Workflow for Editors in the Proceedings Offices at JACoW Conferences

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Overview

What this talk does do:

- Gives overview of editing process
- Puts the task into context (helps to process the papers effectively if you have a good understanding of what you are trying to achieve)

It does not cover the specifics:

- WEBA2: Editing with Acrobat/Pitstop — *Raphael Müller*
- Parallel Session 7a: Editing Papers with Acrobat/Pitstop — *Raphael Müller*

Additional resources:

- JACoW website (http://www.jacow.org/index.php?n=Editors.BasicProcedure)
- J. Chrin, "Criteria for Editors Processing Papers", TM 2011, Shanghai, WEAC01
- J. Poole, "Processing Papers for JACoW Conferences", TM 2012, Valencia, FRCA1
- J. Poole, "Notes for the Paper Processing Demonstration", TM2012, Valencia, TUCSEM61
- T. Satogata, "Proceedings Office Organisation at the Conference", TM2012, Valencia, THAA1
- T. Satogata, "Processing Guidelines for Editors", TM2012, Valencia, THAA2
- JACoW Templates (http://www.jacow.org/index.php?n=Editors.HelpfulItems)

Overview

JACoW (Joint Accelerator Conference Website) is an international collaboration the exists to publish the proceedings of accelerator conferences held around the world (www.JACoW.org)

Conferences aim to provide a forum for the target community to be able to exchange knowledge, ideas and recent results in their field

Proceedings should facilitate this goal:

- Source of latest technical information on a topic
- Long term record of what was discussed / presented

What they are not:

- Proceedings are *not* journal publications!
- Technical content is not assessed (i.e. not editing in the strictest sense)

Paper Processing Criteria

The editing team are there to fulfil the following basic tasks:

- Provide set of papers suitable for electronic viewing on a range of platforms
- Suitable for long-term archival (PDF-A compliant, fonts contained within document)
- Timely publication (shouldn't be obsolete before they are published)

Processing standards:

Must have for JACoW , i.e. the basic JACoW constraints
Level 0: **non-negotiable**

Must have for the Conference, i.e. essential (conference) editing
Level 1: **minimalistic** [if missing after edit, QA Fail]

Would be nice to have for the conference, i.e. desirable editing
Level 2: **pragmatic** [if missing after edit, QA Pass]

In an ideal world would have, i.e. full adherence to template
Level 3: **pedantic** [if missing after edit, QA Pass]

J. Chrin, TM 2011, Shanghai, WEAC01

Technical Constraints Imposed by JACoW

Level 0: **non-negotiable**

- Paper size (JACoW specific – prints equally well on A4 and US Letter)
- Page layout (Text centred on JACoW paper size pages, each page to carry the conference name and a page number etc.)
- Performance: each page to display in less than 5/N seconds, where N is the processor speed in GHz
- Hidden fields: Title, author and keywords set inside the PDF file
- PDF file opening parameters: Open with fit-width and thumbnails
- Type3 fonts: to be avoided as far as possible
- Acrobat version
- PDF parameters like correct compression, no hyperlinks etc.

J. Poole, TM 2012, Valencia, FRCA1

Requirements Set by Conference (Essential)

Level 1: **minimalistic**

- Paper broadly conforms to template style
- Two column layout
- Correct number of pages for the type of contribution (Invited/Contributed oral, Poster)
- Title / Author / Section Headings correctly formatted
- No numbers for pages / section headings
- Correct fonts / font sizes
- Text / figures should be clear and easily readable
- Table / Figure captions correctly placed
- Figure / Table / Equation numbering correct and in sequence
- Footnotes exist if indicated in title
- Funding agencies acknowledged (DoE labs in US)
- References should exist and be in a uniquely identifiable form

Requirements Set by Conference (Desirable)

Level 2: **pragmatic**

- Captions for tables / figures correctly formatted
- Indentations for paragraphs
- Fig. vs Figure, Table Vs Tab.
- Obvious typos

