

CREATING CONFERENCE PROCEEDINGS: TIPS AND TRICKS FROM THE TRENCHES

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ABSTRACT

This technical report is adapted from the post mortems that I carried out after the preparation of the DAFx-01 and the NIME-02 conference proceedings, together with notes and emails from various meetings and people who assisted me in the production of the various proceedings.

Its purpose is to offer future conference organisers and proceedings editors the benefit of experience and of lessons learned in the skill of creating conference proceedings.

Keywords: conference proceedings, conference organization, proceedings production, proceedings compilation

INTRODUCTION

Initial I accepted the job of proceedings editor because I wished to develop my skills in editing and I wanted to learn some things along the way. One thing that I discovered early in my research was the absence of documentation or advice on how to begin the task of creating a proceeding for a conference. It was only after creating my first proceedings that I came across Malkinson's overview of editing a proceedings [1]. Malkinson's article focuses on a process view involved in being a proceedings editor while in this work a more "hands-on" focus is taken which is intended to compliment Malkinson's overview.

A proceedings is not a difficult document to create but it can be very time consuming for a neophyte editor. Narrowing our focus to providing the lessons necessary for a neophyte editor to relatively quickly and painlessly create a proceedings, we will give an overview of the common file formats encountered, point out what tools are required and what is their function in the editing of a proceedings, then how a proceedings can be created in specific. Finally we outline the use of templates as a necessary extension to the production of high quality conference proceedings.

FILE FORMATS

Definition

In this paper, we assume the term *file format* to refer to document file format. The scope of the file formats which we deal with are limited by conference in the case of the DAFx and NIME conferences these formats were the MS Word document format and the LaTeX format. Postscript files were also used by a small number of authors but these were converted to PDF files

and modified in this format if necessary. The PDF file format is the final format used for the production of the proceedings with the other file formats only used for editing prior to conversion to PDF or as templates. In the following paragraphs, we discuss the important aspects of the different file formats with regard to how they are used in the creation of conference proceedings. The only advice I will give on the use of file formats is to use the one that you are most familiar with. However in your role as editor you must be able to work with all the formats mentioned. The tools necessary to work with these formats are discussed in the next section.

MS Word Document

Full Name: Microsoft Document File Format
File Type: .doc
Originator: Microsoft Corporation, Inc.

MS Word is the word editor for the Microsoft Office and uses the MS Word Document as its default file format. It is one of the most common document formats encountered due to the bundling of MS Word with the Microsoft Windows operating systems as the systems default editor. This is the dominant file format encountered when dealing with submissions sent from writers. There are several tutorials available on the Internet giving an introduction into the use of MS Word.

LaTEX

Full Name: LaTeX: A Document Preparation System
File Type: .tex
Originator: Donald E. Knuth.

LaTeX is a system for typesetting documents, which has found a niche in the academic and scientific communities. Its foundation is based on Donald Knuth's TeX typesetting system. The LaTeX is a macro extension to the TeX system. LaTeX is commonly used on Linux or Unix systems. It differs from MS Word in that it uses logical design over visual design. Logical design is where you explicitly state where and how to format a piece of text as well as what kind of type of text it is. Visual design is best seen in MS Word editors and related editors that use the "WYSIWYG" (what you see is what you get) paradigm. There are advantages and disadvantages of both types of design this has spurred much debate between proponents of the designs which is beyond the scope of this paper. An introduction into the LaTeX system can be found in Lamport [2].

PDF

Full Name: Portable Document Format
File Type: .pdf
Originator: Adobe Corporation, Inc.

The Portable Document Format or PDF was designed to be a cross platform document format while retaining the same layout and formatting regardless of the platform or system being used. It another common document format encountered due to the bundling of Adobe's Reader [3] with many operating systems. An important point to illustrate is that Adobe's Reader will only read PDF files it will not modify them. Modifying PDF files requires specific tools such as Adobe's Acrobat [3]. As well as Adobe tools there are several other free to use tools; all of these may be downloaded from the Internet. The "Tools" section of this paper discusses several of these.

