Building Relationships, Advancing Services: Piloting Open Conference Systems with the Indiana University Undergraduate Research Conference


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CHAPTER 5 *

Building Relationships, Advancing Services: Piloting Open Conference Systems with the Indiana University Undergraduate Research Conference

Shayna Pekala and Jane Rogan

Introduction

As the scholarly communication landscape evolves, libraries are continually extending their missions to include the dissemination and preservation of research through the development of library publishing services. While typically geared toward faculty and graduate students, these services are becoming increasingly available to undergraduate students. In service to the 38,000-plus undergraduate students at Indiana University’s flagship campus, the Indiana University Bloomington (IUB) Libraries have provided ample support for undergraduate research in the area of scholarly publishing over the last several years. The Libraries’ Scholarly Communication department has worked with undergraduate students, faculty, and campus units to enable and promote the publication of undergraduate research through its core

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services: IUScholarWorks Repository, a DSpace-based institutional repository service, and IUScholarWorks Journals, an open access journal publishing service built on the Open Journal Systems (OJS) platform. Currently, IUScholarWorks Repository houses a number of undergraduate research projects, and IUScholarWorks Journals is used by four undergraduate-run scholarly journals.

In addition to providing services that support undergraduate publishing activities, the libraries have leveraged key partnerships to develop brand new services. This chapter details a collaborative pilot project between the IUB Libraries and the IU Office of the Vice Provost for Undergraduate Education (OVPUE) to test the viability of Open Conference Systems (OCS) for managing and publishing conference proceedings from the Indiana University Undergraduate Research Conference (IUURC), an annual conference that showcases undergraduate research and creative activity at Indiana University.1 This effort was motivated by the libraries’ desire to expand its open access publishing services, as well as IUURC’s need for a free and flexible conference management system. While current literature captures a variety of case studies of library-supported undergraduate publishing activities, it fails to document the use of OCS for an undergraduate research conference. In addition to presenting the history of the pilot project, this chapter will offer practical considerations for engaging in effective partnerships and implementing similar undergraduate publishing initiatives.

Background

The IUB Libraries have a long tradition of supporting experimentation with new forms of research dissemination and enabling scholars to communicate their research through new vehicles and under new access models. Since 2007, the libraries have preserved and made freely available the digital research materials of Indiana University faculty, students, staff, and other affiliates by hosting more than 7,700 items in IUScholarWorks Repository (including datasets, dissertations, working papers, published articles, technical reports, conference proceedings, and multimedia), and publishing thirty-two open access journals in IUScholarWorks Journals (including six student-run and twenty-six faculty-run journals) across all IU campuses. In an effort to push the boundaries of scholarly publishing, the libraries’ Scholarly Communication department is continually seeking ways to expand its services.

In summer 2014, the department began exploring the feasibility of implementing a new service to support the management and publication of conference proceedings in response to increasing requests from users. While the department already provided support for disseminating conference proceed-
nings through IUScholarWorks Repository, the underlying platform (DSpace) does not provide tools for organizing conference events, managing the editorial workflow for submissions, or creating a customized conference website. The newly proposed service would take advantage of Open Conference Systems (OCS), an open source software platform developed by the Public Knowledge Project (PKP). Having successfully used PKP’s OJS platform for the last six years to publish open access journals, the department felt comfortable experimenting with OCS.

In order to decide whether to bring OCS into its existing set of services, the Scholarly Communication department needed to thoroughly evaluate OCS’s features through testing. OCS provides tools for managing attendee registration, scheduling, and other aspects conference organization. More importantly, it enables two primary functions of publishing conference proceedings: (1) managing the editorial workflow, including organizing submissions, managing peer review, and various stages of editing, and (2) making the proceedings available online. To test the latter function, the department installed a demo instance of OCS, created a test conference site for a previously held library conference, and uploaded the proceedings. To test the first function, however, the department needed to work with a real conference, since the tasks involved require communication among multiple users with varying roles.

