Basic Objectives of Program

- Acquire conference publication content for post-conference sales and promotion
- Provide optimal dissemination of IEEE conference publication content
- Allow conferences to close their financial books in a timely fashion
Expanded Scope and Vision

- View had traditionally been focused on managing acquisitions and conference proceedings-only product offerings
  - Conference experience and end-user experience did not often get as much (or any) attention
- Current scope provides more holistic view of overall conference publishing business
  - More focus on publication activities at the conference and post-conference, end-user requirements
Services

- Inclusion IEEE Xplore® database
- Indexing (INSPEC, others)
- Catalog numbers (ISBN, etc.)
- Registration with Library of Congress
- Worldwide sales and promotion
- Other
Evolution of Conference Publications Dissemination

Conf Pubs

Single Sales
(print/fiche)

Conf (print)

POP (print/fiche)

OOP (print/fiche)
Evolution of Conference Publications Dissemination

- MDL (online)
- IEL (online/DVD)
- Single Sales (print/CD-ROM)
- Conf (print/CD-ROM)
- Article Sales (online)
- SMDLs (online)
- POP All (online)
- POP Extra (print)
- POP (print/online)
- POP+ (print)
- Enterprise (online)
Process for Inclusion

- Only meetings that are sponsored, co-sponsored (financially or technically) or published by IEEE are eligible for inclusion
- Submit IEEE Conference Publication Form
  - Form provides key information regarding your publication plans
  - Note: This is the key step in the process and must occur well in advance of publication production (ideally, at least 6 months prior to meeting)
  - Note: Submission of form does not guarantee inclusion
Process for Inclusion (cont.)

Once received and processed, staff provides Pub Chair (or designee) with Letter of Acquisition (LoA), which includes key information:

- International Standard Book Numbers (ISBNs)
- International Standard Serials Number (ISSN), if applicable
- IEEE Catalog Number and Library of Congress Number
- Content submission requirements
- Copyright information
- Delivery details
- Estimated payment information
- More
Process for Inclusion (cont.)

- Process also accounts for requests from conferences in which IEEE is involved but is not holding the copyright
  - All appropriate permissions are requested from copyright holder
- Form can be found at Online Resource Center for Conference Publication Organizers (www.ieee.org/confpubcenter)
  - Under “Information for Use when Interacting with IEEE”
OK...I’ve submitted the form and received my LoA...now what?

- Ensure that the relevant information provided in the LoA is included in your publication
  - ISBN/ISSN
  - Copyright info
  - IEEE Catalog Number and Library of Congress Number
- Prepare required Xplore-compatible submission
  - In addition to any formats being distributed to attendees
- Submit content to IEEE (ideally within one week after conference but no more than 30 days)
  - Follow instructions in LoA regarding submission requirements and delivery
  - TIMELINESS OF CONTENT DELIVERY IS MAJOR ISSUE FOR IEEE
    - Impacts many things, including how often your content is accessed
    - No payments made to conference until content is received
Need Help?

- Contact IEEE Conference Content Management staff
  - ConfPubs@ieee.org
  - Will provide direct support for issues they manage or will direct you to appropriate contact(s)
- Visit Online Resource Center for Conference Publication Organizers (www.ieee.org/confpubcenter)
- Additional information on tools and services available for assistance with publishing activities to be presented next by Gordon MacPherson
Proceedings In-Depth:
IEEE Conference Publishing Tools

Gordon MacPherson
IEEE eXpress Conference Publishing
Overview

This workshop is designed for conference publication chairs who wish to become familiar with freely available IEEE conference publishing tools.

We will focus on the following tools in this presentation:

1. Manuscript templates
2. eCopyright form (eCF)
3. PDF eXpress
4. Packing List Generator (PLG)
5. Packing List Checker (PLC)
6. Inclusion of multimedia elements (extended objects) as value-added content
1. Manuscript Templates
Manuscript Templates for Conference Proceedings

- Available in MS Word (Windows) and LaTeX (Unix or Windows) formats
  - Also posted on the right side of the eXpress Conference Publishing team’s homepage (under “Authors”) at http://www.ieee.org/web/publications/pubservices/confpub/index.html, and on the left navigation bar of every PDF eXpress site home page
- Formatted to adhere to the appearance of the standard IEEE two-column format used in IEEE Transactions
- Margin Specs:

<table>
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</thead>
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</tr>
<tr>
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</tr>
<tr>
<td>Bottom:</td>
<td>0.625”</td>
<td>13 mm</td>
</tr>
</tbody>
</table>
What do the templates look like?

