CECAM website & event management tool

User guide for organisers at Nodes

Table of Contents

INTRODUCTION **3**

ACCESSING YOUR EVENT **3**

DETAILS TAB **3**

Basic information & description 3

PARTICIPANTS TAB **6**

Opt-in / Opt-out of applications' notifications 6
View applications 7
Accept/reject applications 8
Accept/reject multiple participants *9*
Add participants 10
Individual participant *10*
Multiple participants *12*
Add a coordinator 13
Filter participants 13
Manage accepted participants 14
On-line *15*
On-site *15*
Hybrid *17*

ABSTRACTS (POSTERS & TALKS) TAB **18**

Filter 18
Manage talks 18
Add a talk 19
Manage posters 20
Upgrade a poster to a talk *21*
Add a poster 21

PROGRAM TAB **22**

Time Zone 22
Build the program 22
Move or delete items 23

HOTEL TAB **24**

DOCUMENTS TAB **25**

Booklet 25
Presentations 25
Files 26
Links & Videos 27

ADDITIONAL SPONSOR TAB **28**

Add a sponsor 28

BUDGET TAB **30**

TOOLS TAB **32**

Document last updated on: April 2023

BOOKLET 32
PARTICIPANTS LIST 32
ROOMING LIST 32
MAILING TOOL 33
MY PARTICIPATION TAB 34
On-line *34*
On-site *35*
Hybrid *35*
EVENT HOMEPAGE TAB 35

Introduction

This guide will introduce you to all the features available in the CECAM event management tool. The guide is a living document and we look forward to improving it based on your experience and input. If you have specific questions, please email the CECAM Event Manager at aude.failletaz@epfl.ch.

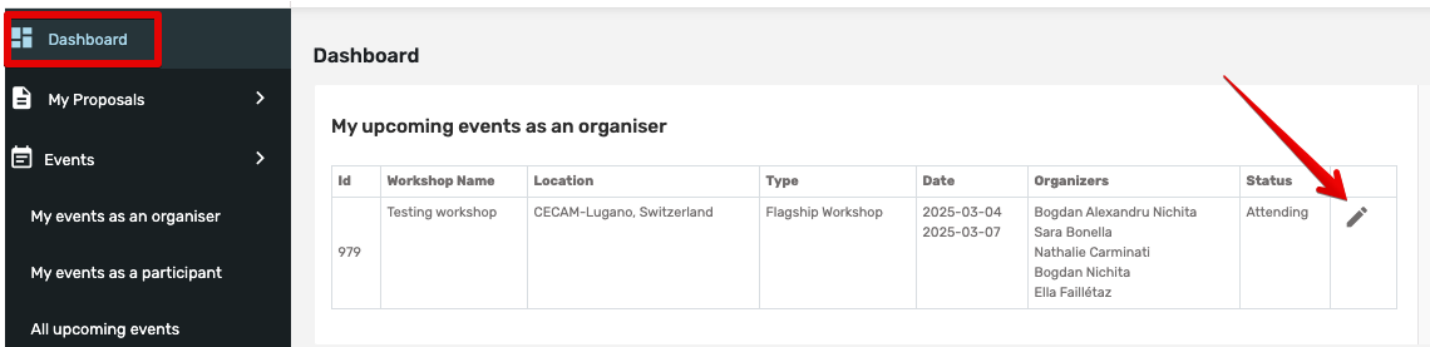
Before going into further details, please note that adding abstracts and building the program require steps to be performed in a specific order. The sequence that needs to be followed is:

1. Accept participants
2. Identify speakers
3. Add or accept abstracts
4. Create program

The rest of the management actions for your event can be performed in any order.

Accessing your event

To access the event you are organising, login with your CECAM credentials here. Once logged in, you will land on your Dashboard. Go to the section "My upcoming events as an organiser" and click on the pencil at the right of the table.



Details tab

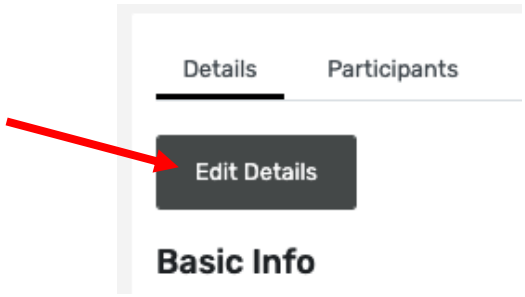
In this tab you can see the general information and the description of your event. The content you'll see upon first entry is based on the accepted proposal. You can modify it via the Edit Details button (see below).

Basic information & description

In this section, you can modify the title, the logo, the event configuration, the location, the dates, the registration deadline and the description of your event.

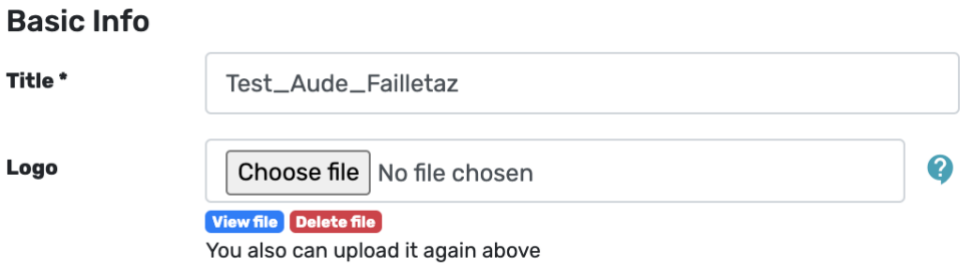
The title, dates, location, description and references will be displayed on your event's public webpage.

To edit any information, click on “Edit Details” and a pop-up window will open.



First, to change the title, simply write the new name in the box “Title”.

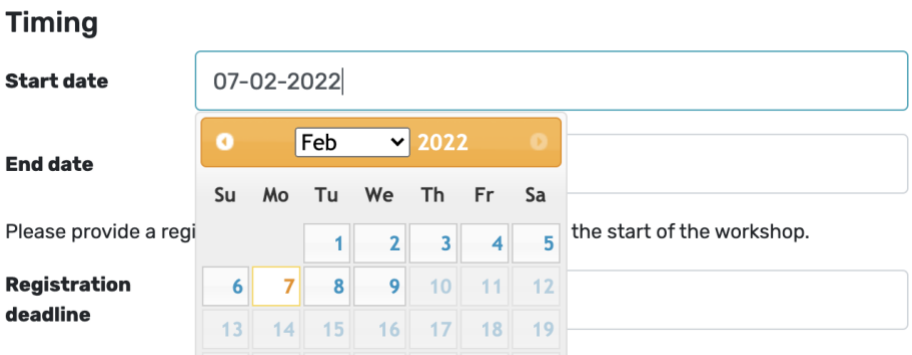
To change the logo, click on “Choose file” and select the file you would like to upload. Valid formats are jpg, png and gif, and the maximum size of the logo is 500KB. You can delete an existing file by clicking on “Delete file” and verify the image you have uploaded by clicking on “View file”.



If your event cannot take place on-site or if you would like to include on-line participants to your in-person workshop, you can change the configuration of your event by ticking the corresponding radio button:

- On-site: all participants are attending the meeting in-person
- Hybrid: participants and speakers are joining both on-line and in-person
- On-line: all participants are attending the meeting remotely

To change the dates, simply click on the start/end box and select the correct date in the calendar.