Meanwhile, the department was seeking ways to extend its support for undergraduate research by further integrating the scholarly communication process into the undergraduate experience. The ACRL white paper, Intersections of Scholarly Communication and Information Literacy: Creating Strategic Collaborations for a Changing Academic Environment, suggests one way that librarians can facilitate conversations about scholarly communication issues is to participate in the organization of campus symposia and conferences; collaborating with an undergraduate research conference for the purposes of testing OCS would provide this opportunity. Mark Caprio and Robert Hackey describe a comparable partnership between the Providence College Health Policy and Management program and the library’s Digital Publishing Services staff to publish papers presented at their annual undergraduate conference, albeit using the institutional repository. Adrian Ho outlines specific areas that libraries can assist with undergraduate journal publishing, including planning, organization, and content management, all of which could also be applied to conferences. As the libraries had recently worked on an initiative to launch the Indiana University Journal of Undergraduate Research (IUJUR), providing a similar service to support undergraduate publishing at a different stage of the research lifecycle seemed like a natural extension.
Partnerships

A previous partnership with OVPUE, a campus-level administrative unit, laid the foundation for what would become the OCS pilot project. Since 2013, the Scholarly Communication department had been collaborating with OVPUE and a group of undergraduate students to develop IUJUR. Scholarly Communication staff provided consultation services and technical infrastructure and support for the journal through IUScholarWorks Journals, while OVPUE provided funding and administrative oversight for the student organization that coordinates the journal. Although IUJUR did not officially launch until June 2015, most of the groundwork had been laid by fall 2014. The Libraries involvement in IUJUR resulted in numerous benefits, most notably a strengthened relationship with OVPUE.

It was a fortunate coincidence that, around the same time the Scholarly Communication department was searching for a conference partner for OCS, OVPUE was preparing to host the twentieth annual IUURC conference for the first time. IUURC is a university-wide initiative that takes place on a different IU campus each year. In 2014, OVPUE assumed responsibility for hosting the conference, which offered an opportunity for a technological overhaul, including a new web presence and switching to an app-based tool, Guidebook, in place of printed conference materials. In addition to these changes, OVPUE was also interested in finding a technical solution for managing conference registrations and submissions and communicating with presenters. In previous years, these tasks were dispersed across multiple systems and units: students submitted their abstracts through Oncourse, IU’s learning management system; conference organizers communicated with presenters over email; and IU Conferences assisted with attendee registration and day-of conference check-in. At the time, IU Conferences also charged a per-participant fee for their services, making their continued use prohibitive for IUURC as the conference is free and does not generate revenue.

Hoping to find a single platform to manage all aspects of IUURC (including publishing the proceedings, which had never previously been done), OVPUE turned to the libraries for help. The Scholarly Communication department recognized the opportunity to use OCS with a real conference and proposed partnering with OVPUE on IUURC. After meeting with OVPUE staff to provide a brief demonstration of OCS, the two units decided to embark on a second joint project, using OCS to manage the registration and submission workflows for IUURC and to publish the resulting proceedings in an open access platform. The goals of the project were twofold: (1) to use OCS to facilitate the organization and management of IUURC, and (2) to determine whether OCS is a useful tool for stakeholders.
Beginning in September 2014, Scholarly Communication staff trained IUURC’s student conference coordinator on the basics of using OCS and helped set up the initial conference website. IUURC has a relatively simple format featuring posters and oral presentations from students across IU’s eight campuses. Because of this simplicity, just a few of the OCS utilities were used. Conference attendees registered through the conference participant registration feature. Student presenters uploaded their abstracts to a relevant conference track, either a poster or oral presentation linked to their home campus. A faculty liaison from each campus was given the role of track director for their campus and verified each student’s submission with the faculty mentor before approving or denying the submission for inclusion in the conference. The student conference coordinator extracted data from OCS using built-in plugins to create a full conference schedule of oral presentation and poster abstracts in the Guidebook app.

Over the course of the fall 2014 semester, the student conference coordinator and Scholarly Communication staff worked to identify and troubleshoot ongoing bugs and usability problems with OCS. After the conference concluded in November, the proceedings were ultimately not able to be published due to copyright concerns from a number of faculty mentors in the bench science disciplines. These faculty mentors communicated to OVPUE that they did not want their student’s work, which is often derivative of the faculty member’s research, to be available in an open access forum for fear of being scooped and to avoid limiting both the student’s and faculty member’s ability to publish the findings in another venue in the future. As these are legitimate and practical disciplinary issues, OVPUE forwent the idea of publishing the proceedings. In the end, OVPUE was satisfied with OCS’s registration and submission management features and elected to use it again for these purposes the following year.

