UK Atomic Energy Authority

UKAEA Indico Training

Event Management and Registration

Adam Parker,
January 20th, 2025

Events

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.

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Lectures

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=RE5jMkFkODFNZFEvTWp6OS9DbkNSZz09
	Password: ACM_UKAEA
📎	📄 TestIndico.pdf
Organised by	Stanislas Pamela
Contact	✉ stanislas.pamela@ukaea.uk

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Meetings

14:30 → 14:40 **Introduction**

- Current status
- Accounts and access
- Plan for the future
- Format and agenda

Speaker: Adam Parker (High Performance Data Analytics)

14:40 → 15:10 **Session 1: Categories and Admin**

14:40 **Talk**

Speaker: Adam Parker (High Performance Data Analytics)

15:00 **Hands-On**

15:10 → 15:40 **Session 2: Event Management and Registration**

15:10 **Talk**

Speaker: Adam Parker (High Performance Data Analytics)

15:30 **Hands-On**

15:40 → 15:50 **Coffee Break**

15:50 → 16:20 **Session 3: Plugins and Additional Features**

15:50 **Talk**

Speaker: Adam Parker (High Performance Data Analytics)

16:10 **Hands-On**

16:20 → 16:30 **Closing Remarks, AOB, and Q+A**

Speaker: Adam Parker (High Performance Data Analytics)

- Multiple contributions

- Often used for longer events

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

Conferences

Conferences
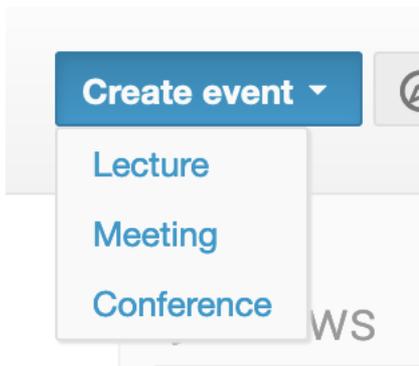
Multi-day events with many participants

Abundance of features by default:

- registration;

- payments;

- page menu;

- abstract submission;

- poster sessions;

- paper review/editing.

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 *	16/05/2024 1:00 🌐
End *	16/05/2024 3:00 🌐
Timezone *	Europe/London
Location	Venue Room
Protection mode	Public Inheriting Protected
	Create event Cancel

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*	✎
ℹ️	**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

Training for Event Organisers and Administrators *16 May*
Created by Adam Parker (adam.parker@ukaea.uk)

Settings

Timetable

Protection

Privacy

Timetable

< Thu 16/05

3) Manage Access and Visibility

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
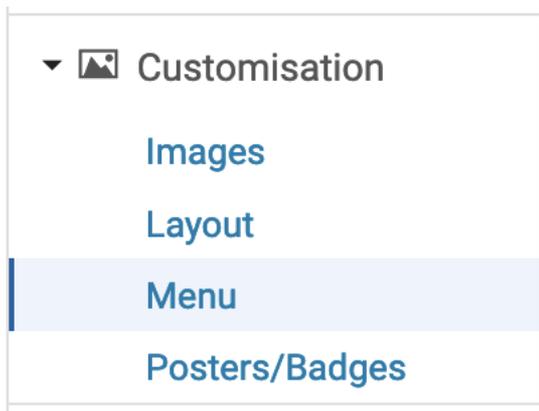
Menu

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

Customisation
- Images
- Layout
- Menu
- Posters/Badges

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

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

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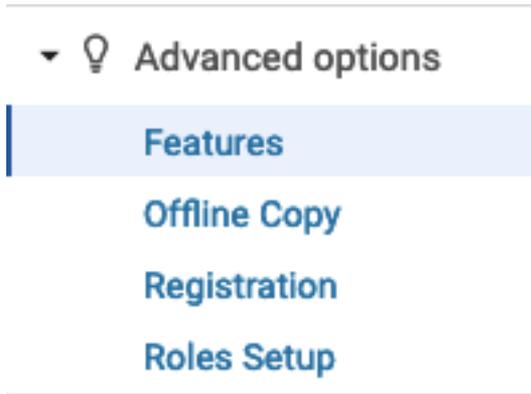
Within the Advanced Options tab of the event management area, features can be selected