Level 3: **pedantic**

- Location of figures close to place in text they are referenced from
- Vertical bars in Tables
- Use of colons / periods

Standard for Conference

Up to individual conference / editor-in-chief to define the standards

Considerations

- Desired level of homogeneity
- Speed / Cost / Standard trade off
- Natural inclination of individual editors vary

*Large conferences generally should have **looser guidelines***

- Faster processing, lower costs, acceptable quality quickly

*Smaller conferences generally should have **stricter guidelines***

- Less cost advantage, lower speed pressure, higher quality proceedings more slowly, easier to align small team strictness

T. Satogata, TM 2012, Valencia, THAA2

Step 1: Acquire a paper

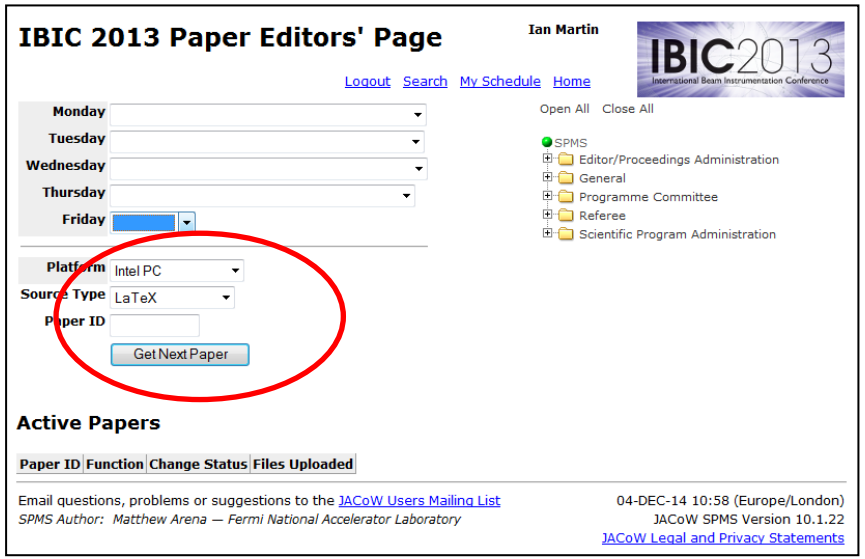
1) Log in to the SPMS with editor privileges

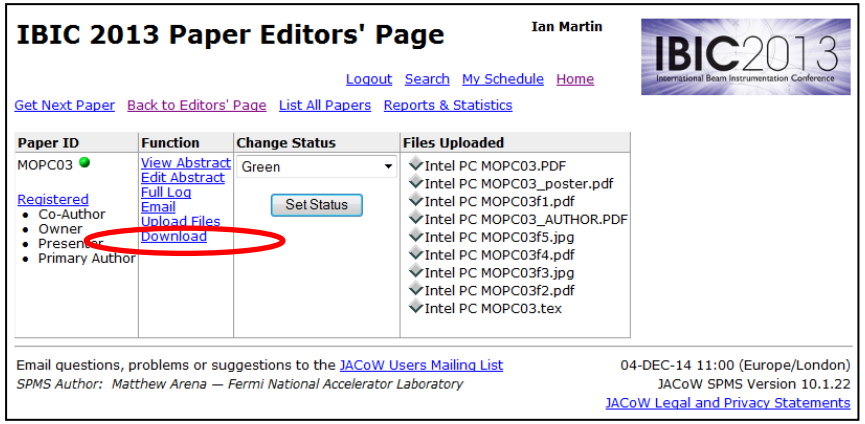
2) Select ‘platform’
   Mac papers should be processed on Macs, etc