Reflection

OVPUE found OCS to be a helpful tool for handling the conference planning and organization for IUURC. Using OCS to communicate with conference registrants offered simplicity and consistency. In prior years, the conference coordinator handled hundreds of emails using both personal and conference email accounts, which led to confusion for student participants. OCS also helped speed up the review process. Student submissions were quickly assigned to a conference track by the student conference coordinator, and track directors were able to swiftly verify submissions and make small typographic edits to ensure consistency with submission guidelines. Approvals took place on a rolling basis and each track director, not just the conference manager, edited and imposed conference guidelines and standards.
As a new tool for IUURC, OCS was embraced by students who found little difficulty navigating through OCS and quickly understood how to register for and submit to the conference. Staff and faculty who served as track directors or who wanted to register for the conference found the platform less intuitive. After the first year of using OCS, the IUURC conference manager and student conference coordinator created a simple guide for faculty track directors that details the steps for reviewing, editing, and accepting (or denying) submissions within the platform. Moving forward, it would be helpful to create similar guides for other processes, like registering for or submitting to the conference. While PKP does provide some helpful materials, such as *OCS in an Hour;* most of this documentation is intended for the conference manager, rather than for the faculty reviewer or track director.

Over the course of the project, OVPUE staff faced several technical challenges using OCS, the biggest of which involved exporting data. OCS provides standard plugins for exporting data, which return results in either XML or CSV format. The conference organizers found that specific tasks, like creating participant name tags (which include the presenter’s name, home campus, and track), required data from more than one plugin. Subsequently, conference organizers resorted to copying and pasting from screen views to fill in missing data. The conference organizers also found OCS limiting due to its inherent complexity. Because OCS is designed for professional conferences, there are essential features built into the system, such as complex peer review management, conference tracks, and themes, which far exceed the needs of a modest, single-day student conference.

From the libraries’ perspective, the OCS pilot project enabled the Scholarly Communication department to understand potential problems with launching and supporting a conference management service. On an administrative level, uncovering the platform’s limitations helped the department realize that it would need to provide a greater amount of technical support than anticipated, calling into question the department’s ability to manage the service with its current level of staffing (one FTE librarian and one FTE professional/administrative staff). Similarly, observing the ways that users struggled with certain parts of the system illustrated the need for Scholarly Communication staff to create supplemental instructional materials before rolling out the service. The project also demonstrated how certain conferences may desire a level of platform customization that cannot be fully accommodated through OCS out-of-the-box, which highlighted the importance of establishing clear policies about the libraries’ role in supporting the platform, likely through a service agreement. Despite these issues, by displaying technical knowledge and providing support for an administrative unit like OVPUE, Scholarly Communication staff were able to challenge outdated and prevailing views of the role of academic libraries and librarians.
Using OCS for IUURC not only benefited OVPUE and the libraries, but also students. OCS enabled students to have a seamless conference submission experience and, more important, it provided them with a framework for understanding how academic scholarship is produced. Using a system like OCS exposes students to the review process and its role in the publication life cycle. By being able to log in and track the progress of an abstract submission through the review, editing, and publication stages, students gain insight into important editorial processes that often go unrecognized, which ultimately expands students’ understanding of the scholarly communication system. From a practical standpoint, student conference participants gained experience using a conference management system to submit presentation and poster abstracts, which prepared them for the process of submitting to a future professional conference.

Assessment

The initiative was assessed informally through conversations between the Scholarly Communication department and OVPUE, which drew on additional communications with IUURC stakeholders—students, faculty, and staff—to determine whether the goals of the partnership had been achieved. As evidenced by IUURC’s OCS website, OVPUE was able to successfully use OCS to facilitate the organization and management of IUURC. The conference organizers found OCS to be a helpful tool in efficiently managing a complex process, as well as documenting and memorializing the research and creative activity efforts of student researchers and faculty mentors. The archived submissions offer a series of data points that demonstrate the commitment of undergraduates and their faculty mentors to research and creative activity endeavors.

There are several factors to consider when evaluating a digital tool like OCS. Stewart Varner identifies five different areas to examine: exports (what the tool allows you to do with what it creates), data storage and intellectual property (what terms and conditions govern the tool), documentation (instructions available to help users understand the tool), stability (how long a tool will be available), and usefulness (whether the tool adds a new dimension to the way the material is engaged with without being distracting). The OCS pilot project was largely focused on helping the Scholarly Communication department determine the software’s usefulness factor, though it ended up providing information about the exports and documentation factors as well. In the future, it would be useful to convert these five factors into a rubric with which to provide a numeric measurement to complement the informal feedback from stakeholders. Together, these two forms of assessment could provide a more complete picture of the initiative’s relative success.
Recommendations/Best Practices

Interdepartmental partnerships, as demonstrated through this project, can be mutually beneficial and rewarding. The OCS pilot project provided clear benefits to both the libraries and OVPUE. The opportunity to work together on this initiative came from a prior collaboration to launch *IUJUR*. Although the two units already had a positive working relationship, they agreed upon simple definitions and expectations for the OCS initiative related to the goals, success, and timeline of the project. These guidelines helped to manage the scale and scope of the work and to understand when the partnership had come to an end.

