- **Notes –** A text box where you can type notes to yourself. These notes aren't visible anywhere else in the system. Before the submission deadline, you can write notes about what is still needed for the submission to be complete. (For example, you can include the length of the submission and whether the formatting needs work to conform to the conference guidelines.) After the submission deadline, when you're checking that the submissions are correctly formatted, you can record your progress as well as any specific formatting problems.

- **Upload Limit –** The total size of a submission (that is, the document plus any additional files) cannot exceed a certain number of megabytes (MB), which PCS will set in discussion with you. If the total size of a submission exceeds this limit, the files will not be stored.

  Some submitters will ask for a higher upload limit, and you can permit it if you wish. To request a higher limit for a particular submission from PCS, send an email to support@precisionconference.com. Type just the number into the text box; you don't need to include *MB* after it.

- **Raw Score –** The average score of all reviews of a submission. Just before the committee meeting, you can sort by this column to make up proposed lists of "Strong Accepts" and "Strong Rejects".

- **Raw Standard Deviation –** The standard deviation of all reviews of a submission. Standard deviations larger than 0.75 are highlighted in light orange; those larger than 1.25 are highlighted in dark orange.

- **Weighted Score –** The expertise-weighted average score of all reviews of a submission. If your review form asks for a reviewer's expertise, each level of expertise has an associated weight, which you provide when editing the review form. (For a description of how a score is calculated, see "4.1.3 Overall Review Score".)

- **Average Expertise –** The average expertise of the reviewers, based on what they've declared in their reviews of a submission.

- **Primary Keyword –** If your submission form asks for keywords, this is the primary keyword provided by the author.

- **Reviewer Match –** The average match of the reviewers assigned to a submission. The match is in the range of 0.0 to 1.0, with 0.0 being a very poor match and 1.0 being a very good match. If you assign reviewers using the automatic facility, it's useful afterward to sort by this column to find those papers that have poor reviewer matches.

- **Reviews Done –** The number of reviews submitted for a submission.

- **Reviews Left –** The number of reviews not yet submitted for a submission.

- **P**, **S**, **E name –** The last name of a reviewer, truncated to six characters. Click on a name to see all of the submissions that this person is reviewing and in what role.

  - **P** (or AC in some versions of the system) corresponds to the Primary reviewer.
  - **S** (or 2AC in some versions) correspond to Secondary reviewers.
  - **E** (or R in some versions) correspond to external, or non-committee, reviewers.

- **P**, **S**, **E score –** The score assigned by a reviewer. A score that is greater than 1.0 standard deviations from the mean score is highlighted in pink; a score that is greater than 1.5 standard deviations from the mean is highlighted in dark pink. Click on the score to see the review.

- **P**, **S**, **E exp –** The expertise declared by a reviewer.

- **ID –** The ID number of a submission, repeated from the left side of the table.

- **Message from Chair –** Comments that you want to be read by the committee members and reviewers of a submission. To see these comments, a person clicks on the submission title on the Submissions page. In the Submission window, these comments appear in red under the contact author's name as **Note to Reviewers**.

- **Last Update –** The amount of time that has elapsed since a submission was last updated.

Appendix B – Columns on the Committee Members and Reviewers Pages

The Committee Members and Reviewers pages display the same information, but for two groups of people. Each page is set up as a table, with the information about one person displayed in each row. The columns in the table are described below. The number below a column heading indicates the sum for that column. (For details on manipulating the information on this page, see "2.15 Manipulating the Table Pages".)

- **ID –** The internal ID number of a person.

- **PC Member** or **Reviewer –** The name of a person. Click on the name to display the Committee Member or Reviewer window, where you can manage the person's status and assignments. (This is described in more detail in "2.9.3 Managing Individual Committee Members and Reviewers".)

- **Email –** The email address of a person. Click on the address to send a message to the person.

- **Cmte –** Whether or not a person is on the committee. This column is usually redundant and can be hidden. (For details about hiding rows, see "2.15.3 Configuring Visible Rows".)

- **Last Login –** The time that has elapsed since a person last logged on. You can sort by this column to see which committee members or reviewers has never logged on to see their assignments.

