collective.conferences

Release 0.2

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CONTENTS:

CHAPTER

ONE

INSTALLATION

You can install the Plone add-on collective.conferences using zc.buildout and the plone.recipe.zope2instance. Thus you could add it to the list of eggs to install, e.g.:

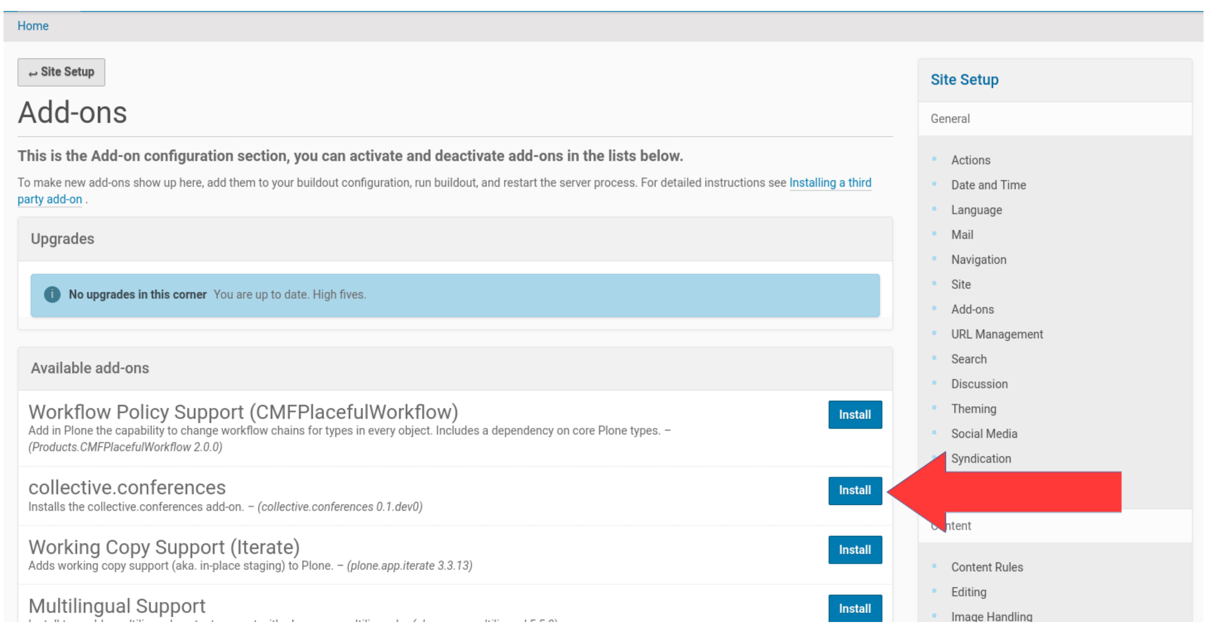
```
[buildout]
    ...
    eggs =
        ...
        collective.conferences
```

Once you have added the add-on re-run buildout, e.g. with:

```
$ ./bin/buildout
```

Once your buildout finished you had to create a new Plone site and then install and activate the Plone add-on inside this new Plone site. Therefor you had to go to the Plone 'Site Setup' adminstration area. If you got administration permissions you find a link to it in the menu entry with your name (or 'admin'). You could reach it directly by adding '/@@overview-controlpanel' to the URL of your Plone site.

In the 'Site Setup' page click on 'Add-ons' and you get a list of the Plone add-ons which are available in your Plone site.



You will get a list like in the above screenshot. Click on the 'install' button next to the 'collective.conferences' list entry and the add-on will be installed in your Plone site.

CHAPTER

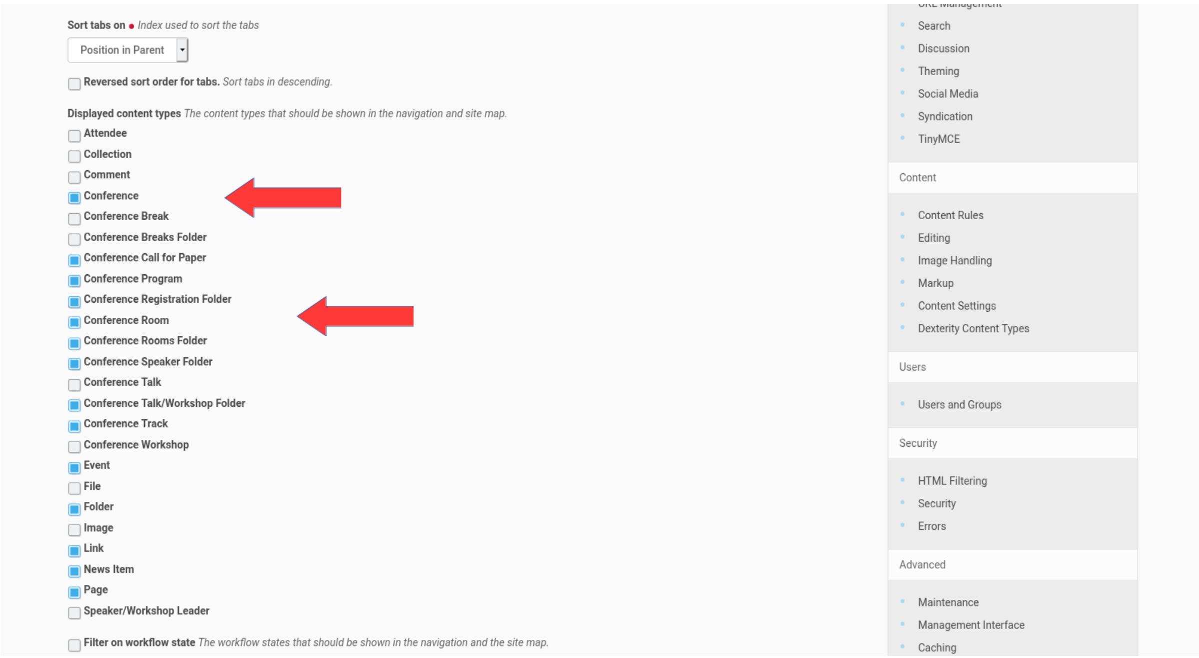
TWO

CONFIGURATION

The configuration of the add-on could be done from the Plone controlpanel 'Site Setup'. You already used this panel during the installation of the add-on. There are entries for different configuration tasks.

2.1 Navigation configuration

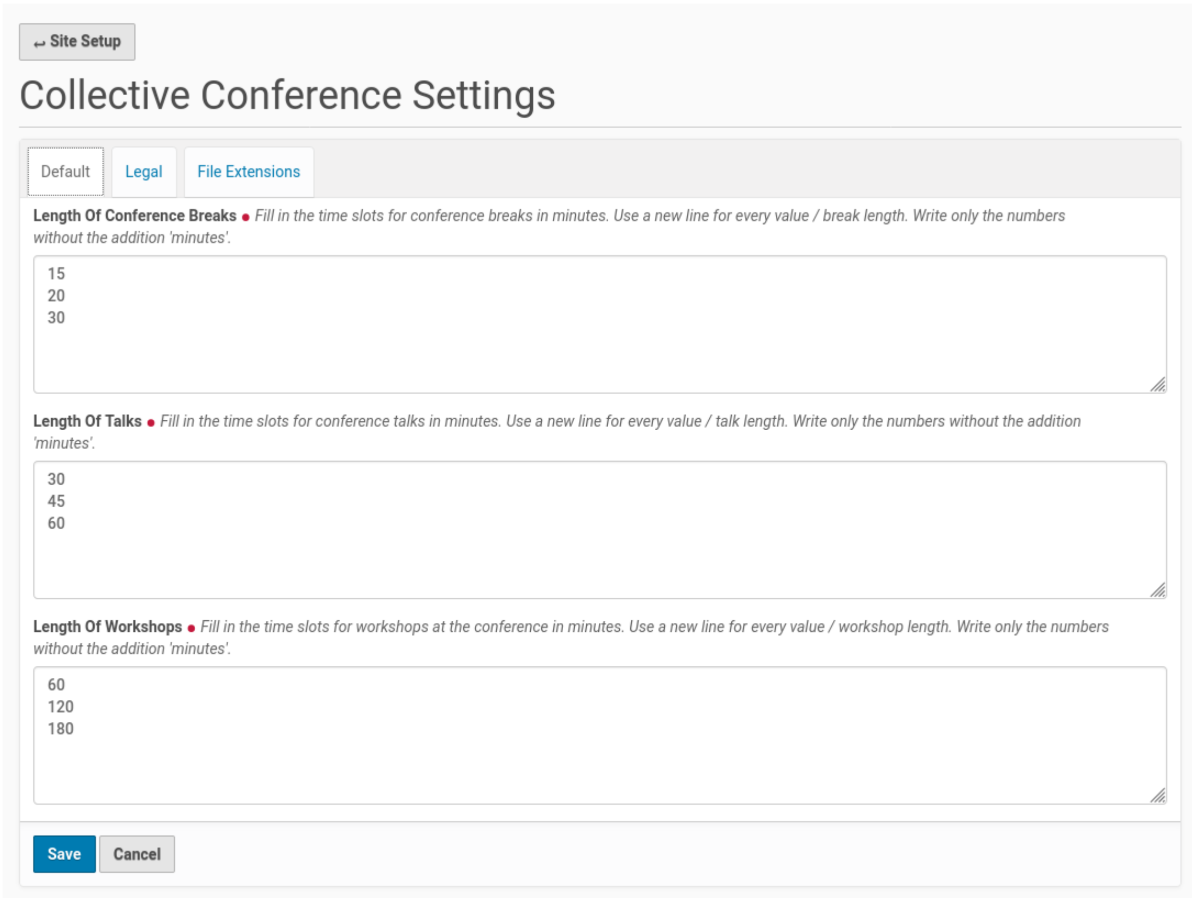
Next you need to go to the 'Navigation' configuration inside the 'Site Setup'. Thus click on the corresponding button and you get to the configuration menu in the screenshot below.



Tick the checkboxes in front of the entries 'Conference', 'Conference Call for Paper', 'Conference Program', 'Conference Registration Folder', 'Conference Room', 'Conference Rooms Folder', 'Conference Speaker Folder', 'Conference Talk/Workshop Folder' and 'Conference Track'. Then save your changes. The necessary steps to setup the navigation of your conference site are done. You should continue with the settings of the add-on (see the following chapter).

2.2 Collective Conferences Settings

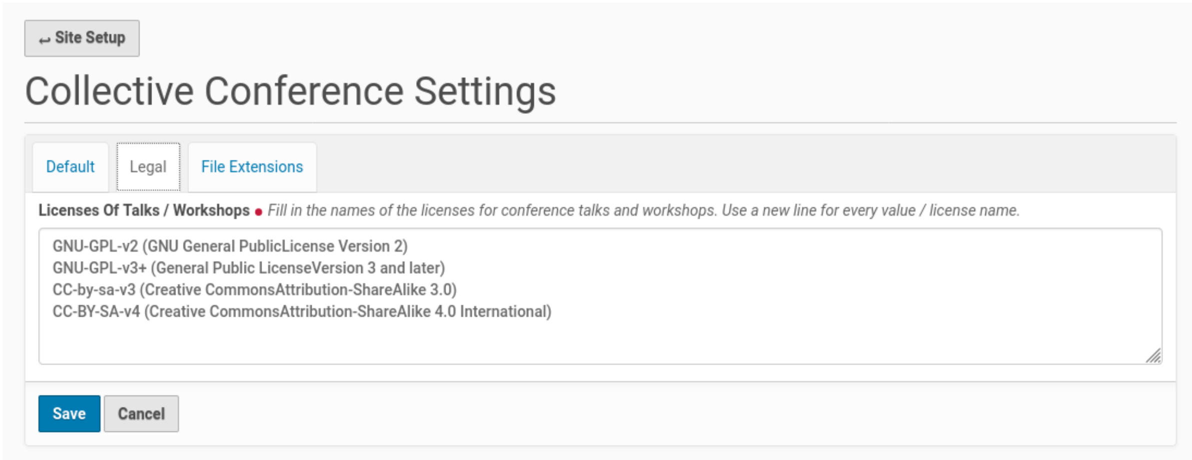
Once you finished the modification of navigation settings you could scroll down a bit on the Site Settings page to the section for 'Add-on Configuration'. There you find a new entry for this add-on with the title 'Collective Conference Settings'. Click on this entry and you get a form with fields to configure the add-on.



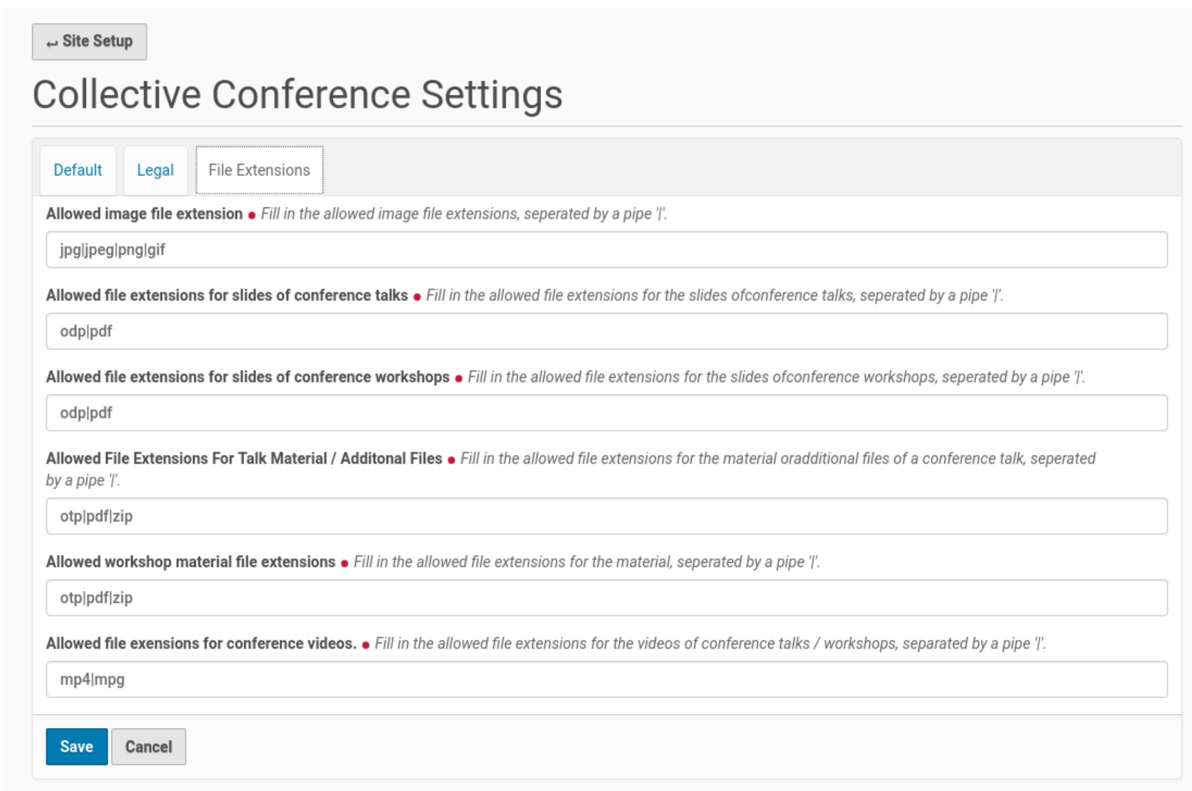
The fields on the first register 'Default' collect the values for the length of conference breaks, talks and workshops. This fields comes already with some default value. You could replace this values with your own choice. Every single value needs a new line.