1. Set simple and well-defined goals for the partnership, including a realistic outline of individual contributions and roles.
2. Create shared definition(s) for success and determine how these will be measured.
3. Establish a realistic time frame for the partnership.
4. Keep an open mind about how the partnership can be extended or built upon beyond the initial scope of the project.

As for the tool itself, OCS has proved to be an effective solution for managing undergraduate research conferences. Librarians wishing to implement OCS should recognize that the system’s complex peer review management features may exceed the needs of an undergraduate-level conference, and, therefore, librarians should be prepared to work with conference organizers to design workflows in OCS that fit the unique needs of each conference. In addition, before implementing OCS, librarians should be advised that the future of the software is unclear. In September 2016, PKP began soliciting community feedback to decide whether or not to continue to develop OCS, which has seen few changes over the last several years aside from security updates. Depending on the outcome of PKP’s decision, OCS may or may not continue to be a viable option for libraries to use to support conference management.

Conclusion

The OCS pilot project strengthened and elevated the relationship between OVPUE and the libraries. Whereas OVPUE previously viewed the libraries as a provider of systems and services, the unit now views the libraries as a valuable collaborator. Furthermore, the pilot project provided a clear example of how the libraries can support the administrative function of the university in addition to its teaching and learning mission.

The newfound perception of the role of the libraries led OVPUE to continue to work with the Scholarly Communication department to develop
other library programs. In fall 2015, the two units collaborated on a library workshop titled, “Research and Publishing Opportunities for Undergraduates,” which presented ways for undergraduates to get involved in research and publishing at IU, including IUJUR and IUURC. At present, the two units are working to expand this into a three-part workshop series that covers all aspects of the publication lifecycle. The partnership also generated a new credit-bearing course in the IU College of Arts and Sciences designed for the student leaders of IUJUR, which focuses on issues and best practices in scholarly publishing. The course debuted in fall 2016 and is taught by the Scholarly Communication Librarian. The continued successful collaborations between OVPUE and the libraries demonstrate the importance of finding campus partners, and of nurturing positive and productive relationships across diverse campus units. These partnerships benefit the departments and personnel involved and, most important, they are essential in enhancing the experience of undergraduate students.
Appendix 5A: IUURC20 Author Information and Abstract Review and Approval

IUURC20 Author Information and Abstract Review and Approval

Step By Step Instructions

Logging In

Login to http://scholarworks.iu.edu/conferences/index.php/iuurc/iuurc20/login using username and password sent via email on Tuesday, 11/4/14

Navigate to USER HOME

Finding Your Students’ Work

Select the In Review link across from your Director role to access your students’ work

In the Assigned To: drop-down menu, select Me and press Search. Click on the TITLE of an Abstract to open it up
Verifying Your Students’ Work

Click on SUMMARY and begin verifying author information, departmental and school affiliation (contained in Submission Metadata).

### Conference

**#69 Review**

**Submission**

**Authors:**

Charelle Adike-Boye (ID)

Indiana University-Purdue University Indianapolis

**Title:**

Examining the Effect of Time on Provider Judgments

**Track:**

Draft Presentations

**Director:**

Jane Auga (ID)

**Keywords:**

2020-12-02

Uploaded a revised file to serve as the Review Version.

### Review

In the Submission Metadata, look at the Title and Abstract entries. The **Abstract** must include the mentor name, departmental and campus affiliation. It will speed up the conference program process remarkably if you would all take these editing steps and ensure the mentor name, department and campus affiliation in the format given in the example below. This is a GREAT example. The student has included their faculty mentor’s name, department and campus affiliation with the right formatting. Job well done!

**Submission Metadata**

**Authors**

Charelle Adike-Boye (ID)

Indiana University-Purdue University Indianapolis

**Title:**

Examining the Effect of Time on Provider Judgments

**Authors**

Charelle A. Adike-Boye, Nicole A. Hoffmeyer, and Adam T. Herb

Department of Psychology, Purdue School of Science, IN/USA

In this study, the researchers explored the relationship between time pressure and provider judgments on patient care. They found that providers tend to make less accurate judgments under time pressure.