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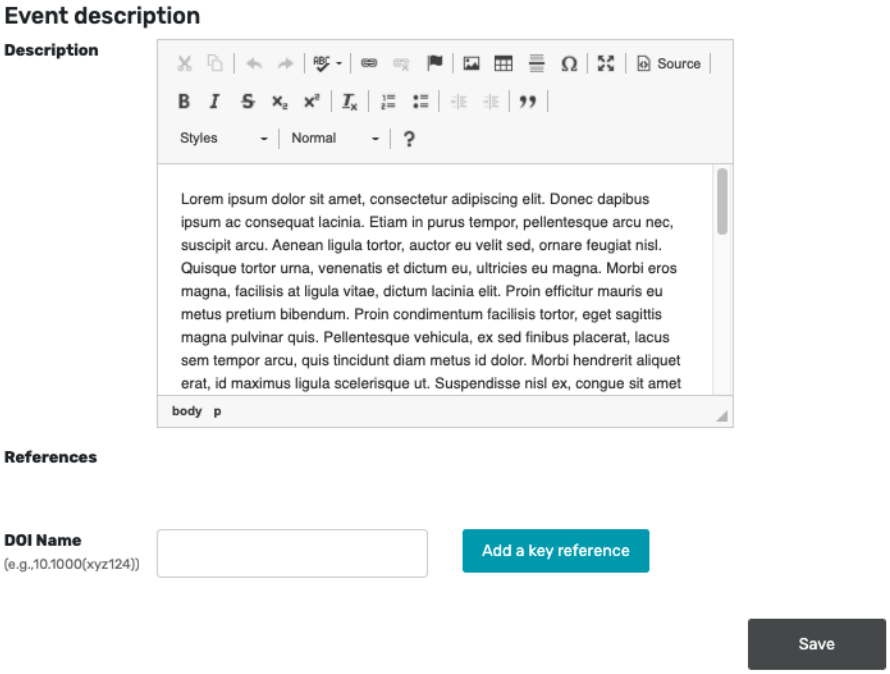
You can also change the deadline for registrations by clicking on the box “Registration deadline” and choosing the date in the calendar. As a default, this date is set for 4 weeks before the start of the event (which is the deadline we recommend for in-person events). For on-line participation however, closing the registration a couple of days before is usually sufficient.

If you would like to update the description (for example add any information for future applicants), scroll down in the pop-up window until “Event description”. Note that this text is generated directly from the proposal that you submitted and changes may be necessary. You add text by writing in the description box or modify the text format with the editing tools on top of the text box.

To add references, enter the DOI reference in the “DOI Name” text box and click on “Add a key reference”. Please do not enter references in other ways, as they will not be properly formatted when displayed.

Click on “Save” when finished.



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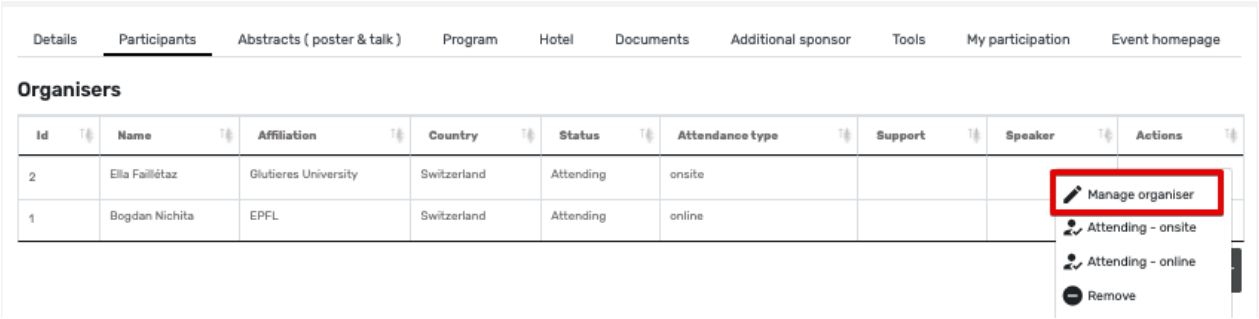
Participants tab

In the "Participants" tab, you can manage the organisers' and attendees' participation. You can also add other organisers if they have not been entered by CECAM. If need be, a coordinator, i.e. someone who will help you with administrative tasks but not who will not attend the meeting, can also be added.

Opt-in / Opt-out of applications' notifications

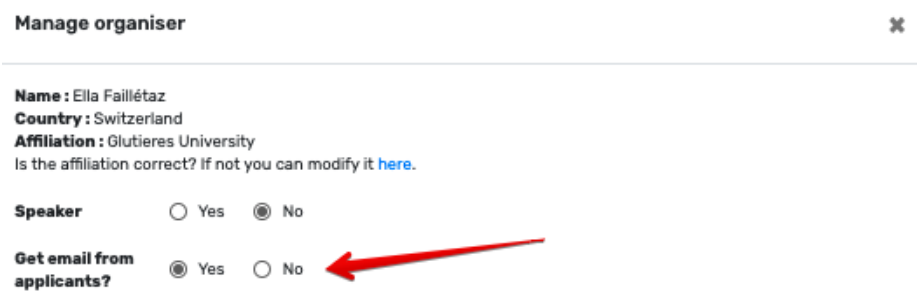
Organisers and coordinators (with the exception of Node Directors) receive an email each time a potential participant submits their application. It is however possible to deactivate (or reactivate) these notifications for each of the organisers and coordinators individually.

Click on the three dots in the "Actions" column for the person you would like to deactivate (or reactivate) this option for and on "Manage organiser/coordinator".



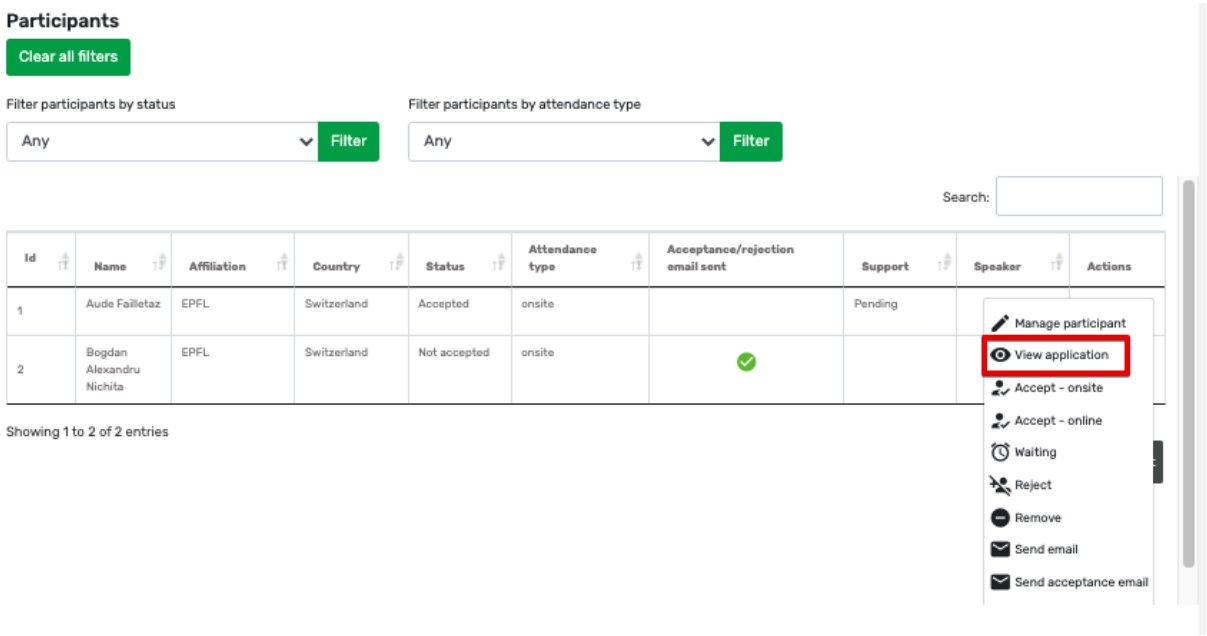
This will open a pop-up window, including a radio button called "Get email from applicants?". As mentioned above, "Yes" will be ticked by default for organisers and coordinators, with the exception of Node Directors, for which "No" will be ticked.

To stop receiving the emails, click "No" and save. To activate the notifications tick "Yes" and save.