The entries of the fields for talk and workshop length will be used to configure the available options for the talk and workshop proposal submitters to suggest a time slot. The values of the fields are also used by the conference organization committee to set the length of talks, workshops and conference breaks in the conference program and its tracks.

The second register 'Legal' currently holds only one field to list the licenses, talks and workshops could be submitted. This field came with some default values too. The default values could be replaced by new entries. Every value needs a new line.



The third register ''File Extensions' need your input about the allowed file extensions for images (e.g. pictures), for talk and workshop slides, for additional talk and workshop material and conference videos. If there are different file extensions allowed for this file categories you could enter this file extensions seperated by a pipe into the form fields, e.g.: 'odp|pdf' for slides.



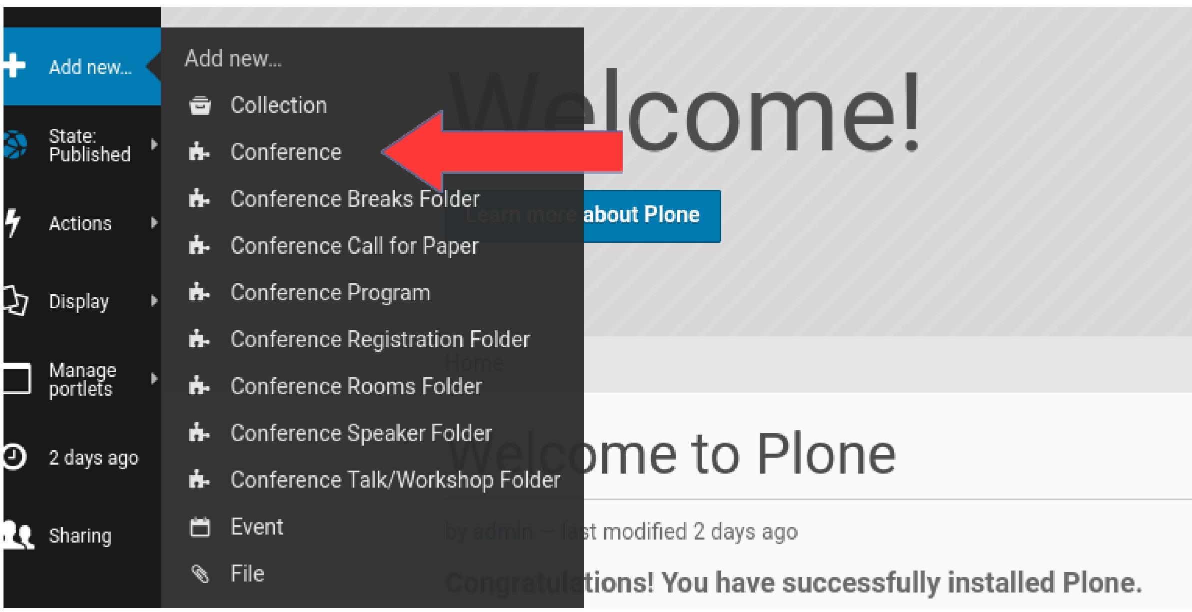
Once you finished the configuration within the fields of all three register save your changes. This will write some new entries to the 'Configuration Registry' of the Plone site. This new Configuration Registry entries will be used for the dynamic content of the edit forms of talks and workshops.

CHAPTER

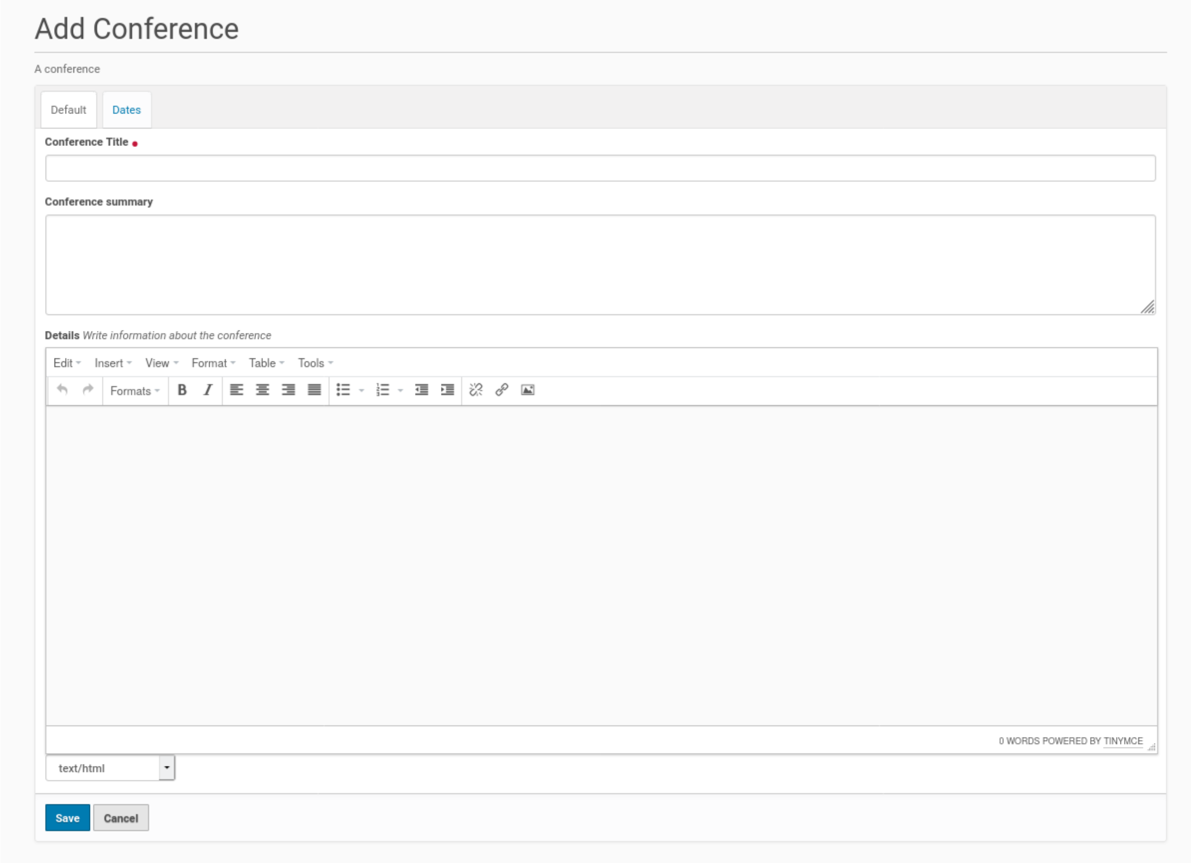
THREE

CONFERENCE PAGE

I assume you want to add new conference page to the Plone site root ('Home') and inform the site visitors about your conference, when it will take place etc. Therefore go to the Plone site root ('Home') and choose from the Plone menu on the left 'Add new'. You get in this menu an entry to create a new 'Conference' (see the screenshot below).



Click on this entry and you get the form below. This is the edit form to create and configure a new conference home page for your Plone site.

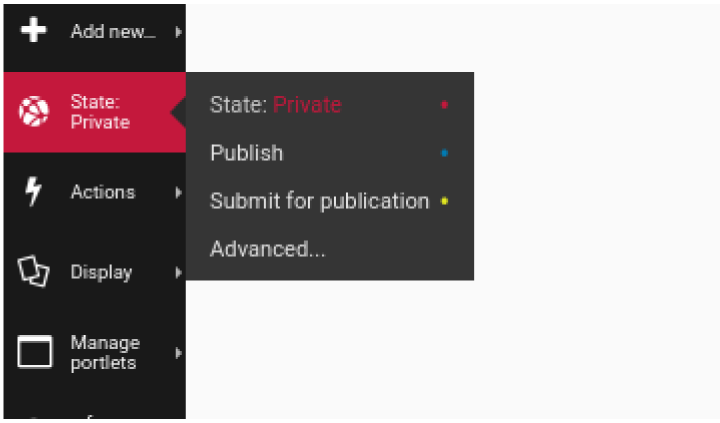


The form contains a field for the title and optional fields for a summary and for detailed text etc. The latter one is a RichText field and offers a lot of design options. It is possible to include e.g. images or links. It is also possible to structure the text of the field, e.g. make it bold or justify it.

Once you finished the edits inside the form, save the form using the corresponding button. You could reedit or expand your content of the site later, if you wish. You could do this by selecting the edit entry on the menu bar on the left side for the conference page.

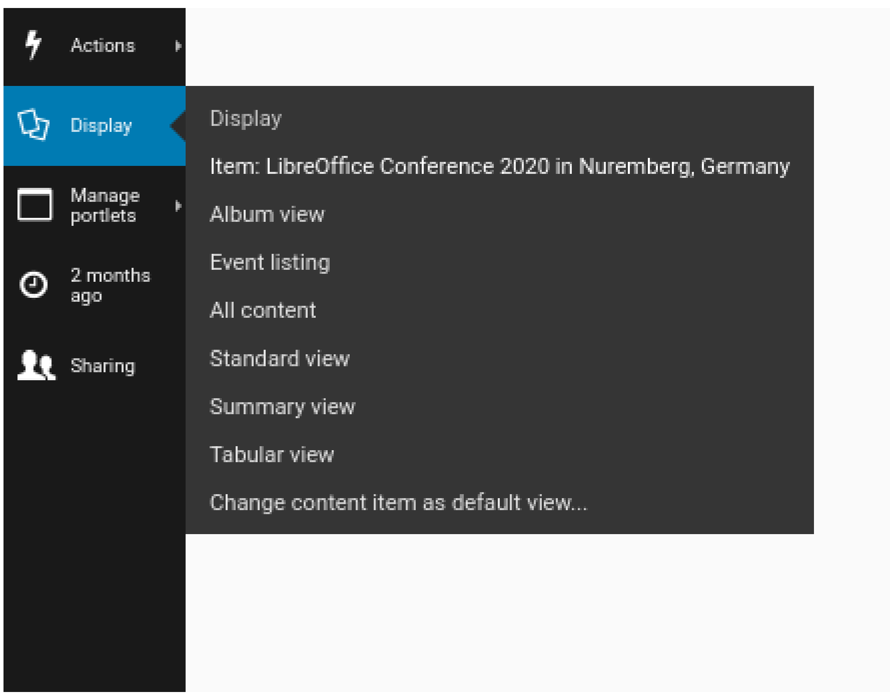
3.1 Publish The Conference Page

Once you finished the edits of the conference page and saved it, it got the default status 'private'. If you have the permissions to publish content on the site you'll find an entry to change this workflow status inside the menu bar on the left side. The corresponding entry shows the status 'private' yet. Click on this entry and you'll get a submenu. If you want tot publish the page directly choose 'publish' from the submenu and your page get published (see screenshot below).



3.2 Make The Conference Page The Home Page Of Your Plone Site

Although the conference page is published yet, it will not show as default entry for the 'Home' entry in the site menu. But it is not difficult to change this. Click on the navigation menu entry 'Home'. Then click inside the menu on the left side the entry 'Display'. There you could choose the entry with the name of your conference page and you're done (see example in the screenshot below).

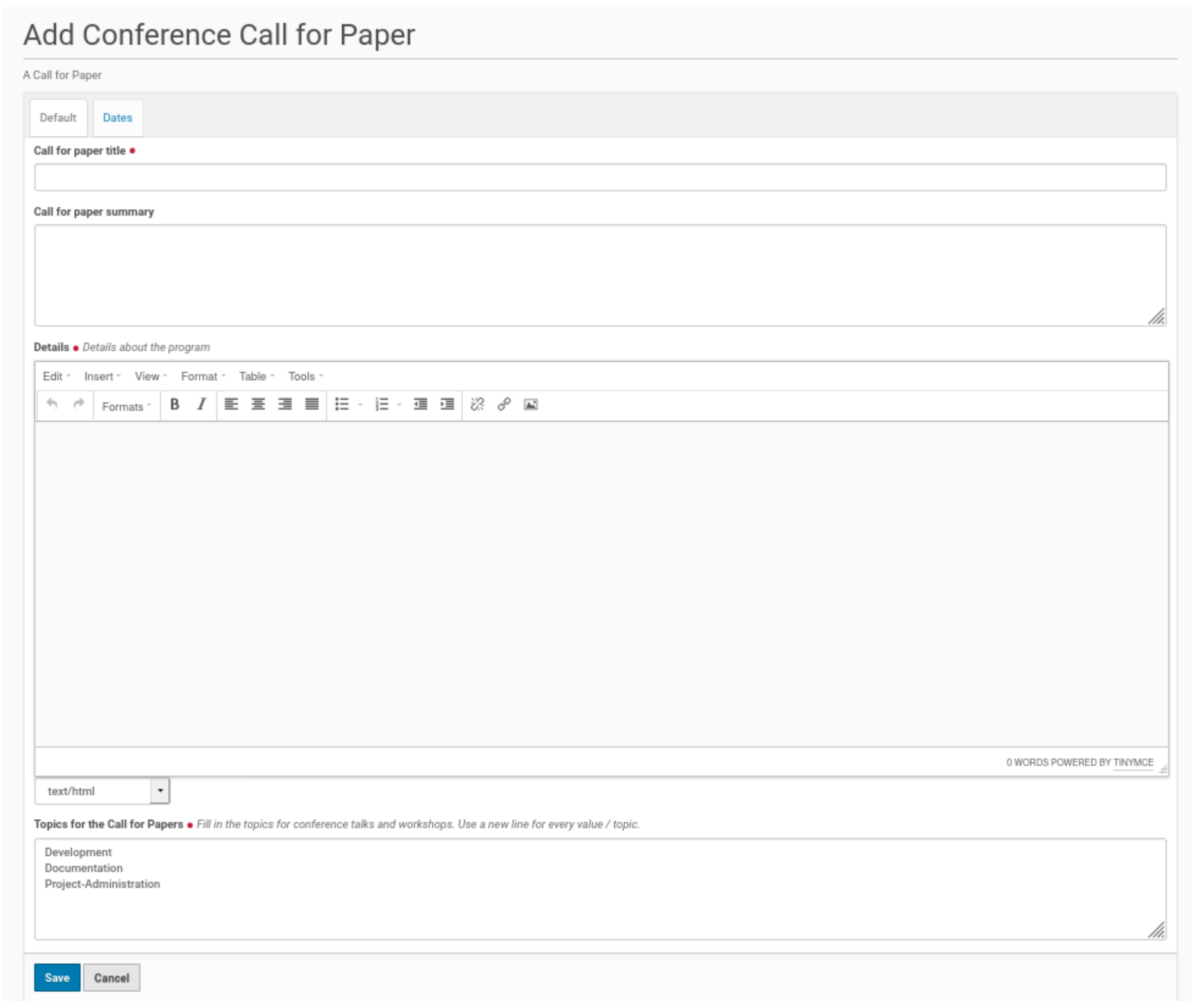


CHAPTER

FOUR

CALL FOR PAPER PAGE

A page for the usual call for papers could be added to the root of the Plone site. Thus click on the 'Home' entry in the menu and choose from the menu on the left side the 'Add new' entry. This opens a submenu. Choose 'Conference Call for Paper' from there. This opens the edit form of a call for paper page.



