Introduction to Indico / DFNconf / Zoom

04/Mar/2020

Agenda

- **Introduction**

- Using Indico

- Using DFNconf

- Using Zoom

Indico

- ***Indico*** is being developed at CERN as a full blown tool for <u>organizing events and meetings</u>

- At EUROfusion it will replace the booking part of fusionTV along with the possibility to upload and share documents.

- Indico is being used by a lot of institutes
  - CERN (obviously), DESY, KIT, …

Features (selected)

- **Events of different complexity**
- In Indico you can organize all kinds of events. It provides workflows that let you easily manage small seminars and meetings as well as more complicated workshops and conferences. Indico will aggregate and store all events of your institute.

- **Hierarchical Protection Scheme**
- Indico was built with a large organization in mind (CERN). This is why events are organized using a hierarchy of categories and protection of resources at several granularity levels. Different roles can be defined within an event as well. From small schools to large enterprises, Indico is the intuitive solution for organized and secure event storage.

Changing from fusionTV to Indico+DFNconf

Today

Future

VC

fusionTV

Video Conferencing

Booking

Screen Sharing

File Sharing

Screen Sharing (fusionTV channels) can access shared files!

Indico

Booking

File Sharing

Screen Sharing is independent of File Sharing!

DFNconf/Zoom VC + Screen Sharing

Video Conferencing

Indico is not connect to VC!
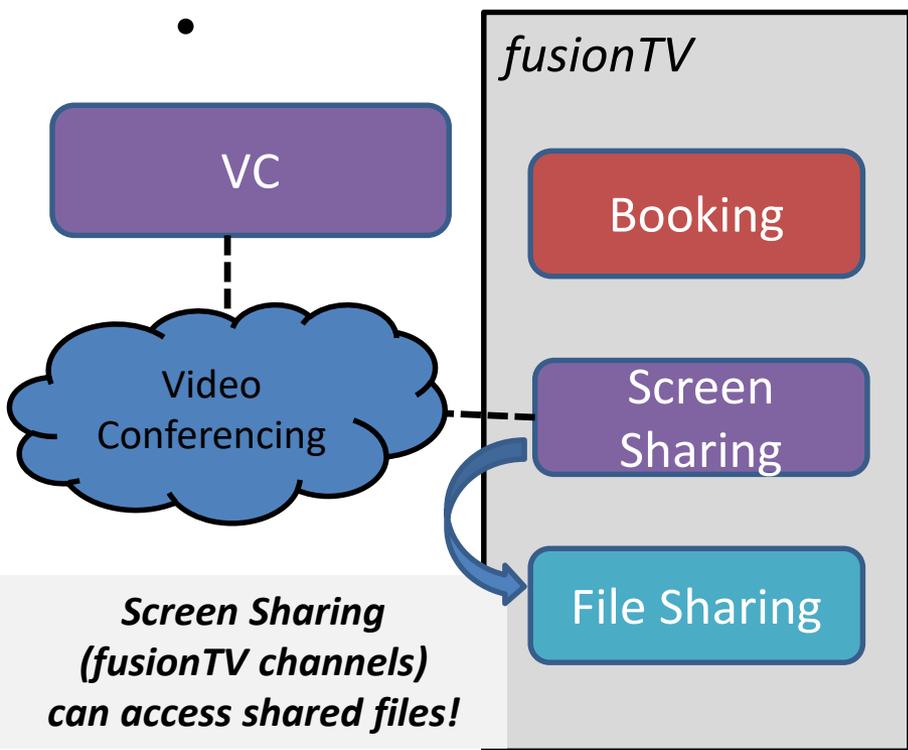
Indico: Major Changes I
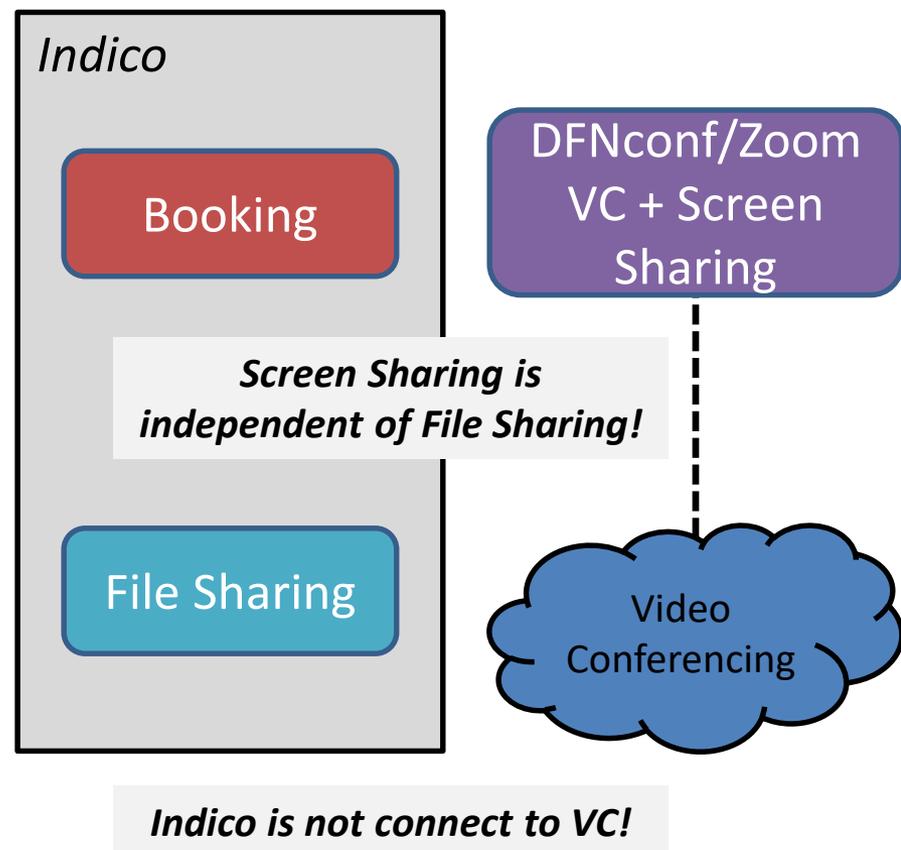
Major Changes

