Indico Hands-On Session - Conferences

The goal of this Indico hands-on session is to familiarize with the management of a conference and discover the main features of the tool.

All information to perform the following exercises can be found in 2 places:

- The Indico website help: http://indico.cern.ch/help.py
- Ask the teacher.

Hints described below are usually not in the user guide, but save time and mouse clicks.

Exercises will be done with your direct neighbor.

Agenda

- Short presentation by the teacher, presentation of Indico features.
- Hands-On: please complete all the following steps. If you don't know how to achieve something, check the online Indico user guide or ask the teacher.
- Open questions and tutorials: feel free to ask any question and procedure, the teacher will try to address the problem.

A. Create a Conference

Navigate to the category where you will create your conference

1. Start at http://indico.cern.ch and navigate to the “Hands-on Training” category (full path is Home > Departments > HR > Training > Technical Training > Office software > Hands-on Training).

Hint: To quickly find an event or category in Indico, click on Site Map *in the menu on the right, which will expand the entire tree of categories. Then use the “find in page” feature of your web browser (Ctrl+F in Internet Explorer).*

2. Log in using your NICE credentials.

Create a Conference

3. In the “Hands-on Training” category, create a conference and give it your full name as a title, starting today at 8am and finishing tomorrow at 6pm.
4. After validating the conference creation form, you are redirected to the management area of the conference.
5. Go back to the display of your conference to see how it looks like.

Hint: use this icon to leave the management area and go to the standard event display.

B. Modify the conference web portal

Configure the menu of the conference

6. Go back to the management area of the conference (click on the icon) and click on the “display” tab.
7. Disable the “Contribution list” link.
8. Change the title of the “Scientific Programme” link to “Conference Programme”.
9. Create a new link named “Conference Home page” and pointing to http://cern.ch
10. Create a new page named “How to come to CERN” and use the editor to create some content.
11. Create a new spacer.
12. Move up the spacer between “conference home page” and “How to come to CERN”.
13. Check the result by going back to the conference display.

General display Options

14. Go back to the “Display” tab of the management area and change the color of the background and text of your conference.
15. Add a logo to your conference (for example this one: http://indico.cern.ch/images/logo_indico.png - you will need to right-click on the image, select Save Image As… and then store it locally before uploading it to your conference)
16. Click on to check the result on the conference display page.

17. The instructor has already prepared a page which you can use to check that you've followed the steps above correctly. You will find this conference in the same category as yours.

Special Announcements

18. Go back to the "Display" tab of the management area and enable the Dynamic announcement features.
19. Enter this text "WARNING: REGISTRATION CLOSES IN 5 DAYS" as a special announcement (don't forget to save)
20. Check the result (the warning should appear at the bottom of the event main page).

Hint: The "Now playing" option is used to display the list of talks which are currently going on. To be used only on the dates of the conference.

C. Conference programme and call for abstract

Prepare the Call for abstract

You now act as the conference manager

21. Go to the "Main" tab of the management area and enable the "Call for abstracts" feature (click on the Call for abstracts link at the bottom of the page)
22. Go to the "Main" tab and create two new types of contributions: "Paper" and "Poster"
23. Go to the "Programme" tab and create two new tracks: "Computing" and "Accelerators"
24. Check the result by clicking on the "Conference Programme" link on the conference display page

Hint: Once the "Call for abstracts" is enabled, you will see a new "Abstracts" tab appear in the management area.

25. Click on the new "Abstract" tab then on the "Call for abstracts" sub-tab. Enable the abstracts submission by clicking on the "Enable" button
26. Check your conference display page: a new "Call for abstracts" section appears in the left menu.
27. Go back to the conference management area and nominate a track coordinator for the "Computing" track: Go to "Programme", click on "Computing" then select the "Coordination control" tab. Click the "add" button and select your neighbor as track coordinator.
28. Define a **notification template** for accepted abstracts. Go to the "Abstracts" tab, "Call for abstracts" and add a new notification template ("add" button down the page). Enter the following fields:

    Title="email for accepted abstracts"
    To addresses="submitters"
    Subject=" [%(conference_title)s] Your Abstract has been accepted!"
    Body=" Dear %(submitter_first_name)s %(submitter_family_name)s,

    your abstract "%(abstract_title)s" has been accepted in track
    "%(abstract_track)s".
    you can access it here:

%(abstract_URL)s

Best regards,
%(conference_title)s organizers"

Save the template, then click on its title.
Add a new condition for which this email will be sent: select "in status ACCEPTED" then click on "new". Select contribution type "any", track "any" and submit. This email will now be sent each time an abstract is approved. You can define similar templates for rejected abstracts, merged abstracts…

29. Check the result by using the "preview" tab.

Submit an Abstract

You now act as the author and submitter of an abstract

30. Go to the display page of the conference created by your neighbor
31. Submit an abstract in the "Computing" track ("Track classification").
32. Check the "View my abstracts" link and modify the title of your abstract

Propose to approve an Abstract

You now act as the "Computing" track coordinator

33. Click on the "Manage my track" link and select the abstract you have just submitted
34. Propose this paper to be accepted with a comment to justify your choice.

