

# 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 four 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 > Office software > Indico > Courses*. See that the event name is "Indico" and it's under today's date.

#### Using Overview

2. Go back 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".

### Departments

[Go to parent category](#) [View](#) [Create](#) [Manage](#)

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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. Take the opportunity to download the material!

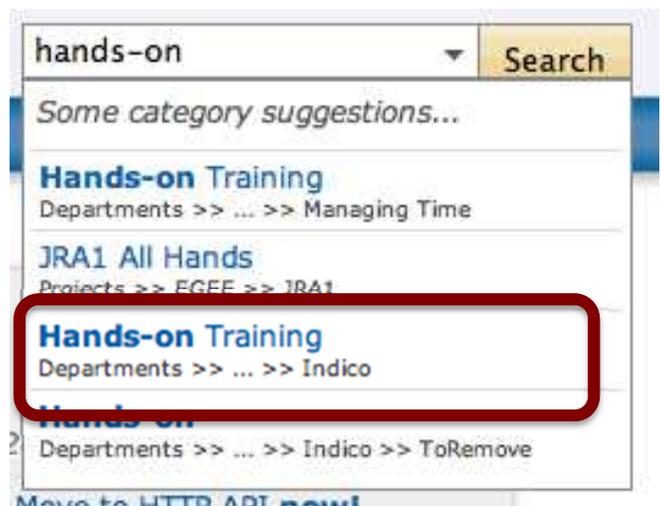
#### Using the Calendar

4. Go back to the Indico home page (from a meeting page you can use the icon  on the header, otherwise use ). Navigate again 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

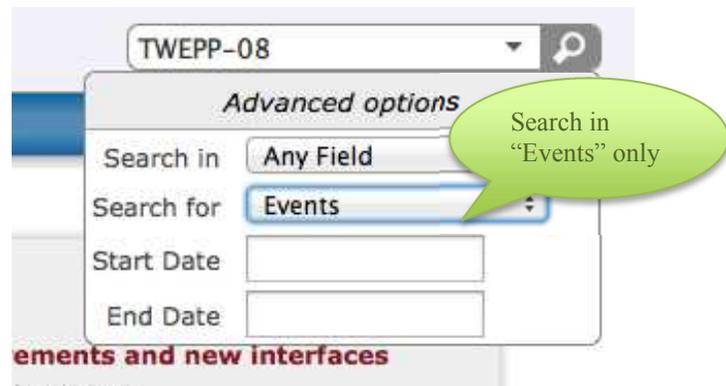
This feature is so useful if you want to search and access a category quite fast. You just have to write in the search box on the top header, Indico will suggest some categories matching with your keywords.

5. Use the category search tool to look for the category in which you will create your meetings later on. Go again to Indico's Home and write *Hands-on* in the search text field and you will see 4 results. Choose the 3<sup>rd</sup> one: "Departments >> ... >> Indico". Once you click it, you will access the category page for the test events that you will create later on. Notice that underneath the blue header, there are breadcrumbs with the full category path *Home > Departments > HR > Training > Technical Training > Office software > Indico > 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.

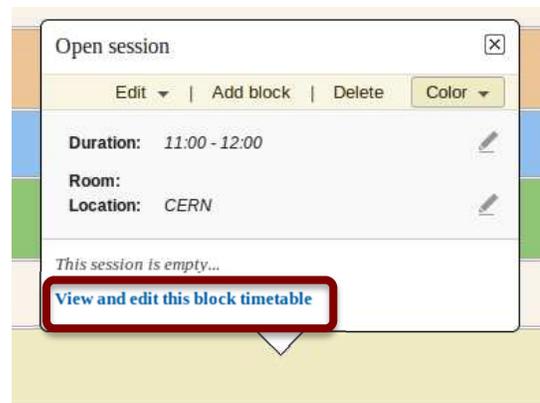


## C. Create a Meeting

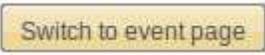
10. Log in using your CERN computer account.
11. In the blue header, click the  button and the option "Create meeting"
12. Step 1: choose the category "Hands-on Training". Remember that the full path is: *Home > Departments > HR > Training > Technical Training > Office software > Indico > Hands-on Training*.
13. Step 2: give the meeting your full name as a title, starting date one week from now, starting time at 08:00 and finishing at 12:00.
14. Step 3: Keep the default value.
15. 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

16. Click on the option "Timetable" (menu on the left)
17. Create a **contribution** with the title "Introduction". *Hint: Use the menu 'Add new' → Contribution.*
18. Create a **session** with the title "open session". Leave the timing and the other values by default.
19. Create a **break** with the title "coffee"
20. Create a second **session** with the title "closed session".
21. 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 on the right).*



22. Switch back to the display of the event, by

clicking the button  in the top right bar, and check the result (menu *Timetable*).

### **E. Modify a meeting**

23. 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.
24. Go to the option “General settings” and set the Location to “CERN” and also choose any room. Click “save” when your choice is done.
25. Go again to the timetable. Click on the contribution “Introduction” and in the balloon you will see the duration. Close to the duration there is a pen, click it to modify the timing, make the contribution last 10 minutes.
26. Go to the inner timetable for the session “closed session” and add a 15 minutes “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 different to modification rights (which controls who has access to the management area of the meeting). More help on protection here: <http://indico.cern.ch/ihelp/html/UserGuide/Protection.html>

27. Set the access rights on “closed session” to “Private”.  
Hint: Go to “Timetable”, click on the “closed session”. In the popup, click the menu “Edit”, option “Session protection”. In the new page, click the button “Private”.  
Later in step 30, you will be able to verify that as a result of protecting this session nobody (but you, the organiser) can see it.

### **G. Assign submission rights to another user**

28. 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.*  
Keep the checkbox “Grant all these users with privileges: submission rights” ticked in order to ensure that the presenter (your neighbor) will be added to the list of authorized submitters. This will give him/her the right to attach a file to this contribution.
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.

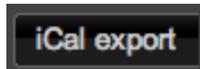
### **J. Alarm**

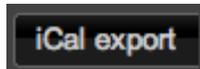
36. Go to the management area of the cloned meeting.
37. Set up an alarm triggered 1 day before the meeting, including a text version of the agenda. Use the “Send me as a test” in order to get a preview of the alarm in your mailbox.

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 (open with Outlook or any other calendar client). 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 “[Add → Indico User](#)” in order to search for them.
40. Now, allow to **apply for participation**.  
Hint 1: Use the tab “Setup”  
Hint 2: 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 → Pending participants.
43. Activate auto-accept (from Setup) 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.**