CREATING CONFERENCE PROCEEDINGS

The appropriate use of the correct Tools allow the easy creation of the proceedings, it's further editing, indexing and the possible touch up of submissions. Management systems can assist in reducing administrative burdens and reduce time demands on the editor. The tools discussed in the following section for the most part are relatively platform independent but it has been my experience that access to both a Microsoft Window system and a Linux system can considerably ease any problems. The proceedings editing section is a practical description of the technique I have used to create various proceeding.

Submission Management

The first item of concern to the neophyte editor is the various submissions. Submission management may or may not be part of their remit. In the case that they must also manage the submissions, software such as **CyberChair** [4] or **BSCW** [5] can be used to considerable ease the situation. CyberChair is a collaborative-shared workspace with specific focus on the management, collect and review of conference papers. BSCW is a more generalized collaborative-shared workspace both result from research projects in the area of CSCW. Having used both systems, I would highly recommend CyberChair for conferences but on general projects BSCW is peerless and can be used as a substitute for CyberChair with a little more work. The use of a submission management tool can help greatly in reducing the burden on your time and also simplify many administrative burdens.

Tools

A couple of tools are required for editing the various file formats. Generally when creating templates for a conference the major formats used by the conference community are used. As discussed previously the two formats commonly used in the DAFx and NIME communities are MS Word and LaTeX. I have found that creating the proceedings can be most easily achieved using a Windows system using Adobe's Acrobat and Distiller [3], MS Word [6] and WinEdt [7]. Certain occasions have required the use of an image editor such as Adobe's Photoshop [3] but there are many other editors such as Paintshop Pro, which can easily achieve the same task. Proceedings may also entail the creation of a CD. The relevant

web pages can be created using any website creation tool such as Macromedia Dreamweaver [8] or Microsoft FrontPage [6] but it is important to reuse the look and graphical design of the conference's homepage if any.

There is another category of tools sometimes required. These are archival tools such as Winzip, Winrar, Tar, Gzip and Stuffit to list a few of the notable archival formats. Many of the document submissions will be large and as such the writers may choose to compress these using an archival tool. An editor must have the full array of these tools available, fortunately these are available in either freeware/open-source or shareware versions. The three formats generally encountered are the Zip format, the Tar format and the Stuffit Format. Winzip or Gzip is used for the Zip format while Tar archives can be opened using the "tar" command on Linux machines or by Winzip on Windows machines. The Stuffit format is opened by Stuffit Expanded and is the archival format common to Macintosh machines.

Proceedings Editing

The final versions of the submissions should be downloaded / assembled on the editors system which has the relevant tools installed. Beginning the compilation of the proceedings all the submissions should be converted to the PDF file format. In the case of MS Word documents, you must install the full version of Adobe Acrobat which links an Adobe icon to your MS Word program as shown in Figure 1. Selecting or "double clicking" this icon will create a PDF file of the current MS Word document.



Figure 1: Adobe Icon in MS Word

In the case of LaTeX documents, conversion is simple on a Linux system using the LaTeX / TEX commands [2]. On a Windows system I recommend the use of the WinEdt software. WinEdt is a word processing package for using LaTeX and TEX in the Windows environment. The use of MikTeX [9] and Ghostview [10], two open source projects supplement WinEdt and allow for the creation of PDF files from LaTeX or TEX. WinEdt is also useful in editing style files used in LaTeX / TEX templates for your conference. At this stage all the submissions should be have been converted into PDF files.

The next step is to create a working directory for your new proceedings and copy the PDF submission files into it. Conference proceedings are generally laid out according to chronologically order, in that the first paper in the first session is at the start and followed by the other submissions, as they would occur during the conference. At this stage the editor should either using the web or contacting the local chair for the conference directly obtain a timetable for the conference. The timetable will serve as the ordering of the submissions within in the proceedings, so at this stage I normally rename the submissions into a numeric format representing when they are presented so the first paper to be presented is renamed to "01.pdf", the twenty-third paper to be presented is renamed to "23.pdf" and so on. This leads into the creation of the body of the proceedings.