The field provides mandatory fields for the call for papers title, its details and topics. The summary field for the call for papers is optional.

The details field is a RichText one, which offers a lot of design options for the page, e.g. insert images and links or to format the text.

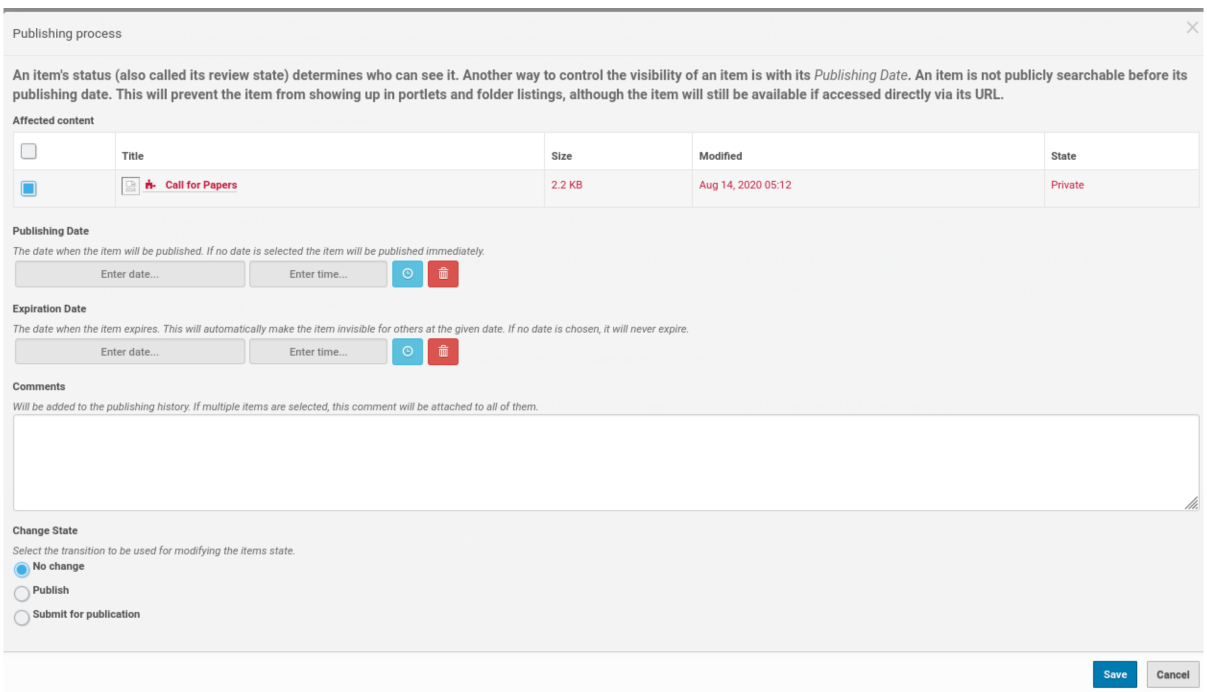
The field 'Topics for the Call for Papers' will hold the topics for conference talks or workshops. This topics will be shown on the call for papers website. The submitters of a talk or workshop proposal will get this topics inside the edit form for a talk or workshop and had to choose one of them for their proposed conference contribution.

Every conference topic in the field needs a new line. The number of topics in this field are not limited.

4.1 Publish The Call for Paper Page

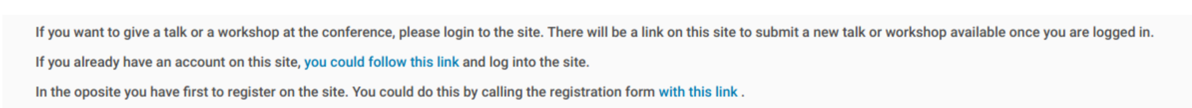
Once you finished the edits of the call for papers page and saved it, it got the default status 'Private'. If you have the permissions to publish content on the site you'll find an entry to change this workflow status inside the menu bar on the left side. The corresponding entry shows the status 'Private' yet. Click on this entry and you'll get a submenu. If you want tot publish the page directly choose 'Publish' from the submenu and your page get published.

Usually the call for papers is only open for a decided time frame. If you want to automatically disappear the call for papers page from the public conference website, choose the entry 'Advanced' from the submenu instead of 'Publish'. You'll get a form, where you could set the publishing date of the call for papers and also the date, when it should disappear from the public (see screenshot below).

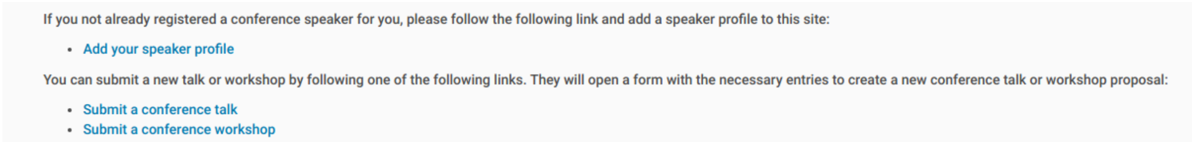


4.2 Call for Paper View

The call for papers view adds different information and links to the page. If a anonymous user (not logged in user) views the page she/he get information about how to log in or how to create a new account on the site (see screenshot below).



Once a user is logged in the content of the site changed and the user get information about creating a new speaker and about submitting a talk or workshop proposal (see screenshot below).


If you not already registered a conference speaker for you, please follow the following link and add a speaker profile to this site:
Add your speaker profile
You can submit a new talk or workshop by following one of the following links. They will open a form with the necessary entries to create a new conference talk or workshop proposal:
Submit a conference talk
Submit a conference workshop

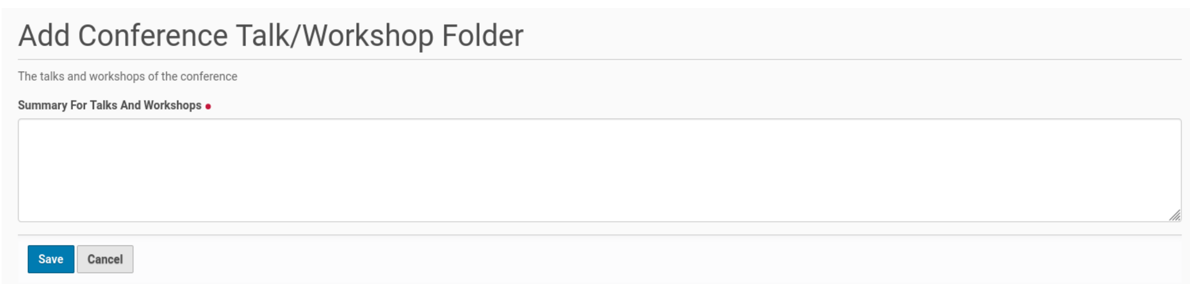
CHAPTER

FIVE

FOLDER FOR TALKS AND WORKSHOPS

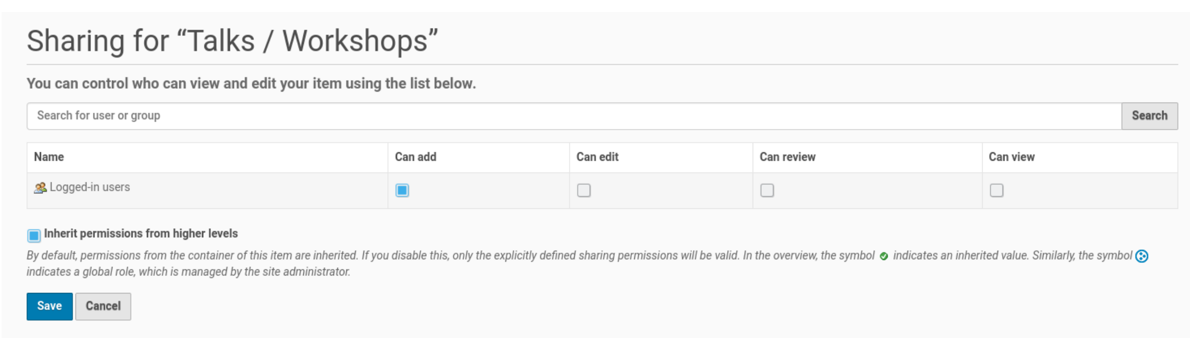
Once a call for papers has been published contributors should be able to submit talk or workshop proposals for the conference. Thus there is the need to create a folder for this content types on the Plone site, because this content types are not allowed on the Plone site and its root, but only inside such a folder.

Therefore you need to create a folder for talks and workshops in parallel with the call for papers page. But it’s not difficult to create such a folder. Go to the Plone site root (‘Home’) and choose from the menu on the left side the ‘Add new’ entry and inside the opening submenu click on ‘Conference Talk/Workshop Folder’. You will get the form shown in the screenshot below.



The title of this folder and its URL are set by default. You need only to add a short description (summary) to the form. Once you finished this text, save your edits. The new folder get the default state ‘private’ then. You need to publish it. You could do this within the menu on the left side. Click on the entry ‘Private’ and choose from the opening submenu ‘Publish’.

Next you need to change the setting of the folder, thus contributors could add their content (proposed talks/workshops) to the new folder. Therefore click on the entry ‘Sharing’ of the menu on the left side. You get the dialog shown below.



Activate the box in front of ‘Can Add’ for logged in users and save your changes. The contributors are able to submit their proposed talk or workshop yet, once they are logged in.

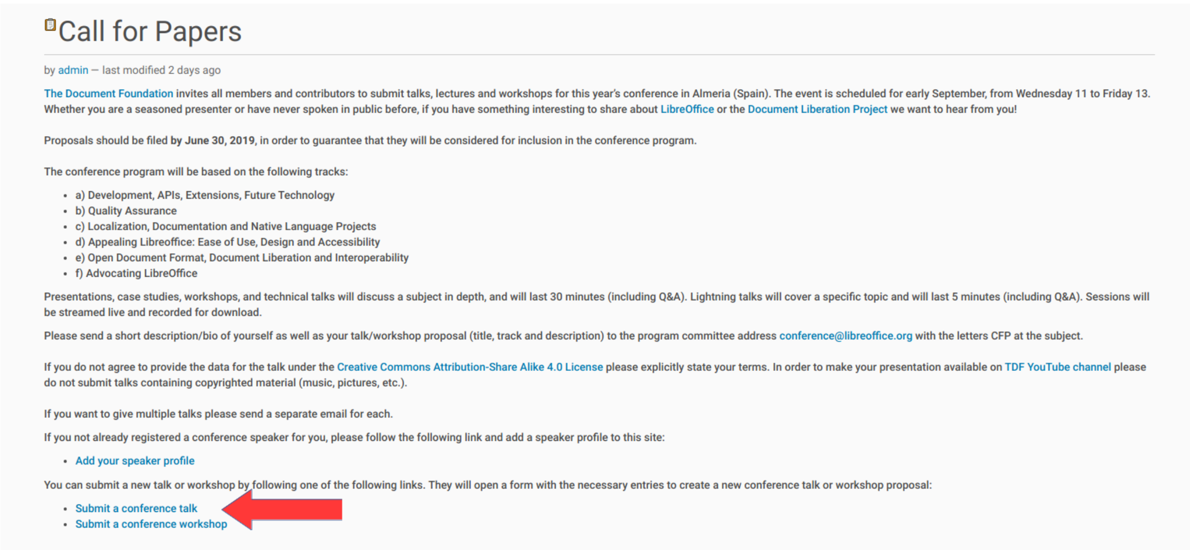
CHAPTER

SIX

TALK

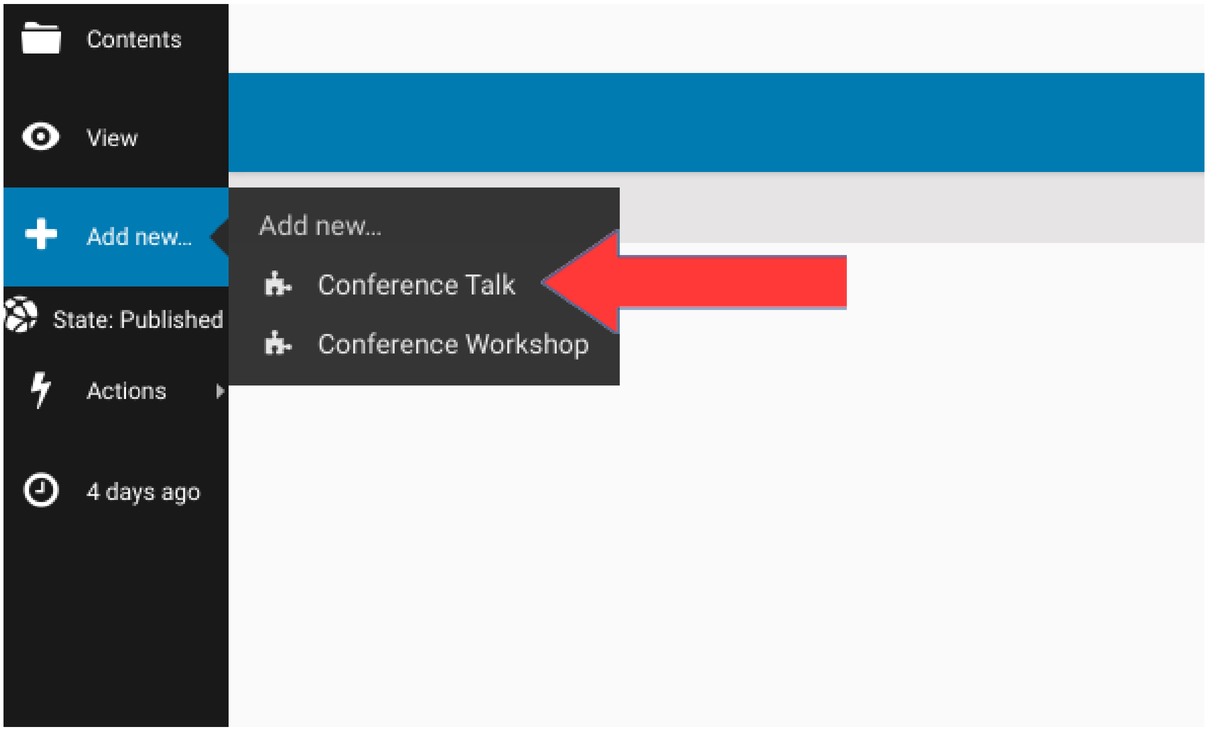
Once the call for papers was published and the folder for talks and workshop was created registered users of the site could add proposals for talks. There are different ways to do this once they are logged-in to the site.