Approve an Abstract

You now act as the conference manager

35. Go back to your conference and to the management area, "Abstract" tab. If your neighbor has reached the same point as you, you should see his/her abstract in the "List of abstracts". Click on the title of the abstract, then accept it.
36.

Submitted abstracts (1) PDF of all participant list of all all abstracts

ID	Title	Type	Status	Acc. Type	Submission date
1	My abstract	Paper	proposed to be accepted	Paper	29 May 2008

Once an abstract is approved, it is automatically converted into a contribution and will appear in the "Contributions" tab.

37. Check the "Contributions" tab to make sure the abstract appears there.

D. <u>Preparing the conference timetable</u>

Timetable

Scenario: you're organizing a two-day conference on the subject of computing. The first day is dedicated to software, while the second day is centered on hardware. Since there's only one subject being discussed, there will be only one session spanning the two days, with one slot for each day. The timetable for the conference will look like this:

Day 1

08:00-18:00	Computing: Software

Day 2

08:00-18:00	Computing: Hardware

38. Go to the "Timetable" tab and create 1 new session called "Computing" and spanning over the 2 days of the conference.
39. Update the title of the first slot and give it title "Software". (Click on the "Computing" session title on the general timetable then click on the "edit slot" button). Adjust the duration as stipulated in the timetable above.
40. Create a new slot on day 2 entitled "Hardware". (Click on the "Computing: Software" link in the main timetable to access the session timetable, then use the new slot button which is found at the bottom of the timetable on day 2). Adjust the duration as stipulated in the timetable above.
41. Go to the "Contributions" tab, select the submitted abstract and change the session to "Computing".
42. Go back to the general timetable, select session "Computing: Software" and add the contribution.
43. Go to the conference display page and check the result by clicking on the "Timetable" link in the left menu.
44. **Creating a booklet.** You can create a pdf of the timetable by clicking on the icon on this page.

E. <u>Using the registration feature</u>

Create a Registration Form

You now act as the conference manager.

45. **Enabling the registration feature.** Go to the "Main" tab of the management area and enable the "registration" feature (click on the "registration form" link at the bottom of the page). Enable also the epayment.
46. Once the feature is enabled, a new "registration" tab appears. Click on it and enable the registration form display (this will create a new "Registration" link in the menu of your conference display page).
47. Go to the conference display page and check the result by clicking on the "Registration form" link in the left menu.
48. **Being warned when someone registers.** Go back to the management area, "registration" -> "setup" page. Click on the modify button and add your email address in the "Notification" -> "To list" field. You will then receive an email each time a new participant registers.
49. **Enabling the e-payment.** Go to the "e-payment" tab and enable the e-payment.

50. **Changing the fields in the registration form.** On the same “Setup” page, disable the “Further information” section of the form by clicking on the icon. The icon turns to red which indicates that the section is disabled. Disable also the “Sessions” section.
51. Edit the “Social event” section by clicking on its title. Add two entries in this section “Conference Lunch” and “Conference Dinner”.
52. Go back to “Registration” -> “Setup” and add a new section to the form (“new sect.” button). Click on the title of this new section (“Miscellaneous information 0”) to edit it. Change the title to “Conference Objects”. Add a new general field with caption “Tee-Shirt”, type “Multiple choice/checkbox”, “billable”, price “15”. Add also a “Mouse Pad” for “10”.

Register

You now act as a participant.

53. Register in the conference of your neighbor.

Manage the participants

You now act as the conference manager.

54. **Displaying the list of registrants.** Go back to your conference and in the management area “registration” -> “registrants”.
55. **Selecting the fields appearing in the list.** Open the “Filtering criteria” panel by clicking on the icon. Display all the fields by clicking on the icon next to “Display”. Then validate with the “Apply” button. All the registration fields now appear in the list.
56. **Exporting to other formats.** Export the list of participants to Excel by clicking on the Excel icon. (Only the fields selected in 52 will appear in the export).
57. **Getting statistics.** Use the blue “i” icon to get attendance statistics.
58. **Creating badges for participants.** Go to the “Tools” menu and choose “Badge printing”. Create a new badge template and apply it to the list of participants.

F. <u>Other features</u>

59. **Reading Logs.** All important actions done through the management interface are accessible through the “Logs” tab with the date and the user who did the action.
60. **Creating a conference CD/DVD.** The “Offline web site for your conference” feature in the “Tools” tab creates a zip file to put on a CD or DVD with all the web portal of the conference.

Congratulations, the basic Indico hands-on session is complete; please feel free to ask any question and further details on Indico.