

Getting Started with CMT	1
Help users report they cannot create accounts	2
Assigning Reviewers	3
Automatic Assignment of reviewers requires the following steps: ...	3
Additional Notes	3
Configuration steps for Reviews.....	4
Paper Statuses, using filtering and Bulk Edit.....	5
Create your own paper statuses.....	5
Use Bulk Edit with Filtering and Aggregate Columns	5
How do I enable discussions and control permissions setting for reviewers using the discussion page?.....	6
Description of the Paper discussion wizard functionality.....	6
How does the wizard work?.....	7
Usage scenarios.....	8
Export List of Papers with all Authors	10

Getting Started with CMT

Before you enable the conference site to accept submissions we recommend you complete three steps.

- 1.) create the submission questions
- 2.) define the subject areas
- 3.) Load the reviewers (if you wish authors to be able to mark conflicts of interest when they create their submissions.)

Lets look at how to perform those steps in CMT

Log in to the CMT site for the conference

Click on the “Chair” tab (found on the upper left)

For step 1.) scroll down and find the Edit Submission Settings link. Click on it
 Submissions questions are questions you want the authors to answer when they create their submission.

Scroll down in the Additional Submissions Questions box, click the Add New Question Link. Enter the question title, choose the type (multiple choice, comment etc) specify whether the question is required, and enter the question text. Click Submit. Repeat for all submissions questions.

For step 2.) you can still use the Edit Submission Settings page. Scroll down to the Subject Areas box and click on the Add New Subject Area link. Enter the title and description for the subject area, click save, and repeat for all subject areas.

Also on this page you can change a number of other settings. One you might want to consider is the Allow Conflicts of Interest Selection box. If you do not want the authors to specify conflicts of interest with the reviewers uncheck this box. If you leave this box checked you will need to add reviewers in step 3.)

For Step 3.) Click the Chair Tab, Click Bulk Import Reviewers link. On this page you can download the Bulk Import Template and edit it, then save the updated file on you machine and upload it to create all the reviewers. If you wish you email a notice to the reviewers when you upload the Bulk Import file.

With those three steps completed you can enable submissions. Click on the Chair Tab. Click on the Edit Conference Settings link. Carefully check the dates for each conference activity and correct the deadlines as needed. Now you can set >New Paper Submission< and >Edit Paper Submission< to enabled, and authors will be able to create new submissions until the deadline specified.

We hope these instructions have been clear and will enable you to start using the CMT site. Please feel free to contact us at cmt@microsoft.com with any questions you have about using the CMT site for your conference.

We would welcome your feedback for this "Getting Started Guide"

Help users report they cannot create accounts

One thing to note is that users must have cookies enabled in their browser in order to use CMT.

However for a variety of reasons some users may not be able to create an account because of the security verification step. In this case you can use the following procedure to assist them.

One thing to check is to see if these individuals are already users. If their email address has been entered in the system as a co-author they will not be able to create a second user account. If they are already listed in the CMT as users they will need to use the "Forgot You Password" link on the login page to set their password. Then they can edit their contact information (if needed) using the "Edit contact info" link on the right side of the CMT Web page.

If they are not already CMT uses then, You can add these individuals as users yourself. The process is not terribly direct, however if you use the following steps it will work.

Click the Bulk Import Reviewers Link

Click the Bulk Import Template link and save the excel file.

Edit the Excel file and add the email addresses and names of these two users.

Import the file. You can choose to add the users as reviewers and choose not to send them an email message.

Then Click on Chair to go back to the Chair Console Click on the View/Edit All Users and Roles link Find the first user in the list. Click on Manage Roles link for that user.

Choose "Remove" and Choose "Reviewers" role to remove this user from the reviewer role.

Click Submit

Repeat this process for the each user to remove them from the reviewer role.

Or you may find it easier to create a dummy paper and create new users by adding them as co-authors to the dummy paper. You can delete this paper before you run the Reviewer Assignments. (And can restore it from the deleted papers if you wish to re-use it to create more users ...)