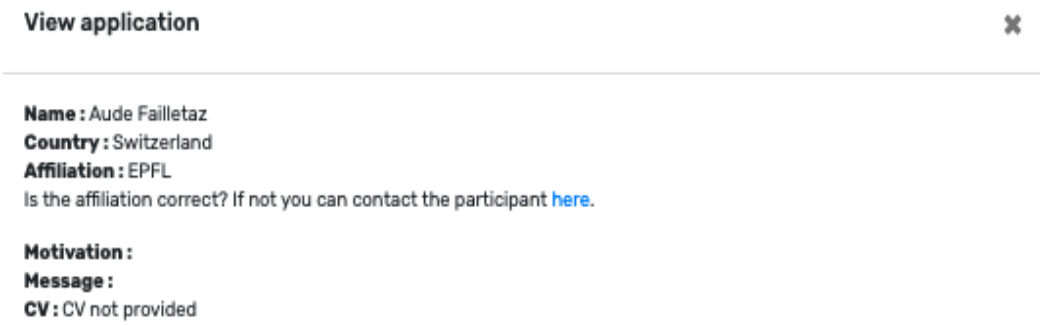


View applications

To review applications and select the participants you would like to accept for your event, you can see the contents of their application by clicking on the three dots in the “Actions” column and then on “View Application”.



This will open a pop-up window including the name, affiliation, motivation (if any) and message (if any) for each applicant. If your event is a school, then the link to the CV will also be displayed here.
This regroups the same information as received by email upon each application.



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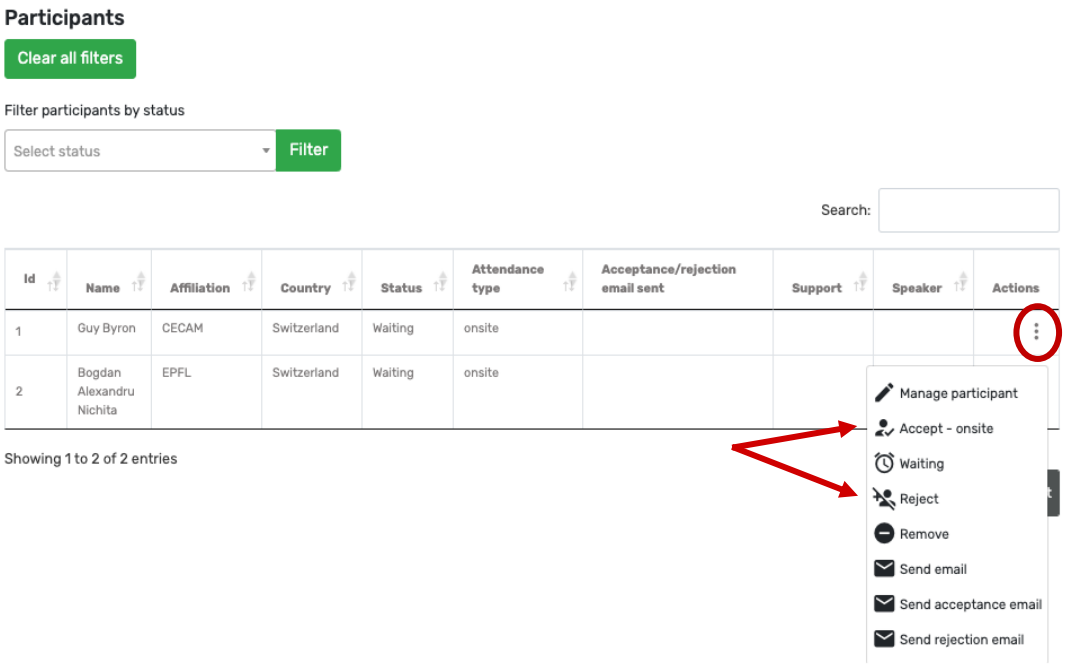
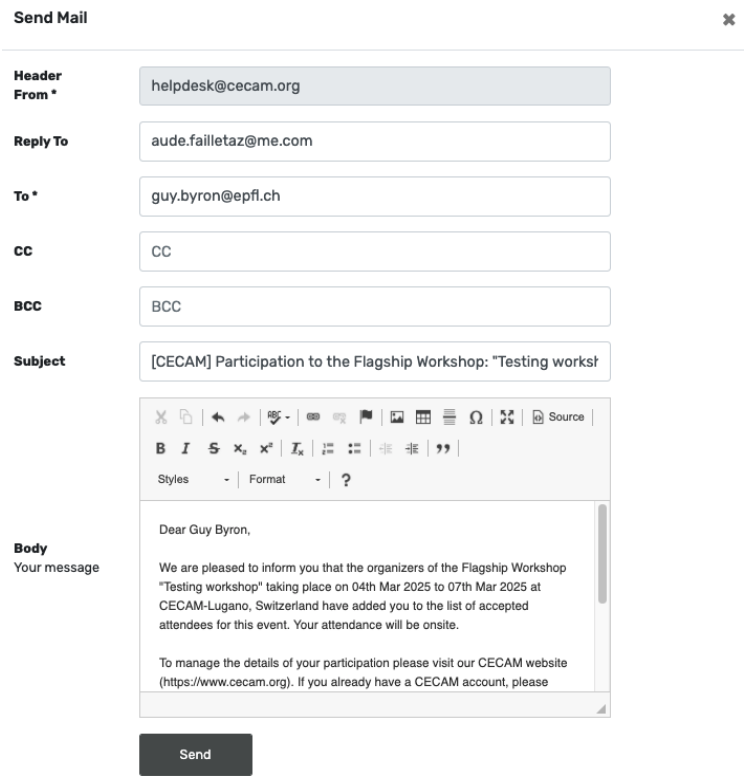
Accept/reject applications

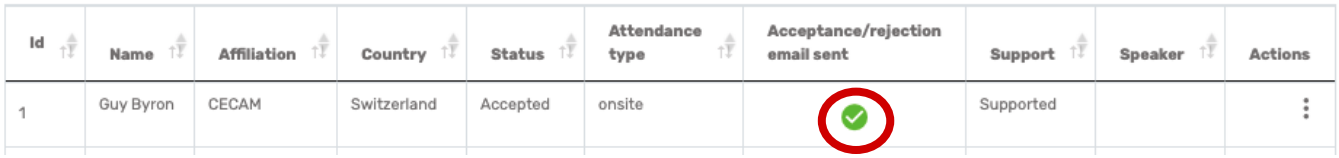
Applications received through the CECAM website will be listed under the “Participants” section and their status will appear as "waiting" by default. You can accept or reject applications by clicking on the three dots at the right of the table and selecting "Accept" or "Reject". Depending on the configuration of your event, the “Accept” button will mention “on-site” or “on-line”.



The status of the participant will automatically be updated according to your choice and a pop-up window will open with a template of acceptance or rejection email. A default text for the email is proposed. Please read it and ensure you agree with its content. You can modify the text of the email and add recipients in cc before sending it to the participant.



Once the email is sent to the participant, a green tick will appear in the column “Acceptance/rejection email sent”.

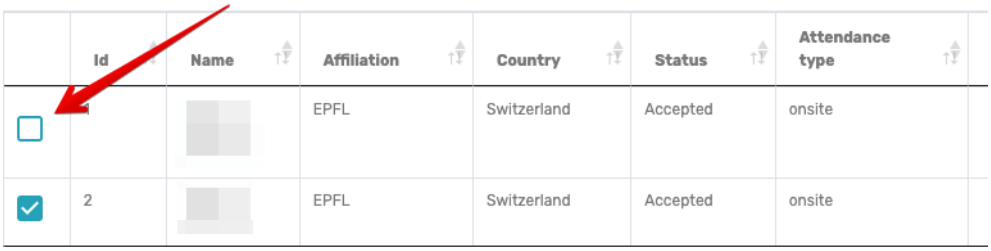


Id	Name	Affiliation	Country	Status	Attendance type	Acceptance/rejection email sent	Support	Speaker	Actions
1	Guy Byron	CECAM	Switzerland	Accepted	onsite	✓	Supported		⋮

Accepted participants automatically appear in the public participant list on the website.

