AN INFORMAL GUIDE TO RUNNING A LARGE CONFERENCE IN CMT

Conference Management Toolkit

Microsoft Research

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Part I: GETTING STARTED

Welcome!

This guide is for you if:

- You Chaired a small conference with CMT before and would like to learn how to manage a larger number of papers.
- You had managed a large conference using CMT but need a refresher guide to help you through a complex scenario.
- You Chaired a large conference on another platform, but the system was not robust or flexible enough to help with your conference needs.

We know how daunting the task of managing a large academic conference can be. But don't worry, this guide is just the thing you need to get you started in the right direction. We will help you make sure everything runs smoothly and give you the tools you need to orchestrate a successful conference.

Keywords

Let's first define some keywords which will be used throughout this guide—*phase, workflow, feature, and setting*.

- **Phase:** This is the particular process from which stems a workflow or workflows. For example, The Paper-Matching Phase comprises of workflows for Subject Areas, Bidding, and Assignments. Once the workflows within the phase are completed, then the phase is completed. One or more features can be used to act as a phase

- **Workflow:** A set of steps performed at a certain time to reach a desired outcome. There can be multiple workflows in a phase, and they can be executed concurrently, consecutively, or they can overlap.

- **Feature:** This is a capability of the system utilized to complete a phase and or workflow, such as customizable review forms, or an option for a reviewer to perform offline reviewing. Features are needed to implement a phase

- **Setting:** A setting can consist of enabling a phase, workflow or configuring a feature. A setting controls the behavior or constraints of a feature. It is important to note that a setting can be a global configuration, e.g. mark all papers for discussion, or it can be a small configuration to a feature, e.g. do not allow reviewers to see desk reject papers

Running a larger conference involves executing multiple workflows in various phases. There will certainly be times throughout your conference where you will need to select one set of features for one workflow, and then another set of features for a different workflow within the same phase.

Example of Phase/Workflow/Feature/Setting

To make understanding the keywords a little easier, here is an example of the keywords for the phase of Assembling the Program Committee.

PHASE: Assembling the Program Committee

1. **Workflow #1**: Recruit Reviewers.
    a) Identify the reviewers to be recruited
    b) Determine which reviewers will be invited in bulk
    c) Determine which reviewers will be invited individually
    d) Make sure if they accept, they are automatically added to the conference
    e) Set the expiration date for the invitation
    f) Monitor reviewers who declined
    g) Send out new invitations to prospected reviewers
    h) Send reminder emails to those who have not responded
2. **Feature:**
    a) Reviewer invite
    b) Add a reviewer
3. **Setting**:
    a) Set the end date of the reviewer invitation
    b) Configure CMT to automatically add the reviewer to the conference upon acceptance.

1. **Workflow #2**: Recruit Meta-Reviewers
    a) Identify the meta-reviewers to be recruited
    b) Determine which meta-reviewers will be invited in bulk
    c) Determine which meta-reviewers will be invited individually
    d) Make sure if they accept, they are automatically added to the conference
    e) Set the expiration date for the invitation
    f) Monitor reviewers who declined
    g) Send out new invitations to prospected reviewers
    h) Send reminder emails to those who have not responded
2. **Feature:** Meta-Reviewer Invite
    a) Meta-reviewer invite
    b) Add a meta-reviewer
3. **Setting:** Set the end date of the invitation
    a) Set the end date of the reviewer invitation
    b) Configure CMT to automatically add the meta-reviewer to the conference upon acceptance.

Small vs Large Conference

Let's start with a comparison of small and large conferences. Large conferences have more papers, more complex reviewing requirements, will include more phases and workflows.

SMALL CONFERENCE	LARGE CONFERENCE
Contains up to 200 submissions	Contains up to 2000 submissions. Conferences with more submissions will be considered a very large conference.
Easy to set up	Requires thorough planning
A small program committee comprised of the Chair and Reviewers	A large program committee with many users and roles such as multiple Chairs, Meta-Reviewers, and Proceeding Editors
Typically, a single track	Can have multiple tracks or a single track with more advanced user roles
Simple workflow	Much preparation work is needed to facilitate phases at different stages of the workflow
Chairs fully manage all tasks	Senior PC members can manage some tasks on behalf of the chair, such as coordinating reviewers and manage reviews. Senior PC members also give recommendations on papers, with the Chair making the final decision
Light use of email communication, e.g. Reviewer invitations, telling Reviewers to commence with reviews, and author notification of status	Heavy use of email communication such as email to authors to provide feedback, PC members regarding paper revision, meta-reviewer deadlines
No desk reject	Chairs delegate senior PC members to vet papers for full submission eligibility
Simple conflicts	More categories of conflicts to define
No bidding	Reviewers and Meta-Reviewers can bid on papers that best match their expertise
Limited options of review-question visibility, such as which review questions are visible to author	Many more visibility options to consider such as meta-reviewer questions; discussions visibility; author feedback to other PC members
No author feedback	Authors write a rebuttal based on reviews and that rebuttal is, in turn, used by the reviewer to modify the review if needed

No revision	Revision is for papers that need improvement to be accepted, this giving the author another chance. The new paper will be reviewed by a reviewer who will make a decision recommendation
No discussion	The chair can enable or delegate a PC member to enable the discussion for those papers where the decision is not clear. Reviewers can discuss papers with other Reviewers, Meta-Reviewers. This will make sure reviews align, resulting in a more confident recommendation
Importing of XML files not necessary	Options to import XML files, e.g. user types, tags, quotas, chair notes
No plagiarism checks	IThenticate (for IEEE Conferences) to check for plagiarism
No paper matching	TPMS a score for quickly showing how papers match reviewers
No copyright	IEEE eCopyright forms
Chair makes the decision on the papers based only on the reviews	Chairs delegate senior PC members to make recommendations for the paper decision, however the chair has the final decision

Should it be a Single Track or Multi-Track Conference?

As your conference grows with the number of submissions, so do the number of users in various roles. You will need to decide if your conference will need more than one track to handle the workflow.

Pros and Cons

There are pros and cons of having a multi-track conference. For example, if your conference has different dates and timelines for the various topics in your conference—and you have the resources to manage those tracks—then it may behoove you to make your conference multi-track. This will keep your paper topics and subjects in different silos to facilitate a streamlined decision.