The easiest way is by using the link on the call for papers page (see the screenshot below).

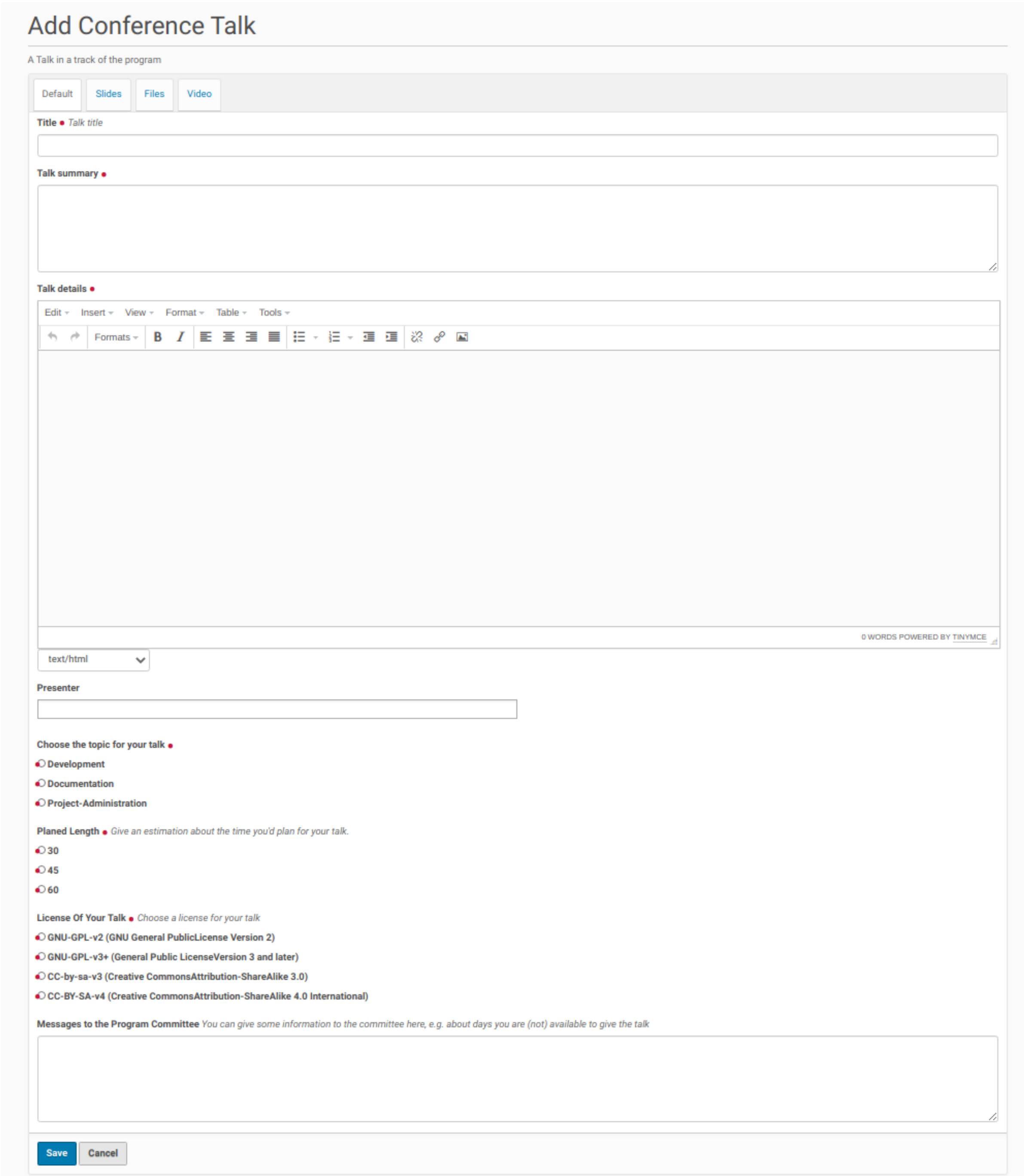


Once the user clicks on this link the edit form for a new talk pops up.

Instead of using this link the logged-in user could go to the folder for talks and workshops (click on the appropriate link in the navigation menu bar) and click inside the menu bar on the left side ‘Add new’. Then choose from the opening submenu the entry ‘Conference Talk’ (see screenshot below).



This leads also to the edit form for a new talk proposal. This form consists currently of four register. The first register ('Default') contains fields for the necessary data of a new talk proposal (screenshot below).



A talk (proposal) needs a unique title, a talk summary and more detailed description. It should have at least one presenter (speaker). But this is not mandatory to make it possible to create and submit a new talk (draft) and ask a competent speaker later to give this talk (maybe with some alignments).

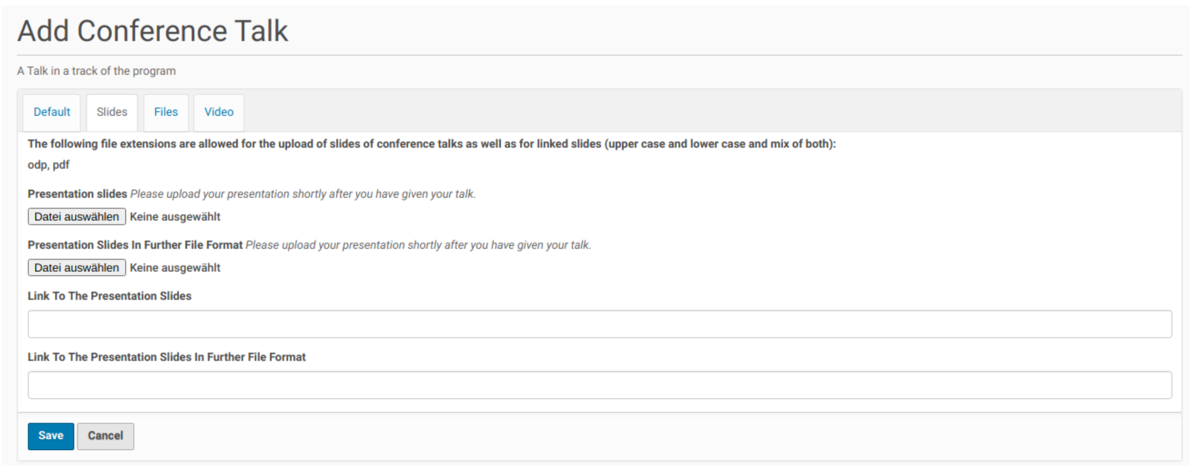
The talk needs an alignment with one of the call for paper topics thus the review committee could assign it to the appropriate conference track. It's also necessary to get information about the planed length of the talk. The submitter of a new talk (proposal) will know best which time slot fits to the content of the talk (the review committee / program owner could adapt this suggestion to the available time slots of the program later). The entry in the field is only a proposal.

It's also necessary that the submitter of a talk proposal adapt one of the available licenses to the talk. And it is possible to give some information to the review committee / the program owner, e.g. about the availability or necessary environment to give the talk.

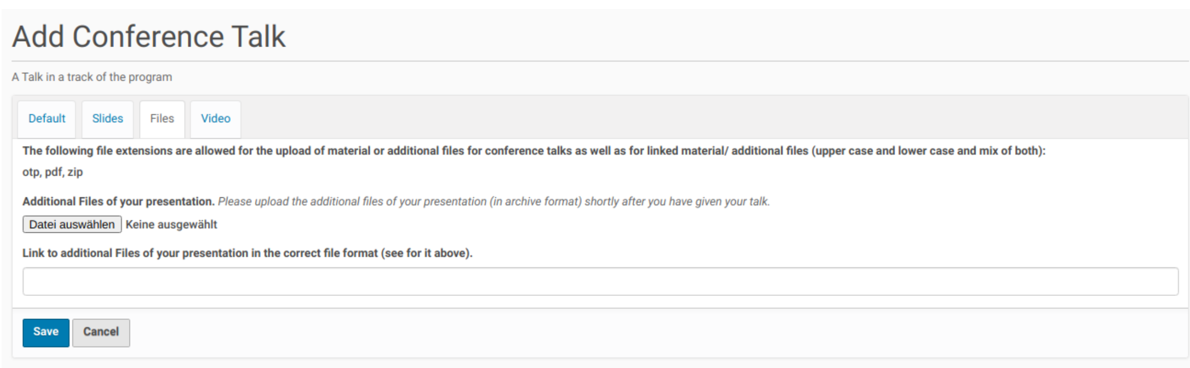
Once the mandatory fields of the 'Default' register has been filled out the user could save his edits and the new talk (proposal) will be submitted to the review queue.

The further register of the dialog consists of the necessary fields to upload or link the slides of a talk, some additional files / material and link to the video of the talk (if the talk was recorded) (see the screenshots below).

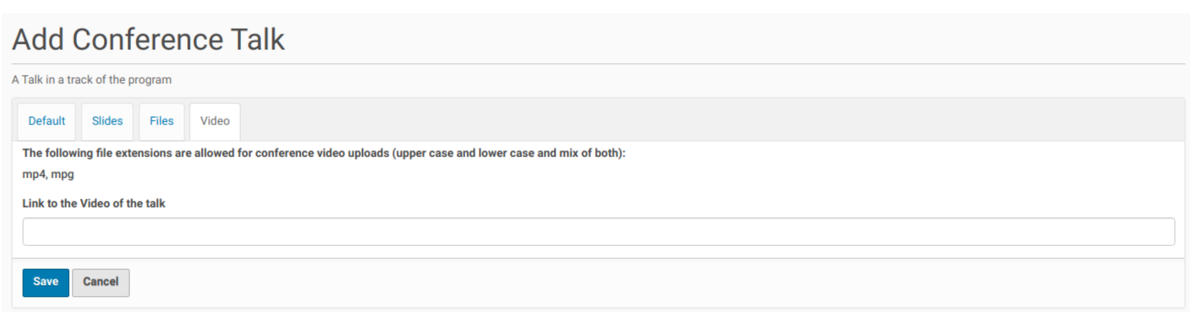
Register 'Slides':



Register 'Files':



Register 'Video':