Paper Title (use style: \textit{paper title})
Subtitle as needed (\textit{paper subtitle})

Authors Name/s per 1st Affiliation (Author)
line 1 (of Affiliation): dept. name of organization
line 2: name of organization, acronyms acceptable
line 3: City, Country
line 4: e-mail address if desired

Authors Name/s per 2nd Affiliation (Author)
line 1 (of Affiliation): dept. name of organization
line 2: name of organization, acronyms acceptable
line 3: City, Country
line 4: e-mail address if desired

\textit{Abstract}—This electronic document is a “live” template. The various components of your paper [title, text, heads, etc.] are already defined on the style sheet, as illustrated by the portions given in this document. (Abstract)

\textit{Keywords-component; formatting; style; styling; insert (keywords)}

I. \textbf{INTRODUCTION (HEADING I)}

This template, modified in MS Word 2003 and saved as “Word 97-2003 & 6.0/95 – RTF” for the PC, provides authors with most of the formatting specifications needed for preparing

not as an independent document. Please do not revise any of the current designations.

III. \textbf{PREPARE YOUR PAPER BEFORE STYLING}

Before you begin to format your paper, first write and save the content as a separate text file. Keep your text and graphic files separate until after the text has been formatted and styled. Do not use hard tabs, and limit use of hard returns to only one return at the end of a paragraph. Do not add any kind of pagination anywhere in the paper. Do not number text heads—the template will do that for you.
2. Electronic IEEE Copyright Form
The Electronic IEEE Copyright Form (eCF)

- **What is the eCF?**
  
The eCF is a web-based, digital version of the IEEE Copyright Form. It functions by way of an interactive ‘Wizard’ that determines the author's copyright status through a series of questions and replies, and then brings the author to the appropriate form to sign.

- **What is the basic requirement for use of the eCF?**
  
  Use of the eCF is open to any IEEE conference publications chair who wants to link his or her manuscript submission site to the eCF tool, and who has previously registered the submission site with the eCF system as a ‘trusted source’.

- **What happens next?**
  
  Authors will input their paper’s metadata as part of the submission process for their final, approved paper. This metadata is passed along simultaneously to the eCF system. The eCF tool is then accessed directly by authors. The “Wizard” guides authors to the appropriate form, which is signed by typing in their names and clicking on a "Submit" button.
More eCF questions and answers

- **How is an author's copyright status determined?**

  The author's copyright status is established by determining (through the eCF Wizard) the type of employer for whom the author works (for example, private industry, U.S. Government, or a Crown Government).

- **How do I "sign" the IEEE Electronic Copyright Form?**

  Simply by typing your name at the proper location.

- **Does a typed name carry the same legal weight as a handwritten signature?**

  Yes. Until the Electronic Signatures in Global and National Commerce Act ("E-Sign") was signed into law in 2000, we were required to obtain a handwritten signature on all copyright transfer forms. The E-Sign Act now gives an electronically signed form the same legal effect as that of an original, hand-signed document.

- **How does this tool benefit me as a conference publications chair?**

  The burden of transferring copyright is shifted from the conference pubs chair, to the authors.

3. PDF eXPress
PDF eXpress is an IEEE-sponsored tool that assists conference authors in meeting the latest IEEE Xplore® requirements for PDF files. Usage is restricted to conferences that have completed the acquisitions process through the IEEE Conference Publications team.

PDF eXpress is a software package that will perform one of two functions:

- It will convert a non-PDF source document into a PDF that meets IEEE Xplore® requirements, or...

- It will confirm that an author-generated PDF meets IEEE Xplore® requirements (and if not, it will identify the issues that are causing problems for that PDF).

It is important to note that PDF eXpress is not a paper submission or collection site – it is a freely available tool intended for conversion and/or validation of FINAL paper submissions.
Why should I recommend that authors submitting papers to my conference use PDF eXpress – what are the benefits?

• Help your authors convert a wide range of application formats (including Word, LaTeX, Pagemaker, Quark eXpress, Powerpoint) to PDFs that meet IEEE Xplore® requirements

• Check author-created PDFs and report whether or not they meet IEEE Xplore® requirements – avoid the delay and extra costs involved in manual scanning of problematic files

• Get assistance in correcting problems with PDFs from an experienced support technician

• Improve the onscreen quality of your proceedings: the paper appears in IEEE Xplore® exactly as the author intended it to

• Contribute toward ensuring that your conference proceedings will be posted on IEEE Xplore® in a timely fashion (while recognizing that there are a number of other variables that can also affect timeliness)
As a Pubs chair, how do I get my own PDF eXpress site?

- You will receive a welcome package via e-mail, including a project-specific URL, and Conference ID to send along to the authors whose papers have been accepted for presentation at your conference.
- Place a prominent link on your conference’s homepage to your PDF eXpress site (as in this example):

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IEEE PDF eXpress™

PPP2007 has registered for use of a new IEEE tool:

The new IEEE Xplore® Requirements for PDF have been enforced since 2005. All conference articles submitted for inclusion in IEEE Xplore must adhere to the IEEE Xplore PDF specification for compatibility.
How does an *author* start using PDF eXpress?