The body of the proceedings starts with opening the file "01.pdf" and the user selects the command "Document -> Insert Pages" as shown in Figure 2. This is the first of three steps in adding a submission to the body. The next step involves choosing the next submission, which in this case will be the second submission as shown in Figure 3. The third step involves

adding this file to the end of the exist body as shown in Figure 4. This is repeated for all the submissions until the body of the proceedings is completed. After this stage a new file should be saved using the “Save As” function, this file represents the proceeding’s body.

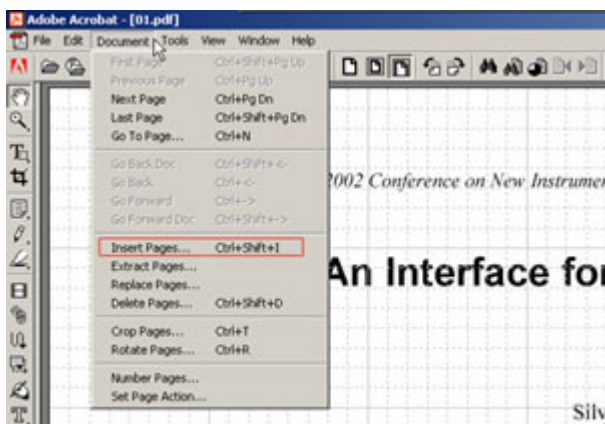


Figure 2: Select Insert Pages

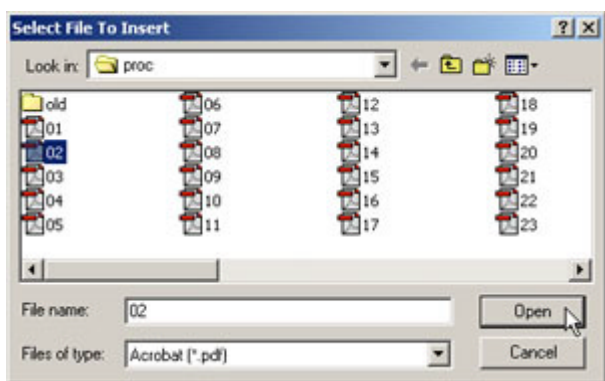


Figure 3: Selecting the particular submission

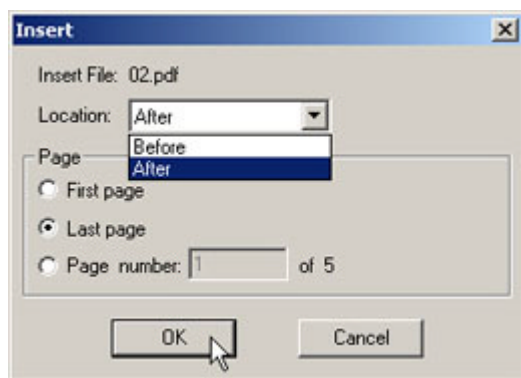


Figure 4: Determining where to add the submission

The body of the proceedings has now been assembled at this stage, one of the first cleanup tasks is required. This is the renumber of the pages numbers within the document. The easiest way to achieve this is using the Text Touchup tool in Acrobat shown in Figure 5. Unfortunately it may not always be that easy, as submissions don’t always use the conference templates so the Text Addition tool may be needed to add the required text shown in Figure 6. The required text is normally a header with the conference name, date and location. A page footer is also required and usually consists of the conference acronym followed by a two-digit year and a page number. Both of these tools are displayed as glyphs on the left hand side menu

in Acrobat. A helpful trick when adding text is to use the forms grid (“View -> Show Forms Grid”) as this can allow you to compare positioning of the header/footer text in the document. At this stage you will have a correctly numbered document with the necessary headers and footers. Now to put the finishing touches on a proceeding requires a few more sections.