Then they can use the "Forgot You Password" link to set their password, or if you prefer you can use the "Reset User Password" link and email them their password.

Alternatively email us at cmt@microsoft.com, send us the email addresses of the users and their names and we can create user account for them and send them their password.

Assigning Reviewers

From the CMT [Automatic Assignments](#) web page

Automatic Assignment of reviewers requires the following steps:

Step 1: Select the papers for which you want to assign Reviewers automatically.

Step 2: Specify Minimum number of requested Reviewers per Paper.

Step 3: Specify Maximum number of requested Papers per Reviewer. After Step 3, Click on "Run Automatic Assignments" to run the algorithm and display the Results.

Step 4: Click on "Save Changes and Finish" to accept the results of Automatic Assignments or Click on "Discard Changes and Start Over" to reject the results and Start all over again.

Additional Notes

It is important to be patient when using the automatic assignment of reviewer. Each click in this wizard will require the utmost patience. If

you click a second time, that will start the process over from the beginning and as a result take even more time.

If you find that network latency issues prevent you from using this tool email us at cmt@Microsoft.com and we will determine the best way to address the issue.

Configuration steps for Reviews

Before you start the reviewing process we suggest that you configure the following.

1. Configure Review questions: Please make sure that the review questions are defined as per your requirements.

Choosing the visibility attributes: Please check the visibility of the review questions/responses by the authors.

a. Visible to authors during feedback: If a question is marked as visible to authors during "Author Feedback", Authors can see these questions/responses during author feedback. Since Author Feedback is part of reviewing, please make sure that only review questions/responses you want authors to see are marked as such as part of review settings.

b. Visible to authors: If a question is marked as visible to authors, Authors can see these questions/responses once Author Notification is marked complete, after paper decision making.

Choosing the right review questions type: If you want to perform aggregates over review question responses to help in paper decision making, (for e.g. average (rating)), please choose the type that is associated with numeric labels (choose rating as multiple choice and NOT multiple choice (Text)). The aggregates over numeric types can be subsequently used in filter and sorting conditions in the "View/Edit Paper Reviews, Discussions, Author Feedback And Status" page.

Choosing review question as Required: If a review question is selected as Required, Reviewers must answer this for the review to be considered as complete.

2. Control the Reviewer Bidding: Once you enable Reviewer Bidding and the deadline for bidding is not over, Reviewers can submit their bids for the various papers.

3. Paper Assignment: You can assign papers to reviewers. You can use the automatic assignment provided by the system, or you can assign the papers to reviewers manually.

4. Allow reviewers to submit reviews: If the Review Submission is enabled and the deadline for review submission is not over, reviewers can submit their reviews. We suggest you do this after you have done the paper assignments.

5. Allow reviewers to discuss reviews: If the Review Discussion is enabled and the deadline for review Discussion is not over, reviewers can discuss their reviews.

Paper Statuses, using filtering and Bulk Edit

Create your own paper statuses

In order to set the paper status, you will first need to create the paper status. To create a paper status go to the Chair console and click on the "Edit Submissions Setting" link. Scroll to the bottom of this page and you will see a Paper Status box where you can Add paper statuses. You can choose to add accept and reject if those are what you wish, but the choice of which paper status to use is entirely up to you.

After you have created the paper statuses use the "View/Edit Paper Reviews, Discussions, Author Feedback And Status" link to set the paper statuses.

You can click the "edit paper status" link to set the statuses for each paper.

Use Bulk Edit with Filtering and Aggregate Columns

If you have many papers you may prefer to add aggregate columns to the display and use filtering and bulk editing. To begin click on the "Edit Aggregate Columns" to add information like the Average(Overall Rating) as a column to the View/Edit Reviews table. You can also add the individual review questions using the "Edit Review Columns Button".

You can sort the papers by clicking on the column heading above the column you wish to sort. Clicking a second time will change the sort order on that column (i.e. it switches between ascending and descending).

