

SUMMARY NOTES OF THE JACoW 2008 KEK TEAM MEETING

Agenda and Transparencies at InDiCo Site:
<http://indico.cern.ch/conferenceDisplay.py?confId=38631>

C. Petit-Jean-Genaz, CERN, Geneva, Switzerland

TM Members Present: Ivan Andrian, Matt Arena, Ronny Billen, Daniele Ceccato, Yong Ho Chin, Jinyuk Choi, Jan Chrin, Martin Comyn, Stefano Deiuri, Massimo Del Bianco, Kazuro Furukawa, Jiankui Hao, Charlie Horak, Takashi Kosuge, Leif Liljeby, Augusto Lombardi, Elder Matias, Rodney McCrady, Akihiko Miura, Hiromitsu Nakajima, Christine Petit-Jean-Genaz, Leandro Piazza, John Poole, Maria Power, Anil Rawat, Hiroyuki Sako, Volker RWSchaa (2003), Akihiro Shirakawa, Ryotaro Tanaka, Sue Waller, Akihiro Yamashita, Youjin Yuan

WELCOME TO THE TEAM AND INTRODUCTIONS

Yong Ho Chin welcomes the Team to KEK and outlines the arrangements for transport, lunches, the reception and dinner.

Volker Schaa thanks Yong Ho and Akihiro Shirakawa for their efforts to prepare for the present meeting, one of the largest TMs since they began in 1999, demonstrating the necessity to stay abreast with developments in electronic publication techniques, and also with the enhancements being constantly made to our event management tool, the SPMS. In view of the turnover in membership, it is necessary to communicate regularly to ensure continuity and the transmission of accumulated knowledge and experience. The present Notes provide an overview of the discussions. For more detail, the transparencies are published at the InDiCo site:

<http://indico.cern.ch/conferenceDisplay.py?confId=38631>

OVERVIEW OF JACoW COLLABORATION AND ACTIVITIES

Volker Schaa notes that JACoW is an Open Archive and our tools provide everything needed to set up and run a conference, process the papers, referee them and prepare the complete set of documents for publication on the web, on paper, on CD/DVD and USB sticks. We can also provide library metadata for Open Access archives (SPIRES, OAI).

Members and Conferences

New members of the JACoW Collaboration bring the number of conference series' up to 17: APAC/EPAC/PAC (soon to be IPAC), BIW, COOL, CYCLOTRONS, DIPAC, ECRIS, FEL, HIAT, ICALÉPCS, ICAP, ICFA ABDW, LINAC, PCaPAC, RuPAC, SRF. Currently 65 sets of proceedings are published with two more almost ready for upload (PCaPAC'08 and DIPAC'07). As for PAC and EPAC, several series' are moving towards scanning their proceedings from the pre-electronic era: CYCLOTRONS, SRF, HEACC and LINAC.

The JACoW Collaboration policy makers are the SPC Chairs, past, current and future, of each collaborating conference series. The Editors, past, current and future, of each collaborating conference series form the Team. The Team meets each year to discuss developments in electronic publication techniques, and also the enhancements to the SPMS, etc. Volker recalls that apart from himself, the Chair of the JACoW Collaboration, Christine Petit-Jean-Genaz is the Secretary and SPMS Repository Content Manager, Matt Arena and Ronny Billen are the Regional Support Managers for North America and Europe respectively, Yong Ho Chin is the KEK Mirror Site Manager. Ivan Andrian, Deputy Chair is leaving the accelerator field and will need to be replaced. Proposals are welcome.

Action: Nominate new Deputy Chair

TECHNICAL ISSUES IN 2008

Acrobat and PitStop

John Poole recalls that since it was generally agreed that Acrobat 6 had a number of flaws, the Collaboration awaited the arrival of Acrobat 7 before upgrading. Today, Acrobat 9 is on the market, and PitStop 8 (on which Martin Comyn reported favourably at the last TM) is available to work with it.

The question today is whether JACoW should purchase Acrobat 9, of which we have a little, not entirely good, experience, and which, apart from a few new features, does not really offer added value for JACoW, together with PitStop 8.

Since Acrobat 9 is already on the market, it is probably no longer possible to purchase Acrobat 8. Thus, the choice is

- to continue with Acrobat 7 and PitStop 7, or
- to go to Acrobat 9 and PitStop 8.

With 9 JACoW conferences scheduled during 2009 it is **generally agreed to continue with Acrobat 7 and PitStop 7 during 2009**, and try to gain some experience of Acrobat 9 with a report at the next TM, prior to upgrading, possibly in connection with IPAC'10.

Action: Test Acrobat 9 and report at next TM

JACoW PDF Version

Traditionally the PDF version is held back from "current" versions in order to ensure the widest possible backward compatibility. In 2005, following a decision taken at the Frascati TM, we moved to PDF1.4 (Acrobat 5). The question now is whether to move to Acrobat 7 and get around the backward compatibility by using "save as" to automatically save in the higher version of Acrobat.

In view of the fact that the Acrobat 7 Reader is free of charge and that Acrobat 7 files can be read by Acrobat 8 and 9, ***there is general agreement to move to Acrobat 7(PDF1.6)***, taking care to change the distiller parameters for future conferences.

Action: Change the distiller parameters, update information published at the JACoW site

Templates

Further to a number of errors detected during processing at EPAC'08, and through several iterations of the templates, the contents of the templates is starting to diverge, not only concerning differences between the US and A4 versions in the references (a deliberate divergence concerning the position of the comma in the US or in the UK references, either inside or after a quote), but also between the Word and LaTeX versions. Other discrepancies concern font names: Times, Times New Roman, Times New Roman PMT ... These are all so many minor details, but with 10 files containing the text for the templates and two class files for LaTeX, if only to facilitate maintenance it makes sense to harmonize. ***The Team agrees that Cathy Eyberger, who worked on the last revision of the Microsoft Word templates, should be asked to review these. Christine would then produce the Macintosh versions. Martin and Ivan volunteer to harmonize the LaTeX and Open Office versions.***

Action: Cathy, Christine, Martin and Ivan to revise the templates

Software Licenses

It is worth recalling that to demonstrate their support of the JACoW Collaboration, PAC and EPAC sponsored the purchase of JACoW's Acrobat and PitStop software and licenses. APAC (IPAC'10) will sponsor the next versions/upgrade.

This software is available, upon request to Ronny Billen for the period around a conference, on the understanding that it is uninstalled immediately after the event.

The software available to JACoW Collaboration Conferences is as follows:

Adobe Acrobat 7.0 Professional

Downloadable zip files from JACoW available for Windows (48 simultaneous users) and Mac (6 simultaneous users)

Not available from Adobe (the current version is 9)

Enfocus Pitstop Professional 7.5

Downloadable zip file from JACoW available for Windows (Mac not requested yet)

Not available from Enfocus (the current version is 8)

With the large number of conferences now members of the Collaboration, Ronny Billen will keep track of the number of simultaneous users over the coming year and make a report to the 2009 TM.

Action: Ronny Billen

2008 AND 2009 CONFERENCE REPORTS

While the conference reports are spread out over several days, the status reports are grouped together in these Notes.

EPAC'08

Christine Petit-Jean-Genaz reports that the last EPAC in the series before the move to a three-year cycle took place in Genoa, Italy, from 23-27 June, 20 years after the first one, EPAC'88 in Rome. The series will now be called IPAC and rotate between Asia, Europe and North America.

With around 1150 full time registered participants (including 63 supported students), 87 oral presentations (54 invited and 33 contributed) and 1200 poster presentations, and with 90 industrial exhibitors, this was the largest EPAC ever.

EPAC'08 was organized using all of the SPMS functionality (scientific programme, delegate and industrial exhibition registration, editorial suite, JPSP, etc.). Thanks to some interesting developments, it was possible to display SPMS data directly at the conference website, including an on-line graph of abstracts submitted, the programme of oral presentations, and the list of participants. This functionality was developed by the EPAC'08 IT people from Sincrotrone Trieste (Ivan Andrian, Massimo DelBianco, Stefano Deiuri).

A total of 26 proceedings office staff (18 editors (10 pre-conference), 3 IT, 5 in author reception), mostly paid from the conference budget, worked flat out to publish 1100 contributions pre-press (papers only, no author index or table of contents) on the last day of the conference, with the final version of 1218 papers published on JACoW only 2 weeks later.

This effort represented 99 processing days, with a cost of per diems amounting to 26 kEuros and around 20 kEuros in computer rental. There is therefore a significant cost involved in publishing professionally and rapidly.

FEL'08

Jinhyuk Choi reports on FEL'08, a yearly (though biennial is under discussion), refereed conference, which took place in Gyeongju, Korea from 24 to 29 August. Around 200 participants attended this event, with a scientific programme offering 50 oral presentations (20 invited and 30 contributed) and a poster session which

was in place during the full duration of the conference (132 posters).

Volker Schaa and Christine Petit-Jean-Genaz arrived a few days in advance of the conference and processed all of the papers received by the time the full team arrived. Some confusion was encountered when the refereeing functionality was switched on to referee processed papers with green dots, because this removed the possibility for all authors to upload their papers.

The choice was

- to continue with upload and delay refereeing, or
- to switch upload off, and begin refereeing.

To take advantage of the presence of referees and authors, and to make the best use of editorial effort, refereeing was enabled, and straggling papers were uploaded manually by editors and in paper reception instead of via author profiles. This topic will be discussed further during the TM.