3) Select ‘source type’
   e.g. MS Word, LaTeX

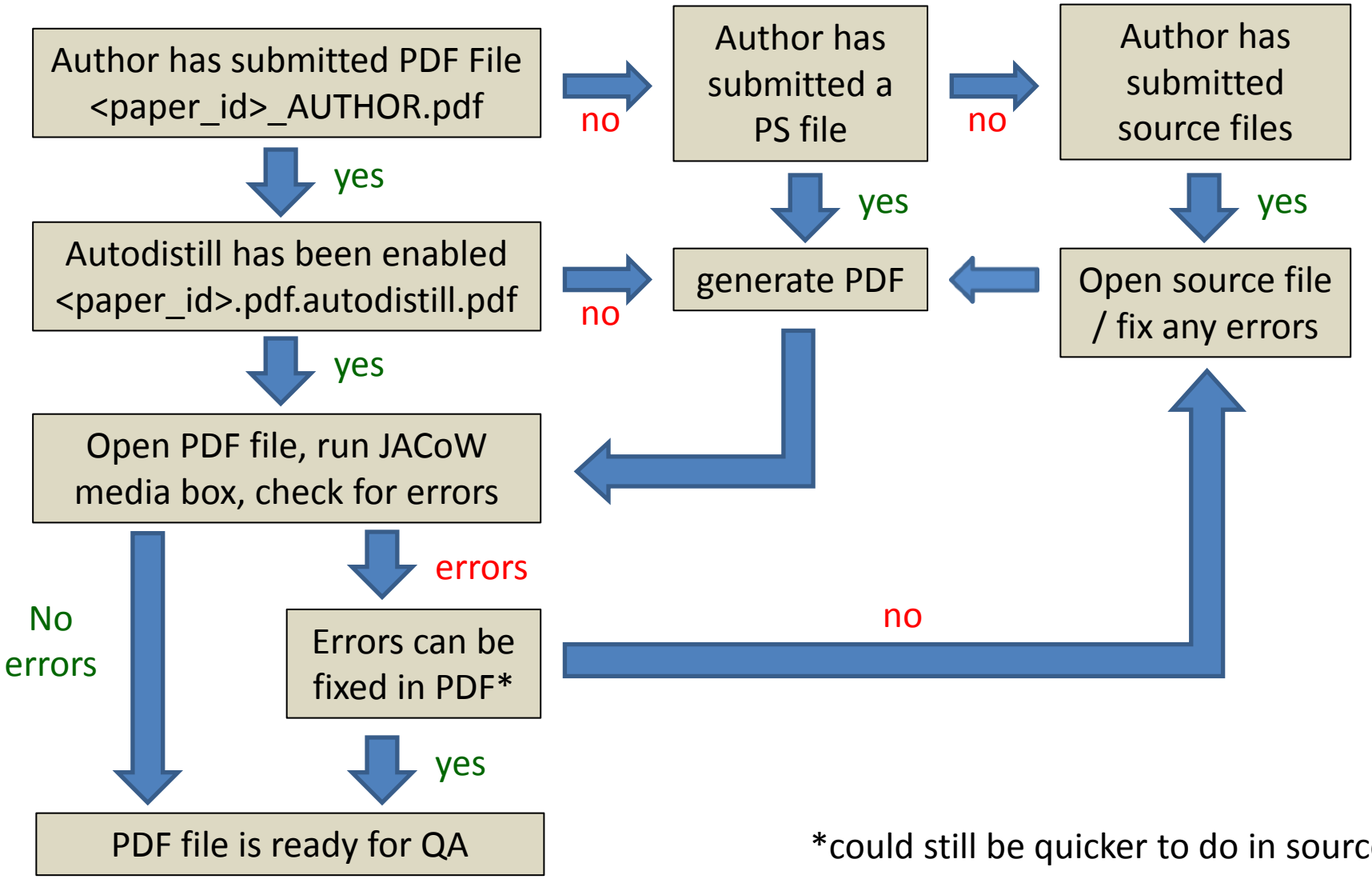
4) Hit ‘Get Next Paper’ and download everything in zip folder to your PC

