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THE EVENT PLANNER'S GUIDE TO TESTING AN ABSTRACT MANAGEMENT SYSTEM

Simple Steps to Ensure a Smooth Call For Papers

No detail is too small when it comes to planning your conference, and that attention to detail includes your abstract management system. Easily avoid any last-minute submission surprises by following the testing tips included in this guide.

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INTRODUCTION

One of the benefits that an abstract management system provides is that it can be configured to match your conference's needs. This flexibility allows you to create an easy submission process for your conference, a review system based on your own criteria, and the ability to build reports that track your submitters' progress. But before you can open your call for papers, there is one final step you need to plan on: testing the system.

Nothing is more frustrating to a submitter (or those volunteering their time to review submissions) than having to deal with technical issues. A poorly set up submission process can deter great speakers and incomplete or garbled information can be a headache for association staff to fix later. In order to minimize any of these complications, it's critical to thoroughly test your submission process before you open up your call for papers.

Advice to "test your site" may sound obvious, but do you know the specific things you should be looking for during your test? Follow the steps in this whitepaper before your collection site goes live to ensure a smooth launch. A checklist is included at the end of this document to help you plan and conduct a thorough test of your abstract management system.

> "For a lot of your conference's submitters, the abstract submission process is going to be the first interaction they have with your association. Taking time to thoroughly test your system is going to help make sure that first impression is a positive one."
>
> -Sean Lawler, Omnipress Product
> Development Manager

DEVELOPING YOUR TESTING PLAN

1. Know What to Test

Before you begin the testing process, develop a plan that outlines the specific parts of your abstract management system that need testing. Some common examples of areas to test include confirming that:

- Presenter information fields display correctly

- Files upload correctly and can be opened by the administrator

- Selectable menu items work as expected

- All required information has been collected

Your system developer may offer additional recommendations on areas that should be included in your testing process. The more planning that takes place at this early stage will help you efficiently move through the testing process.

2. Build a Diverse Testing Team

Regardless of how detailed your testing plan is, there is a good chance that your submitters will manage to use the system in a way you didn't anticipate. That's why it's important to recruit others to help in your testing.

When you are choosing people to help test your site, be sure they represent a variety of ages and have different levels of technical skills. This way, your testers' skill and age levels will reflect those that will actually be using the site.

The obvious choice for your testing team will be from within your association. Staff will be familiar with what your abstract management system is intended to do and will be able to identify issues that might conflict with the organization's collection goals. Also, people within your association are invested in the success of your event, so they will be more willing to make sure your conference attracts the best educational materials possible.

Don't be afraid to enroll people outside of your organization in the testing process, as well. Not only will this expand your testers' demographics, but it will also expand the geography of your tests. It's important that some portion of your testing happens

"An additional benefit to having multiple staff members test your collection system: These testers can become your experts, with enough experience to train other staff and submitters on how to use the system. Some may even be willing to offer technical assistance to submitters when your collection opens."

-Dave Schutz
Omnipress Project Technician

outside of your association's main office. Having friends, neighbors, or relatives use the internet connection at their homes or local coffee shops creates real-life scenarios that can help you identify any issues your organization might have missed.

Another important reason to recruit a tester from outside your association is to make sure your

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submission process is clear to someone who was not involved in creating the process. If someone with no experience with abstracts or paper collection can figure out what they need to do, and in what order, you can feel confident that your process will run smoothly.

3. Leave Yourself Time

Testing a system as complex as your abstract management system is not something you want to do at the last minute. The actual amount of time you should dedicate to testing your collection site will vary for each association. However, a good rule of thumb is that if you are opening a completely new site, you should allow one full week to conduct your testing process. If you are re-activating a site you have used in the past, less time will be needed.

Be sure to leave enough time to submit any change requests to your developer, and even more time for them to receive your feedback and offer solutions to your issues. Your developer might require anything from a few days up to two weeks to make the necessary changes. Finally, allow your organization enough time to

review the changes the developer has made before opening your site to submitters.

PUTTING YOUR TESTING PLAN INTO ACTION

Conducting your testing process in the correct order can have a dramatic impact on the overall time it takes to test your abstract management system. The most efficient method of working through your tests is to mimic the workflow when your site is open. This means you should start with entering submissions into the system, assign and manage reviews from multiple reviewers and ensure that your communication tools perform as expected

1. Start with Your Submission Process

The first place to begin your testing is with the submitters' experience. Providing an easy process for submitters is important since most submissions are typically made as your deadline approaches. Technical issues at this point in your conference planning timeline can be very disruptive.