- In contrast to fusionTV, it **does not offer an integrated screen-/presentation-sharing functionality**

- It is not linked to any kind of VC system.

- Events and uploaded files will not expire in Indico (unlike in fusionTV).

Indico: Major Changes II

Major Changes

- **Indico handles authentication and user accounts different than fusionTV !**

- <u>Only</u> persons with a valid EUROfusion accounts can create events!

- Guest access to protected resources can <u>only</u> be granted through *Access Keys* ('PIN') for events.

- **Guests can never upload documents!**

Help

Getting help

- Support contact for Indico@EUROfusion:
  indico@euro-fusion.org

- Official Indico User Guide:
  https://learn.getindico.io/

- Community Forum
  https://talk.getindico.io/

- All current user documentation will directly available as *Materials* of the "Test Catergory"
  https://indico.euro-fusion.org/category/1/

Agenda

- Introduction

- **Using Indico**

- Using DFNconf

- Using Zoom

Live Demo *** In Parallel …***

Steps:

- Homepage + Categories
- Show „*** Test Category ***"
- Create Event
- Add Permissions and Access Key
- Add Time table
- Add Materials
- Add Event to Outlook
- Login as Participant with Access Key
- Use "My Profile" for Quick Access
- Add Indico Calendar to Outlook

Indico – Getting Started

Homepage https://indico.euro-fusion.org

Indico Concepts: Categories

- *Categories* are like folders in a filesystem. They are used to group events and to assign permissions.
- *Categories*
  - are organized **hierarchically**.
  - are maintained by category managers
- Category security settings
  - **Managers** (have all permissions)
  - **Protectionmode**
    - Public / Protected / Inheriting (from parent category)
  - **Access Control List** (protected categories only)
    - Who can view events in this category
  - **Restricted event creation**
    - Who can create events in this category

Indico Concepts: Categories

- A ***Category*** hierarchy has already been designed and implemented.