*First, set up an ‘author account’ on the site…*
In function, what does PDF eXpress look and act like?

Check or Convert

Paper Information

Enter Title Info:

Submit File for Checking or Converting

Return to Home - Title Status
How do I know that my file was converted successfully?
(Note circled areas – these fields are populated from information the conference pub chair provided when requesting the PDF eXpress site set-up)

Home - Title Status

Welcome Gordon MacPherson,

- To begin, click on the "Create New Title" button. You can convert 10 source files and check 3 PDF files with one Paper ID.
- You are encouraged to correct all content, spelling, and grammatical errors before using this service.

(Click on the Paper Title to view the PDF)
(Click on the column heading to change the table sort)

<table>
<thead>
<tr>
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<th>Paper Title</th>
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</thead>
<tbody>
<tr>
<td>PDFexp10567751</td>
<td>Gordon's paper</td>
</tr>
<tr>
<td>Status*:</td>
<td>File(s) Converted--PDF available</td>
</tr>
<tr>
<td>PDF Checks:</td>
<td>0 of 3</td>
</tr>
<tr>
<td>Source File Conversions:</td>
<td>1 of 10</td>
</tr>
</tbody>
</table>
What happens when my file fails PDF eXpress checking/validation?

<table>
<thead>
<tr>
<th>Paper ID</th>
<th>Paper Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>PDFeXpID680414</td>
<td>Sample PDF</td>
</tr>
</tbody>
</table>

**Status***: Failed PDF Check; use [PDF Check report](#) to find problem(s), and then [get solutions](#).

**PDF Checks:** 1 of 3

**Source File Conversions:** 0 of 10

**OPTIONS:**
- [Try Again](#)
- [Request Technical Help](#)

---

*Manual Conversion = File Type Not Automated - conversion will be performed next business day*

*Error = Please check your email for additional information*

*Upload incomplete = Click on the "Try Again" link to complete the upload of your file*
Using the PDF Check Report

Errors were found on pages 1-3 and in general document properties

- Document contains form fields (1x)
- Document security is used (1x)
- Font Arial-ItalicMT, Arial-BoldMT, ArialMT, Arial-BoldItalicMT is not embedded (283x on pages 1-3)
- Document contains Link annotation(s) (7x on pages 1,3)

Warnings

- External hyperlink is used (1x on page 3)
More help is available!

Use our FAQs (below), or communicate by phone or e-mail with a support technician:

| 1 | How do I find out my conference ID? |
| 2 | How can I get a quicker reply to my question? |
| 3 | What is the PLG? |
| 4 | How does IEEE PDF eXpress work? |
| 5 | What is the conference ID? |
| 6 | What is the difference between checking a PDF and submitting a source file to IEEE PDF eXpress? |
| 7 | The maximum number of PDF Check has been reached. Can I have more? |
| 8 | How do I upload multiple files for one paper title? |
| 9 | Does IEEE PDF eXpress collect my submissions for the conference? |
| 10 | Why did the status of my submission immediately go to "Manual Conversion"? |
| 11 | What is PDF Express? |
| 12 | What if I need to make a change? |
| 13 | I haven't received my Account Confirmation email, and although I know I set up a IEEE PDF eXpress account, I can't login. What should I do? |
| 14 | Why am I having trouble uploading my file? |
| 15 | Why do I get an "incomplete" status, or have no Conversion ID created when I upload my submission? |
My source file has no apparent problems, but I notice a problem in my ‘approved’ PDF… I need more help.

Request Manual Conversion

If you have found a problem with your PDF that is not a problem in your source file, enter a description of the problem in the comments section below, and click on the “Submit” button.

Date: 07-Jul-08
Paper ID (Click on ID to edit paper information): PDFeXp1D680407
File name: ECP.doc

Enter Reason for Manual Conversion:

Submit  Reset
Do I have to use PDF eXpress? What if I am a power user of Acrobat and PitStop?

If you are very comfortable using Adobe Acrobat and Enfocus Pitstop, and do not wish to use PDF eXpress, the following advanced tools are posted on the IEEE Online Resource Center for Conference Publication Organizers:

- PDF Specifications for IEEE Xplore®. This document provides detailed information on PDF requirements for IEEE Xplore®. It also announces the ability to test PDF 1.7 (Acrobat 8) files.
  - Note that this spec has become less restrictive over time – e.g., subsetting of fonts was required previously, but these can now just be embedded
  - The spec is concerned solely with requirements for IEEE Xplore®; there may be other requirements to consider for printed proceedings