This is not without having a less hands-on approach. Think of tracks as mini-conferences within a conference as each track needs its own set of Reviewers, Meta-Reviewers, and configuration. All of this can, at times, be difficult to manage.

It would be best to use Track Chairs if you have a complex timeline or many tracks and submissions. Track Chairs will handle enabling activities, setting deadlines, and managing all of the users for their track, thereby freeing up the Chair's time for other conference-related matters.

Authors may sometimes submit papers to the wrong track if multiple tracks are enabled for submission. Chairs can change the track of a paper; however this is best done before bidding and assignment.

How Tracks are Added

Tracks are added either when submitting a New Site Request form or by using the Track settings page. Once the tracks are added, the order of the tracks cannot change. However, the names of the tracks can be modified. Tracks can also be deleted (or more added), but it is best to do any of this before submissions.

With a multi-track conference, you will need to contact CMT Support when:

- Chairs want to apply the same settings and forms to multiple tracks
- Chairs need to delete a track, but they are prohibited by the system
- A paper needs to be on a different track but cannot be moved either because of conflicts or having different settings and forms between the two tracks

All submissions from all tracks are shown in the Chair Console. This can be filtered by track in the track column.

Multi-Track Alternative

Instead of tracks, sometimes it is best to use Subject Areas for your conference. Subject Areas have the added bonus of having a parent-child hierarchal structure, whereas multiple tracks do not. We will talk more about Subject Areas in the 'Paper-Matching Phase' section of the guide.

Part II: MAIN PHASES

Good planning will eliminate a lot of pitfalls that may occur throughout a conference. It is helpful to know when various phases will occur, and with what PC members and tasks. We will discuss these areas of a large conference:

1. Assembling the Program Committee
   - **PC Members**: Who they are and what they do
   - **The Difference Between Inviting and Adding PC Members to a Role**
   - **Allowing Meta-Reviewers to Invite/Add/Suggest Reviewers**
2. Submission Phase
   - **Artifacts:** What they are and acceptable formats
   - **Submission Settings:** What authors see, author instructions, and submission form
3. Paper-Matching Phase
   - **Subject Areas:** What they are and how they are used
   - **Bidding:** What it is, how it is set up, and how it is used
   - **Quotas:** What it is, and why it is used
   - **Conflicts of Interest:** What it is, how to use it, and why it is important
   - **Assignments: A**ssignment options and how to use them
4. PC Input Phase
   - **Reviews and Meta-Reviews:** How Reviewers and Meta-Reviewers review papers
   - **Discussion:** Who participates, why it is needed, who can set it
   - **Author Feedback:** What it is and how to use it
   - **Revision:** What it is, how to use it, and ratings
5. Decision Phase
   - **Paper Status:** Changing status after decision
   - **Desk Reject:** What it is, why it is done, when it is done
   - **Review and Meta-Review Visibility:** Who can view reviews
6. Camera-Ready Phase
   - **Author Notification:** What to include, what to collect, when it is due
   - **IEEE Copyright:** What it is, how to enable it and its ease of use
   - **Camera-Ready Settings:** What the different settings are and how they are used
   - **Enable Camera-Ready**: How to enable Camera-Ready

1. Assembling the Program Committee

Assembling the Program Committee is akin to assembling the roster of a great sports team. You need to know the positions you need to fill, where to place the seasoned veterans, and line up your trusted advisors to assist you in your decisions. You can use this as a rough guide to help you assemble your team.

PC Members

A large conference has between a couple of hundred papers and a thousand papers and takes significant effort of one or more chairs to manage.

A rough idea for the number of users and roles for committee members of a large conference would be as such:

- Reviewers: Reviewers should review between 3 and 6 papers each
- Meta-Reviewers: There should be one Meta-Reviewer assigned per paper. Each Meta-Reviewer can typically handle up to 30 papers or more.

Going by this rule-of-thumb for a 1000-paper conference, you will need 3000-plus Reviewers and approximately 35 Meta-Reviewers. Keep in mind you will lose some Reviewers and Meta-Reviewers throughout the conference, so you should plan to have some more you can call upon.

If your conference has multiple tracks, you will use the same typical rule-of-thumb, dependent upon the amount of papers in each track.

Users can also have overlapping roles. For example, a Chair can double as a Track Chair, or a Meta-Reviewer for one track can be a Reviewer on a different track. Meta-Reviewers may be a Reviewer on same track but not assigned to papers due to conflicts.

Additionally, various roles can be given various permissions, such as allowing Reviewers to select an External Reviewer to review a paper on their behalf or allowing Meta-Reviewers to assign a Reviewer to a particular paper.

Here is a small list and a quick explanation of roles and responsibilities for the members of a conference.

Co-Chairs

Co-Chairs have the same permissions as a Chair. They can perform all duties in the conference.

Track Chairs

Track Chairs are only utilized in conferences that have multiple tracks. They have the same permissions as a Chair but only on their designated tracks; it is not conference-wide.

Proceeding Editors

These are the people that take care of the Camera-Ready phase of the conference. They handle all the files for publication.

Meta-Reviewers

Meta-Reviewers oversee Reviewers and their reviews to ensure timelines are met and/or the Reviewers' recommendations are valid. The Meta-Reviewer, when writing their own review, must consider all the reviews and Reviewer's suggestions. The Meta-Reviewers' decisions are reviewed by the Chairs. Meta-Reviewers can also bid on papers they want to review based on their expertise.

Reviewers

Reviewers assess the papers they are assigned and formulate an opinion if it should be accepted, rejected, or a revision needs to take place. They can bid on papers they want to review based on their expertise.

External Reviewers

External Reviewers have permission to review a paper on a Reviewer's behalf. External Reviewers can also access reproducibility questions. While the Chair configures the setting for a Reviewer to add an External Reviewer, Chairs have no control over the External Reviewers. External Reviewers can only be added by Reviewers.

The Difference Between Inviting and Adding PC Members to a Role

You have acquired a list of potential Reviewers, Meta-Reviewers, Track Chairs, Co-Chairs, etc., and now need to invite or add them to your conference.

IMPORTANT!

CMT does not allow unregistered users to be added to the conference.
Anyone added to a PC role must have a valid CMT account.