**Title and Abstract**

**Abstract**

Examining the Effect of Time on Provider Judgments

Charelle A. Adike Boye, Nicole A. Hoffmeyer, and Adam T. Herb

Department of Psychology, Purdue School of Science, IN/USA

This study examined the impact of time pressure on provider judgments of patient care. Providers were presented with patient scenarios under time pressure to make judgments about the patient's condition. The results showed that time pressure significantly affected the accuracy of provider judgments, with more time pressure leading to less accurate judgments.

**Keywords:**

- Provider errors
- Time pressure
- Provider judgments
- Patient outcomes
Correct Identifiers

Please use the correct departmental names for your campus. [E.g. in Bloomington it is the Department of Psychological and Brain Sciences, in Indianapolis it is the Department of Psychology.]

Please adhere to the IU-sanctioned campus names and not their acronyms. [Indiana University Bloomington, Indiana University Southeast, Indiana University-Purdue University Indianapolis, Indiana University-Purdue University Columbus, Indiana University East, Indiana University Kokomo, Indiana University-Purdue University Fort Wayne, Indiana University Northwest, or Indiana University South Bend].

Mentor Information is Missing

If the mentor name is missing, please look in the PDF file attached to the submission (scroll back up to the top of the Summary page) and click on the Original File PDF. If a student has not included the mentor information in the Abstract entry (in the Summary Metadata) they have most likely included the mentor’s name in the PDF. Please copy and paste the mentor name, department and campus affiliations from the PDF and into the Abstract Metadata, formatting as above.

Conference

#69 Summary

Submitters

**Authors**

Name

Charita Joyce Peck

Original Title

Effect of Time on Provider Judgments

Subtitle

**Submission**

University: Indiana University

Date Submitted

2018-03-27

Track

Oral Presentations

Directors

**Director**

Name

Joan Stineman

Location: Bloomington

Specialization: Psychology

**Associate Director**

Name

Marc Latchwell

Location: Bloomington

Specialization: Psychology

Request

Action

2018-12-16

CREATE

2018-11-08

DELETE

At this stage, if you’ve verified the metadata is correct and that the abstract isn’t too long, or that the title isn’t misleading, you can move ahead with the review approval.
Building Relationships, Advancing Services

### #69 Summary

**Submission**

- **Authors:** Charnelle Antia Free
- **Title:** Examining the Effect of Time on Provider Judgements
- **Subtitle:**
- **Submitter:** Charnelle Antia Free
- **Date submitted:** 2014-10-20
- **Track:** Oral Presentations

**Directors**

Scroll to **Director Decision** and select **Accept Submission** and click **Record Decision**. The system will ask you to verify your choice.

### #69 Review

**Submission**

- **Authors:** Charnelle Antia Free
- **Title:** Examining the Effect of Time on Provider Judgements
- **Track:** Oral Presentations
- **Director:** Richard Ward
- **Review Version:** 09102-3-RV
- **Supp. files:** None

**Review**

- **Select reviewers**
- **Notify author**
- **Review version**
- **Author version**
- **Upload director version**

**Review**

Add the submission to the list of accepted presentations.

**Layout**
Revisions to Content-Specific Areas

If you feel the author needs to make some content-specific changes, i.e. edit the abstract or title (more than a simple typo, which you can easily correct in the "Edit Metadata" function on the SUMMARY page), you can select Revisions Required in the Director's Decision. In the same area you will notice an icon for Notify Author. Use this to email the author directly about content-specific changes the author needs to make. You can also add Comments to the system by clicking on the speech balloon icon. Comments are safeguarded for future reference.

If you have notified a student that changes need to be made to the abstract/title, please give the student a day to get the changes back to you. Once changes have been submitted by the student (probably via email) and they are to your satisfaction, you can edit the Submission Metadata (see above notes on SUMMARY page Title and Abstract Metadata). Once you’ve made the changes you may then change the Director Decision to Accept Submission.

In the unlikely event that we have to make a water-landing a student fails to provide edits in a timely fashion you may need to Decline a Submission using the Director Decision drop box.

Please let me know if you have ANY questions about the system. It appears clunky at first, but it is so helpful to have a record of all the conversations between Directors and Authors within the system. And never fear, it is REALLY hard to break this system. (Please don’t take that as a challenge!)
Notes

5. See Appendix 5A.

Bibliography