If you wish you have the option of filtering the results and then using bulk edit. In the "specify filter criteria box" click "add" choose a column value and an operator (> < = etc) and enter a value. You can specify multiple criteria and they will be ANDed. Click "Find Papers" and then only the papers matching the criteria will be displayed.

You can use the "Bulk Edit" option to set paper statuses for all the displayed papers.

On this page you can also click the "Email" menu and send emails to all authors or only the primary contact authors. This will let you send groups of authors email messages to let them know their paper was accepted or rejected (if you filtered on paper status after entering you decisions.)

How do I enable discussions and control permissions setting for reviewers using the discussion page?

Paper Discussion allows the reviewers to discuss a paper online. The Review discussion wizard allows you to control what information is visible on the paper discussion page and which reviewers can participate in the discussion. The Review Discussion Wizard is a bulk setting and applies permission settings to all papers for which discussion is enabled. You also have the option of using the “Edit Discussions Setting” link for to fine tune which reviewers can participate in discussion for each paper.

Select the papers you want by enabling these for discussion, the reviewers you want to participate (all non-conflicting reviewers), and select the data about the paper you want reviewers to see (view title, and abstract, submission files, view reviews??).

Description of the Paper discussion wizard functionality

The paper discussion wizard allows you to control the data related to the paper, that is made visible to the reviewers during the discussion process.

These are the key components of the Paper discussion wizard.

1. Permissions for a given paper are defined at the following granularity.
 - **View Abstract, and title**
If a reviewer is granted this permission, reviewer can view the title, and the abstract of the paper.
 - **View Submission File –**
If a reviewer is granted this permission, reviewer can view, and download the files for the paper.
 - **View Reviews**
If a reviewer is granted this permission, reviewer can view all the reviews submitted for the paper.
 - **Write Reviews**
If a reviewer is granted this permission, reviewer can submit reviews for the paper, or edit one’s own previously submitted reviews.
 - **View Author Feedback**
If a reviewer is granted this permission, reviewer can view author feedback for the paper.

- View Discussions
If a reviewer is granted this permission, reviewer can view all discussions related to the paper.
- Write Discussions
If a reviewer is granted this permission, reviewer can view, as well as post to the discussions related to the paper.
- View Paper Status
If a reviewer is granted this permission, reviewer can view the current paper status for the paper.
- Aggregates over specific review question responses.
You can define additional aggregates over specific review question responses for a paper and make it available during the discussion process. For example, if there is a review question “Over all rating”, you can define an aggregate as following: *Average of Over all ratings*. A reviewer, if granted this permission, can view the *Average of Over all ratings* for the paper. You can define other aggregates over the different review question responses.

2. Selecting the papers that will be discussed.

Paper discussion wizard affects all the papers that are currently enabled for discussion. If a paper has been enabled for discussion, it automatically gets considered during the Paper discussion Wizard.

On the flip side, if *a paper is not enabled for discussion*, any changes made using the Paper discussion wizard does not impact the paper.

3. Selecting the reviewers who can participate.

For ease of use, there are two settings provided as part of the wizard to select the reviewers you want the permissions for the papers to apply to.

- You may assign permissions for
- Assigned reviewers.
 - All non-conflicting reviewers.

How does the wizard work?

There are four steps in the Review Discussion wizard. Step one: Set the activity permissions for the assigned reviewers and all non-conflicting reviewers. Step Two, select which aggregate review columns will be displayed on the discussion page. Step three control permissions for who can see the aggregate columns wizard. You can allow the assigned reviewers and the non-conflicting reviewers

to see different sets of aggregate columns. Step four, this step allows you to remove aggregate columns from the discussion page. Be certain after completing each of these steps to move to the confirmation page and click finish to save the changes to the database.

In step One you see that you have two groups of reviewers you can set permissions for. The assigned reviewers for a paper and all non-conflicting reviewers. You can choose to grant various activity permissions on this page. For example you can allow non-conflicting reviewers to read reviews or add comments to the discussion.