Here are the differences between inviting and adding:

ADDING A USER TO A ROLE	INVITING A USER
Only added manually, one-at-a-time	Can be invited individually or in bulk
No email sent	Email sent
User added to the conference by prior consent/knowledge	User can accept or decline through a link sent to their email
User added to the Conference immediately	User added to the Conference only after they accept.

Note: Only Reviewers and Meta-Reviewers can be invited or added to the conference. External Reviewers, Proceeding Editors, Co-Chairs and Track Chairs can only be added manually.

Allowing Meta-Reviewers to Invite/Add/Suggest Reviewers

The Chair can have meta-reviewers invite or add reviewers with a simple selection of feature settings in the Meta-Review settings page.

Another feature CMT offers is to enable meta-reviewers to suggest reviewers they consider suitable to review a paper. For this to be used, the meta-reviewer must already be assigned papers.

There are different ways to use Suggestions.

1. Suggestions can be used during manual assignment. Chairs can assign papers to reviewers with higher suggestion rank.
2. Suggestions can be used individually or in combination with Bids and Relevance during Automatic Assignment. When used together with Bids and Relevance, Chairs can assign weight.
3. For larger conferences, Chairs can use TPMS scores to create a list of suggestions offline and work with CMT Support to upload the list to the conference (to restrict papers shown to reviewers to bid).

To learn more about inviting and adding users, click these links:

Invite Meta-Reviewers

Import Meta-Reviewers

Invite Reviewers

Import Reviewers

Add New Users

Modify a User's Role

2. Submission Phase

The Submission Phase collects from authors the submission title, co-authors, artifacts (abstracts and files) as well as other information such as subject areas and answers to additional questions. Subject areas are important for assigning papers to reviewers and meta-reviewers. Additional questions are important to ensure the authors are adhering to submission requirements.

Not all above information will be required for a conference. Submission settings are used by chairs to configure what to collect from the authors.

Note: No confirmation emails are sent to Authors upon submission. This can be done manually.

Artifacts

CMT allows for three types of artifacts for submissions: abstract, file(s), and supplementary material. The artifacts can have different requirements, including number and size. Some conferences have different deadlines for the artifacts, while others have the same deadlines for each.

The Abstract: This is a summation of the paper between 1000 and 9000 characters. PC members can access the abstracts during bidding. The abstract deadline is usually earlier than the file deadline.

The Submission File: This is the actual paper itself, usually submitted in .pdf format—although other formats such as .pptx, or .docx, can be configured by the chair.

Supplementary Material: This is a document that can be uploaded by the author to explain or augment the main paper submission. Supplementary files can be a single file, multiple files, or a zip file with multiple compressed files. Examples of supplementary files and types are:

- Images or videos up to 350MB to demonstrate results of the proposed approach.
- Technical reports, extended proofs or mathematical derivations that would help reviewers understand the submitted paper better

It is important to know that supplementary material:

- Has its own file upload interface
- Often times has a different deadline than a submission file
- File size limit, file type and number of files are configured separately from submission files
- Will be included in the files when reviewers or meta-reviewers download their assigned papers

Note: Submission files must be uploaded before authors can submit a supplementary file. For more on supplemental material, click here.

Submission Settings

The chairs set up the submission process for authors. Utilizing the settings help document will help steer the chairs toward their goal.

What the Authors See During Submission

Authors use the submission form to submit their papers. At the minimum, the form will have the title and co-authors. Chairs can add the following input elements to the form through submissions settings:

- Abstracts
- Files
- Subject Areas
- Additional questions

Some settings will control whether a certain input element will be included in the submission form. For example, if the maximum number of files allowed in the submission file setting is greater than zero, then the upload button will be displayed in the submission form.

The other settings act as a constraint. For example if the 'Abstract required' box is deselected, then authors need to enter their abstracts to submit a paper.

Instructions to Authors

Clarifying requirements at the outset will minimize many unnecessary submission-related emails since in some cases not all requirements can be enforced through submission settings. For example, the submission settings can enforce a limit on the size of a file, but not how many pages that file can contain. In those cases, the chair can use the Welcome and Instructions field to explain the requirements that cannot be enforced.

Here are additional examples of actions that Chairs can instruct and/or inform authors:

- **Give an ethics statement**: Explaining the ethical implications of the work with positive and negative societal effect, adhering to a code of conduct, etc.
- **Submit supplementary files:** Explaining why these files are needed and when they will be able to submit them
- **Cite comparative works** – Telling authors they need to cite other similar works, explain the differences, etc.
- **Ensure there is no PII in any submission:** Reminding authors not to disclose their names, email addresses or any other information about themselves or co-authors.
- **Be aware of dates:** Mentioning deadlines will help authors timeliness with submissions
- **Ensure correct co-author information is given**: This is for conflicts of interest

The Welcome and Instructions field allows HTML. This gives the added flexibility of using external links for authors to use for more information, or in case it is desired to bold some text or change the color of a word or phrase.

Submission Questions

Chairs can create submission questions on the submission form for authors to answer. The questions can be used to gather information that cannot be obtained from the abstract or file, or to help better qualify the submission and/or its veracity.

Questions can be created as:

- **An agreement**: Chairs can have the authors agree to the conference code of conduct, terms and conditions, or attest that this paper not been rejected by another conference.
- **Multiple-choice:** This will allow authors to choose from a list, such as for a special category or a specific flavor of that category.
- **A comment**: Authors will write in a text box the answer to the question. The length of the answer may or may not be restricted be restricted by the number of characters which is set by the chair.

Submission questions can be made visible to reviewers and/or meta-reviewers. For more on creating and managing submission questions, click here.

Note: All artifacts and information submitted to the conference will be available for download by all chairs, as well as assigned reviewers and meta-reviewers.

3. Paper-Matching Phase

Now it is time to put your PC members to work. Paper-matching is the most crucial part of your conference. Not only do papers need to be assigned to the reviewers and meta-reviewers based on their expertise, but they need to do this taking into account the number of papers each reviewer and meta-reviewer can handle.

Here are four tools chairs use during the paper-matching phase:

1. **Subject Areas:** These are PC members' areas of expertise, usually laid out in detail for users to choose at the outset of the conference. Using 'Subject Areas' will get relevance scores which represents how closely the subject areas of a paper match that of a reviewer.

