



UKAEA Indico Training

Event Management and Registration

Adam Parker,

May 16th, 2024

Indico allows you to manage three basic types of event:

Lectures can be seen as a single presentation, with one or more speakers;

Meetings are generally composed of many presentations. They have a timetable and can last multiple days, although they most commonly happen on a single day. Contributions (talks) can be organized in sessions;

Conferences generally last multiple days and have the advantage over meetings of allowing multiple sessions to happen in parallel. They also offer abstract submission as well as other features

All of these meeting types offer a set of common features:

- Registration;
- Management of participants;
- Surveys;
- Integration with collaborative tools;
- Event reminders.

Technical Meetings



Optimising Sensor Placement in Experiments with Machine Learning and Simulation

by Dom Harrington (Advanced Engineering Simulation), Luke Humphrey (Advanced Engineering Simulation)

 Tuesday 12 Sept 2023, 11:00 → 11:40 Europe/London


 Robinson (D3/2)

Description Dom Harrington will be presenting the summer project placement work he has done over the summer with his supervisor Luke Humphrey.

Zoom link: <https://ukaea.zoom.us/j/7698793312?pwd=RE5jMkFkODFNZFVlTWp6OStDbkNSZz09>

Password: ACM_UKAEA



 TestIndico.pdf

Organised by Stanislas Pamela

Contact  stanislas.pamela@ukaea.uk

Meetings

14:30	→ 14:40	Introduction <ul style="list-style-type: none">▪ Current status▪ Accounts and access▪ Plan for the future▪ Format and agenda <p>Speaker: Adam Parker (High Performance Data Analytics)</p>
14:40	→ 15:10	Session 1: Categories and Admin
14:40		Talk <p>Speaker: Adam Parker (High Performance Data Analytics)</p>
15:00		Hands-On
15:10	→ 15:40	Session 2: Event Management and Registration
15:10		Talk <p>Speaker: Adam Parker (High Performance Data Analytics)</p>
15:30		Hands-On
15:40	→ 15:50	Coffee Break
15:50	→ 16:20	Session 3: Plugins and Additional Features
15:50		Talk <p>Speaker: Adam Parker (High Performance Data Analytics)</p>
16:10		Hands-On
16:20	→ 16:30	Closing Remarks, AOB, and Q+A <p>Speaker: Adam Parker (High Performance Data Analytics)</p>

- Multiple contributions
- Often used for longer events

*Added benefit over lectures
'minutes' can be added to
each contribution*

UKAEA, 29NOV - 1DEC

EVENT MANAGEMENT PLATFORM SHOWCASE

We will help improve your Procurement Engagement Activity, General Event Management, while also saving you money and time!

LEARN MORE

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📍 Abingdon, Oxford, OX14 3DB
🌐 nucleus.ukaea.uk



UKAEA

Event Management Platform Showcase

29 November 2023 to 1 December 2023
Culham Science Centre
Europe/London timezone

Hello Everyone

Overview
Timetable
Contribution List
Registration
Surveys
Privacy Information
Contact for support
✉ adam.parker@randomd...
☎ 01234567890

Inaugural Event Management Platform Showcase

Indico is great

Information

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Massa placerat dui ultricies lacus sed turpis tincidunt id aliquet. Molestie a iaculis at erat pellentesque adipiscing. Volutpat lacus laoreet non curabitur gravida arcu ac. Nullam vehicula ipsum a arcu. Sit amet nulla facilisi morbi tempus iaculis urna id. Ac felis donec et odio pellentesque. Sit amet volutpat consequat mauris nunc congue nisi. Magnis dis parturient montes nascetur ridiculus mus.



More Information

Conferences

Multi-day events with many participants

Abundance of features by default:

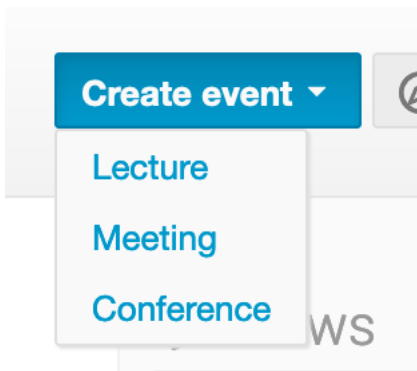
- registration;
- payments;
- page menu;
- abstract submission;
- poster sessions;
- paper review/editing.