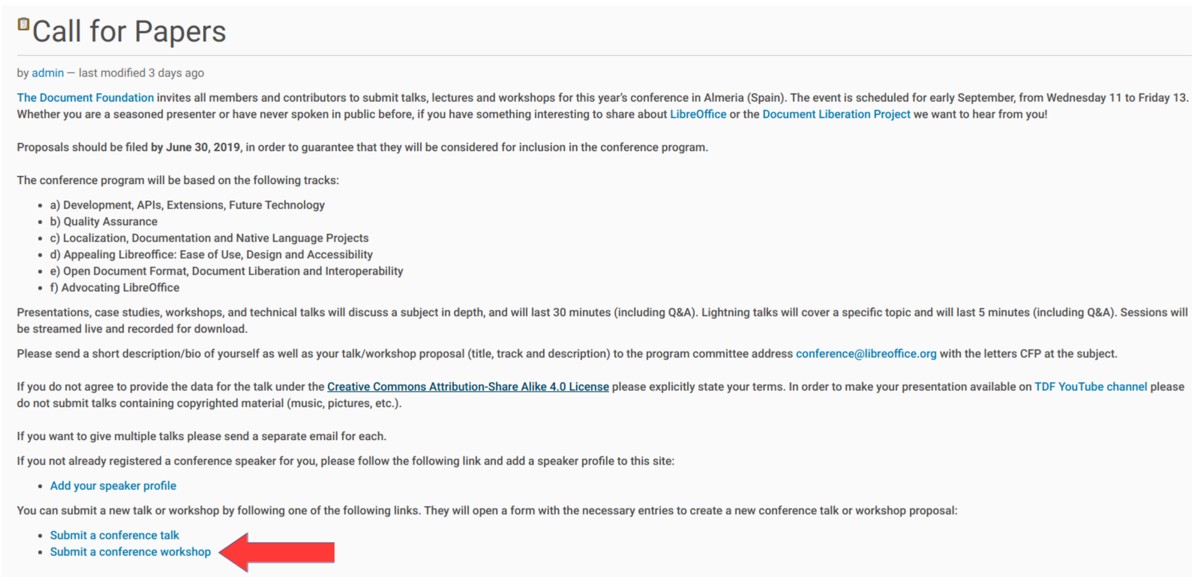
CHAPTER

SEVEN

WORKSHOP

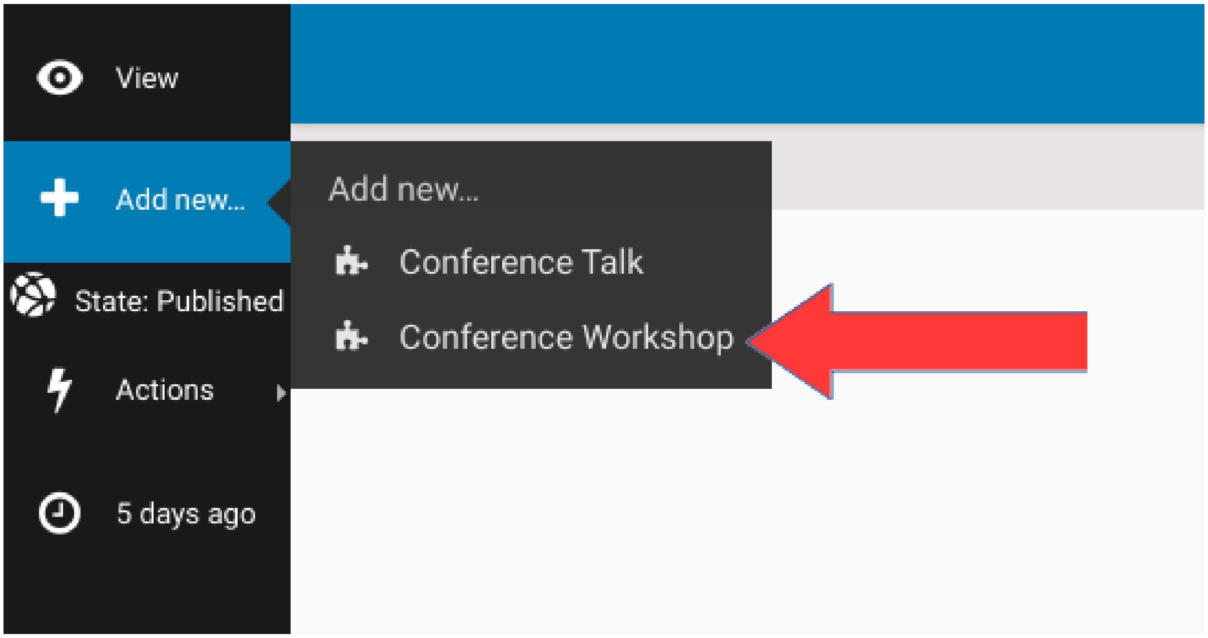
Once the call for papers was published and the folder for talks and workshop was created registered users of the site could add proposals for workshops. There are different ways to do this once they are logged-in to the site.

The easiest way is by using the link on the call for papers page (see the screenshot below).

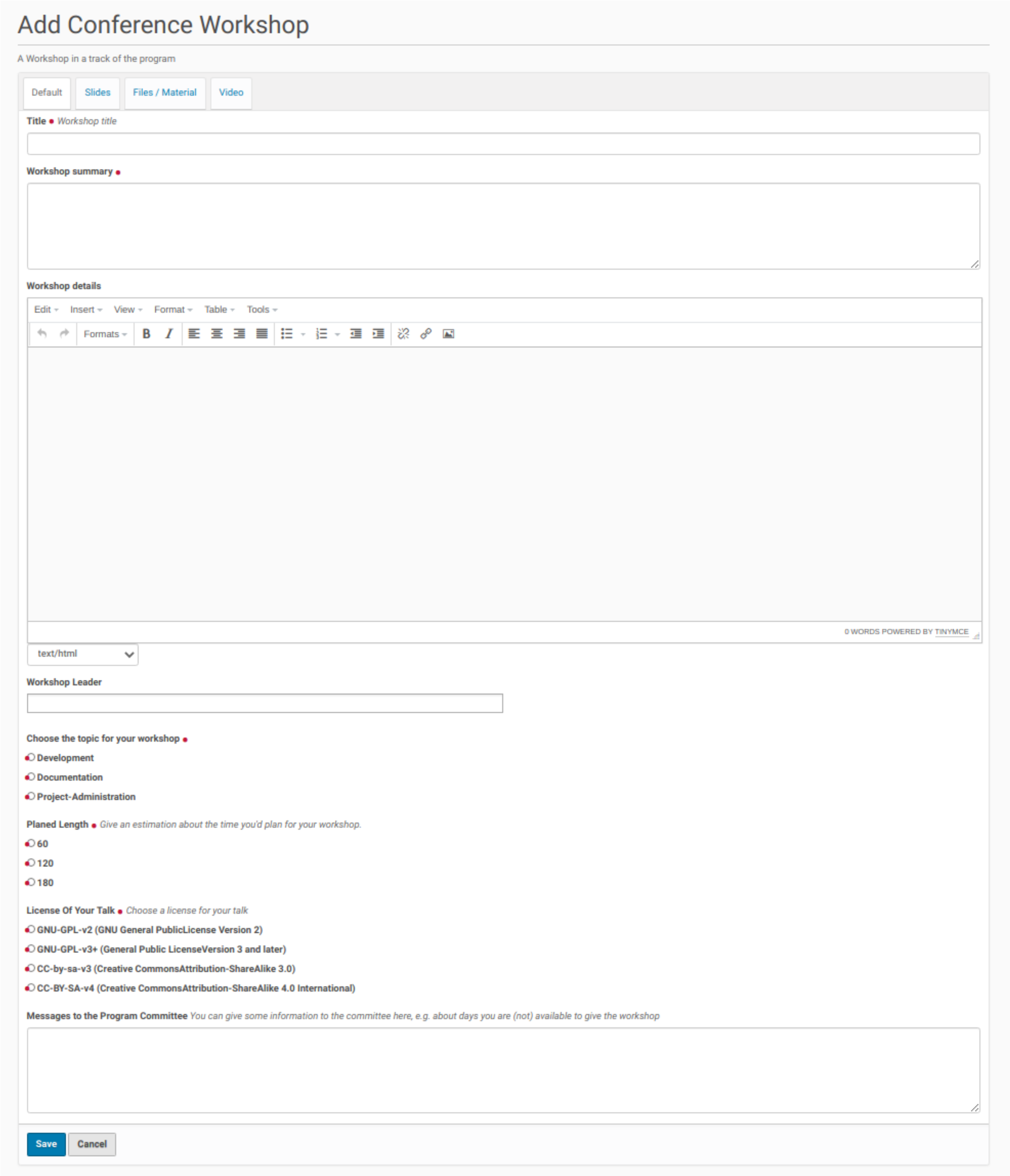


Once the user clicks on this link the edit form for a new workshop pops up.

The logged-in user could go instead of using this link to the folder for talks and workshops (click on the appropriate link in the navigation menu bar) and click inside the menu bar on the left side 'Add new'. Then choose from the opening submenu the entry 'Conference Workshop' (see screenshot below).



This leads also to the edit form for a new workshop proposal. This form consists currently of four register. The first register ('Default') contains fields for the necessary data of a new workshop proposal (screenshot below).



A workshop (proposal) needs a unique title, a workshop summary and more detailed description. It should have at least one presenter (workshop leader). But this is not mandatory to make it possible to create and submit a new workshop (draft) and ask a competent workshop leader later to give this workshop (maybe with some alignments).

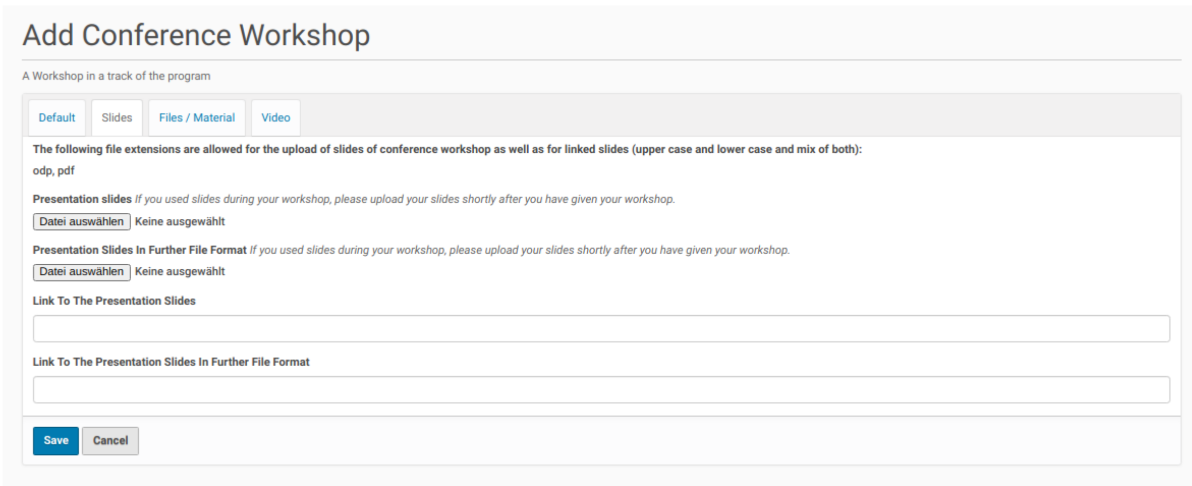
The workshop needs an alignment with one of the call for paper topics thus the review committee could assign it to the appropriate conference track. It's also necessary to get information about the planed length of the workshop. The submitter of a new workshop (proposal) will know best which time slot fits to the content of the workshop (the review committee / program owner could adapt this suggestion to the available time slots of the program later). The entry in the field is only a proposal.

It's also necessary that the submitter of a talk proposal adapt one of the available licenses to the workshop. And it is possible to give some information to the review committee / the program owner, e.g. about the availability or necessary environment to give the workshop.

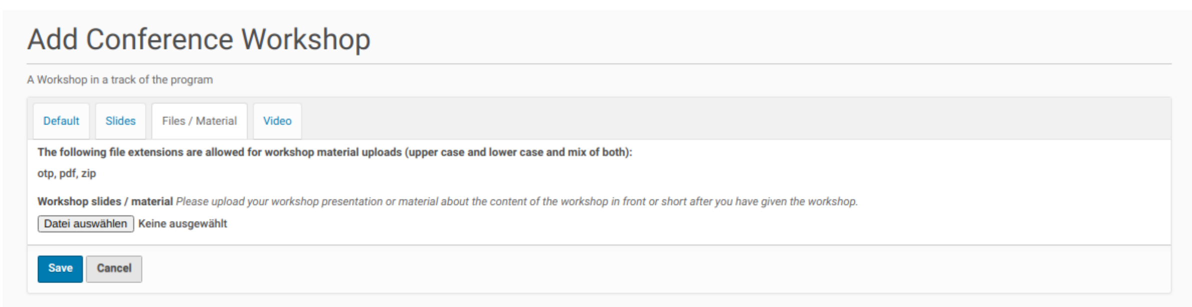
Once the mandatory fields of the 'Default' register has been filled out the user could save his edits and the new workshop (proposal) will be submitted to the review queue.

The further register of the dialog consists of the necessary fields to upload or link the slides of a workshop (register 'slides'), some additional files / material (register 'files') and link to the video of the workshop (if the talk was recorded) (register 'video') (see the screenshots below).

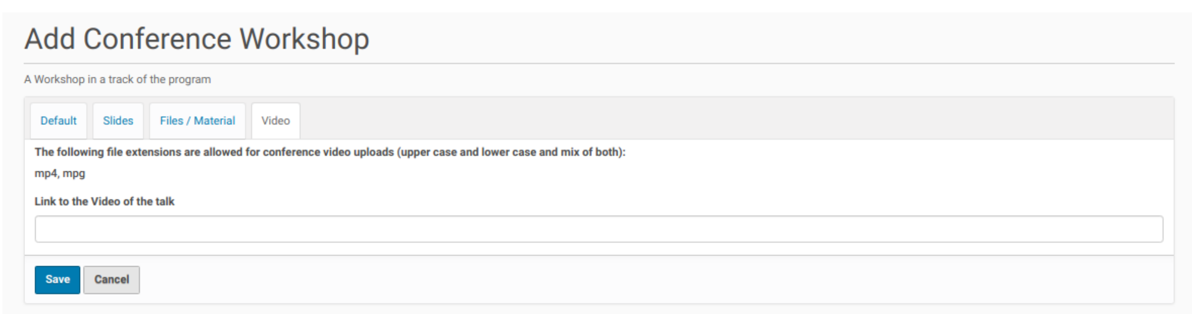
Register 'Slides':



Register 'Files':



Register 'Video':

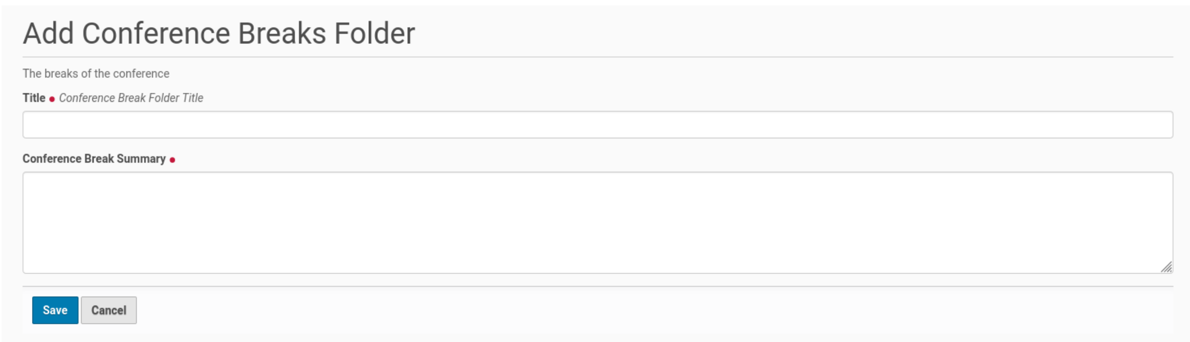


CHAPTER

EIGHT

FOLDER FOR CONFERENCE BREAKS

The breaks of a conference are created and collected inside a folder. It is very easy to create this folder within the root of the Plone site. Thus go to the 'Home' of the Plone site and click in the menu bar on the left side 'Add new' and choose from the opening submenu the entry 'Conference Breaks Folder'. You will get the edit form for this folder (see screenshot below).