2. **Bidding:** Reviewers and meta-reviewers can look at the abstract of each paper and tick off the ones they believe match their skillset. Bidding will help reviewers let the chair know how eager they are to review a particular paper.

3. **Quotas:** Quotas are limits to how many papers each reviewer can be assigned, either based on the reviewer's self-imposed limits or that of the chair's choosing.

4. **Conflicts of Interest:** Conflicts of interest refers to situations in which personal affiliations may compromise, or have the appearance of compromising, a reviewer's expert opinion in assessing the quality of a paper.

CMT provides a convenient way for chairs to assign papers to reviewers and meta-reviewers—the Automatic Assignment Wizard. We cover the Automatic Assignment Wizard later in this guide.

Using Subject Areas

Subject areas are keywords that are used to categorize papers, either broadly or with more specifics. Assignments can be done by matching the subject areas of papers to reviewers' and meta-reviewers' selections.

Subject areas can be used in both single-track and multiple-track conferences for:

- Classifying and grouping papers
- Specifying areas of expertise for reviewers and meta-reviewers
- As an assessment for paper assignment.

Some conferences use subject areas instead of multiple tracks because there is much less to manage, plus subject areas can have a parent-child hierarchal structure where additional tracks do not. One 'parent' subject area can have many 'child' subject areas.

Parent and Child

Chairs add the subject areas in subject area settings. What the authors will select in the submission form will be configured in the submission settings.

If only parent subject areas are added, authors will select just one subject area in the submission form from the list.

If parent and child subject areas are added, authors will need to select one of those subject areas as their primary subject area then, depending how the secondary subject areas are configured in the submission settings, select one or more of the parent/child subject areas as their secondary subject areas. All authors will be selecting from the same list of subject areas configured by the chairs.

The Difference Between Parent/Child and Primary/Secondary

The designation of **parent and child** are the ***subject areas themselves***. The parent would be a main topic with the subsequent children as a more granular set related to the main or parent subject area.

A **primary** subject area is what the ***user picks*** as their ***main focus of expertise***. Then, depending upon how the settings are configured, they can pick **secondary** subject areas that may or may not be related to their primary pick. (The secondary subject area pertains to another set of skills or expertise the user may have that may be pertinent to paper matching.)

They may be able to pick a child subject area as a primary and a parent subject area as a secondary (again depending upon configuration of the settings).

Restrictions

The chair can limit the number of secondary subject areas that users can choose. Just enable 'Limit the number of selected secondary subject areas' and choose a number from zero to ten from the adjacent dropdown.

For Authors

As mentioned, there are different ways to configure Subject Areas for Authors. For example, your conference has three Primary Subject Areas named A, B, and C, respectively.

Example 1: 'Subject A' and 'Subject B' each have four secondary subject areas, while 'Subject C' does not have any.

If all of the checkboxes in the subject area section of the submission settings are deselected, 'Subject A' and 'Subject B' will not be able to be selected as parents. Only their respective secondary subject areas will be able to be selected. Conversely, 'Subject C' will be able to be selected as it does not have any Secondary Subject Areas. The Author is limited to only one choice.

Example 2: To have Authors be able to select 'Subject A' or 'Subject B,' select 'Allow parent selection for hierarchical subject areas' in the submission settings. This will put a checkbox beside those parent areas. This selection is again limited to only one choice.

Example 3: If you add 'Allow secondary subject area selection' into the mix, you will enable Authors to select as many secondary subject areas as they see fit.

Note: Authors need to select one primary subject area, or a warning will show.

For Reviewers

Chairs can enable 'Require reviewers to select subject area' in review settings. This makes it mandatory for reviewers to enter their subject areas. Reviewers will see a red bar requesting their subject areas in the top of their Reviewer Console when they log in.

Reviewers can enter subject areas using the drop-down menu next to their name in the upper right corner of the Reviewer Console. If subject areas are configured for multiple tracks, Reviewers will need to enter them separately for each track.

Relevance scores

Subject Areas will provide Relevance scores. These scores represent how closely subject areas of a paper match that of a reviewer. During Bidding, the reviewer can sort papers based on Relevance scores to find papers on which they would like to bid.

Chairs can use Relevance scores to assign papers to reviewers who have the required expertise. Relevance can be used during automatic assignment.

For more on subject areas, click here.

What is Bidding?

Bidding is having reviewers and meta-reviewers enter their preferences for reviewing certain papers based on reading the abstract and their knowledge of the subject area.

Chairs open bidding to reviewers and meta-reviewers when all of the papers have been submitted and vetted.
Please note that conflicts of interest are not used in bidding on papers. They are, however, used in assigning papers.

Areas of Expertise

During bidding, reviewers and meta-reviewers bid on papers that are within their areas of expertise. Reviewers can sort papers based on Relevance scores (which are enabled by

creating subject areas) to find papers on which they would like to bid. Reviewers can also access abstracts of all non-conflicting papers.

Bid Values

Reviewers and meta-reviewers place their bids on papers by choosing a worded value on how eager they are to review those papers.

There are 4 different bid values. These will all be considered when assigning papers to reviewers:

- Eager
- Willing
- In a pinch
- Not Willing

Restrictions

There are two restrictions chairs can choose to enable before bidding.

- Chairs may choose to limit the amount of papers reviewers can mark as 'Eager.' By not entering any number of 'Eager' bids there will be no limit.
- Chairs can also whose to restrict bidding to only those papers suggested to the reviewer.

For how to do these restrictions and more, click here.

TPMS Ranking

The Toronto Paper Matching System is another way for users to bid on a paper. This system is used by CMT as external service for matching reviewers and papers.

It is advised to enable TPMS before you enable submissions as authors need to agree to the terms of TPMS. Once TPMS is enabled, the TPMS agreement checkbox appears on the submission form when the authors upload their papers. TPMS must be enabled for each track that uses TPMS scores for paper assignments.

Note: It is most important for the chairs not to change paper statuses when sending TPMS.

The TPMS rank of 1 has the highest matching score, which indicates the best match between a paper and a reviewer.

Large conferences could use TPMS scores to prepare a suggested list of reviewers for each paper. Some conferences use a large number of suggestions for each paper, e.g. 1000. Others may use less than 100.

Pages Where TPMS Scores are Used

In addition to the Reviewer and Meta-Reviewer bidding pages, the TPMS Ranking will appear in several other pages of CMT to help facilitate assignments.