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
Show all participants ▼

Visibility to everyone
Hide all participants ▼

Visibility duration (weeks)
Permanent

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

Retention period
Indefinite

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	⬜
If enabled, regist	
Only logged-in users	⬜
Users must be lo	
Registrant must have account	⬜
Registrations em	
Require CAPTCHA	🔵
When registering	
Limit registrations	⬜
Whether there is	
Modification allowed	Never
Will users be abl	
Publish number of registrations	⬜
Number of regist	
Publish check-in status	⬜
Check-in status	

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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
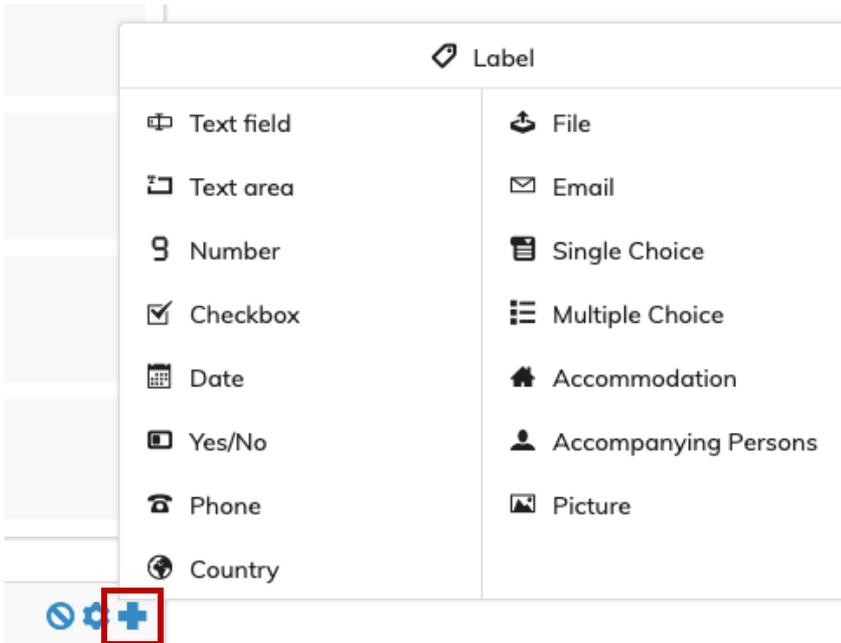
There is no limit to the number of registration forms

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

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

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

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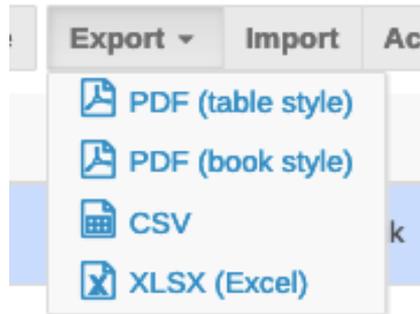'*withdraw*' or '*check-in*' a registration

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

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 ▾
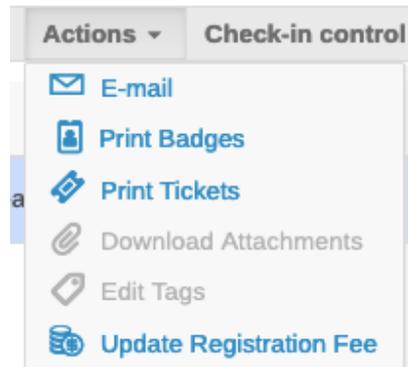
- 📍 Check-in
- ⊗ Reset check-in
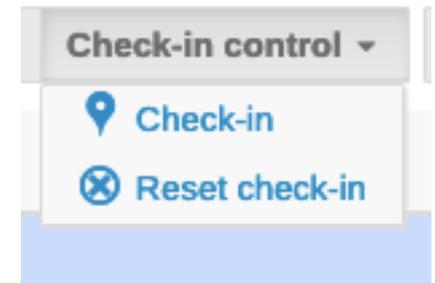
Email Templates and Notifications

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