

Setting Up Zambia from Scratch

Percy, Bendyogagirl

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Abstract:

Zambia is a piece of Con Management Software. This document is a “How To” guide to help set up your Zambia FFF-branch instance from scratch for your convention. This is still a work in progress.

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1 Before beginning

There are some required programs to run the Zambia software. The following programs must be running on whatever server is going to serve up your Zambia instance: (LAMP or WAMP (WAMP is untested))

- apache
- php
- mysql
- some form of email sending software (MTA)
- SFTP/SCP

Either on your staging machine (where you will be uploading the information from) or on your server (if you are loading directly to there) you must also have:

- svn
- text editing program

1.1 Definitions

Table 1: Acronyms and Definitions

Acronym or Term	Definition
precis	An element in your schedule. Could be a class, panel, gathering, party, room-coverage, lounge, or whatever else you might have on your schedule
LAMP	Linux + Apache + MySQL + PHP/Perl/Python
WAMP	Windows + Apache + MySQL + PHP/Perl/Python

1.2 Decisions

You will need to decide the following before you install initially:

1.2.1 Standalone/Combination

Is this system going to be a standalone system, or are you going to interface it with Congo, or another piece of registration software?

1.2.2 Single/Multiple installation

Is this going to be a single instance of Zambia, or are you going to have multiple instances of Zambia running on the same machine with some shared resources?

1.2.3 Webserver

Where is your web installation location (whatever directory you will be putting your files into)? Often something like /var/www/Zambia-Con or /home/username/public_html/Zambia-Con or the like.

1.2.4 db_name.php file

This information will go in the db_name.php file when you install it.

- Required information for the program to run:
 - Database hostname (**DBHOSTNAME**). If you are setting things up on the same machine that MySQL is running on, *localhost* should be what you are using for **DBHOSTNAME**.
 - Database username (**DBUSERNAME**). The user created for the Zambia program to access the database(s).
 - Database password (**DBPASSOWRD**). The password created for the Zambia program to access the database(s).
 - Main database name (**DBDB**). The database for all the single convention specific information to live in.
 - Biographical information database name (**BIODB**). The database for all the (possibly shared between Zambia instances) biographical data. If you are having the same people either for multiple years, or for multiple activities, it makes sense to centralize the information, otherwise it could be a one-shot for the particular convention.
 - The Reports database name (**REPORTDB**) points to where the reports are kept. It is one of the main ways of interaction with the data about the convention. If you have multiple Zambia instances it makes sense for this to be a single, shared resource.
 - The CongoDump database name (**CONGODB**). Congo is another piece of software designed to interact with Zambia. The information in that set of databases can be accessed in a variety of ways.
 - The Limits (**LIMITDB**) and Localizations (**LOCALDB**) databases are used to key things that are specific to a convention, but might all want to live in a central database, for ease of deploying new conventions.
 - The TimeCard database (**TIMECARDDB**) might want to be specific to a convention, or generalized across many different activities of your organization, it often is local to the convention instance, but there are some reasons to have it in a single, externally served database.
 - The convention database keying tag (**CON_KEY**) is useful when the Limits and Localizations are stored in a single table, to distinguish between which instance needs to be pulled.
 - your host name (**MYHOST**) (If you are setting things up on the same machine that MySQL is running on, *localhost* should be what you are using for **MYHOST**) (this doesn't actually go in the file)
- Extremely useful information:

Most of this information, currently in the db_name.php file, would all be candidates to be in the Localization database.