5) Extract everything





Step 2: Process paper



*could still be quicker to do in source file

Step 2: Process paper

Verifying the PDF file

1. Check the fonts by opening File → Document Info → Fonts. All fonts should be embedded and be "Type 1" or TrueType. If the fonts have not been embedded but are otherwise okay, then Save As → More Options → PostScript and repeat from Step 6 (this will force embedding of the fonts as long as they are installed on your system). If there is a problem, go back to the document and try to change the fonts or, if you are not a LaTeX expert and it is a LaTeX paper, pass the paper to an expert to fix the font problem. The PostScript file should be remade and processing repeated from Step 4. When a WORD document has been repaired, make the PDF from a new PostScript file.
2. Check the number of pages: there are usually limits on the number of pages which vary according to the presentation type (more for oral presentations than for posters).
3. Check that all pages are readable and are displayed in a reasonable time (every page should display in less than about 5/N seconds, where N is the speed of the editor's computer in GHz).
4. Change to full page view and enable the grid (View → Show Form Grid or shortcut Ctrl-U), if not already on.
5. Resize the document by using the PitStop Action List called **JACoW Media Box**. Open the Action List Control Panel , locate the "JACoW Media Box" in the Local List and Run it.
6. Check the page size at the bottom of the window: it should be 595 x 792 pt. Move the mouse pointer to the lower left corner of the screen to make the page size appear.
7. The text should now be inside the margins on all pages (+/- ~1 mm). If part of the text or graphics is outside the box, the offending objects may be moved using the "Select Object" tool in the PitStop toolbar and then either hold down the CTRL key or click on the move tool , and then use the keyboard arrows to nudge objects into position.
8. If the formatting is wrong, download the source file, edit the document, make a new PostScript file and go back to Step 6.
9. Save the .PDF file using the Save As... command (CTRL-Shift-S).
10. Check that the name of this final PDF is the <paper_id>.PDF.
11. Check that the size of the PDF file is reasonable. For larger files, double check that it will display rapidly.
12. If the PostScript file has to be made or remade, even if the problem is trivial (e.g., wrong paper size) assign a yellow dot, record your actions through the processing interface, check the boxes that describe the problem best, and forward the paperwork for filing. Always be clear in your comments about processing so that others can understand what the problems are. The author will be invited to download the .PDF, check it, and set the paper to green if he approves the editor's version or come to the proceedings office to proofread the paper and let the staff know whether or not the paper is acceptable.
13. If the problem is very complicated and you cannot fix it yourself, check to see whether another editor can fix it. If this is the case, ask the alternative editor to reassign the paper to himself.
14. If it is estimated that a paper will take more than an hour to fix, assign a red dot, clearly explain the problem through the processing interface, and ask the author to fix at his earliest convenience.

When processing the paper, run through checklist to make sure it conforms to conference guidelines:

- conference-specific
- default:

  http://www.jacow.org/index.php?n=Editors.BasicProcedure

For examples, see also:

- JACoW Templates
  http://www.jacow.org/index.php?n=Authors.HomePage
- Common Author Oversights

  http://www.jacow.org/index.php?n=Editors.CommonAuthorOversights

Final Checks:

- Final PDF saved as <paper_id>.pdf
- Print the paper and check it visually

Step 3: Post-Processing

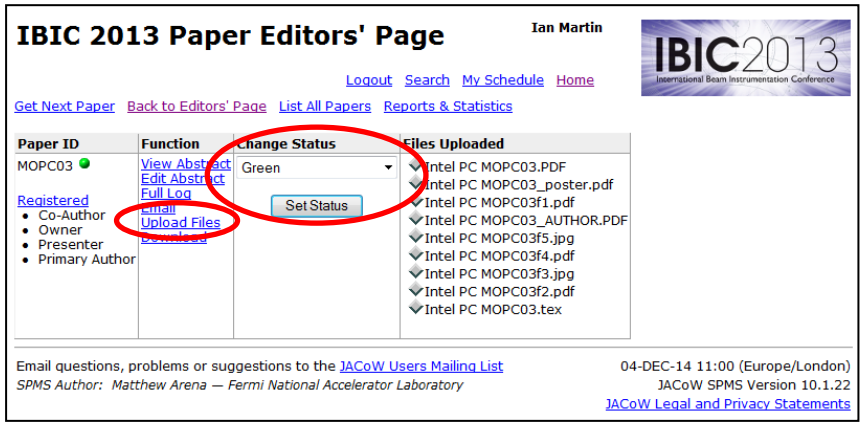
Once the paper is complete:

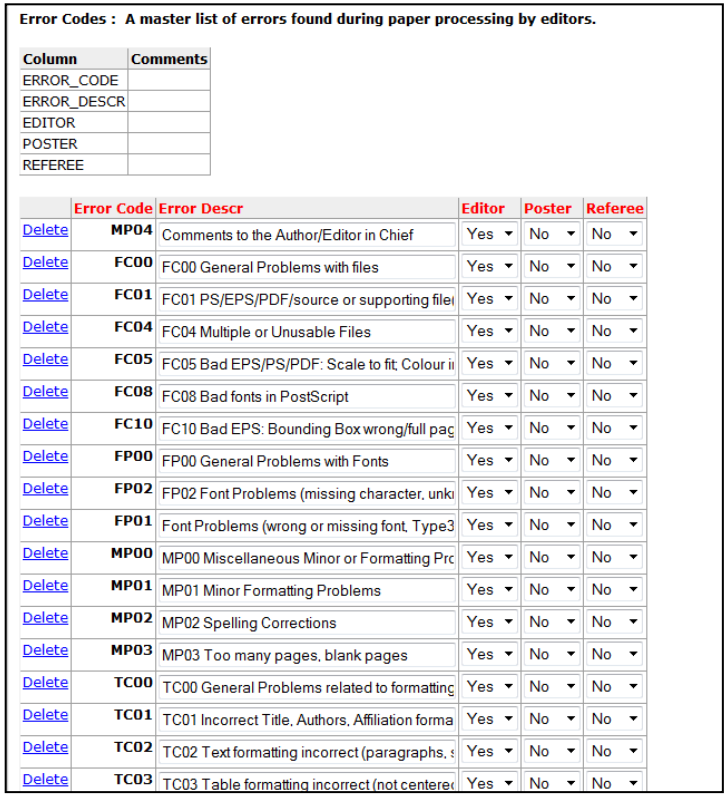
- Write the paper code, the date and your name on the paper copy, put the correct colour dot on it* and file ready for QA

  - Not publishable. Requires author to submit new files.
  - PDF produced from source files / substantial editing in PDF. Requires author to proofread.
  - Author PDF good / only minor edits required to PDF.

- Upload final PDF plus any new/modified sources files to the fileserver
- Set the status in the SPMS, marking the relevant error checkboxes and sending a message to the author detailing what was done