08:00	Registration: Registration									
	Norfolk Waterside Marriott 08:00 - 09:00									
09:00	Welcome and Introduction to CHEP23 Amber Boehnlein et al. 									
	Norfolk Ballroom III-V, Norfolk Waterside Marriott 09:00 - 09:30									
	Keynote: Evolutions and Revolutions in Computing: Science at the Frontier David Dean 									
	Norfolk Ballroom III-V, Norfolk Waterside Marriott 09:30 - 10:00									
10:00	Kenote: Future Trends in Nuclear Physics Computing Markus Diefenthaler 									
	Norfolk Ballroom III-V, Norfolk Waterside Marriott 10:00 - 10:30									
	AM Break									
	Hampton Roads Ballroom (3rd floor), Norfolk Waterside Marriott 10:30 - 11:00									
11:00	Distrib. Ch...	Is Julia Ta...	RooFit' Jo...	dCache Mr...	One ye Fl...	Machin Co...	Securin Bri...	Involvi. M...	MLHad Mi...	Applica Ka...
	ATLAS Ja...	Polygic Gr...	Making Ga...	Erasurc W...	The ne. Va...	Genera M...	Modula Dr ...	DUNE . Da...	SYMBA Mr...	INFN a. Fe...
	Modelli Mr...	The AT Jo...	Build-a Ze...	POSIX Dr ...	Operati Al...	tracc · Att...	Federa Dr ...	A custc Sh...	On Esti Lu...	Outline Dr ...
	Digital Pa...	Multila. Jul...	New de Lo...	Enablin En...	INDRA- Mr...	GPU-ba Ca...	Progre. Lu...	Trainin. Alli...	Multi-M Mr...	ICSC: T Cl...

Creating an Event

In theory, initial event setup should be quite simple...

note, all fields can be modified later



Create new conference ✕

Listing List in a category Keep unlisted

Category *
Choose category

Event title *

Start *

End *

Timezone * ▼

Location ▼ ▼















Protection mode

1) Complete Description and Settings

Training for Event Organisers and Administrators 16 May

Created by Adam Parker (adam.parker@ukaea.uk)

Settings

	Title Training for Event Organisers and Administrators 
	Description Indico Training "Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud..."
	Short URL https://indico.ukaea.uk/e/240516_indico_training
	Date 16 May 2024 
	Time 14:30 - 16:30
	Timezone Europe/London
	Room Remote / Witney 
	Venue C7
	Address None
	Map URL None
	Chairpersons None 
	Contact title Contact 
	Email None
	Phone None
	Keywords None 
	Default language None 
	Enforce language No
	Additional languages None





2) Timetable

In theory, initial event setup should be quite simple...

Indico timetables can sometimes be tricky to configure

LIVE DEMO

 Switch to display view

-  Settings
-  Timetable
-  Protection
-  Privacy

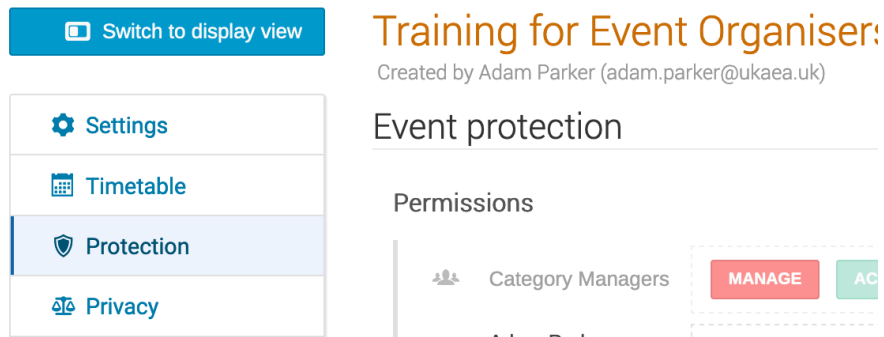
Training for Event Organisers and Administrators 16 May