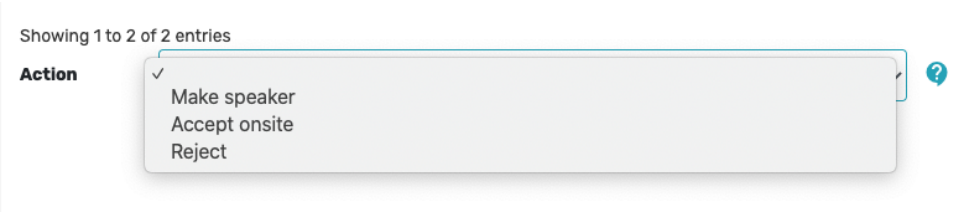
Accept/reject multiple participants

If you would like to accept or reject multiple participants at the same time, select the participants by ticking the corresponding box at the left of the table.



	Id	Name	Affiliation	Country	Status	Attendance type
☐			EPFL	Switzerland	Accepted	onsite
☑	2		EPFL	Switzerland	Accepted	onsite

Then, scroll down to the bottom of the table and select “Accept” or “Reject” in the “Action” drop-down menu.

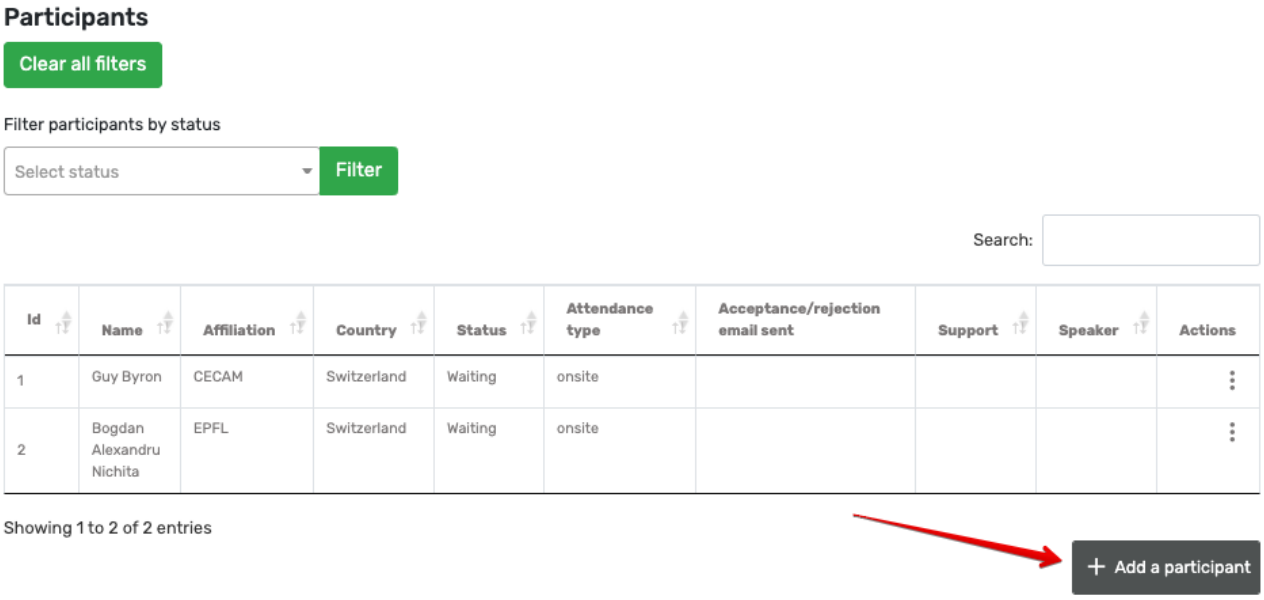


This will change the status of all selected participants and will open a pop-up window with the acceptance/rejection template, as explained above for the individual acceptance/rejection process.

Add participants

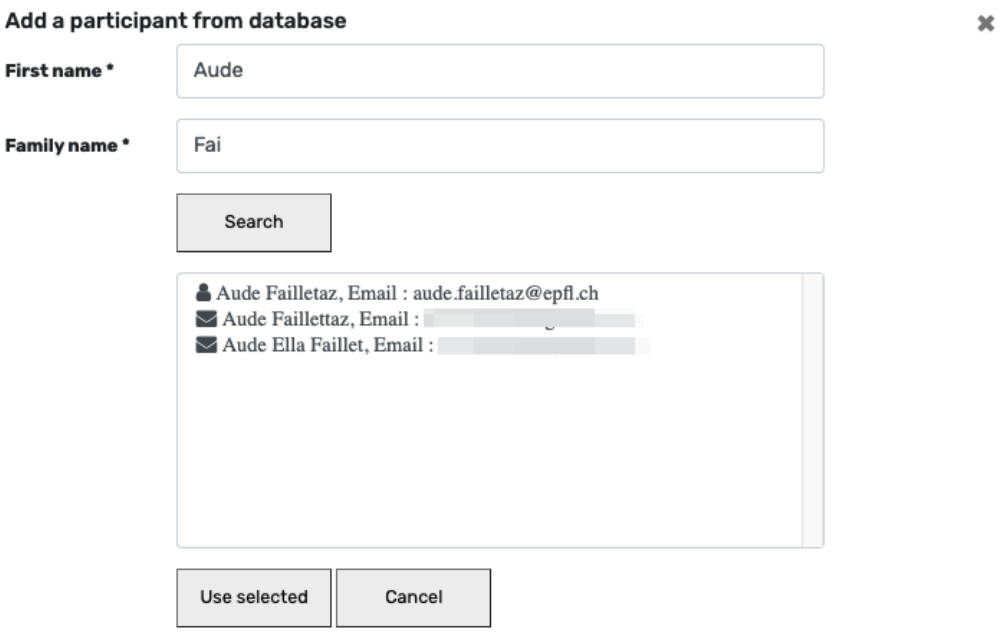
Individual participant

If you would like to add a participant that has not applied yet, click on "Add a participant".

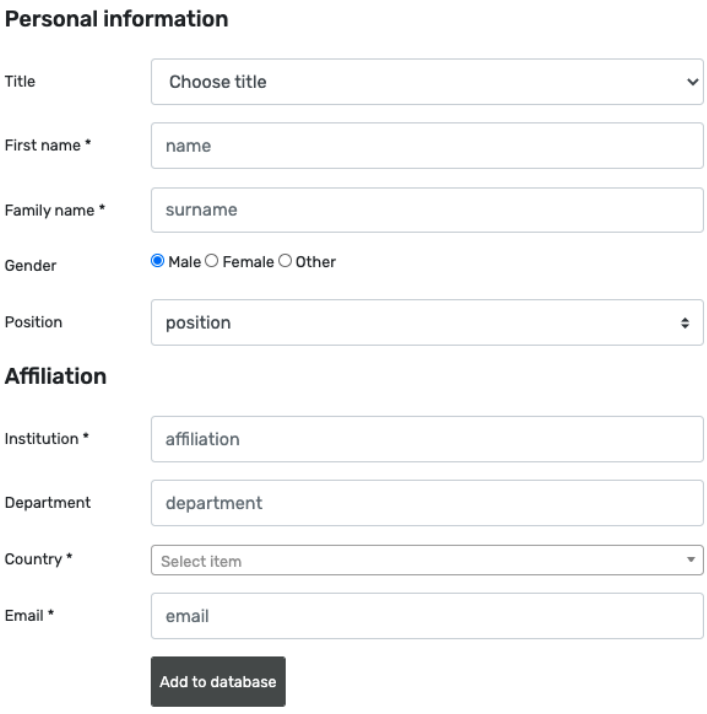


A pop-up window will open. Fill in the First name and/or Family name and click on “Search”.
If the icon before the profile is a person that means the account is active. If it is an envelope that means the account has not been reactivated yet. If you see 2 accounts for the same participant, please choose the one with a person icon. If the participant you are looking for only has an inactive account, you can still select it, he/she will receive the link to reactivate her/his profile in the acceptance email you will send at the next step.