 - Con name.
 - Zambia administrator email.
 - Brainstorm email.
 - Programming email.
 - Registration email.
 - Number of days the con will run (code works for 1-8 currently.)
 - Date and time the con will start (In the format of yyyy-mm-dd HH:MM:DD for parsing)

- purposes. Suggested 00:00:00 for the start time.)
- URL of the con (without the leading http:// in the URL.)
- Logo for the con (gif, png, etc.)
- Availabilty Records (starting number of "availability" fields to render in the "when I am available" form, 8 is a good default.)
- Are kids available (This should probably be set to "FALSE", it is a hold-over from backwards compatibility.)
- Default Duration of the classes. (How long, in H:MM format that the classes are expected to be.)
- Duration in Minutes (Should probably be "FALSE": TRUE: in mmm; False: in hh:mm - affects session edit/create page only, not reports.)
- Grid Spacer (The time divisions in the fixed grid produced, in seconds. For example 1800 is 60 sec/min and 30 min, and a good default.)
- Very useful information
 - Guests of Honor badgelist (if you have specific featured Guests of Honor, the badgeids get listed here, comma seperated.) (This is being migrated as a flag for a presenter.)
 - Preferred total number of sessions upper limit (so your presenters don't oversubscribe themselves 5 is good default for a 3-4 day con.) (This should move to the Limits database.)
 - Preferred daily number of sessions upper limit (3 is a good default.) (This should move to the Limits database.)
- Description minimums and maximums

All of this information should be migrated to the Limits database. Only set a value if you need it, unset values are simply presume there is no limit to the information in that direction. At some point, the precis descriptions will be folded into the same, or a similar structure to the Biographical Information is, currently.

 - Minimum web biography character length (Some cons have minimum biographical information requirements.)
 - Maximum web biography character length (Some cons have a different limits for what is on the web, and what is in the book, 3000 characters is a good starting default for the WWW.)
 - Minimum book biography character length (Some cons have minimum biographical information requirements.)
 - Maximum book biography character length (if there isn't a difference in the limit, but still, there is a limit, set to the same as the web maximum.)
 - Minimum uri biography character length (the URI block is often unlimited in either direction.)
 - Maximum uri biography character length (the URI block is often unlimited in either direction.)
 - Minimum picture biography character length (the picture line is often unlimited in either direction.)
 - Maximum picture biography character length (the picture line is often unlimited in either direction.)
 - Minimum web precis character length (You need a precis description of at least this long to be acceptable, 10 as a good default.)
 - Maximum web precis character length (3000 as a good default.)

- Minimum book precis character length (if there isn't a difference in the limit, set it to the same as above for these, as well.)
- Maximum book precis character length
- Minimum precis title character length (You need a precis title of at least this long to be acceptable, 5 as a good default.)
- Maximum precis title character length (50 as a good default.)
- Minimum name character length (if there is a need to make sure all names are of at least a specific length.)
- Maximum name character length (if there is a need to make sure all names are no more than a specific length.)
- Other interesting settings
 - The linguistic settings (below) will go away once the precis descriptions are migrated to a similar format as the Biographical information currently resides.
 - Is this a bilingual event (This should probably be set to "FALSE" due to it's lack of complete support across the system, and the next few elements in this list, ignored.)
 - What the second language is.
 - Title caption in second language.
 - Description caption in second language.
 - Biography caption in second language.
- The rest of the file should not have to change.

2 Downloading

If you are checking the code out directly on the hosting machine, replace the final "Zambia" with what you decided the web install location will be. If not, you can rename it to whatever you wish to call your staging area.

Please, check out the code from:

```
svn co https://zambia.svn.sourceforge.net/svnroot/zambia/branches/FFF/ Zambia
```

3 Local file setup

There are certain localisms you want to set up, outside the svn tree. This is so (should you need to) if an upgrade to the code-base is desired, it can be done, without writing over your customizations.

To begin the process change to your web install location. There you should see a list of files, and you will add one called "Local". When done your list of files should be: These files you will have to create or modify.

3.1 db_name.php

Copy the example webpages/db_name_sample.php to Local/db_name.php as a start, and then put in the values you decided upon before starting the install process.

3.2 FooterTemplate.html

This is where you will put your standard footer, that will be below all the public pages, to customize the look and feel to match your event's presentation.

3.3 HeaderTemplate.html

This is where you will put your standard header, that will be above all the public pages, to customize the look and feel to match your event's presentation.