*can now be done electronically in acrobat



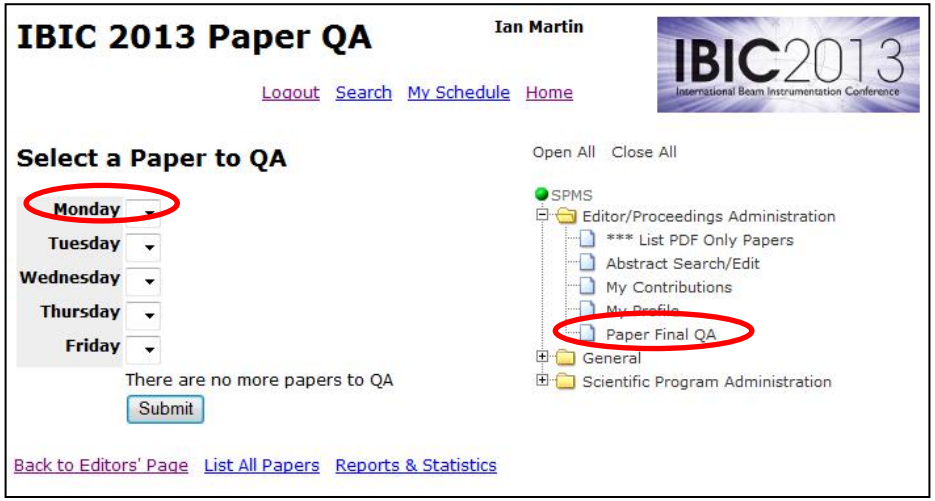


Step 4: Quality Assurance

1) Take a paper from the pile of printed papers that you did not originally process

2) Log in to the SPMS with 'editor QA' privileges

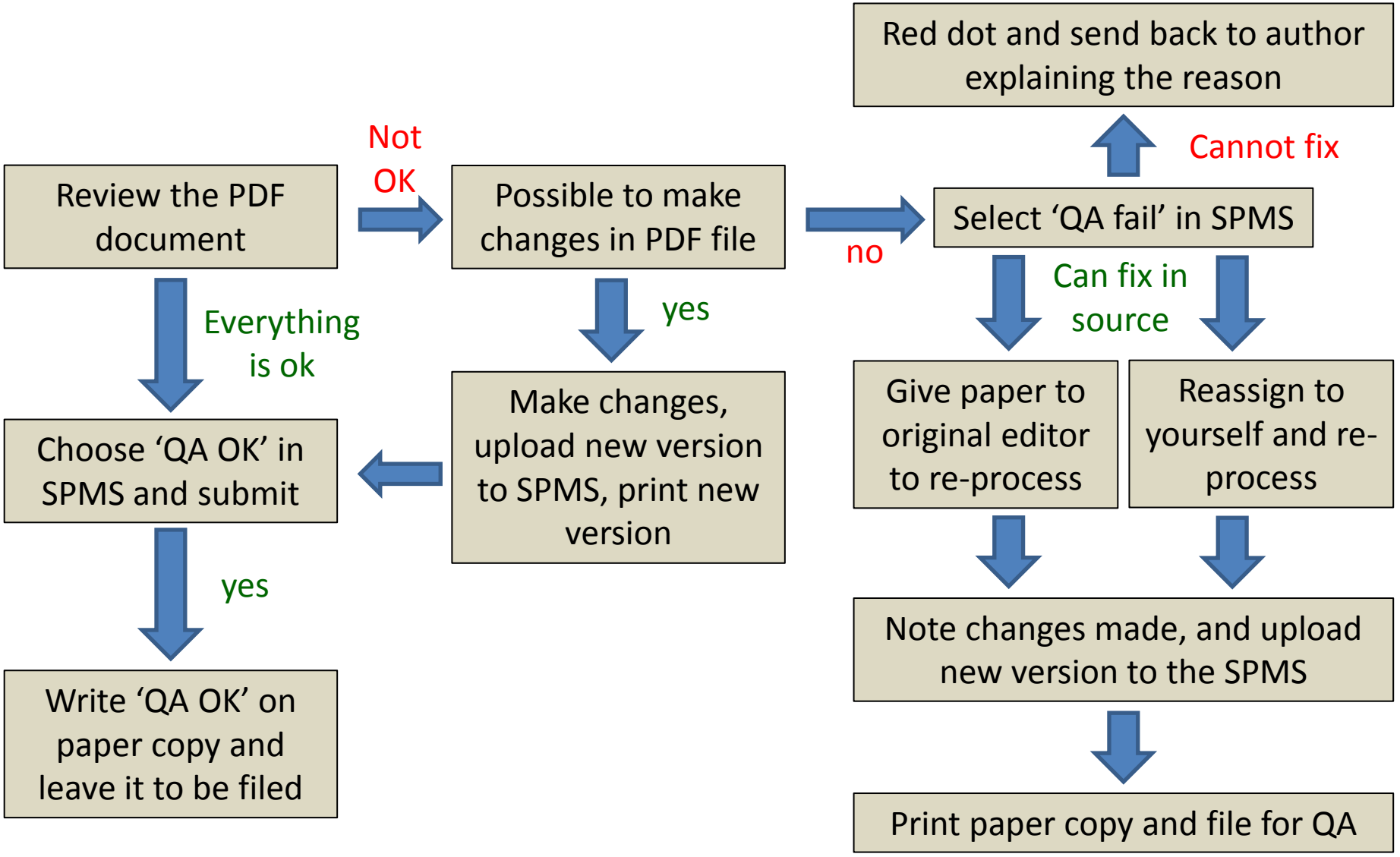
3) Select the paper from the drop-down list on the QA SPMS interface and hit 'submit'



