



## UKAEA Indico Training

# Event Management and Registration

*Adam Parker,*

October 16<sup>th</sup>, 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](mailto:stanislas.pamela@ukaea.uk)

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

📞 01234 567890  
📍 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

<a href="#">Overview</a>
<a href="#">Timetable</a>
<a href="#">Contribution List</a>
<a href="#">Registration</a>
<a href="#">Surveys</a>
<a href="#">Privacy Information</a>
<b>Contact for support</b>
✉ <a href="mailto:adam.parker@randomd...">adam.parker@randomd...</a>
☎ <a href="tel:01234567890">01234567890</a>

## 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:

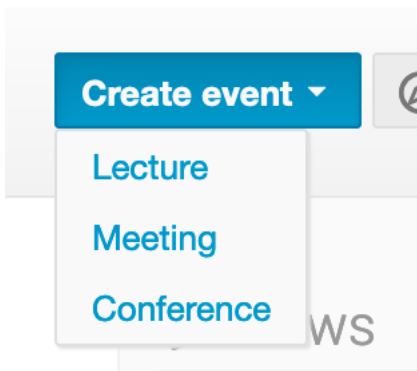
- registration;
- payments;
- page menu;
- abstract submission;
- poster sessions;
- paper review/editing.

08:00	<b>Registration: Registration</b>									
	Norfolk Waterside Marriott <span style="float: right;">08:00 - 09:00</span>									
09:00	<b>Welcome and Introduction to CHEP23</b> <span style="float: right;">Amber Boehnlein et al. </span>									
	Norfolk Ballroom III-V, Norfolk Waterside Marriott <span style="float: right;">09:00 - 09:30</span>									
	<b>Keynote: Evolutions and Revolutions in Computing: Science at the Frontier</b> <span style="float: right;">David Dean </span>									
	Norfolk Ballroom III-V, Norfolk Waterside Marriott <span style="float: right;">09:30 - 10:00</span>									
10:00	<b>Kenote: Future Trends in Nuclear Physics Computing</b> <span style="float: right;">Markus Diefenthaler </span>									
	Norfolk Ballroom III-V, Norfolk Waterside Marriott <span style="float: right;">10:00 - 10:30</span>									
	<b>AM Break</b>									
	Hampton Roads Ballroom (3rd floor), Norfolk Waterside Marriott <span style="float: right;">10:30 - 11:00</span>									
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 \*

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

	<b>Title</b> Training for Event Organisers and Administrators	
	<b>Description</b> 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..."	
	<b>Short URL</b> <a href="https://indico.ukaea.uk/e/240516_indico_training">https://indico.ukaea.uk/e/240516_indico_training</a>	
	<b>Date</b> 16 May 2024	
	<b>Time</b> 14:30 - 16:30	
	<b>Timezone</b> Europe/London	
	<b>Room</b> Remote / Witney	
	<b>Venue</b> C7	
	<b>Address</b> None	
	<b>Map URL</b> None	
	<b>Chairpersons</b> None	
	<b>Contact title</b> Contact	
	<b>Email</b> None	
	<b>Phone</b> None	
	<b>Keywords</b> None	
	<b>Default language</b> None	
	<b>Enforce language</b> No	
	<b>Additional languages</b> 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

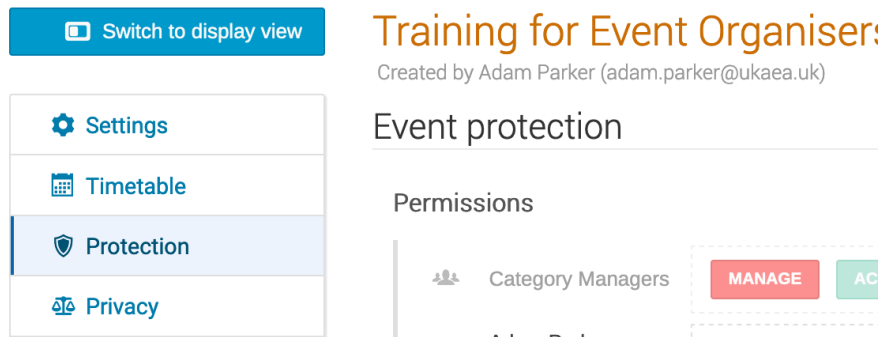
Training for Event Organisers and Administrators 16 May

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

Timetable

< Thu 16/05

# 3) Manage Access and Visibility



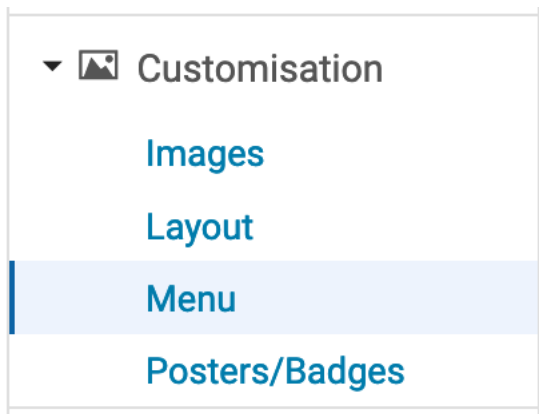
The screenshot shows a user interface for managing an event. At the top left, there is a blue button labeled 'Switch to display view'. Below it is a sidebar menu with four items: 'Settings', 'Timetable', 'Protection' (which is highlighted in light blue), and 'Privacy'. The main content area is titled '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