Figure 5: Text Touchup Tool



Figure 6: Text Addition Tool

These sections consist of the Cover page, the ISBN and Committee page, the Contents page/s, the Index page/s with the possible addition of one or more prefaces by various people and if available keynote addresses. It is these aspects that can really give the “Professional” touch to your proceedings. All of these pages are available online at [11] as templates for your own conference proceedings.

The Cover page consists of the title of the conference, the word “Proceedings”, the place and date of the conference, your name as proceedings editor with anybody else that assisted in the production aspects and the organisations which organised the conference as well as any organisations or companies which sponsored the conference. This is shown in the Cover page template.

The ISBN and Committee page consists of which organisation published the proceedings, the proceedings ISBN number, where and who additional copies may be ordered from, the homepage of the conference and possible previous conferences. The Committee section of the page consists of three elements. The Scientific / Review committee members and their affiliations, the Conference Organising committee members their affiliations and roles and the Conference Support and Coordination personnel and their affiliations and roles. The ISBN number should be order via your University library or if this is not an available resource your National Library and should be ordered early as the title of your proceedings is known well in advance.

The Contents page is very similar to the conference timetable and relates to the page numbers within the body of the proceedings. At this stage you need to get a list of the submission titles, their authors and their page number within the submission. I normally include keynote texts in a keynote section after the main body of the proceedings and this is also listed in the Contents page. The Contents page is illustrated in greater detail in the Contents page template.

The Index page is a very simple alphabetical layout of author surname, author first name initial and page number. It is included at the end of the proceedings to allow for quick reference to a particular author’s work.

The last two sections of a proceeding’s are the prefaces and the keynotes. The prefaces are normally introductions to the conference by the chair/s of the conference and / or the body representing the area. These prefaces introduce the area, a look towards its future and a note about the current conference and future conferences. The keynotes are talks given by prestigious speakers knowledgeable in the conference’s domain. Both prefaces and keynotes also pose research questions about the conference’s domain, simulating areas of new research within the domain. A practice, which I have adopted, is to add the keynotes after the submissions and with page numbers to indicate which keynote speech it belongs to. This stems from the fact that keynotes are not submissions per se and do not go through the same review process as submission so they are more correctly categorized in a separate section. The keynote

layout may or may not use the submission template format but this is a matter of personal preference rather than convention.

After creating these various pages, they need to be assembled into the proceedings. The Cover page, the ISBN and Committee page, any prefaces, the Contents page/s are assembled into one document which will comprise the front section of the proceedings. The back section of the proceedings consists of any keynotes and the Index page/s. These pages use a different numbering scheme to the rest of the proceedings excluding the keynotes as discussed previously. The format of the front section is to use page number in Roman Numerical form and in lowercase from the ISBN page to the last page before the body of the proceedings. In MS Word this can be selected by choosing the menu "Insert -> Page Numbers" as shown in Figure 7 and then by selecting the format option which shown in Figure 8 which displays the formatting choices shown in Figure 9 with the Roman Numerical in lowercase highlighted. The formatting process for the back section is very similar except that the page numbering is started from the last page number in the front section. At this point these sections are normally converted to PDF files and any additional blank pages necessary are added. Blank pages may be necessary to ensure the various sections start with their first page on the right hand side of the proceedings, in other words facing out. This is another style tip that can enhance the presentation and readability of your proceedings.