Top Level Categories

Committees

Project and Scientific Boards

Conferences, Workshops and Events

Meetings

Work Packages and Projects

EUROfusion PMU

EUROfusion Coordinator

Global EUROfusion Consortium

EIROforum

*** TEST Category ***

*** Test Category ***

Use the *** *TEST Category* *** for playing with Indico.

*** TEST Category ***   4 events   →

Do not create "real" events here.

Current User Documentation will always be stored here.

*** TEST Category ***   Create event ▾   ⬆ Parent category   📅▾   👁▾

This category is meant for testing purposes only!

All events older than 3 months will be automatically deleted.
Do not use this category for real events!

📎 Materials

📄 Indico Quick Start Guide 20200124.pdf
📄 Infinity_Connect_Webapp_Userguide_v2···
📄 User Guide - Indico+DFNconf 20200131.pdf

Indico Concepts: Events

- *Events* can be of type: *Meeting*, *Lecture* and *Conference*
  - Event types *Lectures* and *Conference* offer a bunch of sophisticated and advanced features.
  - Typically you might want to use type *Meeting*

- *Protectionmode* for events can be set individually, i.e. independent of the parent category.
  - Public
  - Protected
  - Inherited (from category)

Protectionmodes:
Who can access an Event?
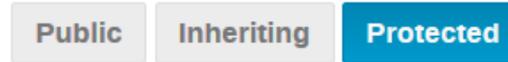
Protected

- Category Managers
- User/Groups which have been explicitly granted access
- With Access Key (if configured)

| Public | Inheriting | **Protected** |

Protected
This object is **only** accessible by the **users specified** below and the **managers** of **parent resources**.

Inheriting (in Protected Category)

- Category Managers
- *Users with Access rights for the Category*
- User/Groups which have been explicitly granted access
- With Access Key (if configured)

| Public | **Inheriting** | Protected |

Protected
This object is not publicly accessible since **IT Workshops *protected*** (Category) is protected.

Public

- Everybody ☺

| **Public** | Inheriting | Protected |
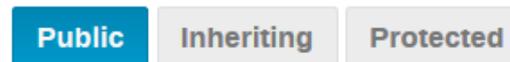
Public
This object is publicly accessible since it is set as public.

Creating an Indico Event

Create new meeting

Category *	Test Category
	Choose category
Event title *	Discuss Indico@EUROfusion
Start *	03/03/2020 15 : 00
End *	03/03/2020 17 : 00
Timezone *	Europe/Berlin
Location	Venue Room
Protection mode	Public Inheriting **Protected**

Protected
The event will **only** be accessible by the **managers** of **parent categories** and users you give access to.

Choose an appropriate category
ⅈ Indico won't let you select a category where you don't have access to

⚠ **Protect your Meeting !**

Create event   Cancel

Event Settings

Settings

Title Discuss Indico@EUROfusion

Description Discuss the details on how to use Indico at EUROfusion. VC details are as follows: ...

Short URL *None*

Date 3 March 2020

Time 15:00 - 17:00

Timezone Europe/Berlin

Room *None*

Venue *None*

Address *None*

Chairpersons Denis Kalupin [Submitter]

Contact title Contact

Email stefan.beck@euro-fusion.org

Phone *None*

Keywords *None*

External IDs *None*

Description is only visible for authorized users. You can provide VC details here.

Chairpersons can upload materials for this meeting.

Contact details are only visible for authorized users.

Handling of VC Details in Indico Event

Recommendation

- In general:
  - **Copy VC details to event description**
  - Event description is protected if event is protected.
  - Event description is available in calendar

- DFNconf
  - Use invitation template for VC details
  - Copy them to Indico event description

Event Permissions

- Permissions for events can be assigned individually, i.e. independent of the parent category.

- **Access permission** allows you to access all *Meeting* details and *Materials*.
  However, it does not allow upload of materials!

- One can get Access permission by either using the *Access Key* or by explicit grant of the *Meeting Manager* (or by being a manager of the parent category).

- By default, only you, the category managers and the *Chairperson* (if any) can upload materials. You must grant *Manage – Submissions* rights to additional users in case they should be able to upload materials!

