Indico Hands-On Session - Meetings

The goal of this Indico hands on session is to familiarize with the management of a simple meeting 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 instructor

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

Some of the exercises will be done with the person sitting next to you.

Agenda

- Short presentation by the instructor, presentation of Indico features.
- Hands-On: please complete all the steps. If you don't know how to perform a specific task, 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.

Finding, creating and modifying an event

A. Navigating using Category Browser, Overview and Calendar

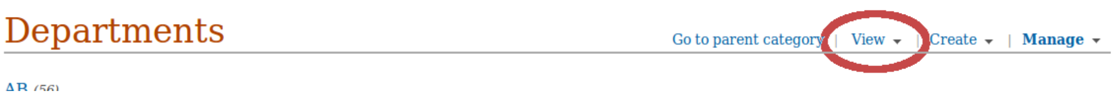
This first part focuses on locating meetings in the Indico hierarchy of events. You're going to find the Indico meeting held today, located somewhere inside the "Departments" category, using two different methods.

Using Category Browser

1. Enter http://indico.cern.ch, navigate through the categories (by clicking in the category name) until you find the event for this course. The event is here: Home > Departments > HR > Training > Technical Training > Software and system technologies > Office software > Courses. See that the event name is "Indico" and it's under today's date.

Using Overview

2. Go to the Indico home page (see  or  in the header toolbar), click on the "Departments" category. In this category page you will see a toolbar close to the category title. Click on *"View"* and then on the option *"Today's events"*:



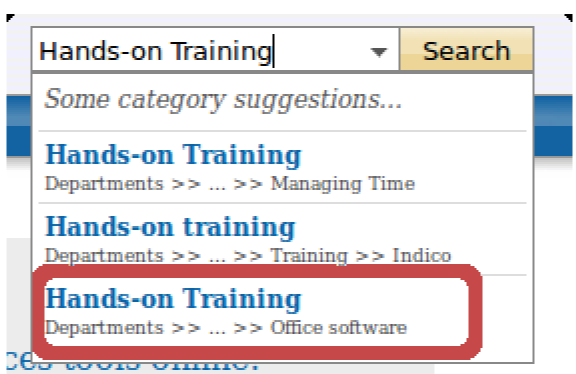
3. In the new page, locate the meeting called "Indico" in the list of meetings. Click on this meeting to enter the meeting's Indico page. Profit to download the material!

Using the Calendar

4. Go back to the Indico home page (from a meeting page you can use the icon  on the header, otherwise use ). Navigate to the "Departments" category, and then click on the *"View"* menu, and the option *"Calendar"*. By hovering your mouse pointer over today's date, you'll find the same meeting as above. Click on the meeting to enter it.

Using the Category Search facility

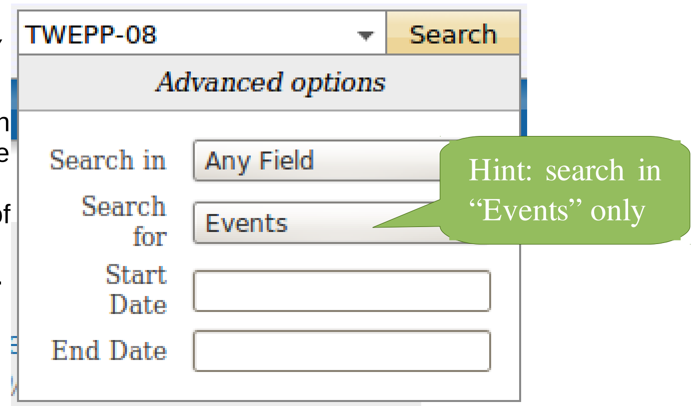
This feature is so useful if you want to search and access a category quite fast. You just have to write in the search box on the top header, Indico will suggest some categories matching with your keywords.



5. Use the category search tool to look for the category in which you will create your meetings later on. Write *Hands-on Training* in the search text field and you will see 3 results. Choose the one in "Departments >> … >> Office software". Once you click it, you will access the category page for your hands-on training. There, underneath the blue header, you can see the breadcrumbs with the full category path Home > Departments > HR > Training >

Technical Training > Office software
> Hands-on Training.

B. Using Indico's search facility



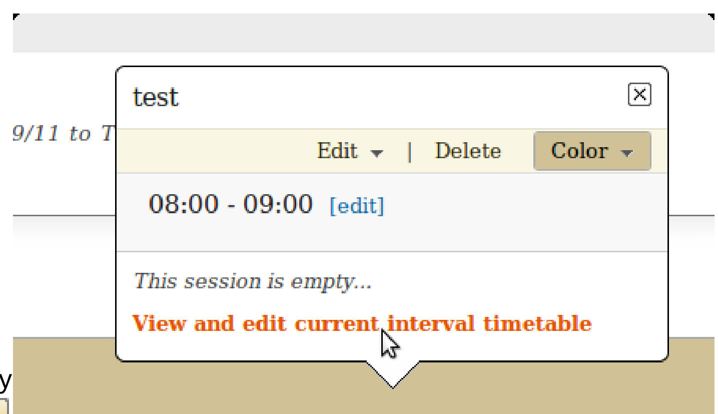
6. Go to the home page and use the search feature (header of the page) to find the "TWEPP-08" workshop.
7. In the results page, you will see the list of results with just 1 hit: Twepp-08.
8. Click on "Event details" to access the event.
9. Go back to Indico home page.