4) Download the PDF and perform the following checks:

- The title and author list in the SPMS agrees with what is written on the paper (correct values in SPMS if not)
- The number of pages defined in SPMS agrees the same as the number of pages in the final document
- The document meets the JACoW technical requirements
- The document conforms to conference guidelines (Fig. / Figure type errors do not matter at this point)

Step 4: Quality Assurance



Then what happens?

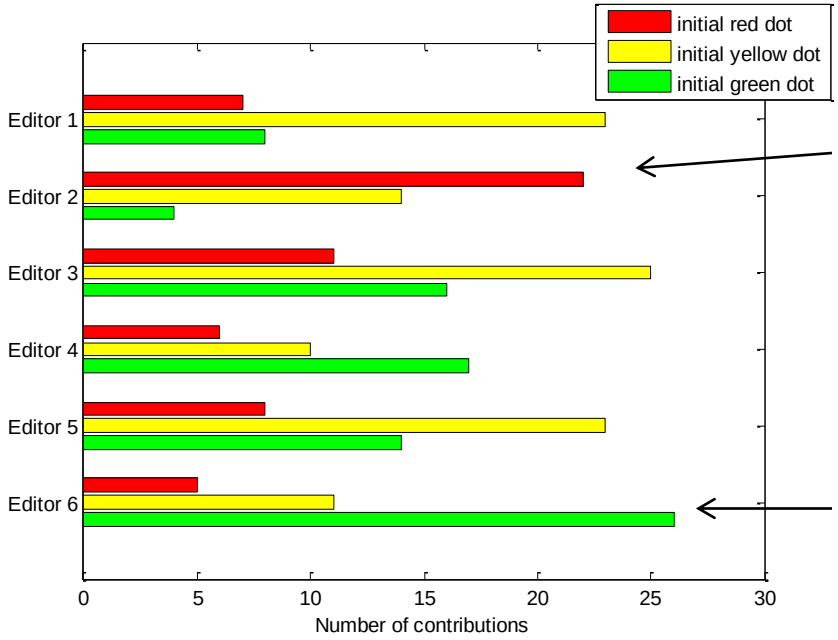
- For the majority of the editing team, the job of processing the papers is now complete
- Ideally, >90% of the papers will have been submitted, processed, QA'd and be ready for publication
- Common goal is to have the pre-press release ready for publication on final day of conference (this is valued by the delegates!)
- The remaining papers can then be chased / edited / added to the final proceedings (usually by the editor-in-chief after conference has closed)
- Final proceedings have wrappers added (page numbers, conference title, paper ID, etc)
- Aim to published on JACoW within a few weeks of conference ending

Case study: IBIC 2013

- 267 delegates
- 284 abstracts submitted (240 contributions received)
- 34 talks (12 invited) / 214 posters
- 7 pages for invited orals, 4 pages for contributed orals and poster (~1000 pages to process)
- 6 editors (4 experienced, 2 trainee) (~40 papers each – 4 editors would have been enough)
- 8 days assigned (2 of which were half-days) , work largely complete by day 6.
- Aiming for relatively high standard (level 2-3)