Indico: Major Changes II

Recall !

Major Changes

- **Indico handles authentication and user accounts different than fusionTV !**

- <u>Only</u> persons with a valid EUROfusion accounts can create events!

- Guest access to protected resources can <u>only</u> be granted through *Access Keys* ('PIN') for events.

- **Guests can never upload documents!**

Event Protection

Permissions

👥 Category Managers	MANAGE	ACCESS
👤 Denis Kalupin denis.kalupin@euro-fu...	SUBMISSION	
👤 Emilia Genangeli emilia.genangeli@euro...	ACCESS	SUBMISSION
👤 Stefan Beck stefan.beck@euro-fusi...	MANAGE	ACCESS

Add | User / Group | Role ▾

Chairpersons automatically get submission rights for uploading materials.

Additional Indico users can get individual permissions.

The Meeting Manager (You) gets all permissions.

Protection mode   Public | Inheriting | **Protected**

🔒 **Protected**
This object is **only** accessible by the **users specified** below and the **managers** of **parent resources**.

The Access Key allows access to all Meeting details and materials. Non-Indico Users need this for accessing the Meeting.

Access key   ••••

It is more secure to use only the ACL and not set an access key. It will have no effect if the event is not protected

Pitfall

Whenever you search for users in Indico, ensure that you enable the checkbox *Users with no Indico account*!

Users with no Indico account ☑

Otherwise your search will only list users that have logged into Indico at least once.

Indico Concepts: (Event) Timetable
Sessions, Session Blocks, Contributions

Time

Time Table Elements

Event

Contribution (e.g. Welcome)

Session A
(e.g. Morning)

Session Block A1
- Contribution A1-1
- Contribution A1-2

Break (e.g. Coffee)

Session Block A2
- Contribution A2-1
- Contribution A2-2

Break (e.g. Lunch)

Session B
(e.g. Afternoon)

Session Block B1
- Contribution B1-1
- Contribution B1-2

Break (e.g. Coffee)

Session Block B2
- Contribution B2-1
- Contribution B2-2

All timetable parts are optional! You do no need add any!

Final Event

Discuss Indico@EUROfusion

📅 Tuesday 3 Mar 2020, 15:00 → 17:00 Europe/Berlin

👤 Denis Kalupin

Description   Discuss the details on how to use Indico at EUROfusion.

VC details are as follows: ...

Contact   ✉ stefan.beck@euro-fusion.org

15:00 → 16:00   **Indico Administration at EUROfusion**   🕐 1h

Speaker: Rudolf Bauer (EUROfusion)

16:00 → 17:00   **Technical Requirements for Running Indico at EUROfusion**   🕐 1h

Speaker: Stefan Beck

Indico Concepts: Materials

- *Materials* are document attachments to categories, events and contributions.
- They can be organized in folders
- They can have security settings on their own.
- Typical attachments are PowerPoint slides or PDF documents.
- **You can add links, too. E.g. links to IDM documents.**

Add materials to the event.
You can attach files or links using the buttons on the right.

Upload files   Add link

Note: Documents cannot be altered during the meeting and then saved for download as it was possible in fusionTV.

Adding Event to your Outlook calendar

- Use the calendar symbol on the Event page and select the desired download format: *Calendar file* vs *Detailed timetable calendar file.*

- *Detailed timetable calendar file* creates multiple Outlook events if the *Event* has multiple contributions.

Download current event:
- Calendar file
- Detailed timetable calendar file

Permanent link for public information only:

https://indico.euro-fusion.org/export/event/3.ics

Permanent link for all public and protected information:

Copy this one ->

https://indico.euro-fusion.org/export/event/3.ics?apik

Please use CTRL + C to copy this URL

☐ Detailed timetable

Contact

Adding Event to your Outlook calendar

- ***Event*** description plus direct link to the event is included in Outlook appointment.

Subject	Discuss Indico@EUROfusion
Location	
Start time	Di 03.03.2020 15:00 ☐ All day event
End time	Di 03.03.2020 17:40

Discuss the details on how to use Indico at EUROfusion.

