To assign roles to persons for an event, the Protection module is used.
Conference Manager

Conference Managers can only manage events which have been assigned to him/her by the Category Manager.

Conference Managers have the same rights as a Category Manager in that once he/she has been assigned to an event, he/she can manage the look, feel and content of an event page, add material to an event page and manage the registrants. He/she may also grant the Registrar role.

Add Conference Manager(s)

- In the event management area, click the Protection module on the left. The Security control pane opens.
- In the Modification control section, click Add manager.
- The Add manager dialogue box opens. Perform a search for the individual to grant the role of Conference Manager to (a pre-requisite is that he/she already has an account in Indico). When found, select the name and click Add.
- Ignore the Modification key field.
- The role of Conference Manager has now been assigned and all privileges related to the role granted. Repeat for additional Conference Managers.
Registrar

Registrars only have access to the Registration module and can only perform specific functions assigned to him/her by the Conference Manager. Registrars can only access the module once registration for the event has been opened.

NOTE: For an event where registration is already closed, a Registrar will be unable to take actions e.g. Add Registrant or Add from Existing or modify unless a modification end date has been set and not yet reached.

Add Registrar(s)

• In the event management area, click the Protection module on the left. The Security control pane opens.
• In the Registration modification control section, click Add manager.
• The Add manager dialogue box opens. Perform a search for the individual to grant the role of Registrar to (a pre-requisite is that he/she already has an account in Indico). When found, select the name and click Add.
• Ignore the field “Update organization”.
• The role of Registrar has now been assigned. Now you will need to apply the appropriate Rights and Criteria to him/her.
Assign registrants to a Registrar to manage

A Registrar is assigned registrants to manage by:
- representation type,
- session, or
- country represented.

So, as a manager you need to ask yourself do you want the Registrar to manage registrants by the country they represent, the session(s) they have selected to attend or by their representation type. The most common used is by representation type. In doing so you can assign to a Registrar certain representation types (e.g. Government and Private Sector only) or all representation types (i.e. Government, IPU, IGO, Private Sector, NGO, Academia, Press/Media, Other, UN).

- In the Registration modification control panel click Criteria beside a chosen Registrar.

- The Criteria editor dialogue box opens. Click “+”.

- A yellow row appears. It is here you indicate how the Registrar will manage registrants (i.e. will it be by Country, Representation Type or Session). As mentioned previously, Representation is the most used one. So, under the Criteria column open the drop-down menu and select Representation.

1 If a Registrar is assigned registrants to manage by session or country represented, the Conference Manager will assign the appropriate rights in the same way as he/she would for representation.
Now you must indicate which of the many representation types he/she will manage. So, under the Value column open the drop-down menu and select a representation type.

After selecting a value click **Save row**.

To assign another representation type to manage click “+”. Assign another type from the drop-down menu and save. You must assign representation values one by one, saving each one before assigning another one.

When finished assigning all the required representation types click **Close**.
Assign rights to a Registrar over registrants

Now that you have assigned registrants to the Registrar, you must determine what actions he/she may perform over those registrants. A Registrar may hold some or all the following action rights:

- **Approve**: approve or reject registrants.
- **Log**: see a history of actions taken by both the Registrar and the participant.
- **Import**: import a list of registrants from excel.
- **Export**: export a list of registrants to excel.
- **Participant lists**: download a draft or final list of participants.
- **VIP/Badge type**:
  - **Badge validity**: change the dates on a badge
  - **Admin field**: see/modify fields of type “Admin” in a registration form
  - **Add existing**: add a registrant on their behalf if that registrant already has an Indico account (this right is reserved for Registrars holding certain UN organization email domains).

For future reference, Registrars who do not have the right to approve can modify registration forms that are Pending **only**. Registrars who have the right to approve can modify registrations that are Approved or Rejected.

• Click **Rights** beside a chosen Registrar.

• The **Rights editor** dialogue box opens.

• Click “+”. A yellow row appears.
• From the **Value** column, open the drop-down menu and select the action right to be assigned.

• After selecting, click **Save row**.

• To add another action right, click “+”. Assign another right from the drop-down menu and save.

• Rights are assigned one by one in this manner.

• When finished click **Close**.

In cases where a **right is to be removed** from a Registrar, click on the right listed in the **Rights editor** panel (turns yellow) and then click the trashcan. A message appears on-screen to confirm the deletion.

In cases where a **representation type** is to be removed from a Registrar, click on the criteria listed in the **Criteria editor** panel (turns yellow) and then click the trashcan. A message appears on-screen to confirm the deletion.

**NOTES**

registrars cannot see a pencil icon in the menu bar to access the management area, then the Registrar role has not been assigned.

If no registrants have been assigned to a Registrar, he/she will see an empty registrants list.

---END---