3.4 Participant_Images

If you choose to have images of your participants with their bios, make this directory, and any pictures that match the badgename of the participant will be put next to the bios.

3.5 Verbiage

If you wish to customize what is put forth to your participants, many of the pages allow for customization. The list of them will grow as more are done. Any information in these files will replace the default text. Some examples of these files are:

3.5.1 BrainstormWelcome_0

```
<P> Here you can submit new suggestions or look at existing ideas for
panels, Meet and Greets, Special Interest Groups, Birds Of a Feathers,
Author Readings, and Author Signings.</P>
```

```
<P> As suggestions come in and we read through them, we will rework
them, combine similar ideas into a single item, split large ones into
pieces that will fit in their allotted time, etc. Please expect the
suggestions you submit to evolve over time.</P>
```

```
<P> Also, please note that we always have more suggestions than are
physically possible with the space and time we have, so not everything
will make it. We do save good ideas for future conventions.</P>
```

```
<UL>
```

```
<LI> <A HREF="BrainstormSearchSession.php">Search</A> for similar
ideas or get inspiration.
```

```
<LI> Email <A HREF="mailto:program@ourcon.org">
program@ourcon.org</A> to suggest modifications on existing
suggestion.
```

```
<LI> <A HREF="BrainstormCreateSession.php">Enter a panel, MnG, SIG,
BOF, et al suggestion.</A>
```

```
<LI> <A HREF="BrainstormSuggestPresenter.php">Enter a suggestion for
a Presenter.</A>
```

```
<LI> See the list of <A HREF="BrainstormReportAll.php">All</A>
suggestions (we've seen some and not see others).
```


 See the list of New suggestions that have been entered recently (may not be fit for young eyes, we haven't see these yet).

 See the list of Reviewed suggestions we are currently working through.

 See the list of Likely to Occur suggestions we are or will allow participants to sign up for.

 See the list of Scheduled suggestions. These are very likely to happen at con.

 Email vols@ourcon.org to volunteer to help process these ideas.

3.5.2 Introduction_Blurb_0

and before I introduce our speaker, let me ask, How many of you are new? Well, let me tell you, you are in for one heck of a ride.<br

3.5.3 Schedule_Blurb_0

Welcome to the Circus Fantastique. We really appreciate all your efforts to make this weekend go so well. Below is your schedule for the weekend. If you have any questions, please, do not hesitate to find our staff in the Green Room, or whomever our point-person is at that time. </P><P>I hope you will have all the fun you can!<hr>

3.5.4 StaffPage_0

<P> Please note the tabs above. One of them will take you to your participant view. Another will allow you to manage Sessions. Note that Sessions is the generic term we are using for all Events, Classes, Panels, BOF/SIG/MnG, other activities, etc. </P>

<P>Current roles:

- Pre-con Logistics: That tall guy, with the 'stash
- At-con Logistics: Bill(1)
- Speaker Liaison: Kat (with a "K")
- Assistant Speaker Liaison: Bill(2)
- Volunteer Captain: Cat
- Assistant Volunteer Captain: The Other Cat
- Green Room Czar: Tim
- Point People: Helium 1, Helium 2, and the Stupid But Cute.
- Schedule Wranglers: The group as a whole

Technical support: Will
(Tentative) Technical Support: Nyot
Bio/copy editing: Rupert
</P>

<P>The general flow of sessions over time is: Brainstorm - New session idea put in to the system by one of our brainstorm users. The idea may or may not be sane or good. It could be too big or too small or duplicative.

Edit Me - New session idea that a participant or staff member entered. An idea entered by a brainstorm user that is non-offensive should be moved to this status. These are still rough and may well have issues. Still could be duplicates.

Vetted - A real session that we would like to see happen. At this point the language should be fairly close to final in the description. Spell checking and grammar checking should have happened. It needs have publication status, a type, kid category, division and a room set. Please check the duration (defaults to 1 hour) and the various things the session might need (like power, mirrors, etc.) This is the minimal status that participants are allowed to sign up for. Avoid duplicates (however the list is still approximately 3 times what will actually run).