VC details are as follows: ...

https://indico.euro-fusion.org/event/3/

- You can use this event to send Outlook invitations.
  So you get feedback who will attend.

Login as Participant with Access Key

If you configure an Access Key for your Event, unauthorized users can enter the Access Key here:

Favourite Categories

We have 100+ categories!

Tipp: Add your important categories as favourites

Using *My Profile / Dashboard* for Quick Access

| Home | Create event ▾ | Administration | My profile |

Home » My Profile

My Profile

Dashboard

Stefan Beck   ⚙ Settings

✉ stefan.beck@euro-fusion.org
☎ +49 171 xxx

Your categories

*** TEST Category ***   ★
Home

EUROfusion PMU   ★
Home

Your events at hand

7 Feb 2020	Discuss basic usage of Indi…
7 Feb 2020	Test
3 Mar 2020	Discuss Indico@EUROfusion
4 Mar 2020	Training Session on new co…

Happening in your categories

3 Mar 2020	Discuss Indico@EUROfusion
	*** TEST Category ***
4 Mar 2020	Training Session on new communication tools INDIC…
	*** TEST Category ***

Add Indico Calendar to Outlook

- You can add **all** Indico events (for which you have access to), as a separate calendar to your Outlook.
  - Gets by default automatically updated every 30m*: Outlook -> File -> Options -> Advanced -> Send and receive*).

- Login to the Indico Homepage and use the Calendar Icon:

Add Indico Calendar to Outlook

- Open Outlook calendar and use *Open Calendar / From Internet* and paste the URL.
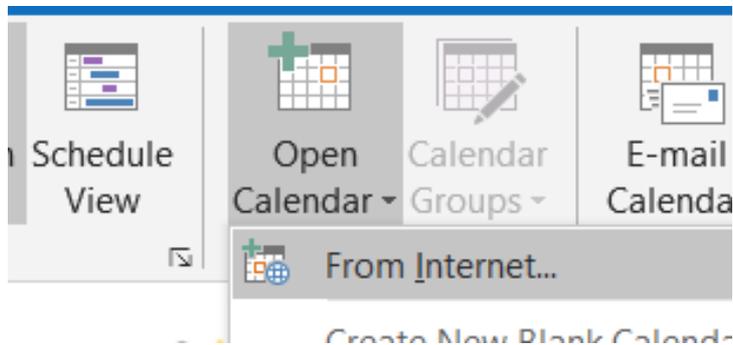
Paste URL

Rename calendar

Agenda

- Introduction

- Using Indico

- **Using DFNconf**

- Using Zoom

DFNconf

DFNconf is a new generation videoconferencing service for the scientific community.
The service can be used by different means.