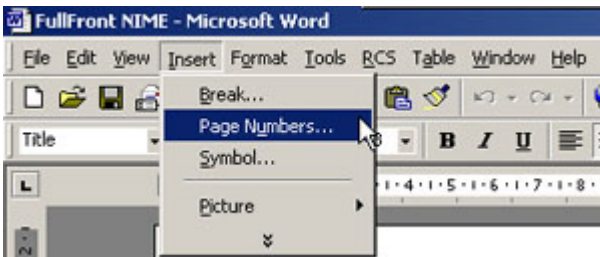


Figure 7: MS Word "Insert -> Page Numbers" option

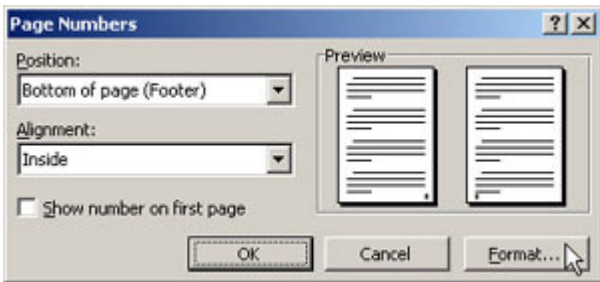


Figure 8: MS Word "Page Numbers -> Format" option

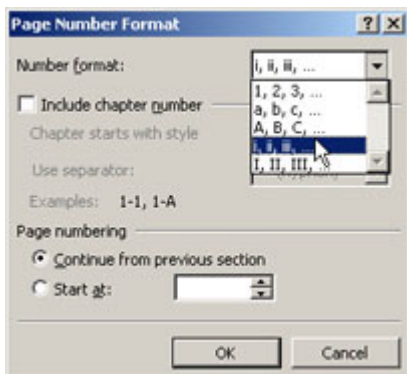


Figure 9: MS Word "Page Number Format" option

The front and back sections are now ready to be added to the body of the conference proceedings. This method is the same as adding submissions to the body as shown in Figures 2 – 4. After this stage its time to enter the "Processing" stage as described in detail by Malkinson[1]. He breaks the "Processing" into four parts:

- a. Integrity Edit
- b. Format Edit
- c. Language Edit
- d. Substantive Edit

The Integrity Edit main function is to "find global problems at an early stage and ensure all part of the publication match". Examining paragraphs, sentences, lines, figures, tables, document structure and completeness of a document are typical activities in this area. The Format Edit is aimed at ensuring that "the chapters of the proceedings look and read like parts of a whole". Activities include consistency checking of headers/footers, fonts, bullet lists, indentation, capitalization and references to figures, tables and actual references. The Language Edit is "concerned with how the writer expresses thoughts through language, regardless of format". It "evaluates how clearly and precisely the sentences express explanations" and examines flow within the document. Checking spelling, grammar, punctuation and reconstruction of sentence fragments are among the various tasks carried out within this operation. The final stage or Substantive Edit is concerned with taking "a step back" and looking at the proceedings to ensure that it has a foundation and is fully completed. Checking that items such as legal notices, copyrights are included as well as checking organization and accuracy of the index and the table of contents are activities within this stage. After this it is essentially a matter of ensuring that the printers receive the proceedings either in a camera-ready format or in an electronic format, it is best to always include a completed hard copy. It is at this point where the work stops for many conference proceedings but increasingly conferences demand the production of a CD and / or website with finished proceedings.

Proceedings CD's and web pages

Similar work on creating multimedia conference proceedings has been discussed by Cheyney et al [12]; the work in for the DAFx and NIME conferences was aimed at producing both a printed and a CD version of the proceedings with the minimum amount of effort. The CD version is not aimed at being a fully interactive multimedia presentation as in Cheyney's work; rather the end result will be a professional proceeding, which could be produced by a single editor. This type of CD is common in the small research communities such as the DAFx or NIME communities, whereas an interactive multimedia CD may be appropriate for larger research communities. It is important to evaluate the requirements for your community to ensure the correct type of CD is created.