Assigned - Session has participants assigned to it.

 Scheduled - Session is in the schedule (do not set this by hand as the tool actually sets this for you when you schedule it in a room!) The language needs to match what you want to see
published.

3.5.5 Volunteer_Jobs_0

<H3>Introducer: (in room)</H3>

 Sign in at the Green Room, so we know everything is covered.

 Collect anything needful, like handouts and blank surveys, or if it is the first class of the day, the signs, from the Green Room.
 Be at class 10 minutes early (at the actual end of the previous class).

 You may, if you wish, pre-stage surveys on people's seats for

when they arrive.

 At the beginning of class, move to the front of the room and do the introduction. The Con Blurb and the speaker(s) bio(s) as provided.

NOTE: A board member or member of the organizing team may step forward to do the introduction, in which case, please hand them the paper to do it off of.

 Take the head count of the class (twice) and write them in the spots provided on the introduction paper.

 Be in the back of the room during class so:

 When the Runner comes to check on the room, you can let them know if there is anything needed.

 If there is vending in the class, you might need to mind the table, while the presenter is presenting, if they don't already have someone assisting them.

 Using the signs provided, give the 10 minute, 5 minute, and Done warnings.

 Hand out/collect surveys and pencils at the end of class.

 Do the hand-off to the next Introducer, which includes the blank surveys and the signs.

 Return the filled out surveys collected folded in the class sheet, when you are checking in at the end of your stint.

<H3>Volunteer: (outside room)</H3>

 Check that people coming into the room have the correct wristbands. If they do not, politely send them to registration (if it is open) to get them. If there is an issue, notify the point person.

 Stay at the door during class to ensure that excessive ins and outs don't occur.

<H3>Runner: (all over con)</H3>

 Ensure that every class room has what it needs.

 Ensure that that A/V and supply needs of a class are met prior to it beginning.

 You can quietly and respectfully bring any supplies into the room as a class is going on, and make sure the Introducer knows what was delivered.

<H3>Green Room: (green room)</H3>

The green room is a space designated for Presenters, Programming Volunteers, Panelists, and Assistants only. While you are welcome to hang out there, it is also the Programming Team's Ground Zero, so, you

might be pressed into service.

- Assist the Program Participants, including disseminating their packets as necessary.

- Check in and out the Introducers and Volunteers as they come on and off their stints.

- Make sure all necessary supplies are available for the volunteers as they arrive for check in, including any handouts.

- Be available to collect the surveys, etc as they arrive.

- Stay in the room and hang out with everyone!

- Be in contact with the Programming Point Person for any problem.

3.5.6 Welcome_Letter_Presenters_0

<P>Dude!

<P>Thanks for helping us, man. You really came through. Like, everyone learned bags of info, and your flow was rad!

<P>Every hand was good, yours were great! High-five!

<P>Dude!

<P>The org-folk.

3.5.7 Welcome_Letter_Presenters_and_Volunteers_0

<P>We would like to express our gratitude for your contribution to the Ancient Order of the Spies Convention. Your expertise, wisdom, experience, and willingness to share your knowledge are critical elements in what will make our event a success. We here at Opsidec do all we can to create a safe and inviting environment for all secretive/spying/hiding people, but we must also rely on support from generous allies such as yourself. Your time and effort are much appreciated, and are a benefit to all in this lifestyle.

<P>Your contribution is helping us to create an event in which any and all people can learn and access information that they may not have available to them in their general life. This process is crucial to expand knowledge and support throughout our cities and also throughout the world. You are assisting in constructing a safe and supportive atmosphere that truly fosters our community. Thank you again for your participation in the Ancient Order of the Spies Convention. Your addition to this event is an advantage to all.