As you and your team add submissions to the system, be sure to pay particular attention to any fields that rely on "conditional logic." Conditional logic fields enable additional options for the submitter to provide information once selected. These menu options are developed using computer code that allows submitters to progress down multiple, paths.

For example, your submission process may ask the submitter to choose between delivering an oral presentation and creating a poster display. Once the submitter selects one of these options, additional relevant menu items appear based on the submitter's answer.

If your submission process allows for multiple, paths, it's important to perform the submission process

multiple times to fully test each option. Before testing begins, assign specific roles to the people recruited to help test your site.

Making changes to these questions after submissions have been completed is extremely difficult to do.

2. Test Your Administration and Review Workflows

Verifying the workflow for submitters is only one portion of the testing process. Equally important is confirming the administration and review process.

Every piece of data that is collected during the submission process should be reviewed. As you examine the completed submissions, the first step is to see that the administrator has the ability to download all of the submitted information. At the same time, you will ensure that the system collected all the data provided by the submitter in the correct format.

In addition to determining the correct format of the data, another area to be on the lookout for is to ensure all required information has been collected. If the developer has not built the system correctly,

it may be possible to finalize a submission without completing all the required fields. Having to track down missing information after your submission site closes is a time-consuming chore. Take the time now to think through your needs for the conference program, mobile app, or anywhere else speaker information will be used.

Finally, be sure to test the review process to ensure that your custom scoring and approval processes are set up to your specifications. Test the review workflow by assigning submissions for your testers to review. Ask for their input on the process. Are the testing criteria clear? Is the review workflow intuitive? In the case of blind reviews, is the appropriate information hidden? Address any issues in the review process now so your volunteer reviewers can focus on providing you their input, not troubleshooting.

3. Evaluate Your Messaging Tools

Testing the communication tools that are a part of your abstract management system is another important step that is often overlooked. If your system supports sending personalized messages to each user, testing this ahead of time is a good way to avoid having to troubleshoot undelivered messages later.

CONCLUSION

An abstract management system turns managing the complex task of collecting and reviewing conference content into a logical process. Before you open the site to submitters though, it's important to perform a thorough test and identify any potential issues. With a detailed plan in place, assemble a diverse team to help you anticipate how your submitters will interact with the site. Be sure to check every option a submitter may encounter, especially if your submission forms contain conditional logic. The submissions created during your initial tests can be used to ensure a smooth experience for your reviewers as well.

ABSTRACT MANAGEMENT SYSTEM TESTING CHECKLIST

Testing your abstract management system is an important part of your pre-conference planning. It can also be a daunting task without a well-defined plan in place. Use this checklist as a guide in developing your testing workflow and to keep track of your progress as you put your plan into action.

1 Prepare for Testing

Event Name: _____

Organizer Main Contact: _____

Date Collection Site Opens: ___/___/_____

Project Manager/Developer: _____

Contact information: _____

Testing To Be Completed By: ___/___/_____

2 Review the Submission Process

- ○ Complete each step of the submission process
- ○ Verify that all needed information is collected
- ○ Upload test files through the interface
- ○ Ensure presenter information fields display correctly
- ○ Test each menu option available to submitters
- ○ Submit tech support request
- ○ Test special character support for science topics
- ○ Check log in procedure
- ○ Additional items to review:
  - ○_____
  - ○_____
  - ○_____
  - ○_____

3 Verify the Submitted Data

- ○ Review test submissions to see that data is received in the correct format
- ○ Confirm all required fields have been completed
- ○ Identify any additional information that needs to be collected from submitters
- ○ Check that uploaded files open correctly
- ○ Test that all messaging tools work properly
- ○ Verify that reports produce expected results
- ○ Test scheduling tools
- ○ Test review assignment roles
- ○ Additional items to verify:
  - ○_____
  - ○_____
  - ○_____

4 Submit Feedback to the Developer

- ○ All change requests have been gathered from testers
- ○ All change requests have been reported to the developer
- ○ Developer has addressed all your requested changes

- ○ Requested changes have been re-tested and work correctly
- ○ Collection site testing is complete!

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Working with organizations to collect and deliver content is what Omnipress was founded to do. We think beyond your initial collection, providing guidance and insights so that your entire process, from collection through production, is significantly easier to manage.

Discover the difference that working with a company founded to help associations can have on your conference.