JACoW Team Meeting, Trieste
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Scientific Programme Management System (SPMS)
Profiles and Institute Modules

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- Some History
- The SPMS
- The Repository
- Production of the Repository Modules
- User Accounts
- Problem Areas
- Disclaimers, Privacy Laws, etc

- **_JACoW Team Meeting, CERN/Thoiry, February 2002_**: the debriefing of the PAC'01 programme database system led to ideas for improvements, and in particular the proposal to develop two plug-ins of individual profiles and affiliation data, to be located at CERN, maintained by owners, and used for each conference, but also for mailing lists, etc.;

  JACoW Team Meeting, LBNL, December 2002: the meeting was preceded by a Database Workshop, with the aim to define the scope and a preliminary functional specification for a Database for Conference Programme and Proceedings Management, including the Repository;

- **_JACoW Database Meeting_**, Portland, Oregon, May 2003: first presentation of SPMS and the JACoW "Repository" and plans for implementation.

The full system is in two parts:

- A Conference Scientific Programme Management System (SPMS), capable of handling contributions to the scientific programme of a conference:
  - ☐ *Abstract submission*
  - ☐ *Complete programme management*
  - ☐ *Production of the proceedings (in particlar the hidden field data in the .pdf files: keywords, co-authors, title texts, etc.)*
- A Repository, composed of two Plug-In database modules for the above, centrally stored, maintained by profile owners, and available for all conferences wishing to adopt the SPMS:
  - ☐ *"Institutes" or "Affiliations" data,*
  - ☐ *"Contributors" or "Individuals" (Profiles) data*

While it is clear we need to "manage" contributions, it is less clear why we opted to develop the associated Repository.

When authors submit abstracts, the data is used for several different purposes in the immediate, middle and long term futures, for example:

- *Publication of contributions on the web*
  - *Composed of the title, and the* **calculation field** *which groups all co-authors by affiliation and in alphabetical order*
- *Production of an abstracts brochure*
  - *As for above, but including the full text of the abstract*
- *Production of a conference programme booklet*
  - *As for above requiring the title and the* **calculation field** *listing authors and their affiliations*

Why, cont'd.

- *Production of a Table of Contents, using the **calculation field***
- *Production of an Authors Index*
  - *Requiring names and initials of all co-authors*
- *Production of Mailing lists (electronic and snail) for future distributions*
  - *Requiring names and mailing addresses*
  - *Requiring names and e-mail addresses*

With profile and affiliation data correctly entered in a unique repository, the work of each conference programme management team is enormously simplified, both for the contributors and for the organizers.

Once the profile/affiliation data is correctly entered in the repository, maintained by the owners themselves, there is no need to re-enter this data for each conference.

It is hoped that this tool will eliminate the random and often erroneous data entry made by authors in a hurry, over and over again for many different conferences, thus immensely reducing the amount of verification for the organizers with respect to the names of authors both for the calculation field of co-authors, and the authors index. *As an example, with over 916 papers published, over 2000 co-authors from at least 500 different affiliations, the task of verification amounted to 6 full weeks of work for the EPAC'02 Scientific Secretariat ….*

During the past summer, the authors and affiliations originating from recent PAC and EPAC conferences were collected into two FileMakerPro databases, then verified, unified, generally "tidied up":

<u>Profiles</u> data, containing "personal" information relating to individuals: name, 'phone, e-mail, affiliation, etc.,

<u>Affiliation</u> data, containing name, mailing address, website, etc. of universities, laboratories, etc., active in the accelerator field.

Result: ~3300 individual profiles, ~600 affiliations

In October, using the e-mail function in the repository, the SPMS was announced to the 3300 individuals (around 400 profiles did not have e-mail addresses, and around 300 had invalid addresses), inviting them to check out, correct, modify etc., the profiles prepared for them, and to create an associated account, to be used for all future submissions to a conference using the SPMS.

To date around 500 individuals have created an account, and around 100 requests for modification of affiliation data have been registered and carried out.

- *Affiliations* - affiliation names (not including the address) are composed of 4 fields: *acronym* (for use when listing co-authors of a contribution), *affiliation name in full* (2 fields), and *department* - where the department is part of the affiliation, for list of participants/mailing, etc.

  While we had originally thought that the department should be part of an individual's personal profile data, which would limit the number of "affiliations", this had to be abandoned because of the complication with university affiliations, where we have the university name, the faculty, and then the department. The department was thus included in the affiliations table.

  The result is several entries for a same affiliation, CERN for example, where the different departments are part of the affiliation data has 7 or 8 entries. It's not perfect, but for the moment there's no alternative……

- *Special Characters:* accented characters in names can be unrecognized, and substituted with question marks, etc.

- *Soundex* - in the search function is confusing

- *Presentation of affiliation data:* US formatting - i.e. no country code, but country in full at the end, has caused confusion: Europeans request "new affiliation" and try to enter country codes in the postal code field

- *The dropdown list of affiliations:* this is not practical - a separate search facility would be more efficient and user friendly

- *Preferred Name:* unclear how or when we could use this, may perhaps be better dropped?

- *Citizenship:* Not really of use for EPAC, could it also be dropped?

- *Modifications to Affiliation data by authors:* confusing for authors since it requires entry of new affiliation prior to deletion of previous data

- *Impossibility to delete an author's affiliation once it is tied to a contribution:* an initial requirement which is proving onerous, for very little added value …..

  And a question for Matt: *Is it possible for a conference to use the Conference Module, **without** the Repository?*

Having checked with the CERN Legal Service, and other governmental sites, it was decided that the JACoW Repository does not contain any *confidential* information. The announcement of the JACoW SPMS thus contained the following message:

The data stored in the JACoW Repository will, under no circumstances:

- be used for any other purpose than in relation to the organization of a JACoW collaboration conference*

- be provided to any external body for any commercial purposes whatsoever.

*The Asian, European and US Particle Accelerator Conferences (APAC, EPAC AND PAC), CYCLOTRONS, DIPAC, ICALEPCS and LINAC.

On the whole well-received, with only one or two minor objections ..