Once you have selected the corresponding profile, click on “Use selected”.



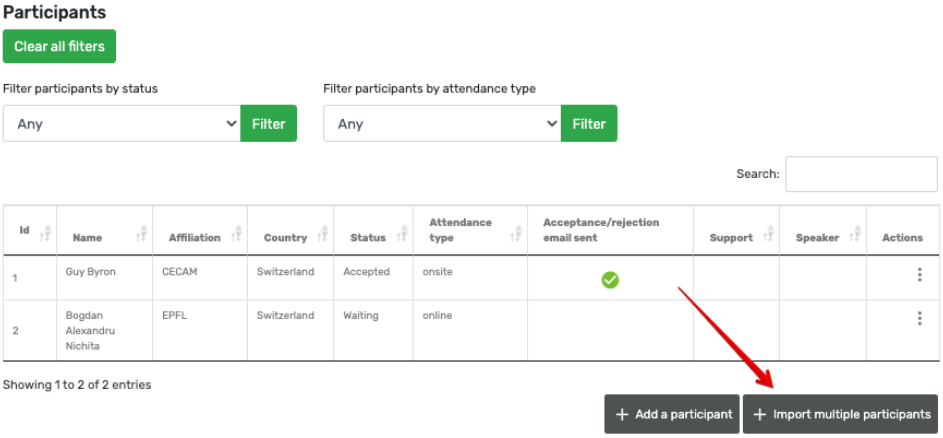
If you cannot find the person in the list above, you can add a profile to our database by filling in the form and clicking on "Add to database".



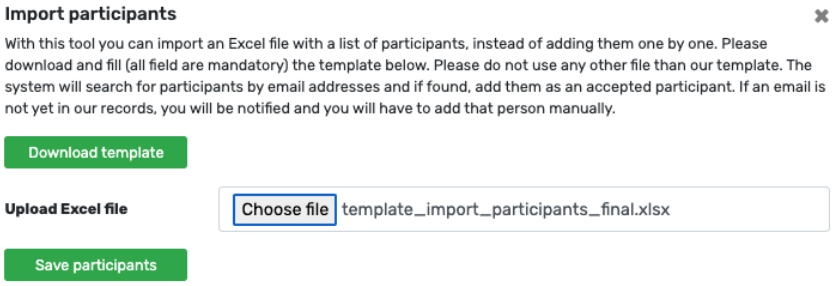
The acceptance process will then be the same as explained above.

Multiple participants

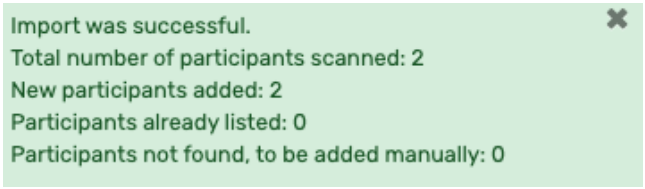
If you would like to add multiple participants at once, click on “Import multiple participants” at the bottom of the table.



A pop-up window will open. Download the Excel template (do not use any other templates) and fill it in with the participants first name, last name, email, if they are a speaker and their attendance type (all fields are mandatory). Speaker and attendance type can be changed later in the participants tab if need be. Once ready, upload the file through the “Choose file” button and click on “Save participants”.



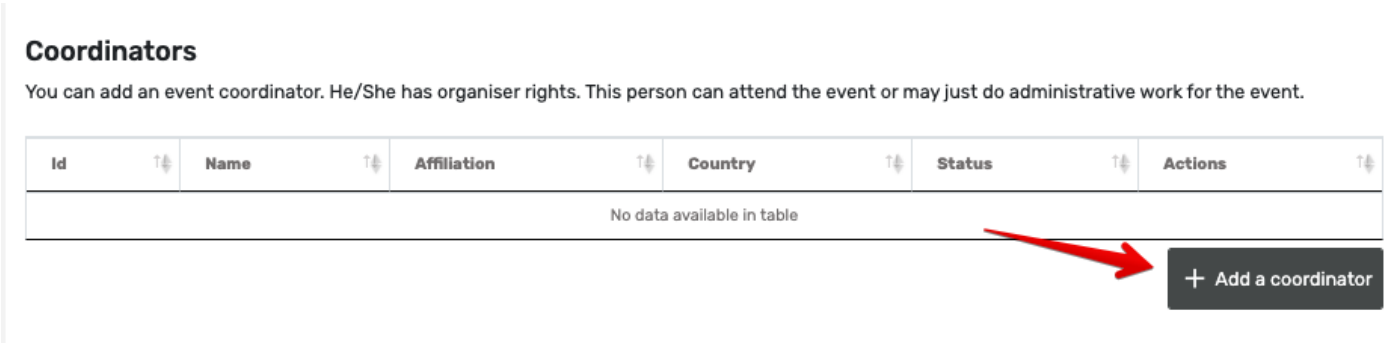
A green box with the summary of your import will appear. Participants successfully added will be listed in “New participants added”, participants that were already in the list will be mentioned in “Participants already listed” and attendees that were not added, because they do not have a CECAM account yet, will be included in “Participants not found, to be added manually”. For the latter, please add them individually, as described above.



The participants that were successfully added will automatically be marked as “accepted” and their attendance type will correspond to the one selected in the excel file.

Add a coordinator

The same process applies for adding a coordinator: start by clicking on “Add a coordinator”.

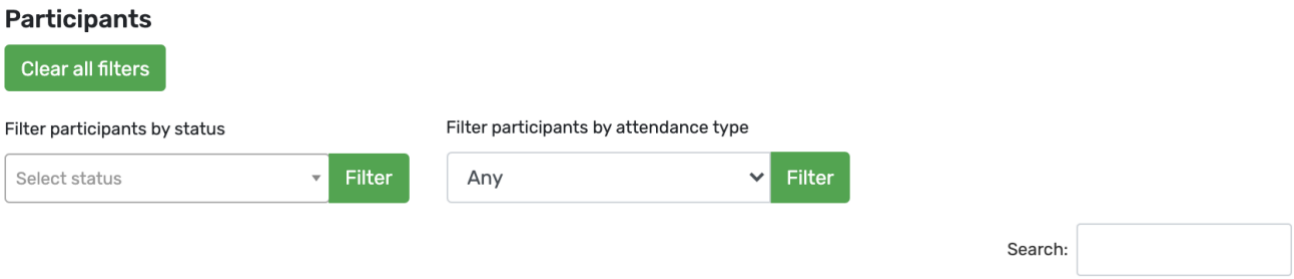


Search the person in the pop-up window or add a person to the database, as explained above for participants.

As a default, coordinators will have the status “Not attending” as this role is meant for administrative support. However, you can change her/his status by clicking on the three dots as explained above.