HB'08

Charlie Horak reports on HB'08 which took place in Nashville, Tennessee from 25 to 29 August. The Workshop was hosted by SNS/ORNL with 122 delegates, and 114 contributions (all oral except for 10), there was no paper reception/proceedings office during the event, and the paper submission deadline was 4 weeks after it. The length of papers was initially 10 pages, but was later reduced to 3 and 5 pages (in most instances).

All papers were processed by Charlie and one other person from ORNL. They used the standard setup, but with Acrobat 8. The author response to deadlines, guidelines, etc. was generally good. Charlie would however hesitate adopt a post-conference paper submission method for a larger event.

Linac'08

Martin Comyn reports on Linac'08 which took place from 29 September to 3 October in Victoria, BC. He underlines how difficult it was for the proceedings office organization in view of heavy commitments falling just prior to the conference.

Linac is an invitation-only conference with no parallel sessions. The scientific programme was composed of 48 invited orals, 36 posters which are selected to be presented as 5 minute contributed orals and 333 posters. Twenty-three posters were presented by students on the Sunday preceding the conference. Martin mentions the fact that since Sunday's posters already carry a conference programme code, managing this separate event via the SPMS is not straightforward.

Martin found it difficult to impose the use of the SPMS for all SPC activities (proposals for invited oral contributions, selection of contributed orals, etc.) and Excel Spread Sheets were used at the meetings, meaning the SPMS had to be updated post-meeting.

The conference venue boasted excellent internet facilities, contributing to the comfort of editors in the proceedings office. The stable network speed was the

highlight. A slight delay was encountered at the outset since software was not fully installed on all systems at the start of processing on the Friday morning. Also, there were printing problems from Windows XP due to not updated printer firmware.

Martin's editorial criteria were very high. He asked editors to give yellow dots even for the most minor of corrections in PitStop. The result was 70% initial yellow dots, compared to around 40% at other events. He is convinced authors were not aware they had not followed the instructions and feels this call to order will be beneficial for the future. He intends to impose these criteria for PAC'09.

At the time of this presentation, 23 papers need to be processed. Several invited orals have not yet been received, but the absolute cut off will be end November.

The industrial exhibitors were unanimously enthusiastic and many will be at PAC'09. Many were grateful for not having to register via SPMS, underlining the need to introduce some "light" registration within the SPMS registration module for this category.

Action: Matt to look at "light registration" for exhibitors

PCaPAC'08

Elder Matias, Editor of PCaPAC'10 reports on behalf of the '08 Editors who unfortunately could not attend the TM.

PCaPAC'08, the seventh in the series, took place in Ljubljana, Slovenia, from 20 to 23 October, 2008. There were 100 participants and 85 contributions to the programme. The SPMS was used for the scientific programme and registration management. The proceedings, with considerable support from Volker Schaa during and after the conference, were published one day after the conference ended.

The '08 editor, Tilen Kusterle, encountered several problems with the registration module, solved by Massimo DelBianco of Elettra who played a key role in the enhancements brought during preparations for EPAC'08.

Tilen listed several areas for improvement:

Registration Module:

- improve the automatic mail sending
- if the payment is not processed by the deadline, the due balance changes to late registration value and can not be fixed – one has to manually waive the late add-on
- improve the visual interface
- provide documentation of the various parameters

Editorial Module:

- provide documentation for the parameters and setting up the file server
- list the people (total number and names) the e-mail utility sends the mail to, before actually initiating the sending
- remove the double recipients names (when sending e-mail to an author who is also primary speaker – the

SPMS lists both in the e-mail if one uses the variables, even if they are the same person.

In conclusion, the SPMS worked very well for PCaPAC and it was a useful tool for the interaction with participants. It would however greatly benefit from better documentation of various database parameters and with a general database overview document for users (such as the JPS documentation).

Action: Review suggested SPMS improvements, prepare documentation

ECRIS'08

Maria Power reports on ECRIS'08 which took place in Chicago, Illinois from 15 to 18 September. Eighty participants attended the Workshop. The scientific programme was composed of 40 oral presentations and 23 posters.

The Workshop used the SPMS for abstract submission, which went well though some editing/correction of "special" characters was required. Unfortunately ANL's IT department refused to allow upload of papers due to concerns about virus'. The Registration Module was not used, the IT department preferring to create its own ...

In a brief discussion on the IT department's refusal to host the file server for paper upload, it is underlined that the chance of virus is very low because access is via profiles. The file server can also be located outside of the laboratory environment.

If she could go back in time and do it again, Maria would have signed onto JACoW sooner to get more complete training, used the registration module, and more of the SPMS features.

PAC'09

Martin Comyn reports that PAC'09, hosted by TRIUMF, will take place in Vancouver, British Columbia from 4 to 9 May 2009.

The SPMS is being used for all activities related to the scientific programme, and in particular for the submission of proposals for invited orals (455). PAC'09 has revised the EPAC/PAC'07 Main and Sub-Classification scheme to provide unique pairings (no sub-classifications can be used in more than one main classification). This results in 16 main classifications/working groups at meetings, compared to half that number for EPAC. The 6-hour meeting decided 113 invited talks, but due to a lack of demographic spread required fine tuning during the following two months.

The deadline for abstract submission is during the first half of December. Martin has brought many modifications to the standard guidelines for submission. They are available on the PAC'09 website and in a condensed format via a link on the abstract submission page.

The SPC meeting to take place in Vancouver in January will decide 82 contributed orals. The total number of oral presentations is slightly lower than at previous PACs to find 30 minutes at the end of both the morning and

afternoon sessions without orals in parallel to allow delegates to attend the poster sessions.

Delegate and industrial exhibition registration has begun, the former via the SPMS into TRIUMF's registration system, the latter directly into TRIUMF's registration system. A crisis has occurred between the Canadian and US dollar. The Canadian dollar was at par, but has fallen to 80 cents in the last few weeks. While all fees are quoted in Canadian dollars, payments in US dollars will be transacted at fixed exchange rates over extended periods with the amount owing being converted from the Canadian dollar amount.

Preparations for the PAC'09 proceedings office setup have begun. Processing will begin Thursday 30 April and every effort will be made to build in a short break for the "core" members. Martin is considering having a "macintosh only" proceedings office with triple OS capability. Courageux mais pas téméraire ... ?

HIAT'09

Augusto Lombardi reports on preparations for the Heavy Ion Accelerator Technology (HIAT'09) Workshop to take place in Venice from 8 to 12 June. HIAT is the 11th in the series, the first as a member of the JACoW Collaboration. The Workshop generally attracts between 100 and 120 participants and the scientific programme is composed of between 10 and 15 invited orals, and 60 to 80 contributed papers. Earlier sets of proceedings were published by NIM B, by AIP, by the Pramana Journal of Physics, but from now on only on JACoW.

Augusto hopes that the TM will provide him with an idea as to whether to adopt the SPMS or InDiCo for the organization of the meeting.

DIPAC'09

Jan Chrín reports that DIPAC'09, the 9th in the series of Workshops on Beam Diagnostics and Instrumentation for Particle Accelerators, will take place in Basel, Switzerland, from 24 to 27 May, 2009.

Approximately 150 participants are expected to attend the Workshop. The SPC met on 3 November, and the first announcement will be made mid-December. The Workshop will be organized using the SPMS both for the scientific programme and for registration. Files of contributions will be uploaded to a file server at PSI.

COOL'09

Youjin Yuan from IMPCAS in Lanzhou, China reports on the Workshop on Beam Cooling and Related Topics (COOL'09) to take place from 31 August to 4 September on the campus of the Institute of Modern Physics, in Lanzhou.

The conference, and also CYCLOTRONS'10 the following year, will be organized using the SPMS on their own Oracle installation. Experience will be shared with colleagues at KEK who are setting up the Asian Regional Support Centre.

ICALEPCS'09

Akihiro Yamashita reports on the status of preparations for the International Conference for Accelerator and Large Experimental Physics Control Systems (ICALEPC'09) which will take place at the Kobe International Conference Centre from 12 to 16 October, preceded by a satellite meeting from 10 to 11 October. Between 250 and 300 papers are expected, of which 70 will be oral presentations.

ICALEPCS will use the SPMS on an instance to be set up at the Asian Regional Support Centre at KEK. The proceedings office staff will be a mixture of local and JACoW.

FEL'09

Sue Waller reports on the status of preparations for the 2009 Free Electron Laser conference, one of JACoW's few refereed conferences, that will take place at the Liverpool Arena and Convention Centre from 23 to 28 August.

Daresbury Laboratory will host the meeting. While Sue has little or no hands on processing, or SPMS experience, she will be able to call on colleagues and JACoW experts for support using the SPMS and the refereeing module, and for the production of the proceedings.

IPAC'10

Akihiro Shirakawa of KEK reports on preparations for the first International Particle Accelerator Conference, IPAC'10, to take place in Kyoto from 24-28 May, 2010.

The SPMS will be used for all activities relating to the scientific programme, as well as delegate and industrial exhibition registration. The IPAC'10 instance of the SPMS has been set up temporarily at CERN for activities relating to the early organization, mailing lists, etc. The data will be imported into an SPMS instance to be set up at the Asian Regional Support Centre at KEK as soon as this has been tested and is performing reliably.

The IPAC'10 organization, scientific programme, main and sub-classifications and method will resemble the EPAC model. Approximately 800 contributions are expected and the organizers will count very much on JACoW support.