- Downloadable parameters for Enfocus PitStop software (Server or Professional). This profile requires PitStop Server 3.51 or PitStop Professional 6.5. It checks that PDFs meet the relaxed IEEE Xplore® requirements as defined in "PDF Specification for IEEE Xplore®."
  - Note that registration is required to download this file
**Pitfall Alert!**

- Once your paper has been processed through PDF eXpress, no further edits or changes should be applied to it – save the PDF eXpress step for your *final, final* paper

- Note that the majority of papers that fail their first attempted loading into IEEE Xplore® were manipulated in some way *after* they were processed through PDF eXpress
4. Packing List Generator
Packing List Generator (PLG)

- The Packing List Generator (PLG) is a Java application, developed to help conference content providers identify all PDF files by their appropriate content type, which ensures that all files can be accounted for during processing.

- To check the validity of a packing list, load the list into the PLG. If there are no errors, you are ready to add the packing list to your Xplore CD.

- The packing list is also a tool for associating extended objects with the paper.
What are the benefits of the Packing List Generator?

- IEEE is able to verify that *all of the content* for that conference has been received.

- Files are loaded into Xplore more quickly and accurately
But what is a ‘packing list’?

- A packing list provides *a mechanism for identifying all the files in a submission*.

- The packing list tells the Database Production team the order in which your files should be displayed.

- Note that the packing list is a *required* component of your Xplore CD.
How does the Packing List Generator work?

- The packing list is divided into two parts:
  - In the header, you will input information (metadata) about who is submitting the publication, and which publication is being submitted.
  - The body contains information about each PDF file, the order of the files, and enables the association of multimedia objects with a PDF file.
  - Note: files must be loaded in the order you wish them to appear in IEEE Xplore – do not cut and paste to achieve this, or otherwise manually manipulate the packing list.
What does the packing list look like?

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2008 Panel of Conference Organizers
Seattle, WA
24-26 July, 2008

978-1-4244-1801-5

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</tr>
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<td>N 2</td>
<td>breaker-page</td>
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<td>orig-research</td>
</tr>
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<td>orig-research</td>
</tr>
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<td>orig-research</td>
</tr>
<tr>
<td>06POCO08_1-4.pdf</td>
<td>N 6</td>
<td>orig-research</td>
</tr>
</tbody>
</table>
5. Packing List Checker
Packing List Checker

- The Packing List Checker (PLC) is used for validating a packing list that was created when *not* using the PLG. *Note that the submission of a packing list that was not created using the PLG is generally not recommended.*
- The Packing List Checker will also validate a file that was created using the PLG, but later manipulated outside of the PLG.
6. Extended Objects (multimedia)
Extended Objects (Multimedia)

What do you mean by ‘extended object’?
- An extended object is a piece of additional content that enhances the value of an article.

What are some examples of extended objects?
- PowerPoint presentations
- Graphical images
- Audio clips
- Video clips
- Executable programs
- Source code
Questions and answers regarding extended objects

*How do I account for extended objects when putting together my Xplore CD?*

- Extended objects are associated with the paper through the packing list. If the extended object(s) are not already in a ZIP file, they will not be processed. Only one ZIP file is allowed per paper. Other archive or compression formats, such as Stuffit, are not supported.

- The Zip file containing the extended objects also needs to include a readme file and a summary file.

*Do I need a fill out a separate IEEE copyright form for my extended objects?*

- Generally speaking, no additional form is required for extended objects since the article’s copyright form is usually sufficient at covering all intellectual property associated with it.
Coming soon…

Links to extended objects from within your paper

What you’ll need to submit:

- The original paper, which would require links to the multimedia object(s)
- The multimedia files themselves
- XML files which contain author-provided, searchable metadata specific to the multimedia, and information needed for the back-end processing of the files
- Reminder: a title must be assigned to each multimedia file (it’s best to do this upon your original submission of the content)

Note that the packing list will remain a requirement

More to come in late summer 2008!
What if I can’t reasonably complete all of these steps by myself – does IEEE provide ‘one-stop shopping’ to address my conference’s publishing needs?

Yes – there are two internal teams at IEEE that provide comprehensive, fee-based conference publishing services, from paper collection, validation, and metadata capture, to posting on IEEE Xplore®:

- IEEE Computer Society Conference Publishing Services (CPS) (Los Alamitos, CA, USA)  
  cps@computer.org

- IEEE eXpress Conference Publishing (Piscataway, NJ, USA)  
  conferencepublishing@ieee.org
Open Question & Answer Session
Thank you for your attention, and for your questions!

If there is an issue that you feel was left out or not covered sufficiently, please exchange e-mail addresses with me after the session, and I will follow up, either by providing you an answer, or by putting you in touch with the person who can.

Thanks-
Gordon

g.macpherson@ieee.org

Special thanks to a number of my fellow IEEE staffers for their assistance in putting together this presentation