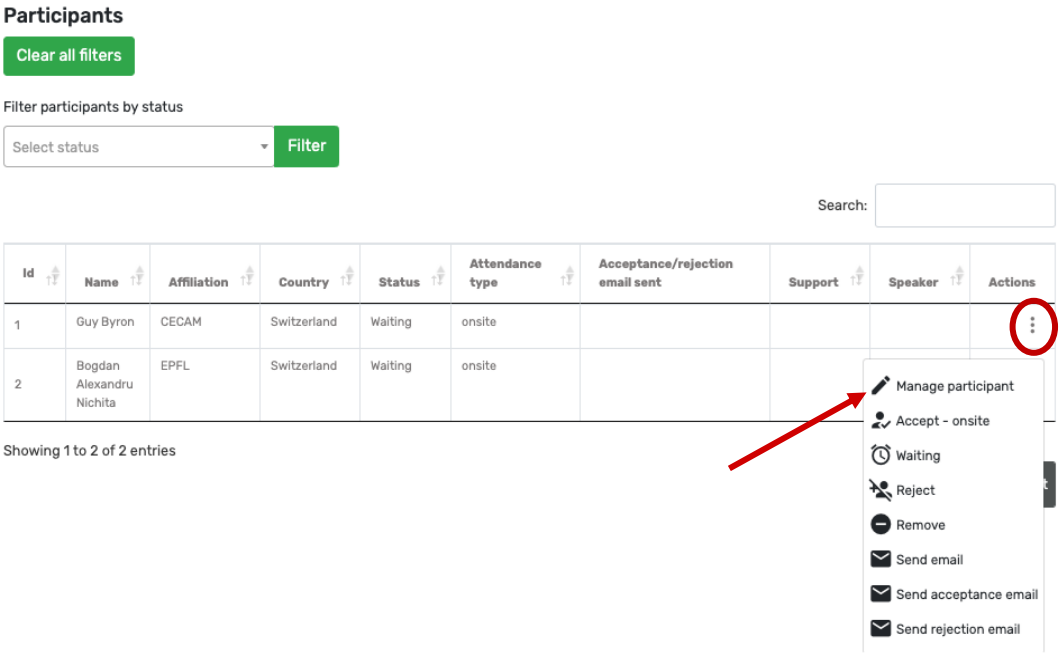
Filter participants

You can filter participants by their status by selecting “waiting”, “accepted”, “cancelled” or “not accepted” in the drop-down list and clicking on “Filter”. In a hybrid setting, there is also a filter for attendance type “on-line” or “on-site”. To come back to the full list of participants, click on “Clear all filters”. You can also search participants by name using the “Search” box.

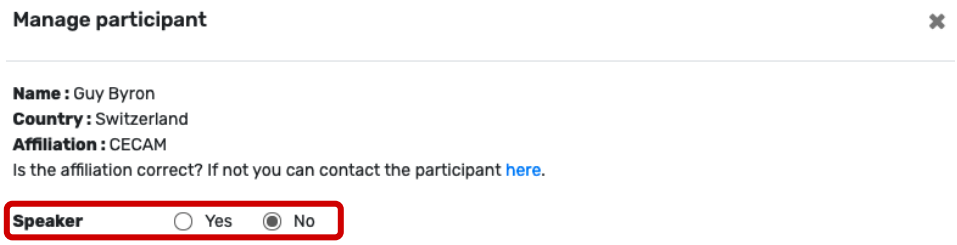


Manage accepted participants

Once a participant is accepted, you can manage their details by clicking the three dots at the right of the table and then on "Manage participant" (pencil icon on the dropdown menu).



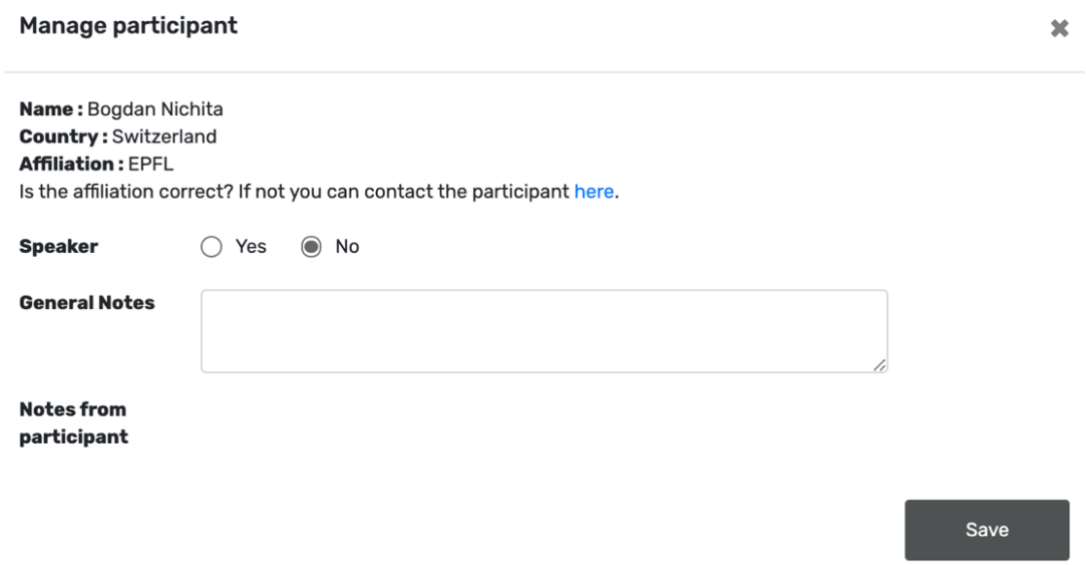
A pop-up window will open. To identify a participant as a speaker, click "yes" next to “Speaker”.



The rest of the window will depend on the event format: on-line, on-site or hybrid.

On-line

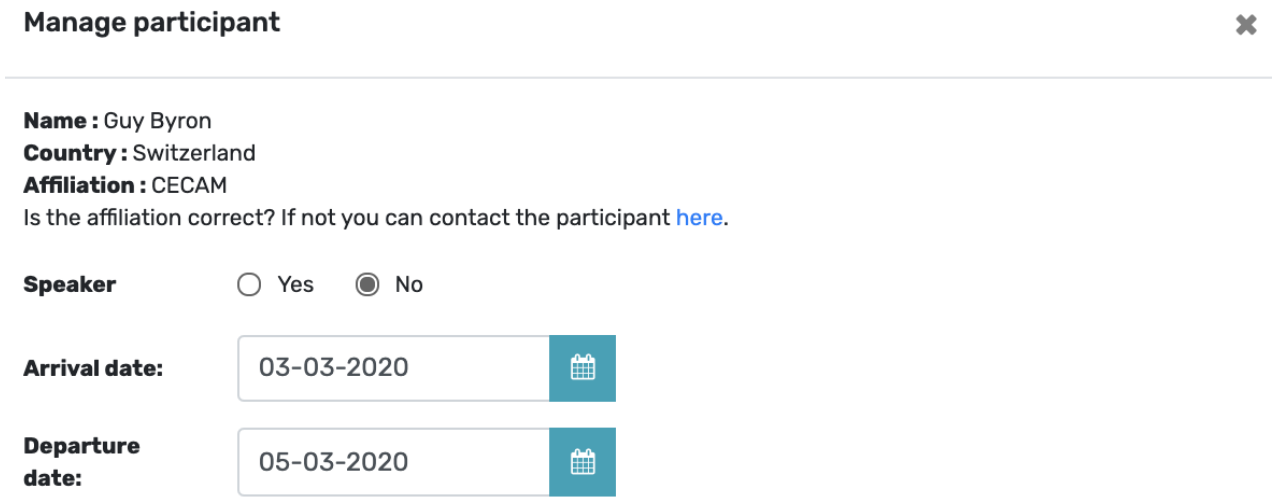
If the workshop is on-line, you will only be able to add notes specific to this participant in “General notes”. You will also see any notes the participant has left you in “Notes from participant”.