Created by Adam Parker (adam.parker@ukaea.uk)

Timetable

< Thu 16/05

3) Manage Access and Visibility



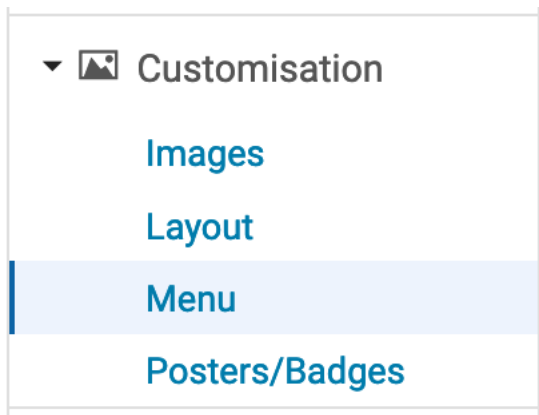
The screenshot shows a web interface for managing an event. At the top left, there is a blue button labeled 'Switch to display view'. Below it is a sidebar menu with four items: 'Settings', 'Timetable', 'Protection' (which is highlighted in light blue), and 'Privacy'. The main content area is titled 'Training for Event Organisers' and 'Event protection'. Under 'Event protection', there is a 'Permissions' section. It lists 'Category Managers' with a user icon and the name 'Adam Parker'. To the right of the name are two buttons: a red 'MANAGE' button and a green 'AC' button.

Again, access and visibility of your event can be managed in the **‘Protection’** tab

However, events come with additional settings, such as:

- access depending on registration form,
- access keys/passwords,
- and public registration,
- + others.

4) Customise Conference Menu



Menu

Customise menu
Menu customisation is currently enabled. Disabling it will revert all changes.

- Overview
- Scientific Programme
- Call for Abstracts
 - Reviewing Area
- Timetable
- Contribution List
- Author List
- Speaker List
- My Conference
 - My Sessions
 - My Contributions
- Paper Peer Reviewing
 - Reviewing Area
 - Judging Area
- Editing
 - Papers
 - Slides
 - Posters

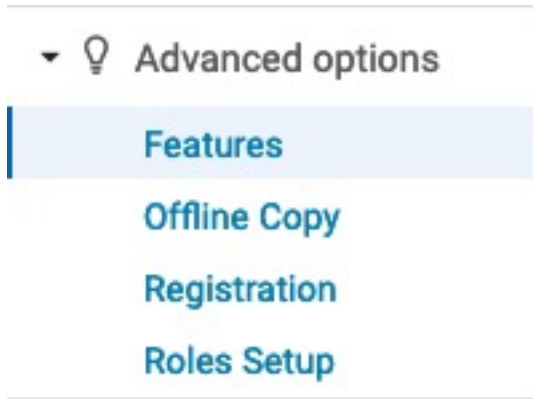
Many default tabs already exist which can be toggled on or off

Very easy to create own tab to relay any information you want

Enable/Disable Features

Creating meetings or lectures, not all features are available by default.

For example, components like registrations and payments you wouldn't expect for a weekly meeting



Features

You can enable/disable various features for your event. Disabling a feature will hide it from both managers and users.

Image manager



Allows event managers to attach images to the event, which can then be used from HTML code. Very useful for e.g. sponsor logos and conference custom pages.

Payment



Gives event managers the opportunity to process payments for registrations.

Registration



Gives event managers the opportunity to handle registrations within the event.

Surveys




Gives event managers the opportunity to create surveys.

Within the Advanced Options tab of the event management area, features can be selected

5) Registration: Visibility and Retention Period

Registration

Create a new registration form

 To create a new registration form, specify the title and participant visibility settings below. The visibility settings can only be changed while there are no registrations.