CYCLOTRONS'10

Youjin Yuan of IMPCAS presents the status of preparations for the 19th International Conference on Cyclotrons and their Applications (Cyclotrons'10) to take place in Lanzhou, China in September 2010. This event will take place at the same venue as COOL'09. Around 200 participants are expected and all of the activities will be organized using the SPMS, making the most of the experience to be gained during COOL'09.

FEL'10

Leif Liljeby presents the status of preparations for FEL'10 to take place in Malmö, Sweden from 23 to

27 August, 2010. The meeting will be hosted by MAX-lab, Lund University and the FEL Centre Sweden. FEL is an annual, refereed conference. Leif, a JACoW editor from the pre-SPMS era, will be using the SPMS for all activities relating to the scientific programme, registration, refereeing, etc.

Linac'10

Yong Ho Chin presents the status of preparations for Linac'10, to take place at the Epochal Conference Centre in Tsukuba, Japan from 13 to 17 September. The meeting will be hosted by KEK and JAEA. Approximately 300 participants are expected and the meeting will follow the "usual" style, plenary sessions only, and poster sessions, with an outing for participants and workers alike mid-week. The conference will be organized via the SPMS for the scientific programme, as well as delegate and industrial exhibition registration. The Linac'10 team already has experience using the SPMS (ICFA ABDW HB2006), and it will follow closely the organization of IPAC'10.

IPAC'11

Christine Petit-Jean-Genaz presents a very brief outline of the status of preparations for the second International Particle Accelerator Conference IPAC'11. The conference will take place in September 2011 in Spain. The exact venue is still to be decided (Granada or San Sebastian). All of the SPMS functionality will as usual be exploited to the full.

Christine mentions that the third IPAC, IPAC'12 will take place in New Orleans.

SPMS REGIONAL SUPPORT CENTRE ACTIVITIES IN NORTH AMERICA

Matt Arena, Fermilab, begins with a brief overview of the Scientific Programme Management System (SPMS), which has gradually developed into an event management tool. It is available under General Public License (GPL), free of charge to all, and to JACoW collaboration conferences it comes together with two repositories:

- profiles/accounts of individuals working in the accelerator field and who have been participants, or authors or co-authors on contributions presented at JACoW events,
- affiliations or companies, involved in accelerator related activities.

Repository data is downloaded from the central repository when a new conference instance is created, and as long as it is active, the data is synchronized with the central repository.

The functionality of the SPMS now spans several areas:

- scientific programme management, to handle all activities related to the scientific programme of an event,
- delegate and industrial exhibition registration, as well as the latest development for hotel accommodation

- automated post-conference proceedings production via scripts developed by Volker Schaa.

Since 2004 when the SPMS came into being, 45 conferences have/are/will use the SPMS. Fermilab supports this initiative and provides the North American Regional Support Centre service to all North American JACoW events.

Users, Roles and Privileges

Matt recalls how earlier on "users" were granted "privileges" which were hard-coded into the SPMS. Unfortunately this meant that it was not easy to change the privilege required for a module or section of code, and granting or revoking privileges for a large group was tedious and time consuming.

A first and considerable improvement was later introduced, by adding functional roles so privileges could be granted/revoked with ease. But the system can be improved upon and fine-grained access is now under development. This will allow administrators to create infinite privileges (hard-coded privileges are banished), and access can be defined at the page or module level. The major disadvantage to fine-grained access is that any module or web page that has no restriction defined is open to the public. The Administrator must test changes to mappings. While this will give even more flexibility to the system, it is limited to read and write access. Read access only would be another enhancement.

System Parameters

The system parameters are gradually being re-grouped based on proposed documentation format, but as functionality evolves, it is necessary to improve this. Matt proposes to link SPMS functionality to specific system parameters, for example, file upload cannot be enabled until the upload CGI script parameter is set.

Repatriation

Very early on, routines were developed to be able to import conference metadata into the central repository. This data was typically the contributions to the conference with the title, the primary author, co-authors, keywords, etc. and it was hoped that this could be available for future conference organizers to check back over prior presentations at different events.

Repatriation requires the execution of a script (written by Volker Schaa) during proceedings generation to load keywords into the conference database. Not many conferences have run the script, probably because they are totally unaware of its existence! If repatriation is desirable, it is necessary to create a procedure/policy to notify the repository administrator to initiate an upload, perhaps upon publication of the proceedings on JACoW. A clearer specification of functionality and reports is required, as is **a "live" test to assess whether there are any conflicts**.

Action: Repatriate PAC'07 to see whether there are any conflicts

New Affiliation Requests

Matt recalls the old procedure for requesting a new affiliation, for example when a submitting author wished to enter a co-author whose affiliation was not in the repository.

The user requested the new affiliation, which remained in a queue until the administrator processed it. This system meant that the administrator could refuse and delete junk requests. The disadvantage was that users adding multiple authors with the same new affiliation had to make multiple requests, and deleted "junk" profiles resulted in orphaned profiles since the profiles remained with "new affiliation request pending" in the place of the affiliation.

Under the new system, new affiliation requests are immediately accepted into the repository, "tagged" for the administrator to review, edit or correct errors and either approve or merge the entry into an existing affiliation.

Unfortunately, users frequently

- enter true junk (they confuse the new affiliation request with the creation of a profile for a person), or
- create duplicate entries because they haven't bothered to search the existing entries, or
- create duplicate entries because they wish to make a correction to an existing entry.

So the problem is, how to handle true "garbage" which cannot be fixed or merged, it being impossible to delete an affiliation that is attached to a profile that is in use.

Matt's proposal is that once efforts to contact the author fail, to perform a force delete on the profile and affiliation. This however induces a number of relatively serious issues:

- any co-author with that affiliation will be deleted from a contribution,
- any contribution owned by or has the primary author with that affiliation will be deleted,
- any profile with that affiliation will be deleted,
- any account with no profile data will be deleted,
- this "delete" will occur in every conference connected to the main repository.

Christine is not enthusiastic about this proposal in view of the extremely dangerous consequences, especially since the JACoW Administrator is working in the Central Repository and is blind to where/when these profiles/contributions are in use. She would prefer to return to an improvement on the original procedure, whereby

- the new request remains pending until the Repository Administrator has approved it,
- the Repository Administrator can simply delete garbage affiliation requests without this having any effect on profiles/contributions,
- the requester is required to describe in more detail the request with the necessity to indicate:
 - this is a completely new request for the entry of an affiliation
 - this is a correction to an existing affiliation entry

- c) enter freehand the reason for motivation for the request.

Christine asks for an improvement on the earlier system such that the approval of the request by the Administrator results in:

- a) the creation of the new affiliation
- b) the automatic update of the profiles with this pending affiliation (previously the profile carried the mention "new affiliation request pending" and the profile owner had to login and update the affiliation himself).

During the discussion on SPMS enhancements, and also the question of documentation, it is proposed, and agreed to organize a technical workshop devoted entirely to SPMS issues. Persons with the most Administrator experience should be invited at a time and place to be decided.

Action: Organize Technical Workshop on SPMS

SPMS REGIONAL SUPPORT CENTRE AND JACoW WEBSITE DEVELOPMENTS

Ronny Billen, CERN, reports on the SPMS European Regional Support Centre activities and on JACoW website developments.

Support Activities since October 2007

Since his last report at the Knoxville TM, 12 SPMS instances have been set up (4 *virtual instances* having the conference repository and web-server hosted elsewhere, 8 *real instances* with data repository and web access tools (DADs), and 5 sets of proceedings have been published.

SPMS-related Activities

The SPMS has evolved constantly, painlessly for the most part, but with some inconvenience in connection with the development effort on the registration modules. Ronny is pleased to report that the collaboration between the North American and European Regional Support Centres (RSC) has worked perfectly.

Incidents and Problems

The incidents and problems encountered concerned:

- failing job repository synchronization (sync.repo): this occurred several times on different instances. Resetting the job did not always work, in particular when the problem was related to Oracle Intermedia indexes;
- performance problems at peak usage: as usual at the wrong time, caused by the fact that the database and the web servers are shared resources;
- profiles (Linac'08): a new bug appeared, later understood and corrected, whereby the SPMS was creating duplicate profiles;
- immediate support in case of problems is expected, which is not possible.

Lifetime of an SPMS Instance for a Conference

Ronny recalls that following a complete formal request for the setting up of an SPMS instance from a JACoW collaboration conference, a dedicated database account on

JACoW-DB is created, together with database objects and web accessibility (Database Access Descriptors). The SPMS administration is handed over to the Conference Database Administrator, who is responsible for the instance throughout the period of exploitation. This involves user and administrator accessibility via web interfaces, automatic synchronization with the central repositories, and assistance from the RSC and experts.

Following the conference and the subsequent generation of the conference proceedings, as well as the repatriation of data, keywords uploading, library data extraction, it is necessary to decide the further lifetime of the instance.

Conference instances occupy space, and require some maintenance (application of patches, etc.). While there is a tendency to wish to delete the instance purely and simply, experience has shown that this can be unwise for the conference series. Indeed, previous instances are extremely useful for later organizers to check parameters, table set-up, but also to extract statistics for the purpose of comparison.

It is agreed that past instances should be conserved for a minimum of 1 conference, though Editors may request more. The synchronization with the Central Repository should be disconnected following the publication of the proceedings, but if the effort is not too acute, patches should continue to be applied for a period to be decided with each Editor.