For the next step, step 2 you can choose which aggregate review questions will be visible on the display form.

For step three you can choose who can view those review columns. Perhaps you wish to allow the assigned reviewers to view all columns, but do not want the non-conflicting reviewers to see the reviewer confidence column. You can control the visibility of columns to the two sets of reviewers here.

In Step four the display may be confusing, because the first time you use the wizard it will say no aggregate columns defined. This may seem wrong if you have just defined aggregate columns. Not to worry. If you have saved aggregate columns (i.e. completed the wizard once before by clicking finish) then you will see the aggregate columns on this page and this page allows you the opportunity to remove those aggregate columns from the discussion page.

The final page gives you the opportunity to click finish to save the changes. One: if you do not click finish then none of the changes you have made will be saved. When you click finish the settings you have specified in the wizard will be applied only to those papers that have already been and are currently enabled for discussion. So go to this last page and click finish.

The settings in the Wizard are not saved as defaults in any way. If you enable discussion for more papers after using the wizard, These newly enabled papers will not get any settings applied. You must re-run the wizard. The second time you run the wizard it will not remember the settings you used from before and you will have to re-specify all of them.

Usage scenarios

- 1. The chair wants to enable all papers for discussion. However, the chair wants the discussion to include only assigned reviewers.**

You can achieve it as follows

Enable discussions for all papers.

Use the wizard to limit the paper discussion to the set of assigned reviewers for all papers (In Step 1)

- 2. The chair wants to enable a selected set of papers for discussion. However, the chair wants the discussion to include only assigned reviewers.**

You can achieve it as follows

Enable discussions for papers the chair

Use the wizard to limit the paper discussion to the set of assigned reviewers for all papers (In Step 1)

Subsequently you may extend the discussion to all non-conflicting reviewers, and provide them access to paper-related information.

- 3. After the completion of wizard, I enabled a paper for discussion. However the settings from the wizard do not seem to apply to the paper.**

That is correct. You must re-run the wizard to set the permissions individually using the “Edit Discussion Settings” link for the paper. The setting for the wizard are not saved as defaults.

- 4. After the completion of wizard, I enabled a number of papers for discussion. How do I make the previously used settings apply to the newly enabled papers?**

A few papers -> can use the Edit discussion Permissions Page for each paper individually

A large set -> Can use the wizard.

- 5. I previously enabled set of paper discussion related permissions for reviewers. Now how do I revoke the permissions for a reviewer?**

You can use the “Edit Discussion Settings” link for each paper and revoke or change the permissions for a single reviewer.

- 6. I previously enabled set of paper discussion related permissions for reviewers. Now how do I revoke the permissions for all reviewers?**

Use the wizard and in step one uncheck all the boxes. Uncheck all boxes on the third page, then be sure to go to last page of the wizard. This will revoke permissions for all reviewers.

- 7. I want to add a paper status to be made visible to the reviewers. I already have an aggregate over a particular review question as part of discussion. How do I add that?**

Go into the wizard, on the third page, check the two boxes to make that aggregate column visible to both assigned reviewers and non-conflicting reviewers. It is important to note that you need to replicate the previous settings when you re-run the wizard. They will not be saved. If you do not set the same activity permissions on the first page and the same aggregate column visibility permissions on the third page of the wizard then clicking finish will revoke permissions. Be sure all the settings in the wizard are what you want for your conference before you click finish.

8. How does it compare with Virtual PC meeting in CMT 1.0?

It provides the same functionality of enabling online discussion amongst reviewers, however it provides much more finely grained control of permissions.

Export List of Papers with all Authors

From the View/Edit Active Papers link available from Chair Console, you can apply the filter "Paper Status=Accept".

Then you can use "Export Metadata as" HTML|EXCEL.

This will export meta-data for all papers that have Paper Status = Accept. This contains the names of all authors (primary contact author is marked with a *). Please note that there is additional meta-data that gets exported as well.