Title *

The title of the registration form

Participant list visibility

Visibility to participants	Visibility to everyone
<input type="text" value="Show all participants"/>	<input type="text" value="Hide all participants"/>

Visibility duration (weeks)

Specify under which conditions the participant list will be visible to other participants and everyone else who can access the event

Retention period

Specify for how many weeks the registration data, including the participant list, should be stored. Retention periods for individual fields can be set in the registration form designer

When creating a new registration form, you will need to set the participant list visibility and retention period of the acquired data!

By default:

- all participants are shown to other participants;
- all participants are hidden from non-registered users;
- the visibility duration is permanent;
- and **the retention period is indefinite**



Privacy settings

Choose who can see the participants of this event.



Configure

Who Can Register?

Registration forms have rich general settings such as:

- registration requires approval
- enforce logged-in users or registrants must have an Indico account
- the number of places can be limited
- publication settings for event popularity and check-in status

The best thing to do would be to explore

Moderated	<input type="checkbox"/>	<i>If enabled, regist</i>
Only logged-in users	<input type="checkbox"/>	<i>Users must be lo</i>
Registrant must have account	<input type="checkbox"/>	<i>Registrations em</i>
Require CAPTCHA	<input checked="" type="checkbox"/>	<i>When registering</i>
Limit registrations	<input type="checkbox"/>	<i>Whether there is</i>
Modification allowed	<input type="text" value="Never"/>	<i>Will users be abl</i>
Publish number of registrations	<input type="checkbox"/>	<i>Number of regist</i>
Publish check-in status	<input type="checkbox"/>	<i>Check-in status v</i>

Registration Forms



Registration Form

Add, remove or modify information registrants may fill out.



Configure

Configure your required questions and fields,

Minimum default personal data required:

- First Name,
- Last Name,
- and Email Address

There is no limit to the number of registration forms

Event organisers often separate speakers and attendees into their own forms

Configure fields in form "Participants"

+ Add section

Personal Data

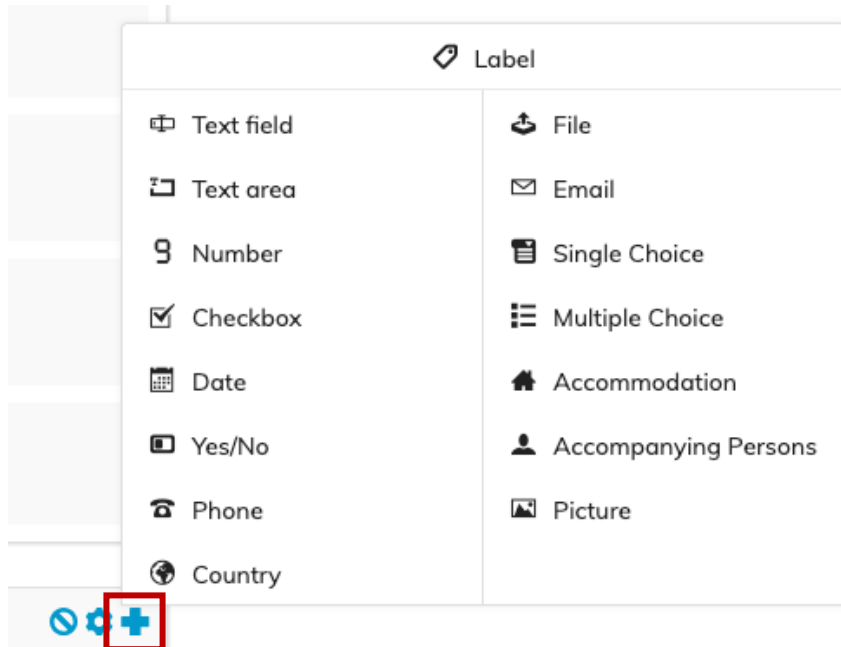
First Name *

Last Name *

Email Address *

Affiliation

Registration Forms



Many question types and fields are available

Add new field

Checkbox ▾

Title *

Description

You can use Markdown or basic HTML formatting tags.