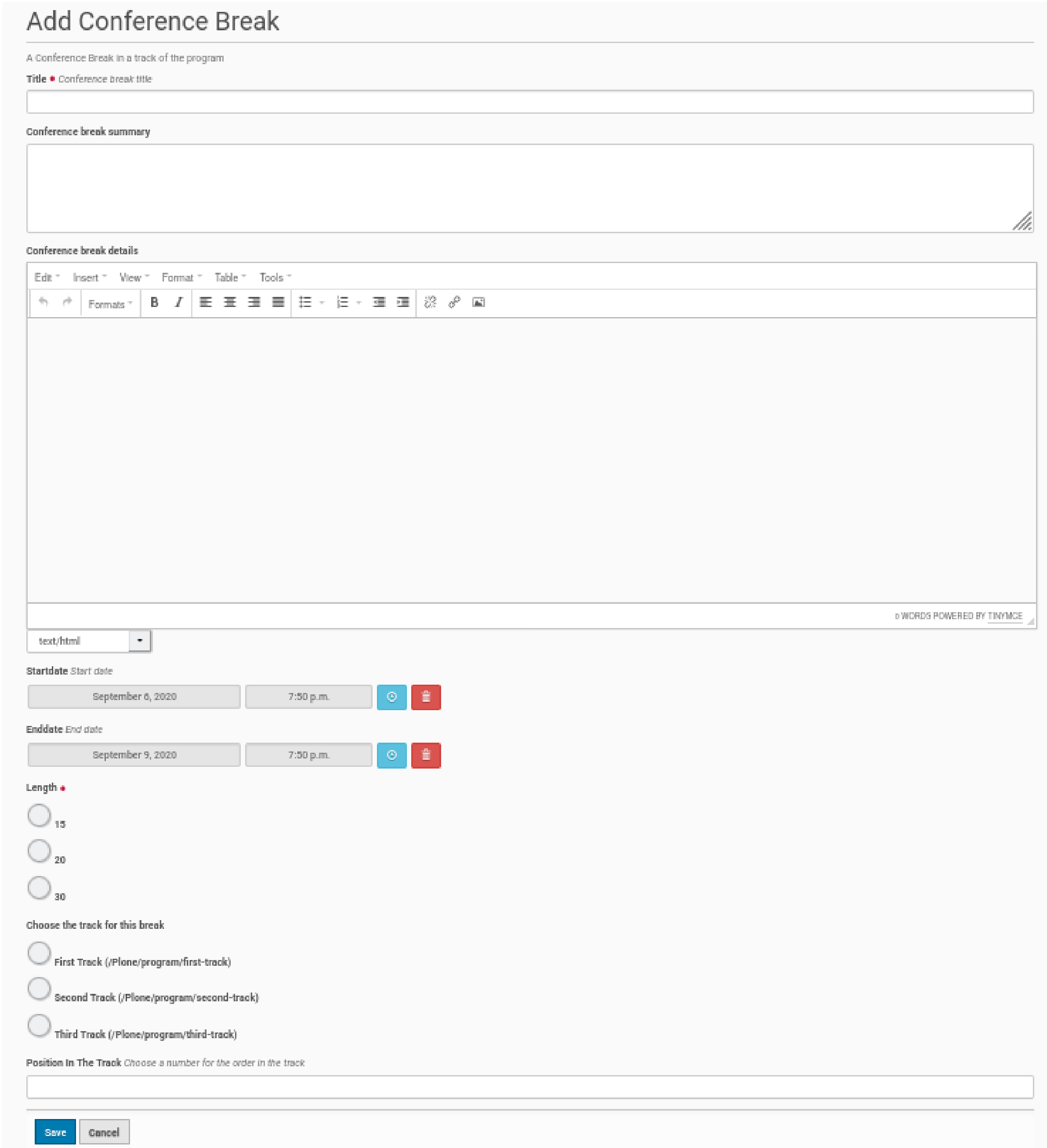


This edit form has two fields, one for the title of the breaks folder and another one for a summary (short description). Both fields are mandatory. Once the fields were completed save the edit form and the conference breaks folder will be created.

CHAPTER NINE

CONFERENCE BREAK

The conference breaks could be created only inside the conference breaks folder. Thus you need to go to this folder inside the Plone site and click 'Add new' on the menu bar on the left side. The opening submenu contains only the entry 'Conference Break'. Choose this entry and you get the conference break edit form (see screenshot below).



It is necessary that a conference break needs a title, e.g. 'Lunch Break'. It could have a summary and a more detailed description, but this is not mandatory.

There is a field to choose the length of the break and another one to assign it to a track. The last field gets a number for the position inside this track.

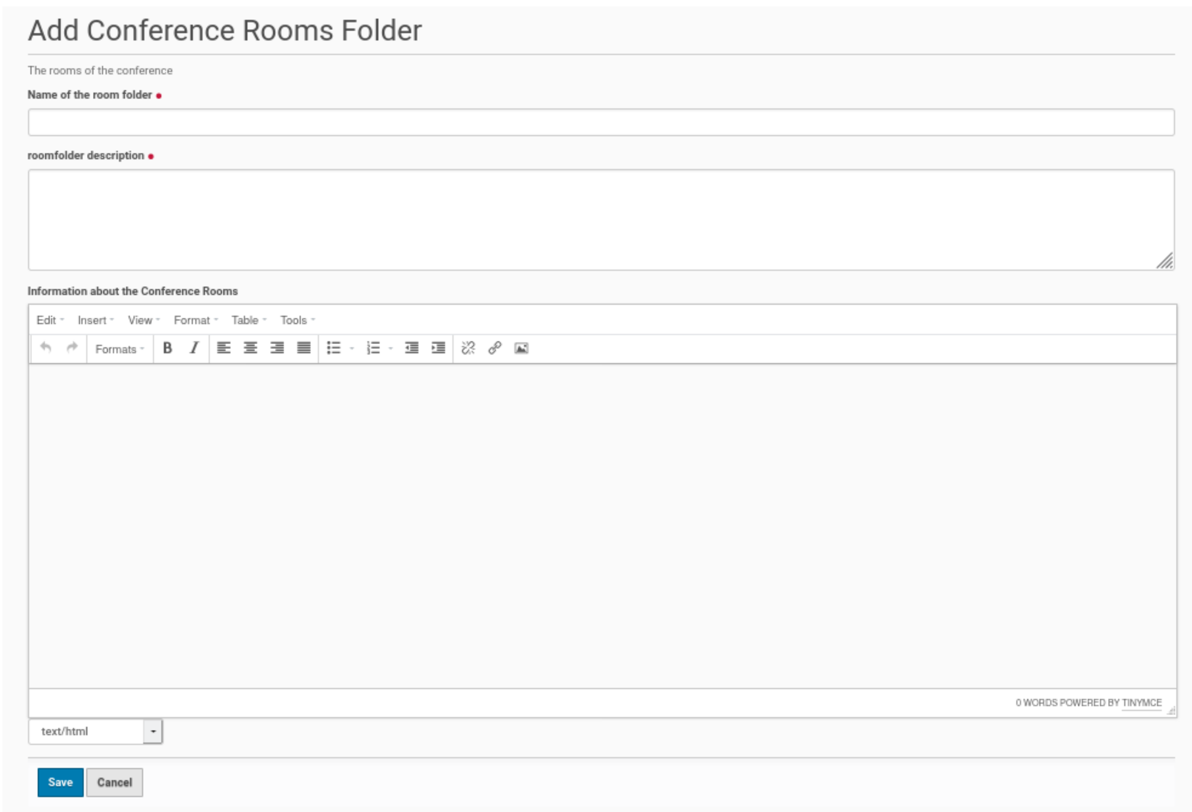
Once all mandatory fields are filled, save the form and the conference break will be created.

CHAPTER

TEN

FOLDER FOR CONFERENCE ROOMS

The rooms of a conference are created and collected inside a folder. It is very easy to create this folder within the root of the Plone site. Thus go to the ‘Home’ of the Plone site and click in the menu bar on the left side ‘Add new’ and choose from the opening submenu the entry ‘Conference Rooms Folder’. You will get the edit form for this folder (see screenshot below).



This edit form has three fields. The first one is for the title of the rooms folder and the second for a summary (short description). This both fields are mandatory.

The third field is available for a longer, more detailed description / information about the rooms of the conference. It is optional. The rooms will be created inside this folder with their own content (description etc.) inside this conference rooms folder later.

Once the fields were completed save the edit form and the conference rooms folder will be created.

10.1 Publishing the room folder

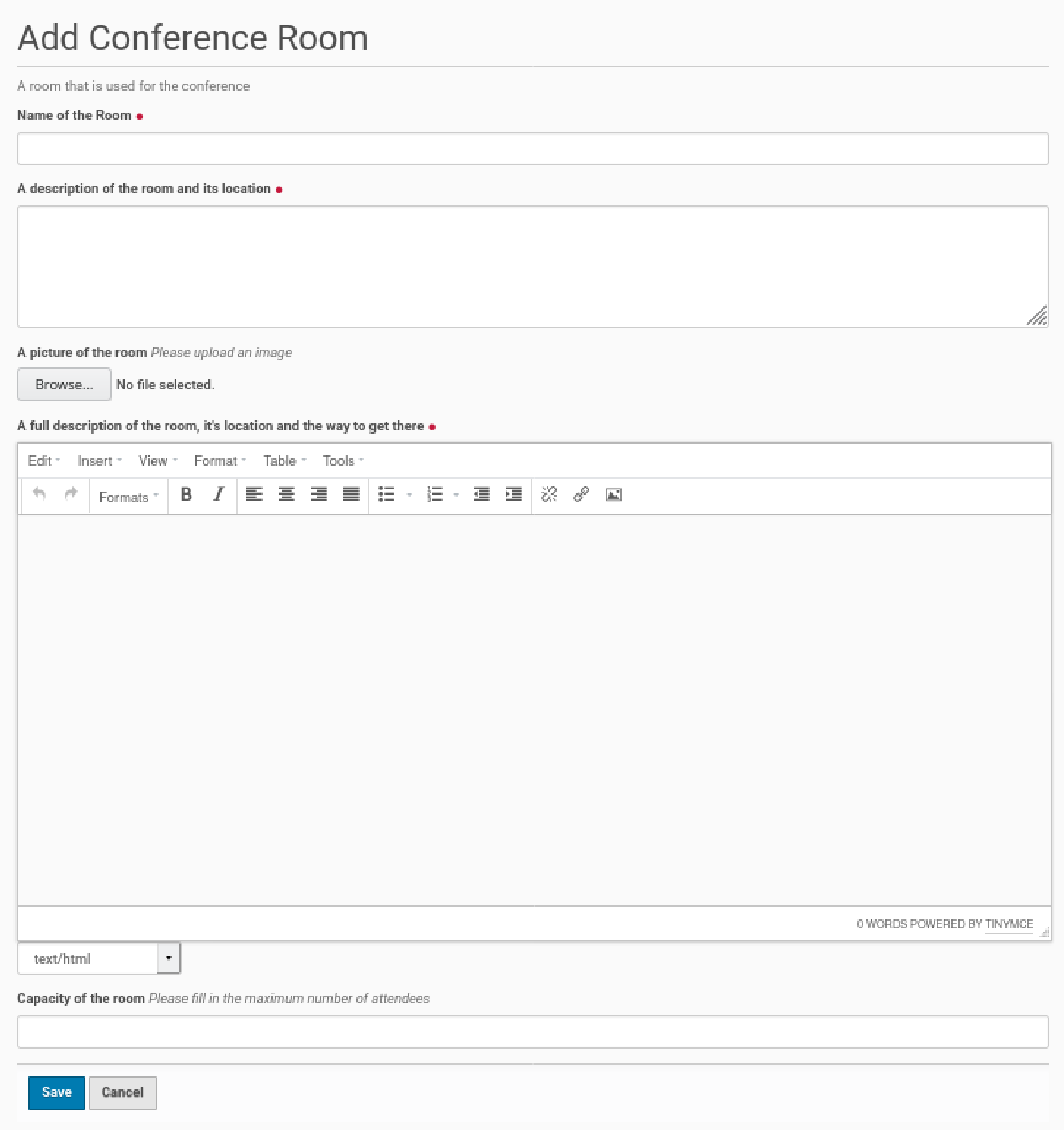
The default state of the created folder will be 'private'. If you want to change this state, click inside the menu bar on the left site on the entry with this state and choose from the opening submenu 'Submit for Publication' or if available 'Publish'. If you could only submit the conference program for publication a user with the appropriate permission need to publish the program later.

CHAPTER

ELEVEN

CONFERENCE ROOM

It's easy to add a new conference room to the Plone site. Just go to the conference rooms folder of the site and click on 'Add new' inside the menu bar on the left side. Choose from the opening submenu the entry 'Conference Room' and it opens a form to create a new conference room (see screenshot below).



The form has three mandatory fields, the first one for the rooms title and further one for the description of the room in the form of a summary. And last mandatory field is a RichText field for a detailed description of the conference room with the ability to insert links and images.

The form offers the opportunity to upload a picture of the room and to add its capacity (number of seats).

Once the fields were completed and the optional picture is uploaded save the edit form and the conference room will be created.