Action: Check with editors of all active instances re. requests for instances to remain active

Database Character Set

The database character set defines the characters that can be represented in the database. The character set currently installed at CERN is not a recommended character set by Oracle and it causes numerous problems related to "special" or "accented" characters used frequently in European names. Unfortunately, CERN is unlikely to change for the universal character set recommended by Oracle, which has unrestricted multilingual support with multibyte. Its impact has so far not been tested at CERN. The question is, to what extent can we encourage CERN IT to test the Oracle recommended character set?

Action: Ronny Billen find out what it means to get a separate instance of Oracle for JACoW which is Unicode aware [amount of additional maintenance, willingness of CERN's IT people to finally make a test on Oracle's recommended char set].

Indexing and Searching of JACoW Pages

A web crawler passes over the JACoW site every 5 days to index the pages. Only the indexed pages are found by the Search engine and occasional hiccups require CERN-IT intervention. Problems are regularly encountered with respect to the search for "special" or "accented" characters. This issue has been raised with CERN-IT.

Action: Any point in raising this again with CERN IT?

Problems, Suggestions, Improvements

Failing searches: Crawler hiccups have been taken care of, and one just has to live with problems related to "special" and "accented" characters ...

Request to search on Home Institute: Affiliations are not a search criteria. No proposal is made to include it. A workaround is to search on text.

Obsolete link to external site: All external links are removed from conference proceedings, but external links are allowed in the JACoW collaboration conferences page.

Cyclotrons'07 Unpublishable Proceedings: These proceedings were proposed for publication

- first try: without hidden fields,
- second try: lacking keywords,
- third try: only the first page of the paper was visible.

Ronny concludes that editors need more help to produce the JACoW publication package.

FEL'07 Incomplete Proceedings: These proceedings contained references to unpublished papers ...

Link from JACoW to PRST-AB: Following a decision to encourage collaboration with PRST-AB, mutual links are now included at both websites.

REVIEW OF JACoW WEBSITE

Aims

John Poole recalls that the primary function of the JACoW site is to provide access to conference proceedings. It also aims to provide information to help authors in the preparation of their papers, and serves as a means of communication between the JACoW Team and the accelerator community.

Review of Pages

The Central Frame

This page has not been updated since 2003. It has a bad link and needs to be updated with more up-to-date examples, and checked to see that the information is still relevant for the FAST search engine. Furthermore, the hit counter only counts hits on the front page. Since we know that the number of papers being served is far more than this indicates (around 400,000 papers are downloaded each year), the counter could be removed.

Action: Check information and remove counter

Author Education/Help/Templates

The analysis of problems encountered by editors at conferences should guide us in updating/completing templates and author information. Most frequent problems are incomplete author lists in the SPMS compared to the papers, formatting errors, A4 printed on US letter and vice-versa, PDF, not PS submitted (situation greatly improved since introduction of auto-distill), and loss of colour.

More information about the SPMS, the repository, library data, etc. should be added to the site. On the

subject of author profiles, the basic description is fine, but the historical information is no longer relevant and could be removed. The creation of profiles should be separate from the privacy policy.

The table on collaboration conferences is up to date*. A more appropriate link to PRST-AB needs to be explored.

Action: Implement above proposals

Editor Information

Many corrections are required related to:

Steering Committee links to a page defining Team membership;

Terms of Reference need to be revised to give prominence to sanctions on conferences that do not adhere to them;

Requirements for membership – the first paragraph should be reworded to explain the requirement that the conference should send a stand-alone set of files and JACoW does not publish links;

Meetings is for the Team and Steering Committee;

Documentation is for the Team.

JACoW Team Items

Corrections are required on:

Website updates – of limited interest, and possibly not in the best location;

SPMS Terms and Conditions – essential source material for organisers wishing to use SPMS or JACoW Software licenses;

SPMS – still has links to old documentation.

Other Links in the Index

A number of links need review:

Library data – is useful and should be there, but does it need its own sub-heading?

About JACoW – useful and it should be on the website;

Award for the collaboration – is nearly 5 years old and could be removed (could be included in "About JACoW");

Future Accelerator Projects – only needs one link from the index – John also asks whether this is a core JACoW activity since the link goes to EPAC, and whether it requires more explanation.

Editor's Time

Help for authors should be reviewed to ensure that they are better informed concerning the issues on which editors spend the most time:

- fonts not available to distiller substituted with Type 3
 - simple to fix but hard to avoid,
- title to upper case,
- sub-section headings to initial caps,
- figure and table captions (single and multi-line),
- figures with paragraph indent,
- tables wider than the column,
- removing hyperlinks.

How can the Website Help?

Some simple proposals consist in the provision of templates, in simplifying the guidelines to give more drill-

* At the request of several conferences (EPAC'08, IPAC'11) a table concerning non-JACoW Conferences will be added to this site.

down instructions, to improve clarity and ease of use, and to provide clear instructions for editors.

The website could be more clearly structured to better reach its objectives dividing into three main areas:

Authors

- How to avoid common problems
- Templates
- General help information

Organisers

- Terms and Conditions
- JACoW Structure and Roles
- Using the SPMS

JACoW Team

- Meetings
- Editor Training
- Documentation

On the JACoW Team Information, there are several important aspects:

- technical requirements for publication on JACoW
- JACoW collaboration membership conditions
- JACoW activities – steering committee and team meetings
- technical information for team members ('editors') such as SPMS/JPSP GPL download site, post mortem reports, editor training and instructions, etc.

John concludes that the site needs to be reviewed completely, to improve the file structure and update all information. He calls on volunteers to:

- update the information
- re-design the site
- produce a new JACoW poster with updated information on the collaboration.

Christine Petit-Jean-Genaz and Stefano Deiuri volunteer to work together to review the JACoW site. Christine will review, correct, add/remove information at the current site, and contact Cathy Eyberger to review the templates. Once the information is correct, Stefano will work on re-structuring the site and improving the visual impact.

Action: Update JACoW site

SPMS REGIONAL SUPPORT CENTRE ACTIVITIES IN ASIA

Takashi Kosuge reports that the hard- and software for the Asian Regional Support Centre has been purchased, installed and is undergoing testing. In response to Matt Arena's request for access to the machine to apply patches, Akihiro Shirakawa will explore how best to achieve this to comply with KEK internal safety requirements.

Action: Akihiro to facilitate access for Matt Arena

POST-MORTEM OF EPAC'08

JACoW Proceedings Production Process Overview

As the TM has pursued its business, it has become apparent that new editors are often relatively ignorant of the proceedings production process and it was decided to add this unscheduled item, to be presented by John Poole on the basis of previous presentations of this type. It is suggested that similar presentations should be a regular TM feature.

Action: Schedule a similar presentation at the 2009 TM

The job of an Editor is to produce a set of files for publication on JACoW, implying

- providing PDF files with correct paper size, fonts, performance, banners and hidden fields,
- indexes (table of contents, authors) and the wrappers (introduction, 'photos, acknowledgements, etc.), and if necessary,
- to produce a CD/DVD, and perhaps paper volumes,
- provide a zip file which can be uploaded by Ronny to the JACoW web site containing all files and material for the conference instance.

The main steps include:

- collect the abstracts, author names and affiliations,
- accept abstracts/contributions to the conference,
- collect the files of the papers (for larger conferences generally in advance of the conference),
- collect hard copies of papers (used to compare the author's version with the editor's PDF - **now abandoned by EPAC**),
- process the files for the papers to make the raw PDF,
- feedback information to the authors about the status of processing,
- make quality control checks,
- number the pages, generate keywords,
- fill in the hidden fields in the PDF files and add page numbers and banners,
- generate the index files (table of contents, author index),
- add the "wrapper" (introduction, acknowledgements, committees, 'photos, etc.),
- final quality checks,
- write the CD/DVD, print hard copies, etc.

While all of the above activities can be achieved without using the SPMS or InDiCo, if the expertise and support is available then the SPMS can automate much of this work, and also handle such activities as delegate and exhibition registration, refereeing, SPC activities (proposals for invited orals, etc.), as well as provide the mailing lists, support for correspondence, statistics, etc.

Each conference wishing to use the full SPMS system together with the associated profiles and affiliations repositories needs to pledge certain undertakings, described at the JACoW site.

Using the SPMS requires the services of:

- a database engineer (setting up Oracle and tuning, application of patches, etc.) if the instance is not located at a Regional Support Centre,
- a web server expert (conference server linked to the conference database),
- a networking engineer (to set up the file server, security, upload scripts, etc.),
- an expert Oracle user (for ad hoc queries, etc., should the Conference Administrator require some assistance),
- a Conference Administrator(s) (editor/user)

The production of an abstracts brochure/programme booklet can be produced from a dump of SPMS data, formatted as required.

Templates are published at the JACoW site, and revised following discussion at TMs. There are versions for US Letter and A4. Since Word documents do not transport well between Windows and Macintosh and vice-versa, separate templates are provided. Since Word documents may not be compatible from one version to another, we maintain several versions. A LaTeX template is also provided for each paper size.

New Editors are well advised to visit JACoW.org and to learn as much as possible about templates, about the experience of previous editors through the post mortems published regularly, and as much as possible about electronic publication in general.

It is common practice at JACoW conferences to invite authors to submit:

- all the source files of the paper and figures,
- a PostScript file,
- information on how the documents were prepared (software and platforms, etc.).