Mobile smart phone using the Pexip App

Skype for Business / Microsoft Teams

SIP/H.323 room system or software client

Desktop Application

Apps

VC-Systeme

Webbasierte Lösungen

Telefoneinwahl

Web Browser (e.g. Google Chrome

Telephone (audio only)
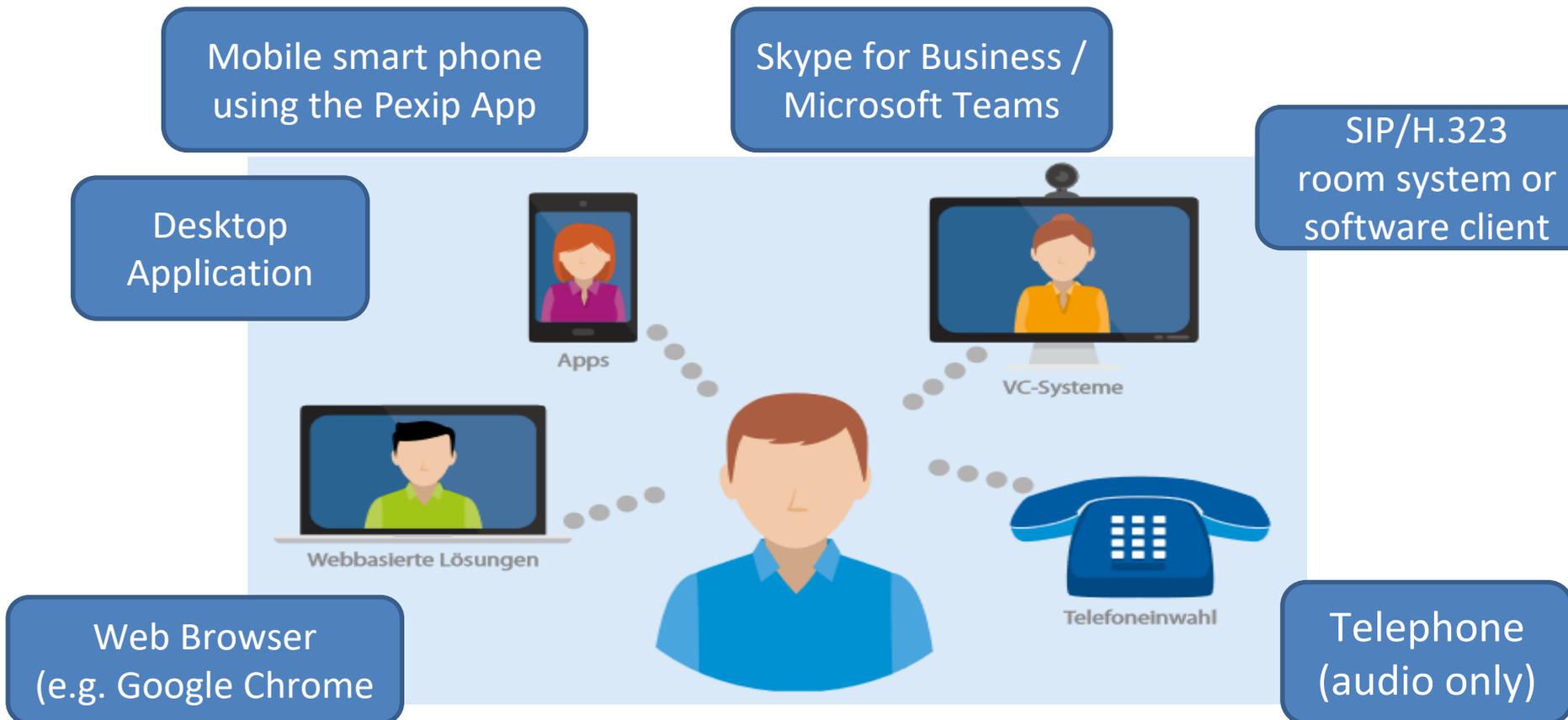
Login as Organizer

- The DFNconf login page: https://my.conf.dfn.de/
- Start by choosing your home organization first:

Create Meeting

- Select *New Meeting Room*

Create Meeting

DFNconf-Portal   🖥 **ADOBE CONNECT | WELCOME, STEFAN BECK | CHANGE PASSWORD | LOGOUT** 🌐 en ▼

Home » Meeting Rooms » New Meeting Room

New Meeting Room

Name:

The name used to refer to this Virtual Meeting Room. Maximum length: 250 characters

Host PIN:

This optional field allows you to set a secure access code for participants who dial in to the Virtual Meeting Room. Length: 4-20 digits, including any terminal #.Note: if a guest PIN is set the host PIN and the guest PIN must have the same number of digits or both PINs must end with #. About PINs, Hosts and Guests

More Settings (Hide)

Description:

A description of the Virtual Meeting Room. Maximum length: 250 characters

Allow Guests: [Ja ▼]

Yes: the conference will have two types of participants: Hosts and Guests. You must enter a PIN in the field above to be used by the Hosts. You can optionally enter a Guest PIN in the field below; if you do not enter a Guest PIN, Guests can join without a PIN, but the meeting will not start until the first Host has joined.
No: all participants will have Host privileges. For more information, see About PINs, Hosts and Guests

Guest PIN:

This optional field allows you to set a secure access code for participants who dial in to the Virtual Meeting Room. Length: 4-20 digits, including any terminal #.Note: if a guest PIN is set the host PIN and the guest PIN must have the same number of digits or both PINs must end with #.