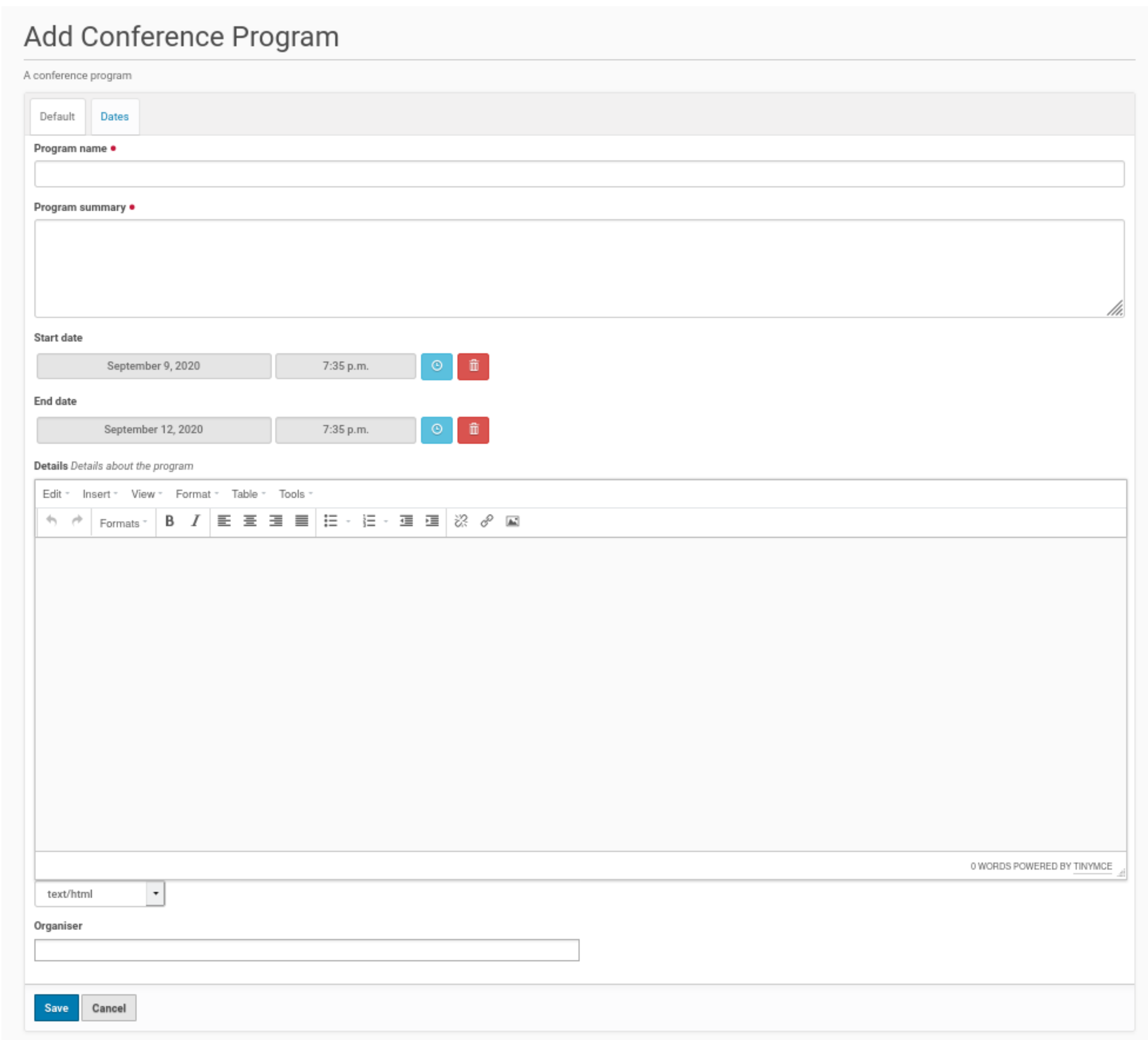
The default state of the created room object will be 'private'. If you want to change this state, click inside the menu bar on the left site on the entry with this state and choose from the opening submenu 'Submit for Publication' or if available 'Publish'.

CHAPTER

TWELVE

CONFERENCE PROGRAM

The conference program with tracks will be created inside the conference program folder. To create this program folder go to the root of the Plone site and click inside the menu on the left side on the entry 'Add new'. This will open a submenu. Choose from this submenu the entry 'Conference Prgram'. This displays the form to create the conference program folder object (see screenshot below).



This form contains fields to set the title of the conference program and to give a short summary description. This fields are mandatory.

Then there is field for a more detailed description of the conference program with the opportunity to e.g. provide links or add pictures and style text using HTML tags.

The form has also two fields to set the begin and the end of the program. The tracks of the program had to be within the boundary of this time slot.

The last field gives the opportunity to add organizers (of the program / conference).

Once the fields were completed save the edit form and the conference program folder will be created.

12.1 Publishing the program

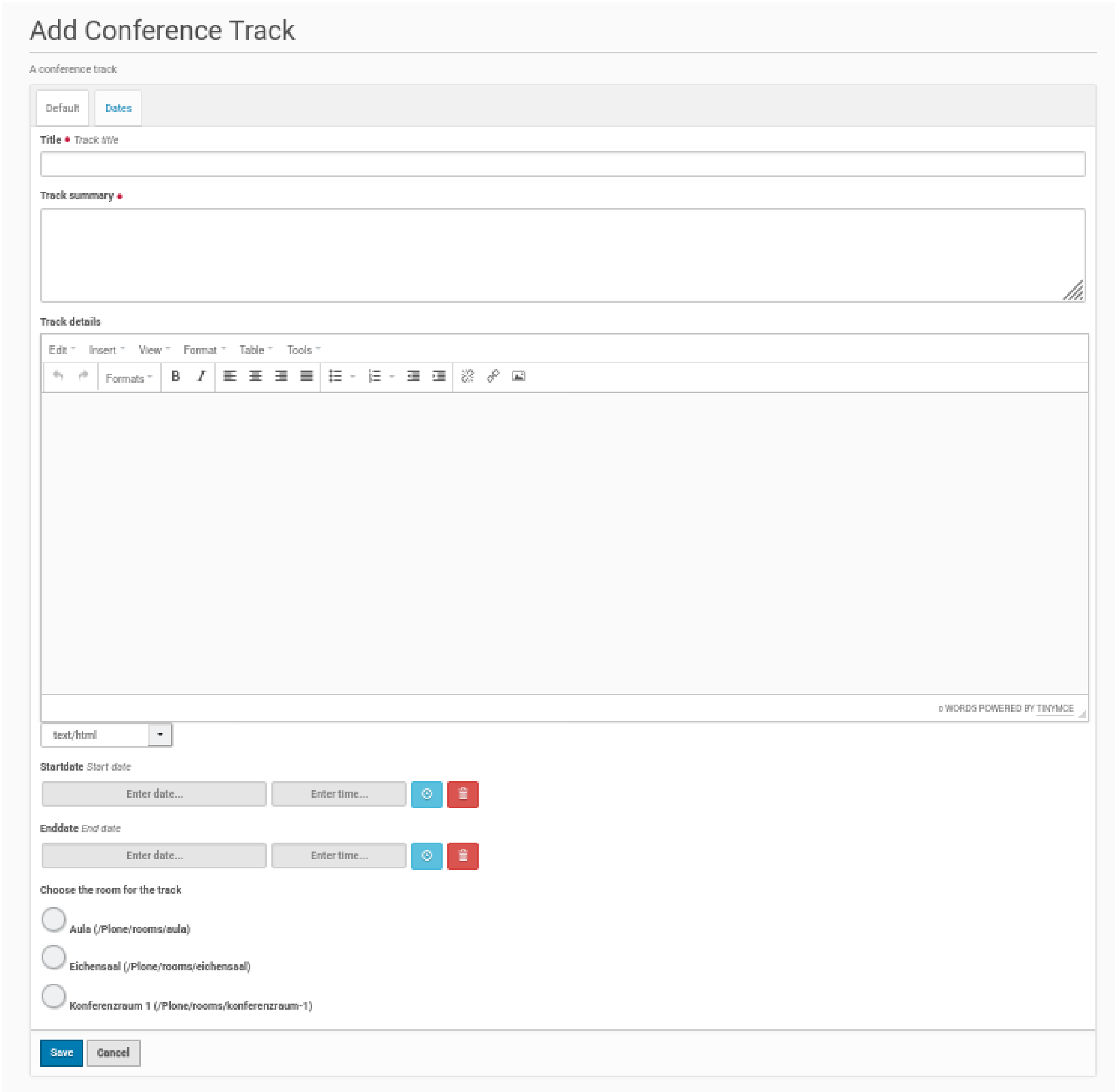
The default state of the created folder will be 'private'. If you want to change this state, click inside the menu bar on the left site on the entry with this state and choose from the opening submenu 'Submit for Publication' or if available 'Publish'. If you could only submit the conference program for publication a user with the appropriate permission need to publish the program later.

CHAPTER

THIRTEEN

CONFERENCE TRACK

It's easy to add a new conference track to the conference program. Once you created a conference program object, go to this folder object by using its navigation menu entry. Inside the program (folder) click within the menu bar on the left side on 'Add new'. Choose from the opening submenu the entry 'Conference Track' and it opens a form to create a new conference track (see screenshot below).



This form contains fields to set the title of the conference track and to give a short summary description. This fields are mandatory.

Then there is field for a more detailed description of the conference program with the opportunity to e.g. provide links or add pictures and style text setting HTML tags using an editor menu.

The form has also two fields to set the begin and the end of the track and to choose a conference room from a listing of already available ones. This conference rooms has to be created inside the conference rooms folder (see the documentation about this rooms folder and the conference rooms).

Once the fields were completed save the edit form and the conference track will be created inside the program (folder) object.

13.1 Publishing the track

The default state of the created track will be 'private'. If you want to change this state, click inside the menu bar on the left site on the entry with this state and choose from the opening submenu 'Submit for Publication' or if available 'Publish'. If you could only submit the conference track for publication a user with the appropriate permission need to publish the track later.

CHAPTER

FOURTEEN

CONFERENCE REGISTRATION

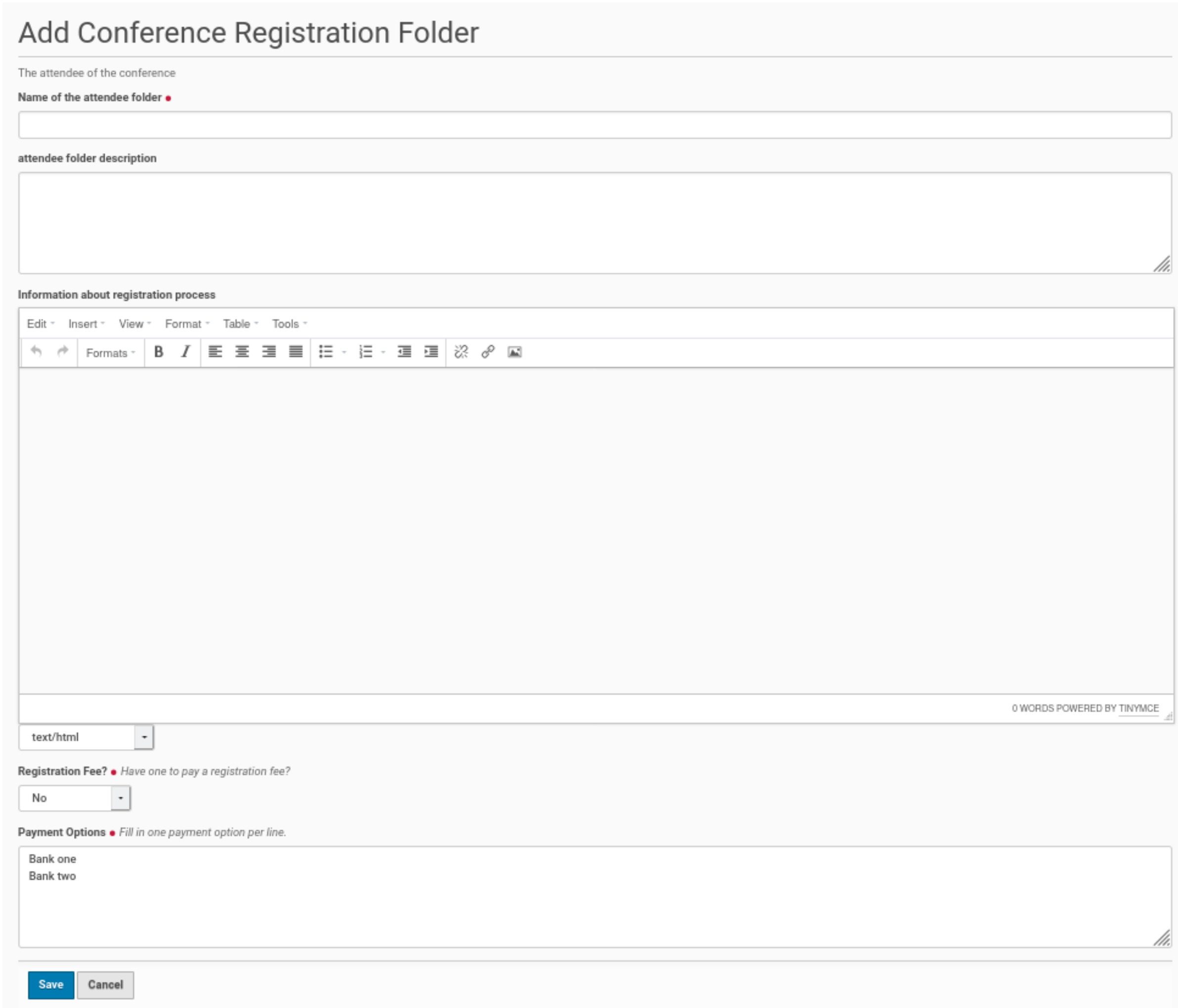
14.1 Two Options To Do The Conference Registration

The collective.conferences Plone add-on provides two ways to process the registration for a conference. The first option is done within a folder of the site. If you choose this option everyone, who registers for the conference, had to get an account on the site and create a content object inside the registration folder.

The second option works with a page about the conference registration process and use a mail form for the registration itself. If you choose this option there is no need for an account and no content object will be created on the site.

14.2 Option 1: Registration Done Inside A Folder

The registration of conference attendees will be done inside a folder object within this option 1. This folder could be created inside the root of the Plone site. Therefore go to the root of the Plone site and click in the menu bar on the left side on the entry 'Add new' and choose from the opening submenu 'Conference Registration Folder'. This opens the edit form to create the folder for conference registrations (see screenshot below).



The form starts with a field for the title of the registration folder. This could be e.g. 'Registration'. This field is mandatory. It is followed by a field for a description of the registration folder, which is optional.

The field with main information about the registration process follows. This field is not mandatory, but it could and should be used to describe the registration process, including e.g. a conference fee.

The following field needs an answer to the question about a conference fee. If this field is set to 'yes' you need to carefully edit the field 'Payment Options'. The strings in that field will be displayed in and used for the registration form which a conference attendee has to fill out (see below).

Once the fields were completed save the edit form and the conference registration folder will be created inside the Plone site root.