Basic processing steps involve distilling the author's PS file, converting it to JACoW paper size (A4 width by US letter high), checking that the resulting PDF file meets JACoW requirements, format, style, page size, performance, etc., saving the final version of the file.

Editors should not accept or use PDF files submitted by the authors.

If the editor runs into problems, he should try to fix them, make a new PostScript file and process it. If no solution is found to the problem, the author must be informed, given advice to remedy the problem if possible, and asked to re-submit the file.

Processing during a conference is a stressful job, carried out under pressure, and experience shows that it is easy to overlook small problems. A second Quality Assurance (QA) check is therefore part of standard procedure. At this stage, all of the specifications should be double-checked and the performance of the file in terms of its size and time to display on the screen verified. Furthermore, it is frequent that titles and co-authors change between abstract submission and paper submission, and a very thorough careful check of this metadata is necessary prior to final publication.

Once all of the individual files have been converted to perfect PDF files, it is necessary to add page

numbers/banners, and to insert the metadata into the hidden fields, used by the search engine at the JACoW site.

Proceedings published on JACoW carry a number of web pages providing access to the papers and other conference materials such as copies of the presentations/transparencies, photos, etc. These pages can be generated using the metadata collected during the conference cycle (from abstract submission to final processing).

The steps above can be achieved using ad hoc methods, but the SPMS brings a set of powerful utilities, which automate much of the work. There are also a number of scripts created by Volker Schaa which are driven by an XML dump from the SPMS to make quality checks, produce the final PDF files and create most of the files for the CD (including indexes and table of contents).

The SPMS is delivered together with what is known as the JACoW Repository, consisting of two databases, one of user profiles/accounts (names, addresses, personal information and preferences), maintained by the individuals themselves, and a database of affiliations, maintained by the JACoW Repository Administrator. The latter avoids individuals entering affiliation data freehand, and facilitates standardization and the production of statistics.

The SPMS provides an interface for authors to submit their abstracts via their JACoW profile/account. They enter the names of co-authors, selecting them from the profiles already existing in the Repository, or creating new profiles as necessary.

To submit a contribution to the proceedings, the submitting author logs into his/her profile, and uploads the required files, filling in the metadata. A script behind the "Upload File" button in the SPMS paper submission interface sends the data to a script that will transfer the files to a file server and store the metadata in the SPMS. Ivan Andrian developed this script, which is well documented at the JACoW site.

In order to process a paper, an editor will prefer to work from a PostScript file – avoiding the risk of formatting or font problems. The SPMS assigns papers to editors according to a weight, typically PS = 2, source file = 1 and PDF and other supporting files = 0. When an editor requests "Get Next Paper" he will get the highest scoring paper above the threshold.

Part of the important metadata is the platform type. Errors can occur if one processes a Macintosh-produced PostScript on a Windows machine. The SPMS allows editors to choose their preferred platform type, as well as the type of software used to prepare the papers (Word or LaTeX for example).

To conclude, John recalls the basic objective of quality checks:

- JACoW Paper Size,
- margins 19 mm top/bottom, 20 mm left/right,
- majority of Type1 and TrueType fonts embedded in the PDF,

- all pages display without error messages with adequate speed.

It is up to the Editor-in-Chief to decide what is acceptable for other items relating to the general appearance and contents, for example:

- strict adherence to title in uppercase or mixed,
- font sizes in titles and headings,
- Fig. or Figure ...,

Technical checks therefore must include:

- paper size,
- text within the frame,
- fonts,
- display speed,
- absence of error messages,
- number of pages and no blank pages,
- examine equations and figures closely for corrupted characters.

Once all papers have been double-checked or Quality Assured (QA'd), they can be repatriated to a web server and the SPMS can be used to publish them. The SPMS will dynamically build web pages to access what are known as "Pre-Press" papers, through the toc.htm package. The URL is defined as a system parameter (called Proceedings TOC Base URL) and the test is done on-line. This process enables authors to access all contributions, while the final preparations for publication on JACoW are being carried out. This is where a complete check of paper titles, authors and affiliations is required, and where Volker Schaa's scripts are run to produce the final JACoW publication package. Volker's scripts are downloadable from the JACoW website and are available under General Public License (GPL). The scripts are embedded in the documentation file that is in PDF format. Varying degrees of training in the use of these scripts is foreseen within the programmes of TMs.

The inclusion of transparencies in the proceedings is now commonplace for all xPAC events. Volker's scripts can build them into the final product. No format requirements are needed, and animation is flattened by the special software used to convert slides to PDF. A frequent problem is size and performance, but Michaela Marx of DESY, an expert in this activity, can be called upon for advice.

Once all of the above is complete, a full set of files should be sent to the JACoW Webmaster (Ronny Billen). Optionally, citation information, in SPIRES and Open Archive Initiative formats can be published – these files can be produced from the SPMS (two packages to do this exist) once the keywords produced by the scripts have been uploaded in SPMS. Once loaded on the JACoW server, the files are indexed by the search engine. This can take up to a week. For each new conference, Ronny has to manually update 4 files on the website. It is therefore highly appreciated that editors get it right first time ...

Proceedings Office and Author Reception Organization

Christine Petit-Jean-Genaz recalls the JACoW Terms of Reference which are to publish conference proceedings at JACoW.org, and to provide support to member conferences by means of tools for conference organization, proceedings production and shared software licenses, and in particular, on the shoulders of the larger conferences, to train editors in the techniques and technologies involved, mostly via hands on processing experience at PAC/EPAC/LINAC/DIPAC etc., and via Team Meetings.

With this latter aim in mind, the EPAC'08 Proceedings Office Team was composed of a core of a dozen "expert" editors who arrived at the venue several days before the outset of the conference. This team set to work immediately and had processed their target of 80% of the papers submitted on deadline by the time the "novice" editors arrived the day prior to the conference. The novices received a general introductory course and then set to work under the supervision of the experts, who in turn began the Quality Assurance stage on the papers successfully processed so far.

It is useful to report here for newcomers that as papers are processed, the editors assign dots to describe the status of processing:

- **green** dots = OK,
- **yellow** dots = some minor modifications were made by the editor, requiring proofreading by the author,
- **red** dots = paper rejected, re-submission required.

Editors have the possibility to enter their comments in the SPMS, which are visible to the authors, who can access the paper processed by the editors.

When the editors ran out of papers to QA (those with green dots), and only yellow dots remained, mails were sent to all authors of yellow dot papers assuming they had proofread and agreed with the conference version of the paper. This meant QA could continue.

The full Proceedings Office team was composed of 18 editors (two of whom worked exclusively on processing transparencies), 3 IT/database staff, and 5 author reception staff.

The team processed, QA'd and published "pre-press" >1100 papers by the last day of the conference, and the full 1218 papers and 90 sets of transparencies just three weeks later.

This outstanding result was due to a number of factors:

Upload of files more efficient: "autodistill" lead to

- more efficient submission and control by authors
- more complete upload (missing .ps files triggered a reminder to the author)

IT setup, computers, network and printers all prepared and functioning perfectly on time

Hard copy requirement abandoned (in the past the hard copy was used for QA), which

- reduced drastically the amount of filing in Author Reception

- freed time for Author Reception staff to cross-check titles and authors on papers against those in the SPMS (3 weeks post-conference work reduced to 1)
- allowed QA to begin earlier, so all papers received were processed and QA'd by the last day of the conference.

Other reasons for success were:

- excellent communication and careful planning between all "actors", i.e. speaker interface, poster session managers, etc.
- repeated reminders to authors via the SPMS e-mail utility
- good balance of editorial staff: "core", "novices", transparency processing, author reception
- "Saltmine" refreshments and social events kept spirits high
- competent leadership, in particular with Volker and John balancing quality criteria with a pragmatic approach
- an absolutely first class IT setup and support provided by Ivan, Massimo and Stefano.

To conclude, Christine proposes that Ivan's specification and approach should be written up, studied carefully and retained as an example for all. She would maintain a similar ratio of editors to papers, which allowed the "core" team to take a breather mid-way. She was very satisfied that the reduction of workload in Author Reception provided the staff with time to assist elsewhere with poster session management, speaker interface, and above all, the vital cross-checking of titles and co-authors in the SPMS with those on the papers.

Editing and Processing Issues Encountered at EPAC'08

John Poole completes the presentations on EPAC'08 proceedings office activities.

When planning the proceedings office staffing, a basic assumption for EPAC is that *expert* editors can edit an average of 35 papers per day. The EPAC'08 deadline for electronic paper submission was Wednesday 21 June, midnight, 5 days in advance of the start of the conference. A majority of the papers was submitted on deadline, and the "core" editors began work on the Thursday morning, and processed 80% of the submitted contributions by the time the "novice" editors arrived on the Sunday.

Several problems relating to the templates became apparent immediately. These concerned missing borders around Figure 1 in the Word 2007 template, the line above the footnote was frequently missing, and people used the new recipe for inserting figures using tables, but forgot to remove the borders.

EPAC'08 proceedings office work went extremely well, with very little room for improvement. A bug appeared in the SPMS editors' list of active papers – the show log option only worked for the last one on the page. Uploading of transparencies (PDF etc.) caused the status (dot) to become unassigned and had to be reassigned to

get correct views on the dotting board and Editor table views.

One might think of installing 2 generic PS drivers – one for A4 and one for Letter, and also test the whole setup before cloning to all computers – wrong job options were used, and the generic driver was not set up correctly and had an ambiguous name.