- Edit Suggestions
- Edit Reviewer Assignments

- Edit Meta-Reviewer Assignments
- Edit Meta-Reviewer Automatic Assignments
- Edit Reviewer Automatic Assignments

For more on TPMS, click here.

Quotas

Quotas put a limit on how many papers can be assigned to a reviewer. This is either done by the chair or it can be a limit set by the reviewer when accepting the invite. This should also be done before assigning papers.

Import Quotas

The Chair can import reviewers' quotas via an XML file. This would be based on how many reviewers are needed per paper and the chair's knowledge of any reviewers that can or cannot review that set amount of papers.

Reviewer Quotas

The Chair can choose to have the Reviewers set their own quotas when the invitation is accepted by the Reviewer. When set, the Reviewers would just enter the number of papers they feel comfortable reviewing.

Conflict of Interest

CMT provides two mechanisms of conflict detection between reviewers and authors in a conference: Individual-based conflict management and Domain-based conflict management.

When used together, conflicts inferred from conflicts domains and conflicts specified by authors and/or PC members will both be considered during paper assignment process.

Some conferences wish to allow authors to input their conflicts with individuals.
Select "Enable authors to mark individual conflicts with PC members, and vice versa" in the Conflicts setting page.

Selecting "Do not allow editing individual conflicts" stops users from editing their conflict after they are entered. However, there is a setting that will allow users to enter if they have not done so, in effect superseding the previous setting. Select, "Allow entering individual conflicts if none have been entered."

DBLP Co-Authorship Conflicts

CMT has partnered with dblp to help identify potential conflicts of interest.

If the "Use dblp co-authorship to detect conflicts between authors and PC members" option is selected in conflict settings, the dblp Id entered by authors and reviewers will be cross-checked to mark additional conflicts of interests (not just a notification).

Double Blind Conference

In a double-blind conference - reviewers cannot see names of authors. If the conference is in this mode, the reviewers cannot dispute conflicts marked by authors. Also, when in this mode, certain conflict of interest settings needs to be enabled for bidding to be enabled.

In the INDIVIDUAL CONFLICTS section of the Conflicts Settings page, enable "Do not allow editing Individual conflicts."

In the DOMAIN CONFLICTS section of the same page, enable, "Do not allow editing personal domain conflicts."

Exporting Conflicts

Sometimes the chair will need to view conflicts outside of CMT.

You can export conflicts with reviewers using "Export to Tab Delimited => Reviewer Conflicts".

To add, if you need to export "non-conflicting" review assignments, you can use "Export to Tab XML => Reviewer Assignments".

For more on managing conflicts, click here.

Disputes

The chair can enable conflict disputes. When an Author enters a conflict via a submission, the PC member would then be able to dispute the conflict. The chair would then review the disputed conflict and decide whether to keep or delete those conflicts.

Disputes can also be withdrawn before the chair makes a decision on the conflict.

For more on managing conflict disputes, click here.

Assignment

A large conference is very difficult to assign papers manually, so when it comes time to assign the papers, it will need to be done in one of two ways—by using the Automatic Assignment Wizard or importing predetermined assignments.

The Automatic Assignment Wizard

For conferences with many papers, it would be hard for chairs to assign papers manually to the best matching candidates. The automatic assignment wizard helps chairs efficiently assign papers taking into account several criteria such as bids and subject area relevance.

It takes only three steps:

1. Set Minimum number of reviewers per paper
2. Set Maximum number of papers per reviewer and
3. Adjust weight of different criteria and run assignments.

The Automatic Assignment algorithm uses Reviewers' bids, candidate suggestions, Subject Area Relevance and TPMS scores to suggest assignments. By default, it uses all the above and assigns certain weights to them. You may specify your own custom weights (must be between 0 and 1) to obtain desired assignment result.

This wizard can also be used for incremental assignment. It can be run at different/multiple times to gradually add more reviewers.

For more on the Automatic Assignment Wizard, click here.

How Do I Use Groups?

Let's say you want to have different groupings of papers and then assign reviewers to each group. You can use a custom paper status to achieve this. It will allow you to set a different minimum number of reviewers for different groups of papers in the Automatic Assignment Wizard.

1. Create a new paper status label for the group (for example, 'Group1', 'Group2', etc.)
2. Change the status of the papers in the Chair Console to that new group
3. Apply the filter for the new group in the status column of the Automatic Assignment Wizard
4. Set the minimum number of reviewers in bulk, respectively.

For more on managing Paper Status, click here.

Importing Assignments

Predetermined assignments, that were assembled externally by the chair, can be imported into CMT via a text (XML) file.

You can import a single reviewer for a single paper, multiple reviewers for a single paper, or multiple reviewers for multiple papers.

After uploading, if there are any conflicts of interest, they will be shown as an error. You may elect to save the changes of the reviewers that are labeled successful. This will leave the failed one that will need to be addressed.

If another Assignment Template xml file is uploaded, the other reviewers must be included in the file or they will be overwritten.

For more on Importing reviewer assignments, click here.

Reviewer Settings for Assignments

Sometimes chairs will want reviewers to see their assignments without being able to review them just yet. Click here to learn more about reviewer assignment settings.

Use Reviewer Note for Reviewer to Accept Assignment

The chairs may use the Reviewer Note to see if they performed certain tasks and or get information not otherwise gotten from other avenues. One way this feature can be used is to tell the chairs if the reviewer accepts the papers assigned to them.

The chair posts the question in the Reviewer Note, the reviewer answers the question, and the chair will know at-a-glance in the Chair Console.

Another option of this feature is to have the questions and answers visible to meta-reviewers. The chairs can delegate the meta-reviewers to glean the data from the questions and then act accordingly.

For more on managing Reviewer Notes, click here.

Editing Assignments

Sometimes it is necessary to re-assign papers to both meta-reviewers and/or reviewers due to unforeseen conflicts. This can easily be done on per paper or per user basis.

The chair can also elect to rerun the Automatic Assignment Wizard with different filtering for those users/papers that need to have the assignments modified.

For more on editing reviewer assignments, click here.

4. PC Input Phase

We have now reached the phase which is the heart of the conference—where the PC team will fill out their initial reviews and meta-reviews of the submissions. It is here where papers are studied, scrutinized, analyzed and dissected by academic peers.