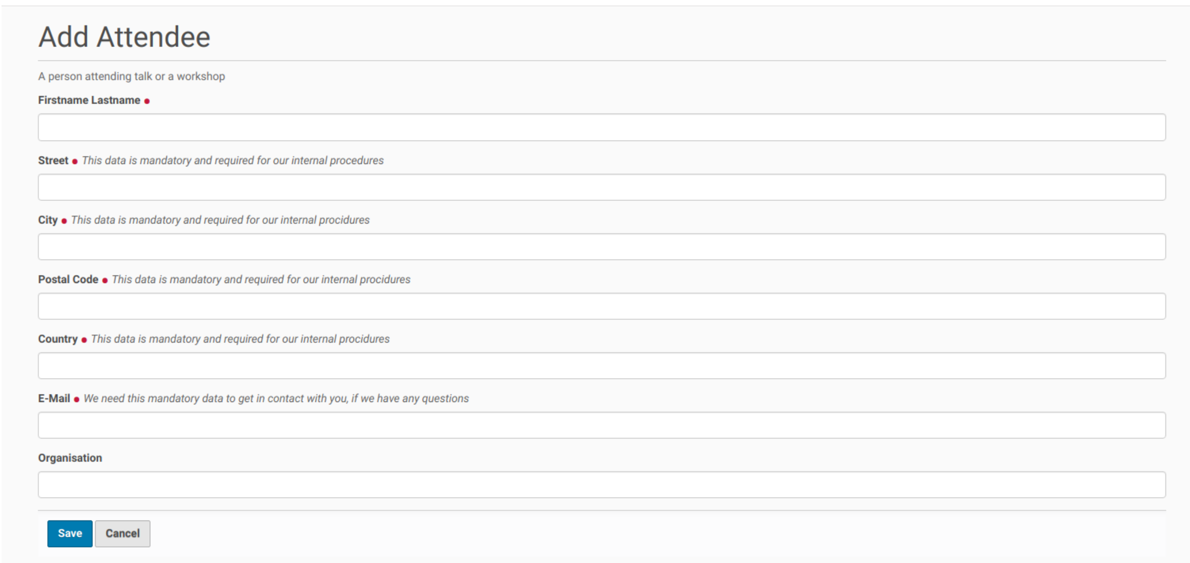
14.2.1 Publishing the registration (folder)

The default state of the created folder will be 'private'. If you want to change this state, click inside the menu bar on the left site on the entry with this state and choose from the opening submenu 'Submit for Publication' or if available 'Publish'. If you could only submit the conference registration folder for publication a user with the appropriate permission need to publish the folder later.

14.2.2 Conference Attendee Registration

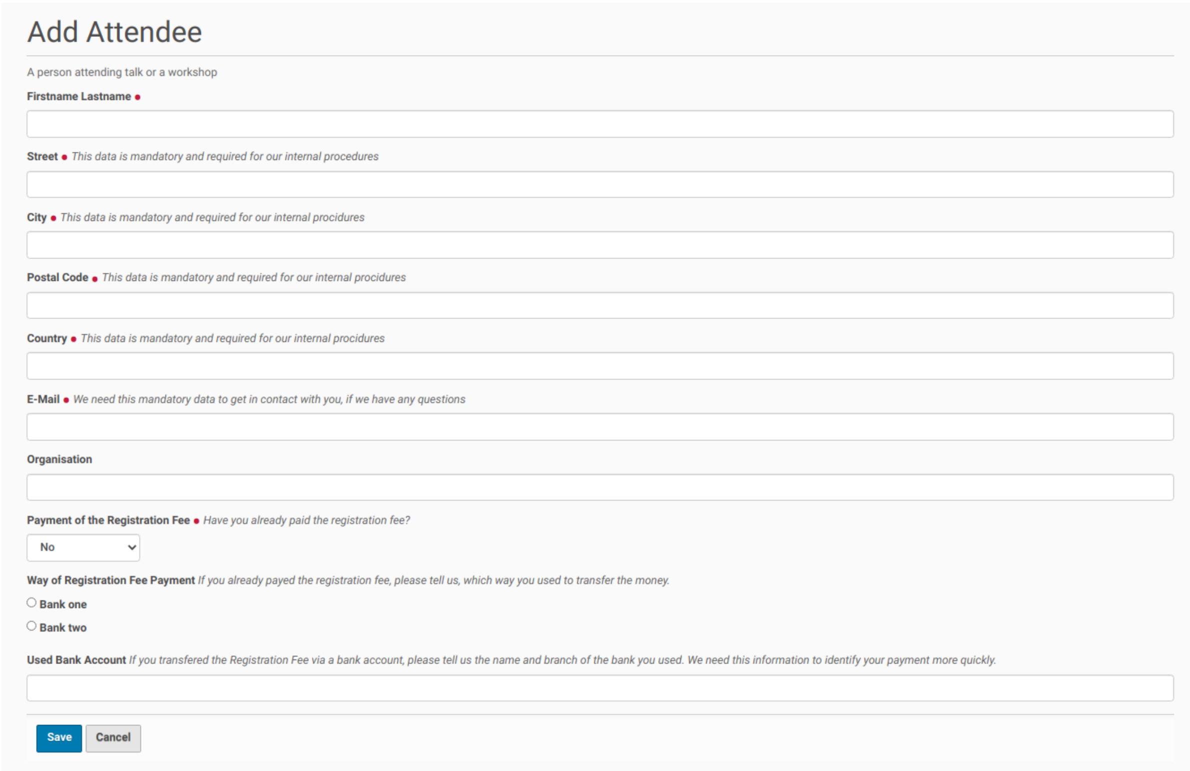
People, who want to register for the conference, first need to get an account on the site and log-in. Thus they had first to register on the site.

Once they logged-in they could click on the folder / page for conference registration, that was already created and published. There they choose from the menu bar on the left the entry 'Add new' and click in the opening submenu on the item 'Attendee'. This opens a form to add a new conference attendee (see the screenshot below).



The attendee has to fill in his full name, his address and his e-mail address into the form. If he is member of an organization he could provide this information in the last field of the form.

If a conference attendee has to pay a conference fee (the appropriate field in the registration folder edit form is set to yes; see above), the registration form for the attendee contains three further fields (see screenshot below).



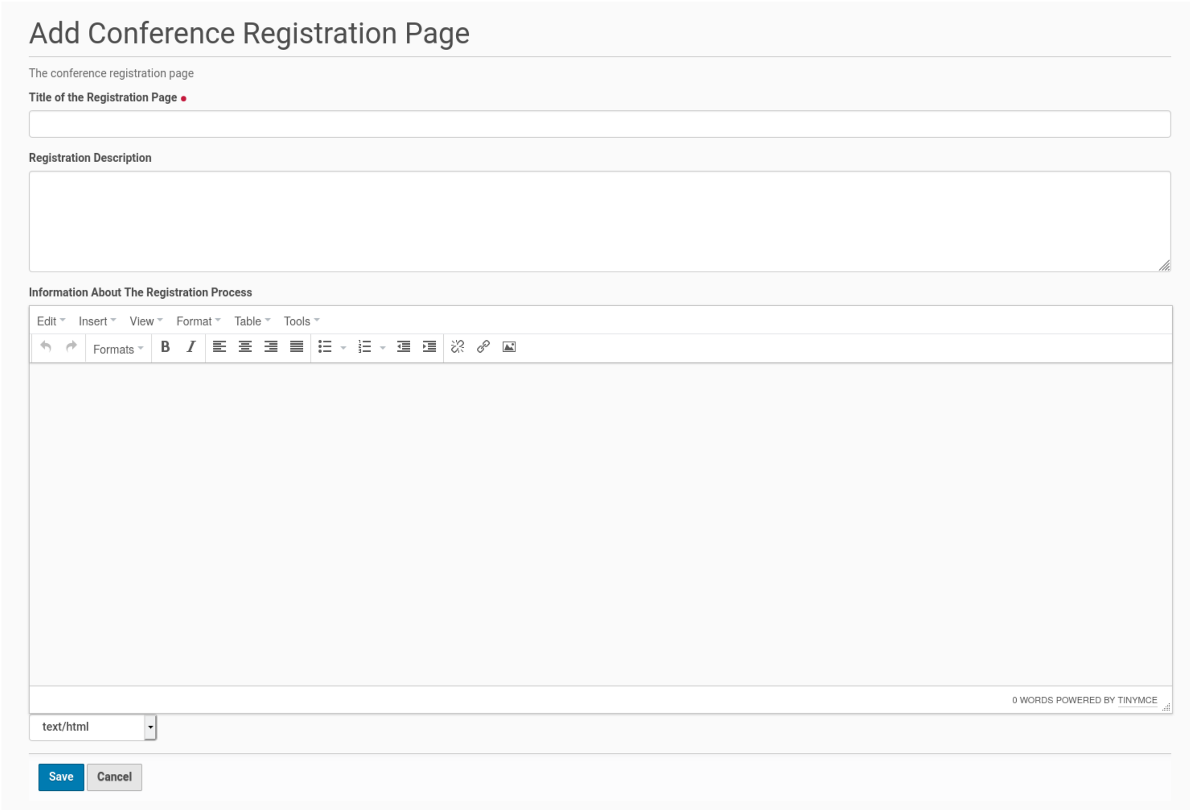
The first field asks, if the conference fee has already been payed. The next question is about the used bank account out of a list of available accounts (they are added on the registration folder edit form). The last field is about the users bank account, which was used for the payment.

Once the attendee has filled in the necessary information she/he could save the form and the registration finished. A new attendee will be created. The default state is 'private'.

14.3 Option 2: Page About Registration And Mail Form

If you prefer to do the conference registration process within a mailing to the conference committee (and its e-mail address) instead, you can create in your Plone instance a conference registration page with information about the conference registration process. The view of this registration page will contain a link to a mail form.

You could add this registration page inside the root of your Plone site by clicking on the entry 'Add new' in the menu on the left side. Then choose the entry 'Conference Registration Page' from the opening sub-menu. You will get a form to create the registration page (see screenshot below).



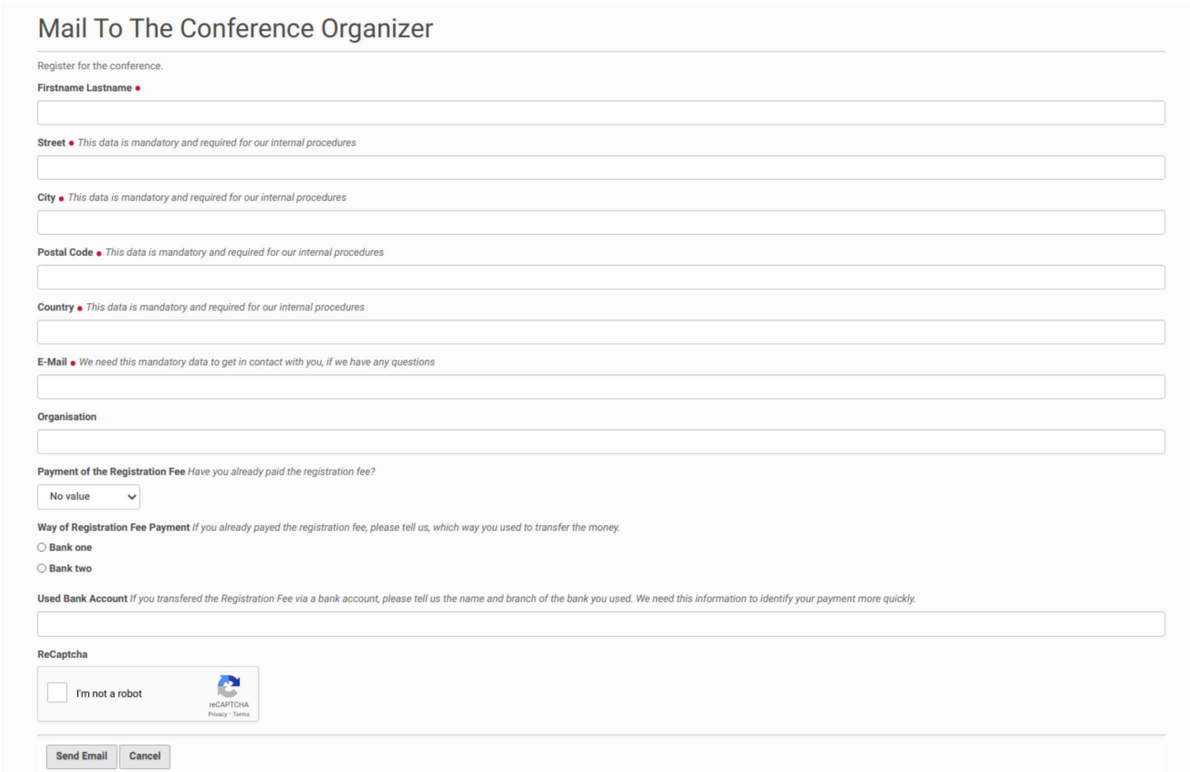
The form contains a mandatory field for the title of the registration page. The further fields for a summary ('Registration Description') and detailed information about the registration process ('Information About The Registration Process') are optional fields. But it is necessary to add here the necessary information about the registration proceding for the people which want to take part in the conference. Thus this fields are only techinically optional.

14.3.1 Publishing the registration page

The default state of the created registration page will be 'private'. If you want to change this state, click inside the menu bar on the left site on the entry with this state and choose from the opening submenu 'Submit for Publication' or if available 'Publish'. If you could only submit the conference registration page for publication a user with the appropriate permission need to publish the page later.

14.3.2 Conference Registration by Email

Once the conference registration is published every visitor of the site will find a link to an email form on this page. If the user clicks on this link a form opens with fields for the necessary user data for the conference registration process (see the screenshot below).



The attendee needs to submit his name and contact address. He had also to fill in a valid email address. If the attendee has to pay a conference fee the form contains (like in the screenshot above) field to inform the organization committee, if the fee was already payed, on which bank account and from which bank account. This makes it easier for the organization committee to find the payment data of the conference attendee.

The form is secured with a recaptcha field. Once the user filled the necessary data into the fields and got the recaptcha challenge solved she/he could press the 'Send Email' button and an email will be send to the default email address of the Plone instance. This email address has been configured inside the administration page of the Plone instance by the administrator.

CHAPTER

FIFTEEN

WORKFLOW

The content objects are assigned to the default 'Simple Publication Workflow' with the exeption of conference talks and workshops. They have their own workflows.

15.1 Simple Publication Workflow

The default state of this content objects is 'private'. The owner (creator) of this object could submit it for publication. This changes the state to pending and will forwarded to the review queue.

If the user want to reedit the content object, she/he could 'retract' it. The state changes back to 'private'.

If a reviewer think the content object is not ready for publication and the user (creator) should rework (edit or make additions), she/he could 'send back' the content object to the user.

If the content object is ready for publication the reviewer could 'publish' it.

There is also an 'advanced' option for the reviewer. She/he could use it to add some notes to her/his action (e.g. send the content object back with some notes to the creator) or set a publication date or/ and the expiration date.

15.2 Conference Talk Publication Workflow

The conference talk object are assigned to the conference talk publication workflow. This workflow currently differs from the simple publication workflow only in regard to its default state. Every conference talk get the default state 'pending'. Thus the talk will be forwarded after its creation to the review queue.

15.3 Conference Workshop Publication Workflow

The conference workshop objects are assigned to the conference workshop publication workflow. There is currently no difference to the process of the conference talk publication workflow (see above).

CHAPTER

SIXTEEN

INDICES AND TABLES

- genindex
- modindex
- search