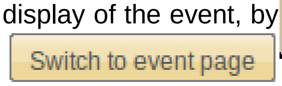
C. Create a Meeting

10. Log in using your NICE credentials.
11. In the blue header, click the button  and the option "Create meeting"
12. Step 1: choose the category "Hands-on Training". Remember that the full path is: Home > Departments > HR > Training > Technical Training > Software and system technologies > Office software.
13. Step 2: give the meeting your full name as a title, starting date one week from now, starting at 08:00 and finishing at 12:00.
14. Click the button "Create meeting". After validating the meeting creation form, you are redirected to the *management area* of the meeting. This area is only accessible by the creator of the event and the managers.

D. Create the timetable

15. Click on the option "Timetable" (menu on the left)
16. Create a contribution with the title "Introduction".
17. Create a session with the title "open session". Leave the timing and the other values by default.
18. Create a break with the title "coffee"
19. Create a second session with the title "closed session".
20. Add 2 contributions to "open session" and 2 more to "closed session". Name them "contribution 1" to "contribution 4". *NOTE: to add a contribution inside a session you need to access the session timetable, therefore click on the session and you will get a balloon with the option "View and edit this block timetable" (see figure).*



21. Switch back to the display of the event, by clicking the button  in the top right bar, and check the result.

E. Modify a meeting

22. When you are logged in and have modification rights over an event, you can use the pen icon  that you can find in the header of the page. Log out (upper right corner) and click on 

to go back to the Indico page. Notice that if you click in the pen icon you will be asked to login.
23. Go to the option “General settings” and set the Location to “CERN” and also choose a room. Click “save” when your choice is done.
24. Go again to the timetable. Click on “Introduction” and in the balloon you will see the hours. Close to the hours (duration) you will see a pen, click it to modify the timing, make the contribution to last 10 mn.
25. Go to the inner timetable for the session “closed session” and add a 15 mn “Tea break” at the end right after “contribution 4”

Access/Modification Rights

F. Protect a session

This section deals with protecting the access to your meeting – i.e. who is allowed to see the agenda and material. Note that this protection scheme is separate from modification rights (which controls who has access to the management area of the meeting).

26. Set the access rights on “closed session” to “Private”.

Hint: Click on the “closed session”. In the popup, click the menu “Edit”, option “Session properties”. In the new page, choose the “Protection” tab, and click the “Private” button.

G. Assign submission rights to another user

27. Go to the timetable and create a new “contribution 5” and **don't forget** to assign it a presenter before the creation, use “Add existing” button. This new presenter will be your neighbor. *Hint: You don't need to fill the whole form to look for someone, just enter some information like the family name.*
28. Add also your neighbor to the list of authorized submitters. This will give him or her the right to attach a file to this contribution. You can do this by keeping clicked the checkbox “Grant all these users with privileges: submission rights”
29. You can verify the submitters of the contribution by editing it and going to its protection tab.

H. Attach a file to a meeting

30. Leave the management area and go to your neighbor’s meeting. You should see only the first session (since the second one was protected).

Hint: From the display page of a meeting, you can go directly to its father category by clicking the “up arrow” link  *in the top menu.*

31. If your neighbor has already granted you submission rights on the “contribution 5”, you should see the modification icon next to it, on the right. 
32. Upload a file to the contribution (use the previous icon and the option “manage material”).
33. Write some minutes in the contribution (use the option “edit minutes”).

Other features

I. Clone

34. Go back to your own meeting.
35. Clone your meeting once, one week after the current date.

Hint: The clone feature is reachable either from the display of the event ("Manage" menu), or from the management area of the meeting, "Tools" menu.

J. Alarm

36. Go to the management area of the cloned meeting.
37. Set up an alarm triggered 1 day before the meeting, including a text version of the agenda. Use the "Send me the alarm as a test" in order to get a preview of the alarm in your mailbox.

Hint: The alarm feature is accessible in the management area of your event, "Tools" tab.

K. Export to personal calendaring tool (Outlook)

38. Add your own first meeting to your personal calendaring tool.

Hint: Click on the icon 

in the top header of the event display page, and export to iCal. You can also do it from list of events in the category page with the icon  *.*

L. Manage participants

39. Go back to your first meeting and add 2 participants to the list of participants. *Hint: You must go to the management area of the meeting and click in the left menu, the option "Participants". Use the button "Search database" in order to search for them.*
40. Now, allow to **apply for participation**.

Hint: The starting date of the event has to be in the future in order to see the option that will allow you to activate it.

41. [You now act as a participant] Open another browser in which you are not logged in. Go to the event and apply for participation using any first name, family name and email.
42. [You now act as the manager] Accept the participation request from the prior step

Hint: Look for it in the management area: Participants tab > pending participants.

43. Activate auto-accept and try again the step 41. Notice the differences.

M. Close your first meeting

Once a meeting's been closed, nobody – not even a meeting manager – can modify the meeting. Only an Indico administrator or category/event manager can re-open a closed meeting.

44. Close your first meeting by clicking on the Tools option (making sure you're within the Meeting context) and choose "Close" and confirm.

N. Delete your second meeting

45. Delete your second meeting by clicking on the Tools option, then the tab "Delete" and confirm it.

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