Lessening CD costs and the Internet has spurred the production of both a proceeding's CD and also a proceeding's website. The website is generally added to the conference website after the conference has finished but this depends on copyright issues. In order to "kill two birds with one stone" I generally create the CD with several web pages which can later serve the purpose as a proceeding's section on the conference website. The layout which is I use is that of a Home page, a Table of Contents page, a Author Index page, a Search page and a Help page. Template versions of these pages taken from the NIME 2002 conference can be found online [11]. These pages can be edited to reflect your particular conference and its

submissions. It is important to retain the graphical design, layout, logo, etc from the conference website if any when designing your web pages. This ensures a graphical continuity between your pages and the actual conference website. This type of ascetics requires little editing and enhances the “Professional” look of your work.

The Search page requires a little more work, as an index must be created for the papers. This requires the use of Adobe’s Catalogue bundled with the full version of Adobe Acrobat. The easiest manner of creating the index is to ensure all the papers are in a folder called “papers” and then edit the file “cd\navig\proc_idx.pdx” with Catalogue as shown in Figure 10 replacing the Index title and descriptions and include directory to reflect your conference and its submissions. The Search page itself is normally presented as a PDF page with the MS Word template only used for its production but not included on the CD or website version. The search button on the Search page can be edited using the “Form tool” in Acrobat, which is shown in Figure 11 and found on the left hand side menu of Acrobat.

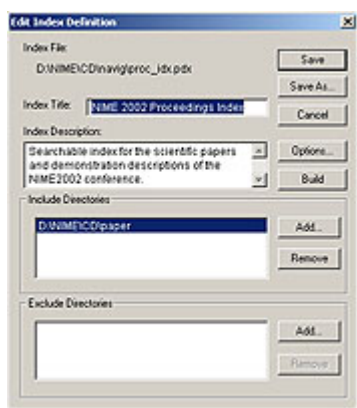


Figure 10: Adobe Catalogue “Edit Index Definition”



Figure 11: Adobe Acrobat “Form Tool”

The proceeding’s CD / web pages should now be ready to be packaged. This stage involves copying the layout, structure and files to a separate computer or web server and ensuring that the hyperlinks function. It is vital discover that your web pages do not use absolute paths such as “C:\absolute\path” to resources on your computer but rather use relative paths “.relative\path”. As important is ensuring that all graphic files as well as submissions are included and hyper linked correctly. CD duplicators or commercial CD printers will take the information in many media formats but I’ve learnt that if you send them a CD to duplicate ensure that the CD is “closed” or “finalized” when using your CD creation program. As with all things it is best to shop around for several quotations both for the printed proceedings and the CD production. A proceeding’s CD can have anything from a colour insert with colour embossing of the CD to a single colour embossing of the CD depending on your budget.

TEMPLATES

These are part of the broad area of “Author Instructions” which includes layout, size limits, deadlines, file formats, graphical formats, document style, reference layout and style. It is one area that may or may not fall under the remit of proceedings editor. The templates for any conference are created prior to the first call for papers with the hyperlink to them included either in

the call or prominently on the conference home page. The available of the templates is important for submissions. When submissions do not follow the conference layout and style they can require considerable time to reedit. The DAFx and NIME templates are available online [11] but use different layouts. The DAFx conference template uses a layout similar to ICASSP conference templates whereas the NIME template uses a layout similar to the ACM CHI conference templates. Many other styles and layouts exist varying elements from the numbers of columns per page to the reference style if there isn’t a decided format for the template it should be the first issue that is dealt with by the editor in conjunction with the conference committee.

CONCLUSIONS

The editing of a proceeding is invisible and will go unnoticed by conference participants. Malkinson sums it up succinctly in that “the only people who should be able to tell that a proceedings was edited are its authors, its editor and other editors”. A good editor is a vital cog in the workings of a conference without which the quality of the conference will be directly affected. The creation of a conference proceeding can seem to be an overwhelming task but the burden can be reduced substantially using the appropriate tools and techniques. The practical approach taken by this article is aimed at ensuring that those new to editing of a conference proceeding use the tools, tricks and techniques discussed to produce a professional proceedings whether they be a print proceedings or a proceedings CD.

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