It is important that the Reviewers and Meta-Reviewers take their time in judging a paper, give detailed critiques and analyses, and do not rush to disregard a paper for what could be corrected by a simple revision.

Papers that have divergent recommendations, that is where some reviewers give it the green light and others say it doesn't pass muster, will need a bit more scrutiny and discussion to make sure that the reviews given can be more aligned. While it is ultimately the Chairs' decision to make, all avenues should be exhausted before the paper is granted an 'Accept' or given a definite 'Reject.'

CMT has a few features in place to help guide the Chairs in this important phase. They are:

- Review and Meta-Review Forms
- Discussion
- Author Feedback
- Revision

There will be a lot of communication between all PC members to assure everyone that the paper recommendations align with each other.

Reviews and Meta-Reviews

The reviews that Reviewers and Meta-Reviewers give are the main source of information regarding whether or not the Chair will accept or reject the paper.

These reviews are largely made up of answering questions created in the review (and meta-review form). These questions need to be detailed so as there is no mistaking a reviewer's intention for deciding for or against a paper.

Possible questions can be:

- What does this paper contributions to the field?
- Is this paper clearly written, well organized and informative?
- How does this differ from other contributions?
- Does this paper address a difficult task in an easier way?
- Was code provided?
- Did you look at the code?
- Was it useful in leading your review to a proper conclusion?
- Is this an original work?
- Has it been posted anywhere before?

There is a provision for the questions to have the reviewer write in a comment box their reviews of a paper. If the chairs feel reviewers will have a large amount of text, they can instruct the reviewers to upload a file instead.

Questions may also be in the form providing an overall score for the acceptance of a paper. This score can include weighted values, perhaps a percentage of what the reviewer feels should be the decision for the paper.

A reviewer confidence question could be added—how confident the reviewer is the paper qualifies or doesn't qualify the conclusion.

Meta-Reviewer questions can include some of the same types of questions as review questions, such as confidence level of the meta-reviewer's decision and an overall score if the paper should be accepted or rejected. Some meta-review questions can be written to address any divergent reviews on a particular paper.

Aggregated Values

What are aggregated values?

Aggregated values are a quick and easy way for chairs and meta-reviewers to see the scores the reviewers gave the paper.

Aggregated values are a compiled result of reviewers' answers to review questions for a paper. It is a review question with a numerical value assigned to multiple choice answers. This numerical value can be configured as #1 being best or worst. It is up to the chair.

The reviewer answers these questions when giving their review of their assigned paper. The answers, in turn, show up as a numeric value in the Chair Console and the Meta-Reviewer Console in four categories.

On a given question the Chair can see the results of all the reviews sorted in the categories. These are the categories and what they mean:

Minimum: This would be the minimum score a reviewer gave for that question

Maximum: This would be the maximum score a reviewer gave for that question

Average: This is the average score from all of the reviews

Spread: This is the difference of the values form a low review value to a high review value

It is easy to see at a quick glance, which questions have the most reviews with roughly the same answer, or where a big discrepancy lies between reviews.

Setting Aggregated Values

In the review and meta-review settings, there are checkboxes to allow for aggregate columns to be shown in the Chair and the Meta-Reviewer Consoles.

These aggregate values can also be configured as not to show in the Meta-Reviewer Console. This is done in the meta-review settings by merely selecting what columns you want to hide from the meta-reviewer. The reviewer aggregates begin with an [R] so it is easy to see which ones to hide.

These aggregate column can be turned off (and on) at any time during the conference to allow for faster loading if needed.

Note: Only value-added multiple-choice questions will show in the consoles. Answers to any other type of questions will not appear in the consoles.

Discussion

A discussion is enabled by the chair after reviews with contrary recommendations have been submitted for papers.

Usually the chair will not want all the papers enabled for discussion; only those papers where the decision isn't clear. However, there may be times the chair may want to enable all the papers for discussion. Enabling them in bulk saves time in conferences with many papers.

Meta-Reviewers

Chairs can give permission to meta-reviewers to enable 'Discussion' for their assigned papers. To do this, it is important to disable the review feature, 'Enable all papers for discussion.'

Reviewers

During the 'Discussion' phase, reviewers can access other reviewers' comments and discussion posts for assigned papers. There are a few settings you can fine-tune for reviewers during this phase.

1. If you want reviewers to participate in the discussion of non-conflicting papers that are not assigned to them, enable 'Allow all reviewers to discuss non-conflicting papers' in the review settings.

2. If you want the reviewer to not be influenced by other reviews in the discussion before they submit their own review, you can enable 'Allow access to reviewing data only after submitting own review' in the review settings. Only after they submit their own review will they be able to see the others.

3. Typically, after the reviews and discussions are completed, the reviewers would not have access to those reviews and posts. Enabling 'Allow reviewers to access reviewing data after reviewing' will allow them to keep access to that data.

4. If you want to disable new posts by reviewers, enable 'Do not allow reviewer to post new message.' Reviewers will still be able to see old messages.

5. By default, reviewers cannot update their reviews during the Discussion phase. By enabling 'Allow Review Update During Discussion' the reviewers will be able to edit their reviews while the discussion is still active.

6. If the setting in #5 is enabled, reviewers can be notified of updates of a review during discussion by enabling 'Notify other reviewers for review update during discussion.'

Author Feedback

Chairs will request author feedback of the reviews to explain or mitigate issues that reviewers see in the paper. The Chair creates the Author Feedback questions, sets the activity deadline, enables Author Feedback, and sends the emails to the Authors.

Authors then write a rebuttal based on reviews, and that rebuttal is, in turn, used by the reviewer to modify the review, if needed. This rebuttal can be either answering questions entered in the Author Feedback form or a file that would be uploaded to the conference.

Settings

There are options to be aware of during 'Author Feedback' in the 'Author Feedback' settings.

- If 'Do not use review snapshot during author feedback' is set, author will see reviews instead of review snapshot during author feedback.
- If this 'Request all papers for author feedback' is set, all papers are requested for author feedback when Author Feedback activity is changed from Disabled to Enabled.

Revision

This phase of the conference gives authors a second chance to have their papers accepted. Not every paper will warrant a revision.

The Authors will then re-write the paper to address all the concerns brought forth by the senior PC members. The submission of a Revision will not override the original Paper submission. It will be separate from it and labeled accordingly.