On the very positive side one could note that downloading a zipped package of all files is very useful, particularly for LaTeX where figure files are not included in the binary container like in Word. Autodistill saved time for editors who could immediately work on the PDF. The "you have not finished your submission" message to authors who had not uploaded a PostScript file triggered a great improvement in the submission of these files and reduced the consequent volume of yellow dots where editors were obliged to use a source file. There were also very few post-deadline submissions (~7%) allowing the team to process and QA the majority of papers and publish pre-press during the conference.

Following this experience, John feels that in future authors should be asked to check the editors' yellow dot papers via the SPMS, instead of requiring them to come to the proceedings office. He also feels it is time to remove the old Word 2003 template, leaving the 2007 one only.

Action: Improve instructions/guidelines on submission of papers to include a word about Yellow Dot Papers, and remove the Word 2003 template

On the topic of planning the editorial effort, the number of editors was based on a lower number of contributions than that which was actually received. This meant that pre-conference processing was hard work for 9 editors:

Thursday:	200 papers
Friday:	325 papers
Saturday:	389 papers

A total of 916 papers were processed pre-conference, meaning an average of 34/35 papers per day per editor – the figure used for EPAC estimates. This left approximately 300 papers for the "novice" editors, while the "experts" began QA, completing the full job before the end of the conference.

Statistical data from the SPMS show that:

- 82% of the papers were produced on PCs running Windows,
- 10% were produced on Unix
- 8% were produced on Macintosh.

The used software was

- Word (PC) in 64.6% of papers,
- LaTeX in 29% of papers,
- Word (Macintosh) in 5.7% and,
- OpenOffice (OO) in 0.7% of the papers.

A comparison of processing problems compared to EPAC'06 is shown in Table 1.

John concludes his presentation with the following observations:

- the latest Word software has a few "new" problems but the tools available are even more powerful;

- new templates have helped to improve the quality of authors' contributions, but there is room for improvement;
- we can see from the analysis where the problems are and we should concentrate our efforts on providing tools and education to reduce them;
- changing how we handle yellow dots could save time and effort.

Table 1: Comparison of Processing Problems in 2006 and 2008

2008 (%)	2006 (%)	Problems
49	32	Format Problems – doesn't match template
20	24	Other
10	12	No PostScript File
#	6	Title not in upper case
4	6	Font problems
#	4	Bad format in references
7	4	A4 printed on US Paper or vice-versa
8	4	Unusable files
1	2	Type 3 Fonts (LaTeX)
#	2	Footnote outside margin
#	1	Too many pages
#	1	Colour lost in figures
0.4	.3	Slow graphics
#	.25	Blank last page
0.1	.25	Multiple PS Files
#	.2	PDF file not PS

OVERVIEW OF THE PROCEEDINGS OFFICE SETUP AT EPAC'08

Ivan Andrian and Stefano Deiuri review the soft- and hardware, computing setup, network, servers, etc. provided in connection with the proceedings office activities at EPAC'08. Stefano also presents the software developed for timing oral presentations. This is a web application using HTML and JavaScript. It runs on different OS and is easy to modify. This will be published at the JACoW site for the use of other users.

Action: Publish Stefano's speaker timing system on JACoW

The following provides an overview of Hard- and Software.

Hardware

A total of 76 PCs plus 1 Mac (73 (20x19" + 53x17")) were rented as follows:

- 3 Linux / Captive Portal + spare
- 20 Linux LCD 17" / Internet Café
- 20 Win LCD 17" / Paper Café
- 20 Win Core2Duo LCD 19" / Proceedings Office
- 1 iMac 24" / Proceedings Office
- 6 Win LCD 17" / ARO
- 7 Win LCD 17" / Registration (5 Reg., 1 Industrial, 1 ID check)

Also available were 2 eeePC + 7 Win + 2 Mac:

- 1 MacBook + LCD 19" / Proceedings
- 1 MacBook / Slide
- 1 Win / Slide
- 2 EeePC linux / Timer
- 2 Win / Dotting Monitor
- 4 Win / Info Monitor

Three colour and 3 black and white printers were available as follows:

- 2 Laser Colour / Proceedings
- 1 Laser Colour / Registration
- 1 Laser / Paper Café
- 1 Laser / Internet Café
- 1 Laser / Student Registration

Network Switch ports were available as follows:

- 2 x 5 ports – Registration
- 1 x 12 ports – Registration
- 1 x 48 ports – Internet Café
- 2 x 24 ports – Proceedings Office
- 1 x 12 ports – ARO
- 1 x 48 ports – Paper Café
- 2 x 16 ports - spare

WiFi AccessPoints were composed of:

- 7 / Guest Net
- 1 / Info Monitor, Dotting Board, PO, ARO
- 1 / Registration

The layout of all of this equipment is shown in the slides published at the TM website.

The shipping to the venue and setting up of the IT equipment was as follows:

6 June: Set up masters (Win Proceedings, Win Paper Café, Linux Internet Café)

12 June: Cloning

16 June: Loading up in Trieste

17 June: Transport to the venue in Genoa and unload

18 June: Setup Network, Paper Café, Proceedings Office

19-20 June: Registration Area, WiFi, Internet Café

19 June: Proceedings Office on-line

21 June: Setup Info monitor & Dotting Board

22 June: Everything in use.

Software for Proceedings Office

Windows XP Professional (SP3) with firewall enabled

Adobe Acrobat 7.1

CoreFTP 2.1

Firefox 2.0.14 (add-on MouseGesture, DownloadStatusbar, QuickRestart)

Gimp 2.4.6

gVim

JEdit

MS Office 2003 + 2007 Converter

MS IE 7

OpenOffice 2.4

PitStop 7.5

ProText 2007 (MiKTeX 2.7 + TeXnicCenter + Ghostscript+GSview)

Putty

Skype 3.8

Symantec Antivirus 10.2

WinEdt 5.5

7zip

Software for the Paper Café

Windows XP Professional (SP3) with firewall enabled

Acrobat Reader 8.1.2

CoreFTP 2.1

Firefox 2.0.14 (add-on

MouseGesture,

DownloadStatusbar, QuickRestart)

Gimp 2.4.6

gVim

JEdit

MS Office 2003

MS IE 7

OpenOffice 2.4

ProText 2007 (MiKTeX 2.7 + TeXnicCenter + Ghostscript + GSView)

Putty

Skype 3.8

Symantec Antivirus 10.2

WinEdt 5.5

7zip

The cloning procedure for all PCs is graphically represented in the transparencies published on InDiCo.

Website Hard- and Software

Processor: Dual Pentium3 1 GHz

Memory: 512MB

Disk: 36GB SCSI Ultra 160

Web server: Apache 1.3

PHP 4.1.2

RRDtools 1.0.45

PmWiki 2.1.27

Load

4000 html pages

600 php pages

30 wiki

Conference Website

The EPAC'08 WiKi Conference website consisted of 25 MB, 60 pages, 150 documents, and 15 editors had privileges to read and write.

SPMS DEVELOPMENTS

Enhancements to the Registration and Industrial Exhibition Modules

Ivan Andrian reports on the enhancements he and his team brought to these modules in connection with EPAC'08, and in particular the use of credit cards for the transfer of registration fees.

In the original version of the registration module, the delegate entered his/her credit card data into the SPMS. The Registration Manager transferred the information to a bank, in an extremely labour intensive but cost free way. The new system is safer, more professional and automated, and far less labour intensive, but it comes at the cost involved by contracting to a credit card vendor.

The Team is grateful to Ivan and his staff for all of the other enhancements that make registration more user

friendly, with the provision of clearer statistics and reports.

Transport of SPMS Data to the Conference Website

Some highly useful developments were implemented based on the transport of data directly from the SPMS to the conference web pages, in graphic form, to show:

- on-line list of participants, with graph showing registration figures, in real time,
- the status of industrial exhibition booth bookings and layout also in real time,
- the oral presentations showing titles and speakers, auditoria, chairs, etc. all in real time, at the website, but also on the information monitors around the venue.

These developments were all excellent additions to the conference website since they worked with data directly available from the SPMS and hence completely up to date. The scripts and techniques used are shown in the transparencies.

Accommodation Module

Massimo Delbianco reports on the Accommodation Module, a completely new addition to SPMS functionality. It was developed together with the EPAC'08 Professional Conference Organizer (PCO) and is relatively easy to use. Together with the registration modules, this functionality completes the activities required for a full event management tool and provides the administrators with a complete overview of the activities of all persons involved in an event, be they staff, exhibitors, participants, speakers, contributors, etc.

Impressions of a New User

Martin Comyn, TRIUMF, responsible for the scientific secretariat and proceedings production for two consecutive events, Linac'08, an invitation only conference, and PAC'09, the biggest JACoW event, is an excellent candidate for this presentation.

Martin begins by underlining that one should not hesitate to contact JACoW Team Members for advice and assistance. The chances are they have experienced your problem and can provide help rapidly.

Functionality

Martin's impression is that the functionality is often obvious when browsing with Administrator privileges, though it can be difficult to remember exactly where certain features reside. The TM decisions on documentation, if it could follow the flow of a conference, would go a long way towards solving these problems. He was aware of changes to "look and feel" of the SPMS, as he was in the learning process, due to enhancements being brought to EPAC'08.

Documentation, Screens, JACoW Instructions

As frequently pointed out, documentation on SPMS functionality is very scarce, and what exists, prepared by Christine in 2005, became, as was to be expected, rapidly

overtaken by new formatting/ functionality. Martin would be willing to contribute to the team looking at documentation over the coming year.