<P>With much gratitude,

<P>Opsidec Limited Organizers

3.5.8 Welcome_Letter_Volunteers_0

<P>We would like to express our gratitude for your contribution to the Con of your Dreams. Your willingness to share your time and energy are critical elements in what will make our event a success. We here at Dream Productions do all we can to create a safe and inviting environment for all sleepers, but we must also rely on support from generous allies such as yourself. Your effort is much appreciated, and is a benefit to all in this lifestyle.

<P>Your contribution is helping us to create an event in which any and all people can learn and access information that they may not have available to them in their general life. This process is crucial to expand knowledge and support throughout our cities and also throughout the world. You are assisting in constructing a safe and supportive atmosphere that truly fosters our community. Thank you again for your participation in the Con of your Dreams. Your addition to this event is an advantage to all.

<P>With much gratitude,

<P>The Programming Team

4 Database setup

You should already have mysql set up. If mysql is not already set up, a good guide to setting up a mysql server is:

http://www.linuxhomenetworking.com/wiki/index.php/Quick_HOWTO_: _Ch34_: _Basic_MySQL_Configuration

The pieces of information you will need are from the above decisions for the db_name.php file:

- database hostname: (**DBHOSTNAME**) (If you are setting things up on the same machine that MySQL is running on, *localhost* should be what you are using for **DBHOSTNAME**).
- database username: (**DBUSERNAME**)
- database password: (**DBPASSWRD**)
- database name: (**DBNAME**)
- Each of the alternate database locators that will be used: (**BIODB**), (**REPORTDB**), (**CONGODB**), (**LIMITDB**), (**LOCALDB**), (**TIMECARDDB**)
- your host name (**MYHOST**) (If you are setting things up on the same machine that MySQL is running on, *localhost* should be what you are using for **MYHOST**)

4.1 Hosted server

If you are going to have your database served from a machine that is running cpanel or some other menu-based software, the method of setting up your database should be documented there.

The chances are your setup will have you:

- create a database or databases
- possibly create a MySQL user
- add MySQL user to the database or databases
- grant the MySQL user all privs.

4.2 Your own MySQL Setup

If you are setting up your own MySQL server, and need to set up the database by hand the following steps should work for you. Don't forget to replace the instances of **DBHOSTNAME**, **DBUSERNAME**, etc. with the proper bits of information.

- Log into the database: (it should ask you for your MySQL root password)

```
mysql -h*DBHOSTNAME* -p -u root
```

- Create your database:

```
create database DBNAME;
```

- Grant **DBUSERNAME** user access with the password of **DBPASSWORD**:

```
grant all on DBNAME.* to 'DBUSERNAME'@'MYHOST' identified by 'DBPASSWORD';  
grant lock tables on DBNAME.* to 'DBUSERNAME'@'MYHOST';
```

- Reset the privileges

```
flush privileges;
```

5 Database populate

change directories until you are in the Install directory, then:

```
mysql -hDBHOSTNAME -p -uDBUSERNAME DBNAME < ./EmptyDbase.dump
```

6 Database tweaks

Some of the tables in the database don't yet have appropriate front-ends, so, to customize them for your particular event, you will need to modify them directly from the MySQL client. As development proceeds, these will get fewer over time.

Currently, they are:

- Divisions:: If you want some other divisions than Other, Programming, Events, Fixed Functions, Hotel, Unspecified, and Volunteer.

- EmailCC:: Needs to be customized for your convention.
- EmailFrom:: Needs to be customized for your convention.
- EmailTo:: Might need to be customized.
- Features:: List of things that can be in a room. Might need to be customized.
- Phases:: The “Phase” you are in will need to be changed as your phase changes.
- PreconHours:: If you are tracking volunteer hours, the PreconHours will probably need to be added to.
- PubStatuses:: Depending on the useage of the software, you might need more statuses than Prog Staff, Public, Do Not Print, and Volunteer.
- QuestionsForSurvey:: You might want to change these.
- RegTypes:: Depending on how you use it, the RegTypes may change.
- Roles:: Fairly standard, but might want to be customized for your convention.
- RoomSets: Fairly standard, but might want to be customized for your convention.
- Rooms:: This definitely wants to be customized for your convention.
- Services:: List of services that can be provided to a room. Might need to be customized.
- SessionStatuses:: Might need to be customized for your convention.
- Tracks:: Probably will want to be customized for your convention
- Types:: May want to be customized for your convention.