On-site

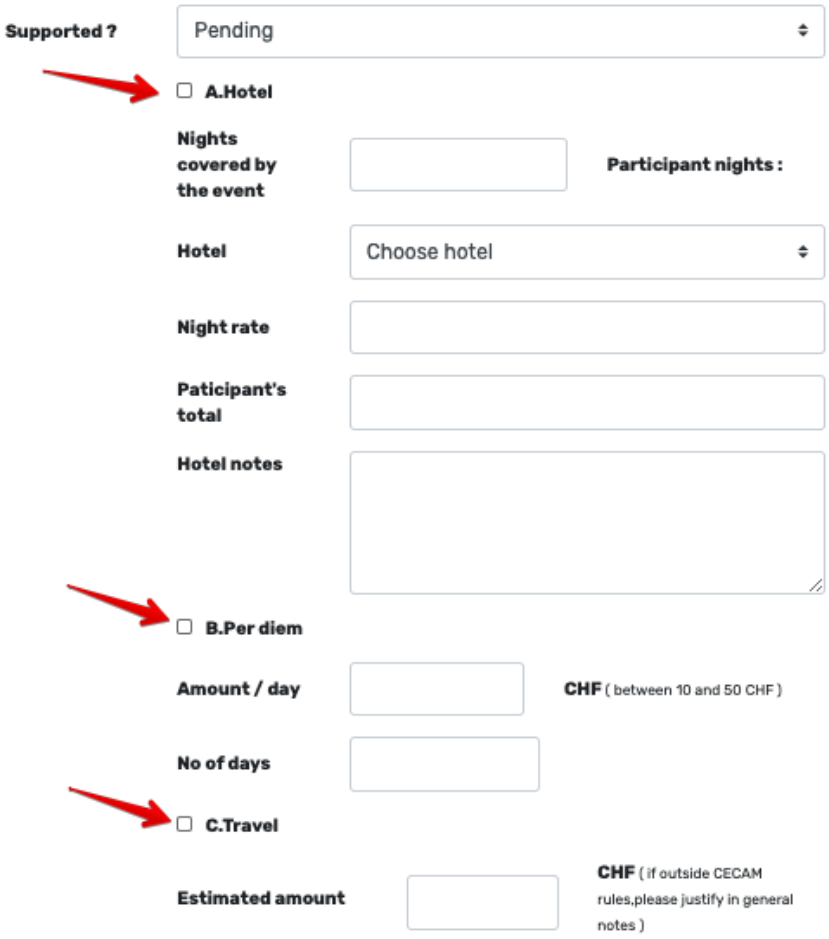
If the workshop is taking place in person, in addition to the entries mentioned for On-line events, you will be able to manage the following details for each attendee.

First, you can verify the arrival and departure dates that he/she has indicated and check for inconsistency with respect to the program.



Then, you can choose if this person is supported or not by choosing from the drop-down menu “Supported?”. If you are still unsure whether the budget will be sufficient, you can keep the status as pending and modify it later.

If a participant is supported, tick for which expense he/she will be supported (possible to tick all boxes): A. Hotel, B. Per diem and C. Travel.



A. Hotel

First, you need to specify hotels and nightly rates by following the instructions here. Once this is done, you will be able to manage hotel assignment and cost as follows. The number of nights covered by the event and, as a result, the total amount the participant needs to pay (if applicable) will be automatically entered as the maximum mentioned in CECAM workshop/school guidelines. You can then manually increase or decrease the number of nights covered depending on your budget and rules of the Node. If the participant has entered any specific request (ex: her/his spouse or family are accompanying them), this will appear in “Hotel notes”.

B. Per diem

If budget allows, you can allocate per diems to participants by entering the amount per day and the number of supported days.

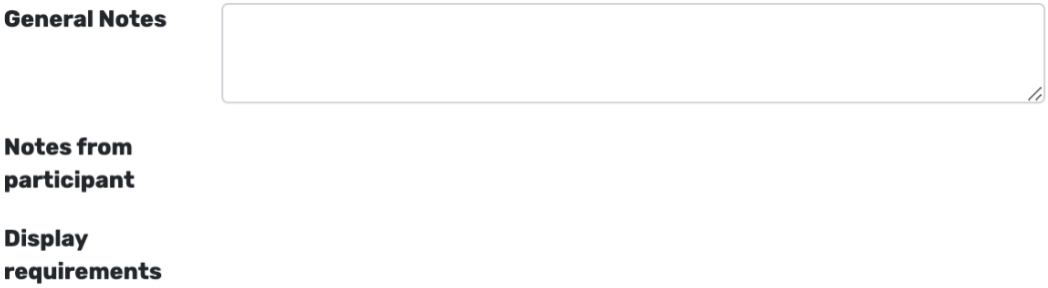
C. Travel

In the box "estimated amount", you can enter the maximum contribution to the participants' travel expenses. For reference, the maximum amounts covered for CECAM HQ are mentioned in the workshop/school guidelines.

Then, you will see whether the participant has confirmed her/his presence to the social dinner in the section “Attending dinner”. This will be a reflection of the choice the participant has made in the tab “my participation”.

If necessary, you can add specific notes in the “General notes” section.

Finally, if the participant has provided comments or entered any dietary restrictions, this information will appear at the end of the window, respectively in “Notes from participant” and “Display requirements”.



Hybrid

In a hybrid setting, the participant management window will adapt to the individual type of participation. Please refer to this section for a participant joining on-line and this section for an on-site participant.

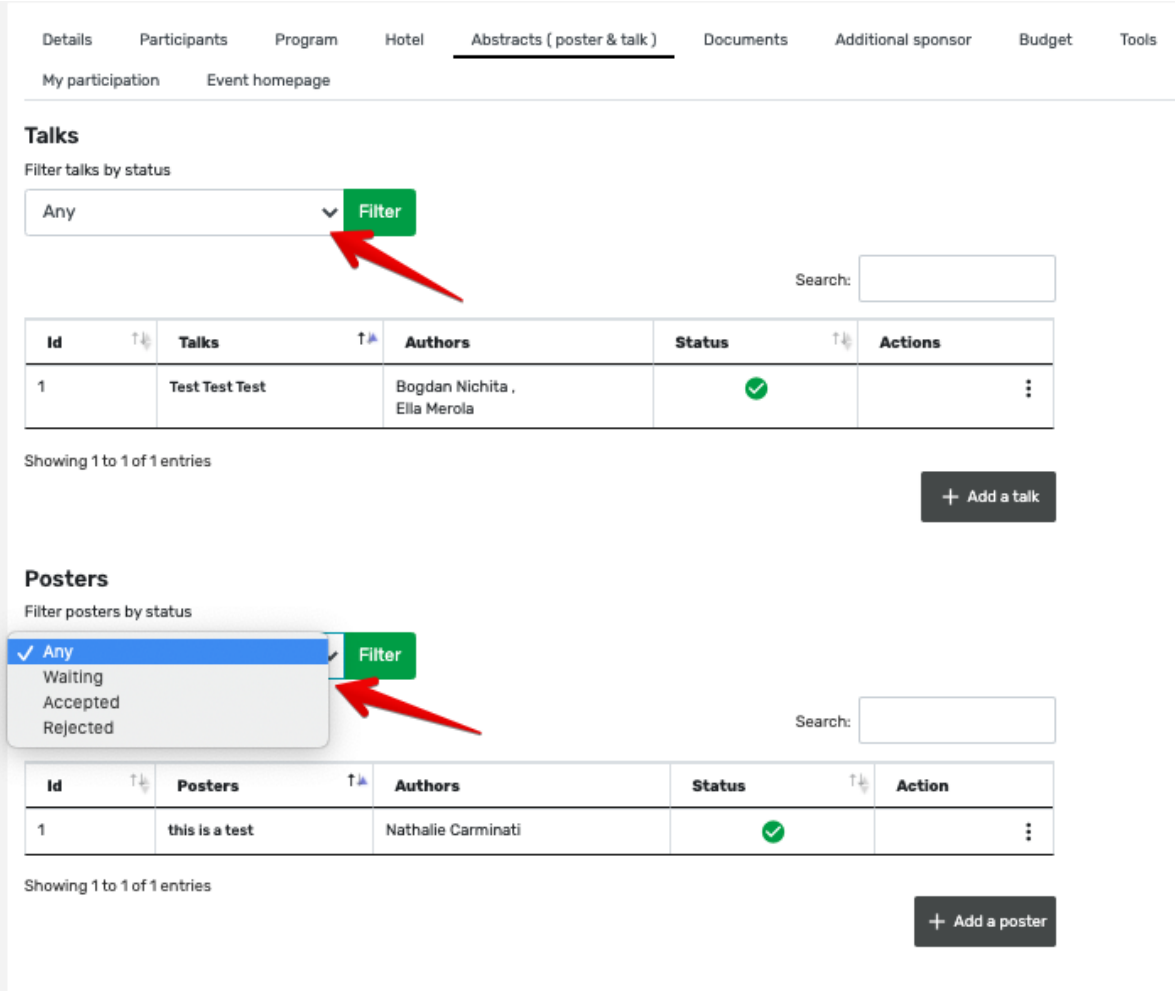
Abstracts (posters & talks) tab

This tab allows you to manage the talks and posters submitted by the participants as well as to add new ones if you need to.