Price

Required field

Places limit

Privacy

Retention period (weeks)

Specify how long user-provided data for this field will be preserved in the database.

Fields can have an associated price for fees, as well as a places limit

NOTE

Data Protection officer suggested 52weeks retention period for fields

however, this can be set separately for each field

Manage Registrations



List of registrations

Add, remove or modify registrations.

 0

 **Manage**



Invitations

Manage invitations to register for your event.

 **Manage**



Tickets

Configure ticketing system


 **Configure**


All registrations can be viewed individually or listed in full and filtered


Select a particular individual to *'mark as paid'*, *'withdraw'* or *'check-in'* a registration

Registration

List of registrations for "Participants"

 **Customise list**

 **Register**


 **Remove**

Export

Import


Actions

Check-in control



ID	Full name	Title	Email Address	Affiliation
<input type="checkbox"/>	#1 Adam Parker		adam.parker@ukaea.uk	UKAEA

17 | UKAEA Indico Training



Manage Registrations

Summary


Reference: #1 Date: 16 May 2024

Personal Data

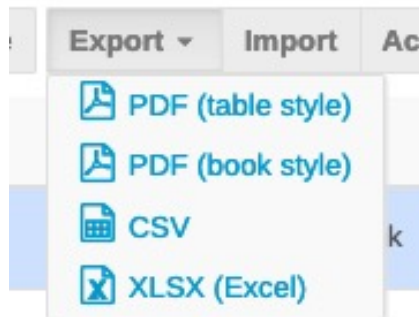
First Name	Adam
Last Name	Parker
Email Address	adam.parker@ukaea.uk
Affiliation	UKAEA

Privacy options

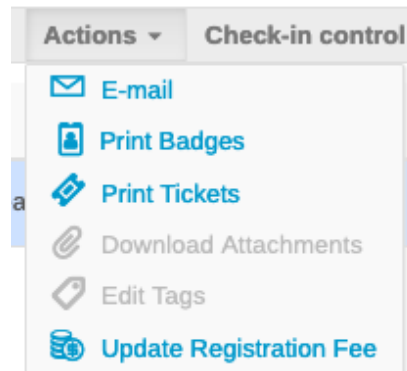
Visibility	Display to everyone
------------	---------------------

 Hide participant

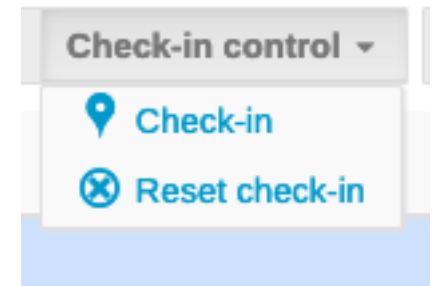
Export registrations



Send e-mails



Check-in manually



Email Templates and Notifications

Notifications for registrants

Notification sender address

Email address set as the sender of all notifications sent to users. If empty, then `noreply@indico.ukaea.uk` is used.

Message for pending registrations

Text included in emails sent to pending registrations (Markdown syntax)

Message for unpaid registrations

Text included in emails sent to unpaid registrations (Markdown syntax)

Message for complete registrations

Text included in emails sent to complete registrations (Markdown syntax)

Attach iCalendar file

Attach an iCalendar file to the mail sent once a registration is complete

Notifications for managers

Enabled

Enable notifications to managers about registrations

List of recipients *

Email addresses that will receive notifications

Save

Back

Training for Event Organisers and Administrators

Participants

ref: #1

Dear Adam Parker,

Thank you! Your registration for the event **Training for Event Organisers and Administrators** (16 May 2024, 14:30 - 16:30) has been received.

Personal Data

First Name:	Adam
Last Name:	Parker
Email Address:	adam.parker@ukaea.uk
Affiliation:	UKAEA

To manage your registration follow this link: [Manage my registration](#)

HANDS-ON

Things to try

1. Create Conference in your area
2. Change visibility
3. Customise and edit main page and menu
4. Make registration form
5. Register for own event
6. Have a partner register
7. Hide participants or registration, play with visibility
8. Export registrations to CSV