UNOG Indico

Training material for Category & Conference Managers
➢ **Account creation and roles**

1. Go to Indico home page and click on the Login button at the top right of the window
2. Click on **Create new** Indico Account
   a. Fill out the form
   b. Make sure your password meet the minimum-security requirements
   c. Click on Confirm
3. Activate your account
4. Get the proper roles from your Category Manager or the UNOG Indico team

➢ **Select or create a conference**

5. Now that you have Category Manager rights, you can create a conference/event or setup one up, if it already exists on Indico.
6. If you are not logged in to Indico, please do so by clicking on the login button at the top right corner of the window.
7. Navigate to your category
8. Click on the meeting you would like to setup or click on the pencil icon on the right to create a new conference
   a. Enter the title and date of your conference
   b. Click on **submit**

➢ **Set up your conference**

9. Click on the pencil icon located on the top black menu to access your conference management area (orange background color)
10. On the General settings page
    a. Tick Hide event from public for your conference to be only visible to your Category Managers and only those with whom you share its link with will be able to register
    b. Enter a short title. This will be displayed on the badge - Click on the (edit) link
    c. Enter a description of your conference/event if any
      i. Click on the (edit) link next to the input field
      ii. Click on **switch to rich text** to display MS Word-like text formatting tools.
d. Check the location, room and address

e. For any other important info, edit the Additional info input field

f. Enter your entity support email address or the contact/focal point email address for this conference

11. Would you like to see how your meeting page looks like? Click on the yellow button on the right, **Switch to event page**.

**Create your registration form**

12. Click on the menu **Registration** on the left panel

13. Next to the Setup tab, you will see the **Edit** tab. Click on it.

14. Edit your registration form by adding new sections to the default ones
   a. If your conference does not have sessions, disable the Sessions section.
   b. Click on +Add section button to create a new one. Give it a title then click **Add**
   c. Inside your new section, click on the big + to add a new field: file to upload, date, dropdown, etc.
   d. It is saved automatically.

**Open the registration**

15. Now that your registration form is ready, click on the Setup tab

16. Click on the button **Current status** to open the registration

17. Now that the button is on ON, scroll down and click on **modify**

18. Enter the start and end date of the registration period.

19. Provide an email address for the field **Email notification sender address** (your conference support email)

20. Click on **Ok** at the bottom of the form

21. Click on the yellow button on the right, **Switch to event page**, to see how your meeting registration page looks like

22. From your conference registration page, copy the URL

23. Share your conference link with your participants or post it on your website

**Manage your registrants/participants**

24. Go back to your conference registration page

25. Make sure you are logged in.
   a. Look if your name is displayed on the top right corner of the screen
b. If you are not logged in, kindly do so by clicking on the Login button
26. Go to your conference management area (orange background color)
27. Click on the Registration menu on the left panel
28. Click on the tab Registrants
29. On the Registrants page, you can:
   a. Approve/Reject participants
   b. Select participants and send emails, approve/reject selected, export in Word or Excel
   c. Register a participant - Add a new participant from an existing account or from new, remove a registrant, import participants using an Excel template

➢ More functionalities

Please check the user’s guide to know more about the following functionalities

- Quick stats about your conference
- Conference logs/audit
- Set up a survey – menu evaluation –
- Menu layout: upload conference logo, the map of the venue, menu, …
- Upload or link to existing conference documents
- Add a registrar to your conference
- Clone a conference, a registration form, …