Important to Know About Revision

- The CMT default Paper Status of 'Revision' (not a chair-added custom status of the same name) is what would need to be selected for papers to be able to be uploaded as 'Revision' papers
- Do not re-enable the 'Paper Submission' or 'Edit Paper Submission' status for the Revision phase. These are two separate things and should be kept as such
- The Revision file will be included in the downloads of the submission files.
- In Steps #3 and #4 of 'AFTER COMPLETION' above, will disallow all other papers, except revision papers, to be reviewed.

Meta-Reviewer Rating of Reviews

A useful feature to enable is 'Allow meta-reviewer to rate review' in the Meta-Review settings page.

This will allow each Meta-Reviewer to rate the reviews of their papers. The Chair can then export this date to a tab-delimited file. This can be put in Excel to help the Chairs with the decision for the papers.

To enable Meta-Reviewers rating reviews, click here.

5. Decision Phase

After the revised paper reviews, meta-reviewers will give recommendations whether a paper should be accepted or not. The chair will have the final say.

Paper Status

The status of a paper will change throughout the course of the conference. It is up to the chair to have these statuses seen by the authors.

The default statuses in CMT are:

- **Awaiting Decision:** No decision has been made on the paper yet
- **Accept:** The paper has been accepted for publishing
- **Reject:** The paper was rejected
- **Desk Reject:** The initial abstract did not meet the criteria or requirements set forth by the chair
- **Revision:** When the chair deems the paper has enough value, but should be revised to fix some issues brought up in the review
- **Withdrawn:** When authors decide to remove the paper from consideration

CMT also allows for custom paper statuses for conference-specific grouping. To learn more about custom paper statuses and how to change paper statuses, click here.

Desk Reject

When a paper is submitted, it is usually given a cursory check to make sure it will be worthy of a full review by the conference. This is, in effect, the first decision on a paper to be made.

The cursory check will often be to go over the abstract to make sure it is cohesive, structured correctly and on topic. If there are large doubts in the abstract, then this would be grounds for desk reject.

Examples of criteria for rejection would be:

- Poorly written
- Not on topic
- Disorganized
- Out of the scope of the conference
- Rehash of existing applications/protocols/technology, etc.
- Poor flow of ideas
- Blatant plagiarism

This cursory review may be handled by the chair, but it usually handled by Meta-Reviewers, mostly out of time constraints and expertise. They will give their review of the paper and recommendation for desk reject.

For a large conference, seven to ten meta-reviewers would be ideal to perform this cursory check of papers and give their review and vote as to why it should be desk rejected.

The chairs will evaluate the suggestions and set the paper status accordingly.

Logistics for Desk Reject Recommendation

It should be decided upon beforehand if Authors will be notified and shown the review of their Desk Rejected papers.

If the Authors will be shown their reviews, as well as their paper's status, then Meta-Review questions will need to be configured both for veracity of the Meta-Reviewer's claim and visibility pertaining to what you deem the Author should see.

If the Authors are not going to be shown reviews and just be notified of the status of their paper, then the Meta-Reviewer Note can be used instead.

Meta-Reviewer Questions

The Chairs can create meta-reviewer questions in the Forms section of the Settings tab. During the Review phase of the conference, the Meta-Reviewer questions are what the Meta-Reviewer will answer regarding their Reviewer's review of a paper.

However, we can use it here as well, for the recommendation for a paper to be Desk Rejected. At the completion of the Desk Reject phase, it is up to the Chairs to keep those questions and answers or not. If the authors are to see the review of their Desk Rejected paper, the questions can be kept by checking 'Locked for edit.' This way they have no one can change what is entered nor can anything new be added.

The Meta-Reviewer Form has various checkboxes to enable different users to see the review at different times.

For the authors to see the reviews of their papers when the status is changed to Desk Reject a few simple things need to be configured.

1. The chair will enter text asking if the paper should be Desk Rejected and why. The meta-reviewer's answer would be either in the form of free text or the choosing of one of a multiple of items from a list. Then enable the 'Required' checkbox and the 'Visible to authors after author notification' checkbox.
2. The Submissions Setting page has a Desk Reject section with a checkbox that needs to be enabled. Check 'Allows authors to see the status and reviewing data of desk reject paper'.
3. Set the Meta-Review status to 'Enabled' with a future-dated deadline. You do this in the Settings tab>Activity Timeline>Deadline.

Once the Desk Reject phase is completed, disable the Meta-Reviewer Submission setting.

Meta-Reviewer Note

The Meta-Reviewer Note is a feature used by Chairs to get information to or from Meta-Reviewers that is not exposed to any other role but the Chairs. It can be a reminder, question or acknowledgement that will let the Chairs know if a goal was reached or a recommendation was made. The Meta-Reviewer's answer would be either in the form of free text or the choosing of one of a multiple of items from a list.

For this scenario we will use it for recommending if a paper should get a Desk Reject. The Authors will not get a review of their Desk Reject paper.

The Chair could configure the note with a simple question "Desk Reject – yes or no and why."

The Meta-Reviewer's answer would then be in a text box that can be configured from 125 characters to 8000 or more. It is highly recommended to keep the answers limited to a couple of hundred characters because of the room it will take up in the Chair Console.

When all the papers have been vetted, the Chair or Track Chairs can easily sort the Meta-Reviewer Note column in the Chair Console to view the recommendations. Then they can make the decision to change the statuses of those papers affected.

Meta-Reviewer Setting

It is important that after the desk reject is complete, the checkbox ''Do not show desk reject papers' in the meta-review settings page, is enabled so meta-reviewers do not see desk reject papers anymore, nor be assigned desk reject papers by mistake.

Reviewer Setting

It is important that after the desk reject is complete, the checkbox ''Do not show desk reject papers' in the review settings page, is enabled so reviewers cannot see desk reject papers, nor be assigned desk deject papers by mistake.

Review and Meta-Review Visibility

When the chairs notify authors about their paper status, they may want authors to be able to see reviews and/or meta-reviews for their specific papers.

For a quick guide on how to configure both, click here.

For more help on data visibility, click here.

Notification

Chairs use email through CMT to notify various PC members throughout the conference of assignments, reminders of deadlines, paper acceptance, etc.