- **Overall Expertise –** A number between 0 and 1, indicating the overall expertise of a person. A higher number denotes greater expertise. This number is only provided at the request of the organization running the system since it involves collecting supplemental information from the users. The overall expertise, if available, is used in the automatic assignment of reviewers to submissions.

- **Free –** The number of additional submissions that a person is willing to review. This is the difference between the number of submissions that the person has volunteered to review and the number the person has been assigned.

- **Primary –** The number of submissions that have been assigned to a person as Primary.

- **Non-primary –** The number of submissions that have been assigned to a person as Secondary or external reviewer.

- **Volunteered –** The number of submissions that a person volunteered to review when he or she signed up to review for your conference. This field is editable, so you can change the number (after consulting the person). This saves times when you're fine-tuning the review assignments.

- **Reviews Remaining –** The number of assigned reviews that the person has not yet submitted. You can sort by this column to see which reviewers are falling behind on their reviews.

- **P1**, **P2**, **P3**, etc. **–** The ID number of a submission (**P** indicates *Paper*) that a person is assigned to review. Click on a number to display the individual Submission window. Reviews that have not yet been completed are highlighted in yellow.

- **S1**, **S2**, **S3**, etc. **–** The overall score (**S**) of a review that has been submitted. Click on a score to display the Review of Submission window and read the review. Blanks, where scores have not yet been calculated, are highlighted in yellow.

Appendix C – The Match Score

A *match score* is calculated for each submission/reviewer combination. The score is based on the level of expertise provided for each keyword by the reviewer and the keywords selected by the submitter. These keywords consist of a single primary keyword and any number of other keywords.

The match score is calculated as

```
 \sum_k\ r_k\ s_k
  \over
  \sum_k\ r_{max}\ s_k
```

where the sums are taken over all the keywords of the submission, r_k is the numeric level of expertise of the reviewer for keyword k, and s_k is the numeric weight of keyword k for the submission. r_{max} is maximum possible value of r_k. The specific values are given below.

```
\begin{tabular}{ccc}

\begin{tabular}[t]{|c|c|}
\hline
Reviewer expertise & r_k \\
for keyword k & \\
\hline
Expert       & 4.0 \\
Knowledgeable & 2.0 \\
Passing      & 1.0 \\
No Knowledge  & 0.1 \\
{\em not provided\/}  & 0.0 \\
\hline
\end{tabular}

& \qquad &

\begin{tabular}[t]{|c|c|}
\hline
Type of & s_k \\
keyword k & \\
\hline
primary & 5.0 \\
other   & 2.0 \\
\hline
\end{tabular}
```

A reviewer who is expert in all of the keywords will have a match score of 1.0, and a reviewer who has no knowledge in any of the keywords will have a match score of 0.1 / 4.0, or 0.025. A reviewer who has *not* provided levels of expertise will have a match score of 0.0; they will never be assigned a submission by the automatic assignment facility.

In some systems, each reviewer is also assigned an overall level of expertise, based on information that the reviewer has provided about their research and reviewing history. If the overall level of expertise is available, it's in the range 0.0 to 1.0, and the match score is calculated by multiplying the ratio of sums above by the level of expertise.

Calculating the Match Score

The match score for a particular reviewer/submission pair is calculated as a combination of the preference, p, of the reviewer for that submission and the original match score, m. (Both p and m are between 0.0 and 1.0):

{\rm match\ score}\ =\ { w_p\ p + w_m\ m \over w_p + w_m }

where w_p is the weight given to the preference and w_m is the weight given to the original match score described in "Appendix D – Example Automatic Reviewer Assignment". The value (p) of each stated preference is shown in the following table:

\begin{tabular}[h]{|c|c|}
\hline
Preference & p \\
\hline
Want & 1.0 \\
Willing & 0.5 \\
Reluctant & 0.0 \\
\hline

A committee member who has indicated a conflict with a particular submission will not be assigned to that submission.

To ignore the committee preferences, assign a weight of 1 to w_m and a weight of 0 to w_p.

Appendix D – Example Automatic Reviewer Assignment

In this example, one Primary, two Secondaries, and three Externals are assigned to each paper. Committee preferences are not taken into account. There are 133 submissions and 20 committee members; thus, each committee member should be Primary on six or seven submissions (133 / 30 = 6.65) and Secondary on 13 or 14 submissions.