Also, some of the Permission interconnects might have to be customized for your convention.

One set of tables that you might be updating across the life of this instance of Zambia is the Reports table. As people generate useful reports, they do tend to get shared. We hope that, should you develop noteworthy reports, you share them back with the community at large, as well.

Loading such reports are often as simple as:

```
mysql -hDBHOSTNAME -p -uDBUSERNAME DBNAME < ./NewReports.sql
```

Sharing them is as simple as, say, exporting your new report called *voltimepanelists*:

```
echo "SELECT * FROM Reports WHERE reportname='voltimepanelists';" |  
mysql -hDBHOSTNAME -p -uDBUSERNAME DBNAME > ./NewReports.sql
```

7 Account creation

7.1 Standalone

If you are going to be using Zambia and not some other registration package, you are going to need access to the program, to begin adding the people who are going to be working with the system.

Currently the easiest way to do so is to add the first three users, by pulling in the Initial_Users.sql file from the *Install* directory.

```
mysql -hDBHOSTNAME -p -uDBUSERNAME DBNAME < ./Inital_Users.sql
```

Once you have done that, you can log in to Zambia using the badgeid of **101** and the password of **changeme**.

You then can modify the appropriate information. Under the *Manage Participants & Schedule* tab, there is an *Administer Participants* choice. Selecting that will allow you to update your password

(important step) and the “Edit Further” link at the bottom of the page will allow you to update the information so it actually matches you.

Feel free to then go and add the rest of your staff, off of the *Enter Participants* link.

7.2 Congo

You might want to complete the activities above, just to make sure you have access, but once you do, you can migrate the congo data into the system, so all the other folks have their information added.

From congo, do:

```
export_program_participants_congo.sql
```

This generates sql that can be, in turn, loaded into Zambia.

7.3 Not Congo

Tying this into another registration system is slightly more complicated. The easiest way is to use the “regtype” field to track the registration number that the various other registration programs give you, and see if there is a way to massage their data into the “CongoDump” format.

8 First steps

8.1 Schedule

Establishing the schedule of activities in the form of a “todo” list is probably the first thing you wish to do.

`YourWebPath/webpages/genreport.php?reportname=tasklistdisplay`

Replacing, of course *YourWebPath* with the proper URL to get to your Zambia-FFF branch install.

8.2 Brainstorming

The Brainstorming links should work immediately. From the top directory (index) page of your site, you should be able to click on the “Suggest a Session/Presenter” button and get right into it.

9 Backing up

Under the *scripts* directory there is a nice little shell-script that you can call with cron to back your information up. If you are to use it, make sure you create the *Data_Backup* directory under the *Local* directory before you use it. I back up weekly several months before the con, start in on daily once heavy changes are being made, so we lose less information if there is a problem, and then about a month or so after the con, back off to weekly or monthly. At one point in time, I was running it hourly, just to be sure.

The script is invoked as:

```
backup_mysql /your/path/to/Zambia-FFF/instance
```


10 Quick and dirty

To build a quick and dirty copy on the same machine as another running version:

- for i in ../Zambia-FFF/* ; do ln -s \$i . ; done
- rm Local
- rm webpages
- mkdir Local webpages
- cd webpages
- for i in ../../Zambia-FFF/webpages/* ; do ln -s \$i . ; done
- cd ../Local
- mkdir Verbiage
- for i in ../../Zambia-FFF/Local/*.html ; do ln -s \$i . ; done
- ln -s ../../Zambia-FFF/Local/Participant_Images .

Finally, copy over, and modify the db_name.php as appropriate To update them all do:

```
for i in FFF-[34]*
do
    pushd $i/webpages
    for j in ../../Zambia-FFF/webpages/*
    do
        ln -s $j .
    done
    popd
done
```