Meeting Security

#	Access	Roles	Host PIN	Allow Guests	Guest PIN
1	Anyone - no PIN required	All participants have the same Host privileges.	Leave blank	Select No	Leave blank
2	All participants must enter the same PIN	All participants have the same Host privileges.	Enter the PIN	Select No	Leave blank
3	Hosts must enter a PIN but Guest do not	Participants who enter the PIN have Host privileges. All other participants have Guest privileges and do not need to enter a PIN.	Enter the PIN	Select Yes	Leave blank
4	Hosts and Guests must enter different PINs	Participants who enter the Host PIN have Host privileges. Participants who enter the Guest PIN have Guest privileges.	Enter the PIN (must be different from the Guest PIN)	Select Yes	Enter the PIN* (must be different from the Host PIN)
	* If you configure a Guest PIN, you must also configure a Host PIN.				

Invitation Template

Live Demo of DFNconf

- Create Meeting

- Join Meeting

DFNconf Web Browser Interface

Show selfview

Show side panel

Main Panel

Timeline

DFNconf Web Browser Interface

Main Panel

Disconnect

Add Participant

Camera

Present Files

Speakers

Share Screen

Start Recording

Microphone

Float video window

DFNconf Web Browser Interface

Side Panel

List Events

List Participants

97987386

Events

Stefan Beck
joined

Write a message

97987386

Participant list

Stefan Beck

Filter by name

Control

Open Control

Control

Close control

Lock meeting

Mute all Guests

Disconnect all

Select media devices

Get media stats

Add Participant

Change conference layout

DFNConf - Presentation

Presentation can be done with:

In meeting rooms:

- the meeting room PC picture is injected to the VC

Office and Travel use:

- screensharing
- present files

DFNConf - Presentation

Start meeting room presentation injection

- push "laptop" button
  on the remote control

- you can also connect your laptop to the KVM-switch
- make sure to have all materials uploaded to Indico

DFNConf - Presetation

Screensharing

- to start screen sharing

- entire Screen
- single applications
- single browser tabs

DFNConf - Presentation
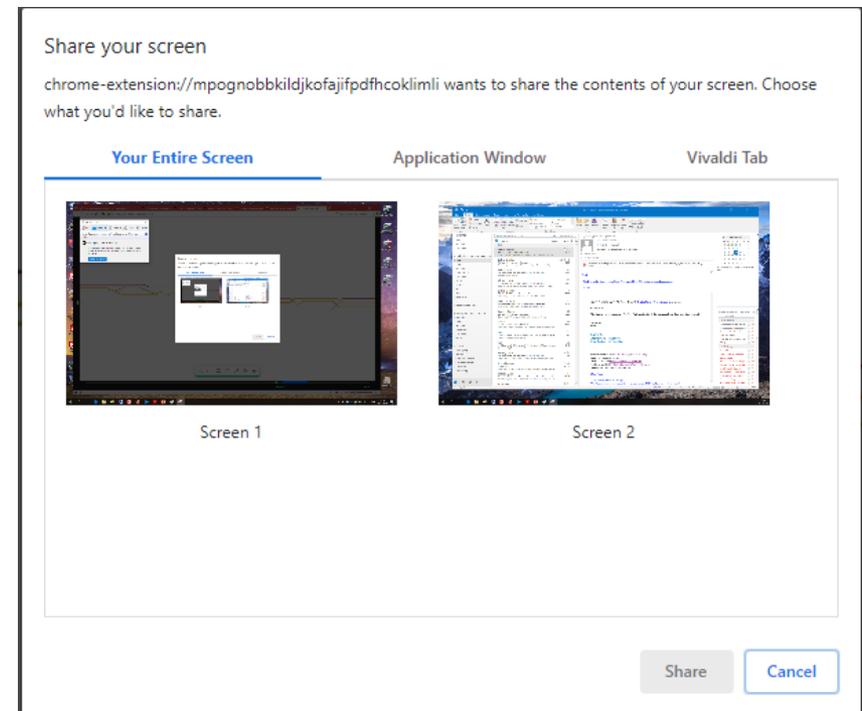
Present Files

Share images or PDFs with all other participants by selecting "Present Files" from the main panel

Presentation

+

Upload or
drag & drop
to present

+

You can add multiple images (.JPEG, .BMP, .PNG, or .GIF) and PDFs.
Each image will be converted into an individual slide, as will each page of each PDF.