It's recommended to relax the "number of submissions per committee member" constraint; this results in better matches at the cost of a less balanced distribution of submissions among the committee members. In this example, the number of Primary submissions per person is limited to eight (rather than seven), and the number of Secondary submissions is limited to 15 (rather than 14).

If, after the assignments are made, there are one or two committee members with very few assigned submissions, those committee members are poor matches for most submissions. This situation might occur because these people have been overly modest in stating their levels of expertise; in this case, those levels should be changed. Alternatively, if each person has an overall expertise level (this is only available in some systems, when requested by the organization), this situation might occur because the committee member's overall expertise level is very low.

Iteration 1

In Iteration 1, you make the following settings to assign one Primary to each submission. Your input is shown beside the arrows. Note the "Maximum submissions per person."

```
\vbox{\scriptsize
\begin{verbatim}
            Which group of people is being assigned submissions?

               -> primary
                  secondary
                  external

            How many such people (from the group you chose above) are
assigned to
            each submission, in total?  Number of people per
submission:

               -> 1

            What is the maximum number of submissions that a person
can take on, in total?

                  Assign at most the person's stated maximum or, if no
maximum is
                  stated, at most the number below.
```

```
                -> Assign up to the number below, regardless of the
person's stated maximum.


                   Maximum submissions per person:
                -> 8

            Which group of submissions is to be assigned reviewers?

                -> Assign reviewers to all submissions.

                   Assign reviewers to submissions for which ...

            How is a submission/person match to be calculated?

                   Weight of the keyword/expertise match
                -> 1

                   Weight of the person's bid (if any)
                -> 0
\end{verbatim}
}
```

Iteration 2

In Iteration 2, you make the following settings to assign two Secondaries to each submission. Note the "How many such people ..." and the "Maximum submissions per person."

```
\vbox{\scriptsize
\begin{verbatim}
            Which group of people is being assigned submissions?

                   primary
                -> secondary
                   external

            How many such people (from the group you chose above) are
assigned to
            each submission, in total?  Number of people per
submission:

                -> 2

            What is the maximum number of submissions that a person
can take on, in total?

                   Assign at most the person's stated maximum or, if no
maximum is
                   stated, at most the number below.
```

```
                  -> Assign up to the number below, regardless of the
person's stated maximum.

                     Maximum submissions per person:
                  -> 15

            Which group of submissions is to be assigned reviewers?

                  -> Assign reviewers to all submissions.

                     Assign reviewers to submissions for which ...

            How is a submission/person match to be calculated?

                     Weight of the keyword/expertise match
                  -> 1

                     Weight of the person's bid (if any)
                  -> 0
\end{verbatim}
}
```

Iteration 3

In Iteration 3, you make the following settings to assign three Externals to each submission. Note that the reviewer limit is no longer overridden, and a default maximum of five submissions is provided in case the reviewer has not specified a limit.

```
\vbox{\scriptsize
\begin{verbatim}
            Which group of people is being assigned submissions?

                     primary
                     secondary
                  -> external

            How many such people (from the group you chose above) are
assigned to
            each submission, in total?  Number of people per
submission:

                  -> 3

            What is the maximum number of submissions that a person
can take on, in total?

                  -> Assign at most the person's stated maximum or, if no
maximum is
                     stated, at most the number below.
```

```
                  Assign up to the number below, regardless of the
person's stated maximum.

                  Maximum submissions per person:
               -> 5

            Which group of submissions is to be assigned reviewers?

               -> Assign reviewers to all submissions.

                  Assign reviewers to submissions for which ...

            How is a submission/person match to be calculated?

                  Weight of the keyword/expertise match
               -> 1

                  Weight of the person's bid (if any)
               -> 0
\end{verbatim}
}
```

You can make the assignments in a more "fine-grained" manner by iterating within each group of people. For example, rather than assigning three Externals per submission in a single iteration, you can make three iterations, each of which assigns a single External. This process is advantageous when there aren't many reviewers because it ensures that each submission gets [something missing here]: Each paper is assigned one or two good reviewers in the first two iterations, and the remaining, poorly matched reviewers are assigned in the third iteration.