Action: Keep Martin to his promise ...

He mentions furthermore that instructions on the screens are frequently poorly worded, in particular for some of the system parameter and option settings, which can be misleading even to a native English speaker. Another update is to the JACoW Website instructions for Mac that should be updated from OS 7-9.x to OS X.

Action: Review SPMS wording, Update Macintosh instructions

PC Mode

The PC mode features are undoubtedly powerful, but complex, so the lack of documentation complicates things further. Martin is pleased to note that PAC "horse trading" is effectively impossible via the SPMS, though some enhancements to the logic, in particular with respect to privileges, could improve functionality.

Reports and Data Extracts

Almost all Reports required for an organizer are already included in the SPMS. Some are missing vital fields or have incorrect totals. While he will provide Matt with feedback on problems he has spotted, he wonders whether a "build your own" report via pull down menus might be a possible future enhancement.

Action: Martin to transmit feedback on problems with reports, Matt to explore incorporating "build your own" reports

Invitation Only Conference

Martin was very happy with this functionality, providing in particular:

- total control of abstract submission and registration,
- no bogus profiles created by asylum seekers,
- lock down access,
- no need to advertise SPMS URL on conference website,
- no SPAM e-mail.

Disadvantages noted by Martin were:

- relying on assigned nominators to submit list of invitees,
- late or non-submission can create acute embarrassment,
- cannot spell invitee's name correctly,
- e-mail address provided does not match that in JACoW profile,
- bad or outdated JACoW profiles result in the Invitees not receiving their invitation and SPMS e-mails,
- extremely disturbing how many senior people (IOC, PC, Invited Speaker) have JACoW profiles with the wrong affiliation or, most importantly, wrong e-mail address,
- if an invitee does not have a JACoW profile and account, one has to be created for them and an Id and password assigned.

The above disadvantages are related almost exclusively to the Repository, and the sloppiness of profile/account owners, creators, or even conference editors who have not

understood that the SPMS Profiles Repository is a "shared resource" and that if anyone spots a problem, they should remedy it.

Other problems, also related to the Repository, revealed that extreme caution is required when using the Invitee List page and Option 2 – Bulk Load Invitees via Email Addresses where it is necessary to watch for invalid e-mail addresses and hence failure to add invitee, as well as for single e-mail addresses used in multiple JACoW profiles. This is especially prevalent for Ukrainian and Chinese profiles. Martin found 15 Ukrainians with the same single e-mail address. Christine points out that she regularly writes to these e-mail addresses to complain, but no solution is possible by the users, thus, we can most only recognize that there IS a problem, but NO solution, other than removing these profiles ...

To summarize, Martin recognizes that the invitation only functionality is an extremely powerful, and vital tool. He found entry of the invitees time consuming (5-7 days in total), and the fact that if people do not read their mails and bookmark the SPMS url, they cannot find the conference website via the lockdown.

Christine suggests that a means of rolling over the invitees from one Linac event to the next would be a starting point for the list of invitees. She commiserates with Martin on the last point, which is a problem with the users, and no fault of the SPMS!

Registration Methods

The Registration Module is not being used for Linac or PAC'09. Instead, SPMS profile data is entered directly into the TRIUMF registration system. The applications for financial support and to present work in the special session for students is however via the SPMS forms.

Martin again remarks on the number of profiles containing wrong e-mail addresses or affiliations. Christine is delighted that Martin mentions this point and encourages all editors to correct whenever or wherever they spot problems. Christine can usually spot erroneous e-mails when new profiles are created, simply because the e-mail generated by the SPMS from her to the profile owner bounces. She can contact the creator of the profile, but once an e-mail address is out of date, the person has retired and moved etc., she is just as helpless as the editor of a conference.

On the subject of North American postal addresses, he would like to see a new field "State/Province/County". Of course this could create a problem for non-North American postal addresses. The question of affiliation address fields could be tackled at a future SPMS Technical Workshop.

Action: Review the fields in affiliation addresses and personal data in profiles

Abstract Booklet

Martin used the report included in the SPMS, with a fair amount of hacking.

Problems Encountered

The problems listed below should be addressed at a future SPMS Technical Workshop:

- timing problems for e-mails,
- List My Papers in the Editor page is not working correctly (show log functionality),
- PS files uploaded by authors rejected due to script searching for %!PS-Adobe failing due to control character before %!PS-Adobe,
- threshold weights not working as advertised or correctly advertised ☺,
- new version of Perl scripts Perl_Scripts_3.zip available, but documentation on Elettra Wiki relates to old version,
- not sure about using autodistilling,
- installing on a Linux fileserver revealed problems,
- Perl needs to see the defined In and Out paths, even if they are not used. They pointed to explicit Elettra locations. Perhaps defaults should be /tmp,
- PS upload failed for one paper due to size – it was 125 MB. He set option to 0 to allow infinite file sizes (the editor managed to squeeze down the final version of the PS to 1.8 MB).

Murphy's Law

One can always count on something unexpected happening:

- since we rely on network connections at all times, Martin was surprised not to encounter more problems,
- bad profile problem at Linac'08 abstract submission deadline,
- PAC'09 SPC meeting "enjoyed" a network failure just before wrap-up,
- the fileserver at TRIUMF crashed due to crane shorting out two phases at UBC at the beginning of Linac'08 processing in Victoria.

Request

Martin would like to have a report of Paper IDs showing platform and source file type.

Action: Matt to explore

Experience with the Refereeing Module at FEL'08

Christine Petit-Jean-Genaz reminds the TM of the original philosophy that provided for a staged approach, separating the two activities:

- upload of contributions by authors and initial processing by editors assigning dots (green means OK to referee), and
- refereeing by designated referees (once the referees had been entered and the system parameter has been set to allow the refereeing activity).

During FEL'08 (and incidentally also FEL'07), the editors ran into the problem that once the system parameter to begin refereeing was enabled, it was no longer possible for authors to upload contributions.

The only solution was

- to switch on the refereeing module to allow referees to do their job during the conference, the best time since a) they have the opportunity to discuss directly with authors, and b) to take advantage of the editorial effort present to QA successfully refereed papers, and

- to upload contributions manually for the 20% or so of straggling contributors who had not uploaded their papers on deadline or who wanted to upload corrections to their red paper or modifications requested by the referee.

FEL is so far the only JACoW conference to use the refereeing module. It would clearly facilitate the refereeing of papers and rapid processing and QA if the two activities could be conducted in parallel:

- file upload by contributors
- refereeing of papers already processed with green dots.

Matt recalls that the original refereeing module was indeed developed with a separation of these activities in mind, and that modifications in the sense requested will require a substantial effort. He appreciates however the need to use all of the editorial effort during a conference and will hopefully be able to improve the functionality in time for FEL'09.

Action: Matt to refine the refereeing module as described above

What's Next for SPMS

Leandro Piazza and Christine Petit-Jean-Genaz have given some thought to future enhancements to the SPMS. Leandro reviews many of the activities relating to the organization of an event, with a view to the future, and how project management, and a budget tool, might be integrated into or associated with the SPMS environment.

Leandro's experience with SPMS in the organization of the scientific programme and of delegate and exhibition registration for Cyclotrons'07, lead him to think about how to stretch the functionality of SPMS even further.

Leandro considers that conference organization should be likened to a project, defined as a collection of correlated activities, organized to reach the same goal with part time man-effort.

Listing the functions associated with the organization of a conference, for example, budget, scientific programme, registration, accommodation, etc., Leandro outlines the different activities/actions involved for each, for example, in connection with the budget it is necessary to set and communicate the different kinds of fee (delegate, exhibitor, sponsor, etc.) and manage the budget from there. While a number of activities can be managed within the SPMS, some link to other support media, such as Microsoft Office Project, needs to be studied.

Furthermore, a budget tool template, for example similar to the one developed for EPAC, would be a useful basic tool for conference/event managers.

While the JACoW collaboration, and the SPMS, were originally concerned only with achieving speedy electronic publication, the development of the SPMS for scientific programme management, and all of the other functionality incorporated since 2005, the time has perhaps come to take another look at the aims of JACoW, what more can be done within the SPMS, and without.

Many TM participants, and in particular newcomers, have earlier expressed the need for an SPMS Users' Manual. Many, with little or no event management experience, are particularly interested in having a complete description of all of the tasks that can be handled within and without the SPMS. Following discussion, there is general agreement that the next steps involve exploring how to accommodate all activities related to conference organization, including those related to expenditure, income, and general management both time and cost.

It is suggested that Microsoft Project and/or Open Project could be used/published at the JACoW site to help future conference organizers while more thought and effort is invested in how to introduce new functionality into the SPMS.

Leandro's preliminary set of functions and activities, together with an outline of EPAC's budget template, might be the first place to start. It is agreed that Leandro's proposal needs to be studied in connection with the SPMS Technical Workshop to be organized during 2009.

Action: Leandro and Christine to explore these ideas further and bring proposals to the Technical Workshop

ACTIVITIES RELATED TO FINAL PROCEEDINGS PRODUCTION PARTS I AND II

Following a certain amount of time lost setting up the necessary software on individual laptops (clearly not a trivial operation), TM participants went through all of the activities related to putting together a final set of JACoW compatible files ready for publication at the JACoW site. They could use a "real" conference as the basis for the exercise.

Volker Schaa's scripts were developed for use with data directly derived from the SPMS or InDiCo. His very complete documentation is published at the JACoW site.