DFNConf - Presentation

Present Files

By default, every slide will be selected for presenting, but you can click on individual slides to select and deselect them

DFNConf - Presentation

Present Files

When you have selected all the slides you want to share, select **Present**.

Use the left **<** and right **>** on-screen controls, or the arrow keys on your keyboard, to scroll through the slides.

Whether you are the presenter or a participant, you can view the current presentation in a separate pop-out window.

Agenda

- Introduction

- Using Indico

- Using DFNconf

- **Using Zoom**

ZOOM – Pro Account Guide - 1

- Up to 100 participants

- Meeting duration limit set to 24 hours

- Features:
    - User management (add, delete and assign roles and add-on features)
    - Admin (advanced meeting controls - enabling and disabling recording, encryption, chat and notifications)
    - Reporting (Run usage reports to learn how many meetings are taking place in your organization, which days, number of participants, number of meeting minutes and more)

ZOOM – Pro Account Guide - 2

- Assign scheduler
    - Allows you to assign someone else to set up your meetings for you. Assignee must also have a Pro plan)

- 1GB of MP4 or M4A cloud recording
    - Record meetings in the Zoom Cloud, where the file can then be downloaded and/or streamed from a browser. Available formats include MP4 (video), M4A (audio) and txt (chat) [More details here](#))

- Skype for Business (Lync) interoperability
    - Allows Lync users 2010, 2013 and Skype for Business users to initiate a Zoom meeting from the Lync contact list)

ZOOM – Pro Account Guide - 3

Zoom Pro Account Adds-on:

-   H.323/SIP Room Connector - Enable H.323/SIP room systems to communicate with desktop, tablet and mobile devices. [More details here](#).

Zoom website offers a comprehensive documentation and training materials on how to use Zoom on different platforms -- https://support.zoom.us.

ZOOM – Pro Account Sing In and Profile

Go to: https://zoom.us
and click on "Sign In" link to get into your account.

We highly recommend to generate a new meeting id every time you want to host a meeting!

Profile details – i.e. Personal Meeting ID (a unique zoom number: 123-456-7890) and the web link: https://zoom.us/j/1234567890 (can be used for instant meetings)

ZOOM – Schedule a Meeting - 1

Click on the "SCHEDULE A MEETING" link and enter couple of info in the fields displayed on the form, i.e.:

- Topic - choose a relevant topic name

- Description (optional) - choose a relevant description, if you want

- When - choose the date and time

- Duration - choose the duration of the meeting

- Time zone and recurring - as and if you need it

- Registration - typically, you don't need to set this as required, as you don't want people that are invited to the meeting to register for it

ZOOM – Schedule a Meeting - 2

- Meeting – better option is the system to generate an automated meeting id

- Meeting password – - good practise is to select Required, and a text box will appear to enter a password. You will need to send this password when sending the meeting details email to the participants

- Video – both Host and Participant set as on (if the need is of a video conference)

- Audio – set Both

- Hosting options – it is good to set Enable join before host, as everybody can join the meeting before the host arrives.

- Alternative hosts – no real need to set up anything here

ZOOM – Schedule a Meeting - 3

At the end click on Save. Meeting details will be shown.

ZOOM - PMU / JEU in Culham

Zoom platform at Culham is only available to EUROfusion PMU and JEU users based at Culham. It is not available to external EUROfusion users.

The Zoom rooms (physical or virtual rooms) can be booked through the roombooker application at Culham (at present only through Vicky and Doreen).

Details on Zoom application, user guide / instructions and FAQ document are available via the Users website.

* * *

Thanks for listening!

* * *

? ? ? Questions ? ? ?

* * *