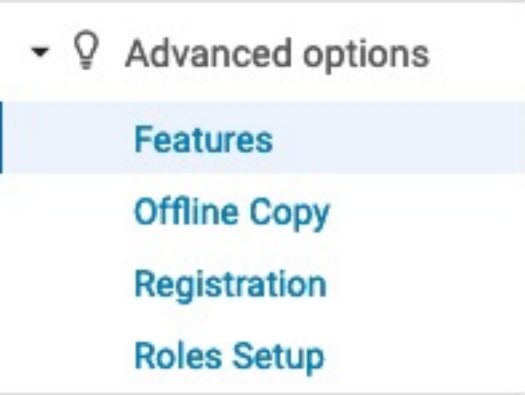
Many default tabs already exist which can be toggled on or off

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**

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

**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

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

Configure fields in form "Participants"

+ Add section

### Personal Data

First Name \*

Last Name \*

☰ Email Address \*

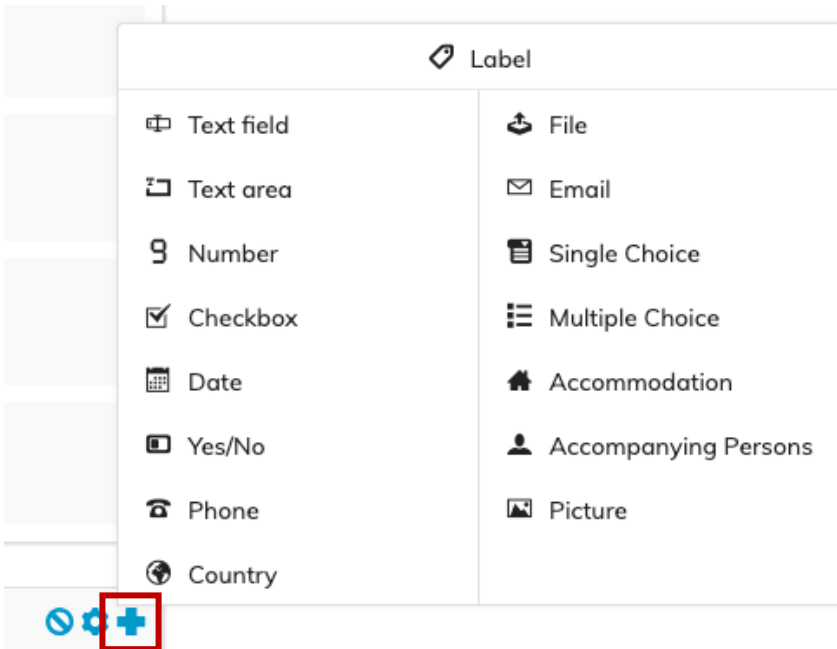
Affiliation

There is no limit to the number of registration forms

Event organisers often separate speakers and attendees into their own forms

# 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

# Manage Registrations

## Summary


Reference: #1 Date: 16 May 2024

### Personal Data

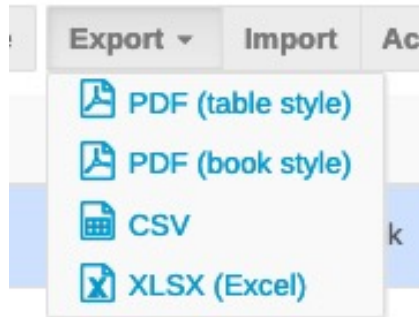
First Name	Adam
Last Name	Parker
Email Address	adam.parker@ukaea.uk
Affiliation	UKAEA

### Privacy options

Visibility	Display to everyone
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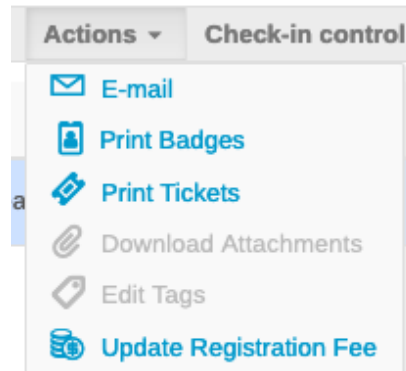
## Export registrations



Export ▾ Import Ac

- PDF (table style)
- PDF (book style)
- CSV
- XLSX (Excel)

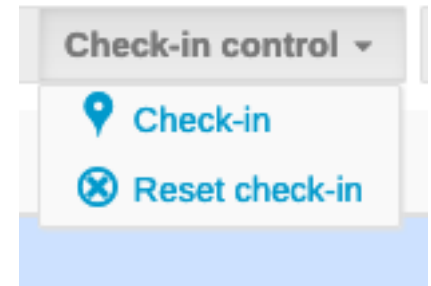
## Send e-mails



Actions ▾ Check-in control

- E-mail
- Print Badges
- Print Tickets
- Download Attachments
- Edit Tags
- Update Registration Fee

## Check-in manually



Check-in control ▾

- Check-in
- Reset check-in

# 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