Email templates can be set up to help facilitate the sending of mass emails while ensuring anonymity.

Emails can be sent in bulk or per individual paper.

For more on emailing meta-reviewers, click here.
For more on emailing reviewers, click here.
For more on emailing authors, click here.

6. Camera-Ready Phase

Camera-ready is the phase to get the paper ready to be published. This phase is usually delegated to the proceeding editor to manage. If the conference has no proceeding editor, then you, the Chair, will perform these duties.

The material is collected in a specific format(s) designated beforehand by the Chair, or the organization the conference belongs to, such as IEEE or ACM. The data is collected by the proceeding editor (or chair) in CMT, or someone else to a separate site.

What the chair/proceeding editor needs to do:

- Configure the camera-ready submissions
- Create the camera-ready questions
- Create instructions and requirements for the authors, including copyright information
- Communicate all of the above to the authors

What the authors need to do:

- Create the file adhering to the requirements of size, format and length
- Answer all Camera-Ready Questions
- Provide all access to required artifacts, links, code, etc.
- Upload signed copyright form (if required)

Camera-Ready File

This is the actual paper itself, usually submitted in .pdf format. The chair sets the type, size and number of files. These can be a single file, multiple files, or a zip file with multiple compressed files.

Camera-Ready Settings

The camera-ready settings are used to set up camera-ready submission form with instruction to authors for camera-ready submission.

Instructions for Author

This is where you can congratulate your authors for their papers being accepted to the conference and instruct them on what is required during this phase.

You can construct the message to include:

- The deadline for the submission
- A link to an external site with Camera-Ready guidelines
- Requirements such as line spacing, fonts, the maximum number of pages, etc.
- Restrictions such as allowing only minor changes (formatting or typographical errors) can be made as the paper was already reviewed and accepted.

Allow/Disallow the Editing of Authors

Proceeding Editor or Chair can decide if authors have permission to remove or add co-authors from their camera-ready submission. New co-authors may need to be included for recognition. In some cases, existing co-authors need to be removed.

Allow/Disallow the Order of the Authors to be Changed

Proceeding Editor or Chair can decide if authors have permission to modify the author order of a camera-ready submission when no change can be made to the authors. If allowed, the order of the co-authors would be modified to one that they feel represents author contribution.

Camera-Ready Questions

Chairs can create camera-ready questions which will show up on the camera-ready submission form for authors to answer.

Questions can be created as:

- **An agreement**: Authors will agree to a statement or question that they answered or performed a task
- **Multiple-choice:** This will allow authors to choose from a list, such as for a special category or a specific flavor of that category

- **A comment**: Authors will write in a text box the answer to the question. The length of the answer may or may not be restricted be restricted by the number of characters which is set by the chair

Camera-ready questions may be used to gather information such as:

- Asking for author/co-author data
- An agreement to comply with a code of conduct
- Verification the title matches that of the accepted paper
- Affirmation the format of the submission has been adhered to
- An explanation of how the paper was modified if it were revised
- Asking for links to accompanying material summarizing the paper

For more on camera-ready questions, click here.

Author Communication

The proceeding editor contacts the authors of the papers that are accepted for publishing in the conference proceedings.

The email should consist of any information the authors need to fully comply with the requirements of the camera-ready submission:

- Deadline
- File format
- File size
- Maximum number of pages.
- Instructions to fill out the Reproducibility Checklist
- Instructions to fill out or submit any non-CMT forms needed by the conference, such as an IEEE Copyright form

The email can also include:

- Where to find formatting style guides
- Where to find the code submission policy
- Explanation that Meta-Reviewers of shepherd papers will proof the submission suggesting last minute changes

IEEE Copyright

IEEE is a global technology organization that holds and manages the copyrights for papers from their IEEE registered conferences. The Chairs or conference organizers have to register the conference before they can use the CMT copyright transfer. The IEEE registration forms are here.

Once the Chair has the confirmation from IEEE, setting up your conference is quite simple. Just enter the Publication Title and 5-digit conference code in the Camera-Ready Submission settings, making sure the 'IEEE Copyright Form Registration Required' checkbox is enabled.

For Authors, it is quite effortless to use. When enabled, the Authors will see a link in their Author Console. They can use the link to submit the copyright form to IEEE. It is a simple process—there is nothing to be filled out by the Author. The Title and Author name are sent by CMT to IEEE and the form will automatically populate on the IEEE site.

Once that is done, Authors will need to download the completed form and upload it into CMT. The copyright forms can later be downloaded by the Chairs/Proceeding Editors.

Enable Camera-Ready

Once the Camera-Ready Timeline Activity Deadline has been enabled with a proper future date, the link will appear to those authors from whom Camera-Ready files were requested.

Download Camera-Ready Papers

Once all of the camera-ready files are uploaded, the Proceeding Editor may download the files.

PART III: OTHER FEATURES

What is iThenticate?

iThenticate is a provider of professional plagiarism detection and prevention technology to ensure the originality of written work before publication.

iThenticate is an added feature CMT has to check the papers that are submitted to your conference are not plagiarized in any way, thus ensuring the work is original, thereby upholding the reputation of your conference.

It is integrated with CMT and very easy to use. Once iThenticate is enabled, the iThenticate agreement checkbox appears on the Submission page when the authors upload their papers. That is all the authors need to do to accept the agreement so the conference may send their papers to iThenticate to see if there are matches.

Since it is integrated with CMT, all you need to do is click on the Retrieve Results and View Status tabs to see the status of the matches and the subsequent results in an easy-to-read table. Those results, in the form of a percentage, show you how much or how little the paper content matches other published papers.

Please note that iThenticate is only used by IEEE conferences on a select-basis.

For more on iThenticate, click here.

Reproducibility Checklist

CMT features include a Reproducibility Checklist and Camera-Ready Questions to be answered by Authors when getting the paper ready for the Camera-Ready submission.

The reproducibility checklist will cover the technical specifics of the paper like math, code, theories in the content of the paper, number of experiments, etc.
The chairs can create the checklist for the authors to include:

- A link to download a source code, libraries, if any, and any other dependencies
- A simulation environment
- Number of tests run to gather the conclusion
- Proof of the results
- Explanation of assumptions
- Scope of the evaluations

The reproducibility checklist can also be configured as required in the camera-ready settings. For more on camera-ready, click here.

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