This training should become a standard part of the TM. An exact procedure for pre-team meeting software setup has to be published to allow participants to use their own laptop computers for the hands-on training.

INDICO/JPSP COMPATIBILITY

John Poole recalls that JACoW has been promoting the links between InDiCo and JPSP (JACoW's scripting interface) for many years and at the 2006 TM it was decided to build an interface to run Volker's scripts on an event organized with InDiCo (as opposed to SPMS). This was carried out in connection with ERL'07.

Since the quality of the final result is dependent on the quality of the data entered (metadata concerning titles of contributions, author names, type of presentations, etc.,) and because InDiCo is not managed or maintained to the same level of the SPMS – InDiCo allows a significant amount of data to be entered freehand – errors or bad information become very apparent, very quickly.

John runs through a number of problems he ran into when testing Volker's scripts on the InDiCo instance of ERL'07.

He concludes that the two are compatible, but there is more work for the editor since there are no profiles or affiliations repositories. Metadata needs very careful review. But, if all the data in InDiCo is clean, then the scripts can work.

The InDiCo to JPSP process is therefore a valuable addition to the JACoW suite of tools and can be considered to be in production. Certain improvements have been suggested, but they are not necessary for the current functionality or needs.

This development provides a good solution for smaller conferences without the resources to implement an SPMS to publish on JACoW.

DOCUMENTATION

Christine Petit-Jean-Genaz recalls that she made a start on writing up the SPMS Users Manual in 2005, via FrontPage, and in a form resembling Administrator Views of the SPMS. This was no doubt premature with respect to the then status of the SPMS. Writing the documentation revealed many potential enhancements, corrections, clarifications, re-groupings, etc., implemented gradually by Matt as she went along, such that when she finished it was time to start again ... Christine's 2005 effort is still published at the JACoW site:

<http://accelconf.web.cern.ch/AccelConf/JACoW/template/SPMS/Manual/DefaultNew.html>

In 2007 Ivan Andrian proposed another system, whereby individuals would simply throw texts into a wiki at random

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

Following discussion, and in the view of the need to make progress, Stefano volunteers to set up a wiki with the directory structure of the SPMS. Christine will review her earlier reports on conference organization and activities, review the SPMS documentation currently publishable, and coordinate the preparation of further documentation with "experts", members of the Collaboration. It should be possible to report some progress in time for PAC'09.

Action: Christine and Stefano to get the Documentation and Site under way

ROUND TABLE DISCUSSION

The numerous very constructive comments made during the round table discussion are grouped under several general headings below.

SPMS/Tutorials/ Documentation

In response to Anil Rawat's remark expressing concern that the SPMS package may become too bulky for smaller

events, Matt responds that in spite of complex functionality, the SPMS remains as generic as possible.

It is however true that Matt, as a developer, may not always appreciate that a development in one direction may not suit all users. It is thus advisable that any major enhancements be at least shared with concurrent users.

To address Anil's concern one might imagine being able to turn different functionality on or off in the system parameters, as required. Indeed, this would allay the fears of some newcomers faced with the apparent complexity.

While tutorials on how to create a conference instance, how to set up the SPMS parameters, the preparation of a video, etc., would facilitate the entry of new users to the use of the SPMS, good documentation will go a long way to solving this problem too. It is agreed that documentation, tutorials, and video could all contribute to facilitating the use of SPMS and that this should be undertaken in time for the next TM.

Action: Documentation, tutorials, video for next TM

Volker would like to be sure that obsolete information does not remain, in particular concerning versions of distiller software, etc.. The latest version of all documentation should be published in one place.

Leandro Piazza recalls earlier Team Meetings where complete introductions to SPMS and functionality were covered. He felt this was missing from this meeting, in particular since so many new editors have joined the collaboration. He feels that while documentation is essential, comprehensive tutorials on SPMS should be a regular basic feature of TMs.

Ronny Billen appreciates the fact that with so many competences represented at TMs, there is a need for the programme to be flexible. His idea of proposing breakout sessions is approved.

Jan Chrin's proposal that TMs should be lengthened, possibly to 5 days, to cater for all of the above is also agreed. They could usefully begin with general all round training for newcomers (both SPMS (all activities) and hands-on editing), moving on later to specific technical issues and plenty of time for general discussion.

Action: Include SPMS and Editing/Scripting Tutorials and Break-out Sessions for different users in future TM Agendas. Announce attendance more widely than to Editors

Deputy Chair

With the retirement of John Poole and Ivan Andrian's departure from Sincrotrone Trieste, Team Members are asked to make proposals for a new Deputy Chair.

Aims of Team Meetings/Training of Editors/Conference Organizers/Administrators

John Poole, following the previous discussion, remarks that, as mentioned in various presentations, while JACoW's aim is to publish conference proceedings, the format of the Team Meetings may need to be reviewed to take into account the development of the SPMS not only for scientific programme management, but also now for

many other activities, as well as scripting to produce proceedings, etc.

He also supports the idea that name "Team Meeting" might be changed to better reflect event management as a whole, and not only proceedings production.

In terms of training, John can see a case for offering different training for individuals with different responsibilities or roles.

Training could be separated into such areas as:

- setting up the SPMS and initial parameters (Regional Support Centre),
- Administrator jobs (parameters, privileges, overview of everything),
- scientific programme management (all activities related to running the scientific programme, interface with contributors, interface with SPC, coherence of metadata, refereeing, etc.),
- editorial (processing techniques, templates, etc.), - *John re-iterates his promise to write up the part of the Manual dealing with proceedings production process and editing,*
- IT functions (setting up soft- and hardware, file server)
- pre-/post-conference scripting function (from abstract booklet to final proceedings)
- "Other" activities such as delegate/exhibition registration.

Following on the above discussion, Augusto Lombardi has the feeling he tried to catch the train while it was steaming along. He learned a lot about proceedings production, but he would have appreciated more background information and how best to prepare himself. He knows how to organize conferences, but he needed to know how the SPMS could help him.

Volker appreciates Augusto's dilemma concerning help for event managers in the early stages, prior to taking a decision on whether, or not, to use the SPMS, or other systems. He himself recalls earlier COOL events when there was a rumour about the SPMS being able to handle registration. He looked into it and discovered that it was possible. He agrees that one needs a concise description of what's available, how the tools are used, what is required and what has to be supplied to JACoW for final publication.

Elder Matias would like to see a simple worksheet that could go to an SPC right at the beginning to help it decide whether, or not, to use the SPMS.

Maria Power agrees with the above, and would have appreciated documentation and clearer information on how to start, though she does admit that a lot of information is published at the JACoW site.

Action: Prepare the above-mentioned worksheet

InDiCo

In response to a comment by John Poole concerning InDiCo support, Volker remarks that his scripts cannot be run based on InDiCo XML output from FNAL and DESY instances, though the TRIUMF version is fine. If InDiCo version >0.96 is installed the XML export works fine and

can be found in the drop-down menu "View" under JACoW XML.

InDiCo Regional Support Centres

Since CERN will only support InDiCo events organized by CERN, it is suggested that it would be worthwhile negotiating the setting up of JACoW Regional Support Centres for JACoW events using InDiCo, similar to JACoW SPMS Regional Support Centres. As for SPMS, they would be located in Europe, North America and Asia.

With an estimated 3 JACoW events organized with InDiCo per year and per region, the overhead for an Administrator would be minimal. An added advantage would be to associate the JACoW Repositories, improving the coherence of the metadata, a handicap underlined by John earlier.

The TM feels this would be an interesting initiative. Christine will contact the InDiCo Management at CERN to pursue this proposal. Depending on the result, TRIUMF/FNAL could be encouraged to consider hosting a NA Regional Support Centre. Kazuro Furukawa mentions that Asia is currently exploring the use of InDiCo and he is encouraged to pursue this with his colleagues.

Action: Christine to initiate discussions on InDiCo Regional Support Centres

JPSP and the SPMS

Ivan suggests that some of the functionality/logic built into Volker's scripts could possibly be incorporated into the SPMS, simplifying the final scripting. Volker and Matt will explore this proposal.

Action: Volker and Matt

JACoW, A Service of the Community

Jinhyuk Choi is of the opinion that JACoW is now reputed worldwide and recognized as a service to the community by users, but conference organizers, in particular the smaller events, find it difficult to find the financial resources to comply with the boundary condition which is to send their editors to TMs. Jinhyuk questions whether Volker should write to laboratory directors, asking for their undertaking to support the Collaboration if a conference does not have the resources to send its editor to a TM.

Christine recalls that earlier attempts in this direction resulted in a JACoW proposal to be able to call on financial support from conferences in the case of necessity. The "famous" 2500 Euros.

The proposal was rejected out of hand by the PACCC (JACoW's founding fathers), and resulted in a later proposal to sanction conferences that do not abide by their pledge. This is the case today, and the only sanction at JACoW's disposal to "encourage" conferences to budget for the attendance of their editors at TMs.

Jinhyuk's second proposal that former editors, SPC and OC Chairs, laboratory directors, etc., should be more regularly informed of JACoW activities is well received and will be implemented.

Action: Volker to write to laboratory directors

With an aim to improving JACoW's image, Martin's proposal to propose a contribution on JACoW to PAC'09 is well received. John would be willing to make an oral presentation if invited, and he and Martin agree to submit an abstract.

Action: Prepare and submit abstract on JACoW to PAC'09