Initial dots:

- 23% red dot
- 41% yellow dot
- 36% green dot



Editor 2 was keen on 'author education'

Editor 6 was keen to progress

~90% of papers available for pre-press release on final day on conference

Case study: IBIC 2013

Platform	File Type	Number of contributions	Percentage of total
Intel PC	Word	105	43.8%
	Open Office	1	0.4%
	Latex	38	15.8%
Macintosh	Word	17	7.1%
	Open Office	0	0%
	Latex	25	10.4%
Linux	Word	2	0.8%
	Open Office	1	0.4%
	Latex	29	12.1%
Unix	Word	1	0.4%
-	PDF only	21	8.7%
Total		240	100%

~52% Word
~38% Latex
~10% Other (mostly PDF only)

Case study: IBIC 2013

Activity Log

Count	Activity
3,328	File Uploaded
763	Abstract Initial QA Performed
763	Abstract Updated
435	File Removed
357	Edit Complete
281	Final QA Passed
264	Abstract Created
244	Paper Assigned
219	Poster Police
160	Dot Reassignment
112	Abstract Withdrawn
53	Transparency Complete
46	Transparency Assigned
37	Abstract Owner Changed
24	Paper Re-assigned
9	Author rejected the Editor's changes
9	Final QA Failed
1	Transparency Reassigned

Error Log

Count	Pct	Running	Error Type
85	15.10%	15.10%	TC06 Reference or Reference formatting incorrect (missing, multiply defined, wrong order, indentation, hyperlink, inconsistent)
68	12.08%	27.18%	TC02 Text formatting incorrect (paragraphs, section/sub-section headings, indentation, column/intercolumn width)
59	10.48%	37.66%	TC01 Incorrect Title, Authors, Affiliation formatting (size, UPPER/Lowercase, not in required lowercase [e.g. MHz], country missing)
54	9.59%	47.25%	TC04 Figure formatting incorrect (outside margins, single/multiple line caption not centred/justified or placed above, Caption wrongly labeled [abbreviated, colon missing, wrong font size, bold/italic])
53	9.41%	56.66%	TC03 Table formatting incorrect (not centered, outside margins, caption below table, wrongly labeled, not in Initial Caps, single/multiple line caption not centred/justified)
40	7.10%	63.77%	Comments to the Author/Editor in Chief
23	4.09%	67.85%	MP01 Minor Formatting Problems
20	3.55%	71.40%	FC01 PS/EPS/PDF/source or supporting file(s) missing
20	3.55%	74.96%	TC08 Figure/Table/Reference not referenced in text or missing
15	2.66%	77.62%	Font Problems (wrong or missing font, Type3/bitmap font)
14	2.49%	80.11%	TC09 Equation/Eq., Figure/Fig., Table wrongly used in text (lower case, abbreviated, period missing)
13	2.31%	82.42%	TC00 General Problems related to formatting
13	2.31%	84.72%	TC07 Figure/Table/Equation/Reference numbers not in sequence
10	1.78%	86.50%	TC05 Footnote formatting incorrect (outside margins, no line above, not at bottom/first column, missing)
10	1.78%	88.28%	UT01 Template not used or parameter change; Bounding Box wrong; Incorrect column and/or intercolumn widths

Summary

- Conference editing team are there to provide a complete set of proceedings in electronic format for publication on JACoW website
- Papers must meet the minimum set of technical requirements defined by JACoW in order to be published
- In addition, conference should define in advance the standards / requirements to be met
  - Level of homogeneity
  - 'Value added' to scientific content
  - Cost vs. speed of production
- Goals of the conference should be kept in mind when deciding which errors to fix
- Scientific content / language of paper not assessed (do not proofread!)
- Ideally have vast majority of papers completed on final day of conference ready for pre-press release