Filter

Talks and posters can be filtered by their status "waiting" "accepted" or "rejected". Each table has its own filter. First, select the status in the drop-down menu by clicking in the arrow on the left of the “Filter” button. Then click on the “Filter” button.

To remove the filter, select “Any” and click on the “Filter” button again.

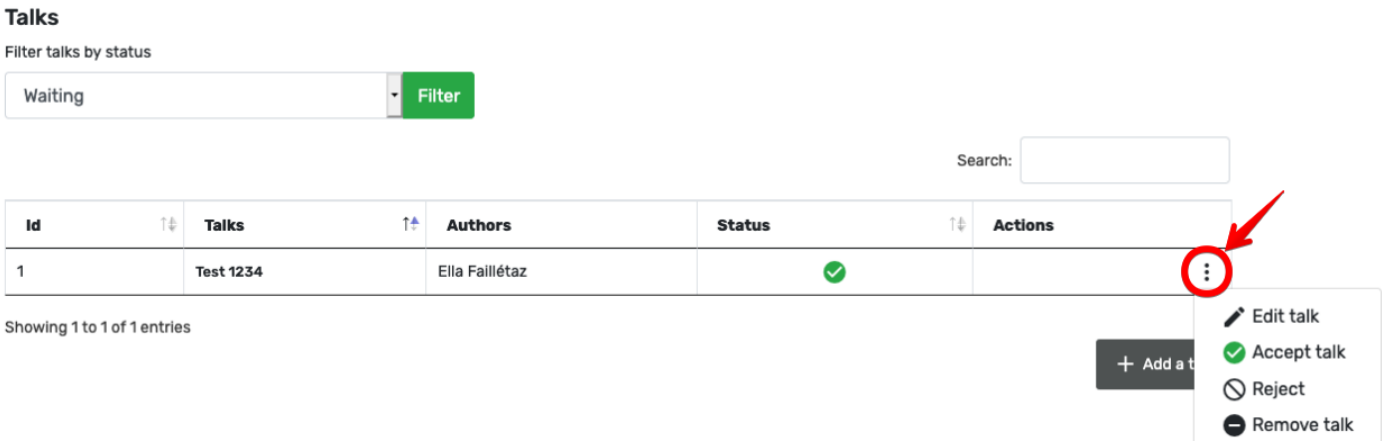


Manage talks

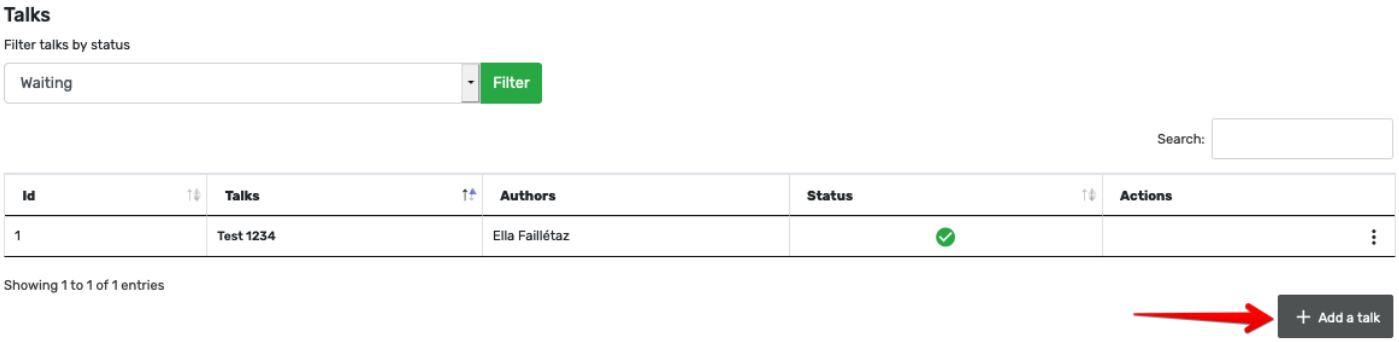
The talks submitted by participants in their “my participation” tab will appear in the first table. By clicking on the 3 dots (in the column “Action”), you can edit, accept, reject or remove talks. Once a talk is

accepted, it will appear as an agenda item (inside the drop-down menu) in the program tab and will be visible on the event public webpage, in the abstracts tab.

Add a talk

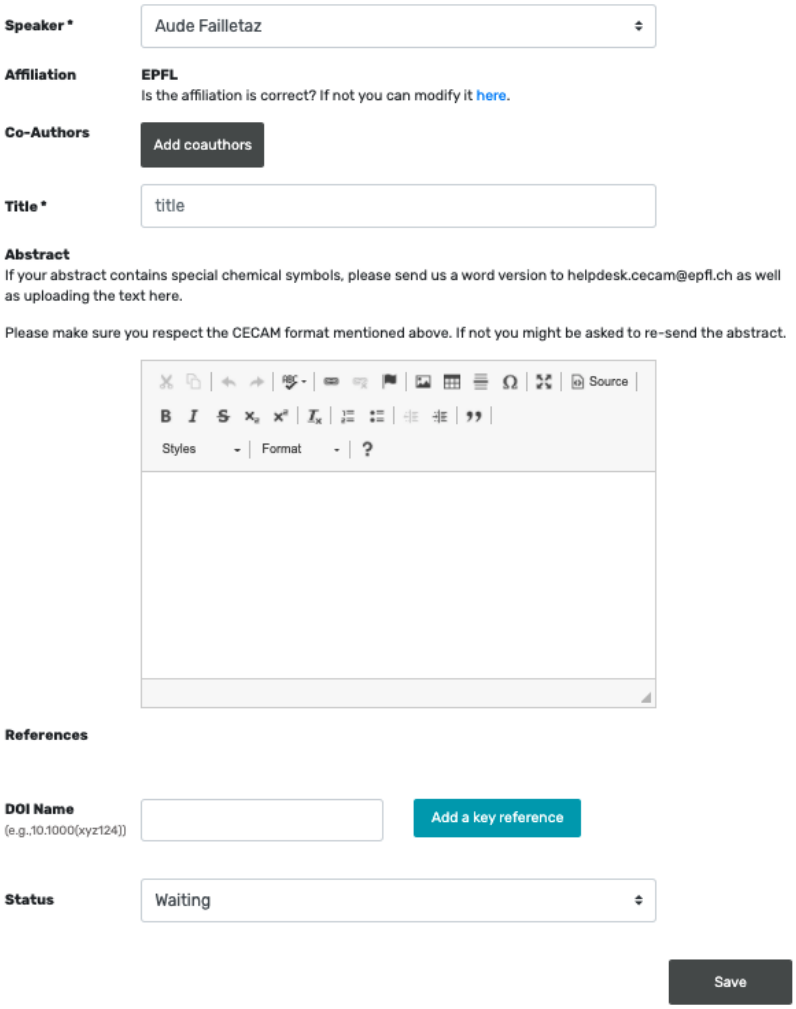


To add a new talk, click on the button "add a talk" at the bottom right of the “Talks” table.



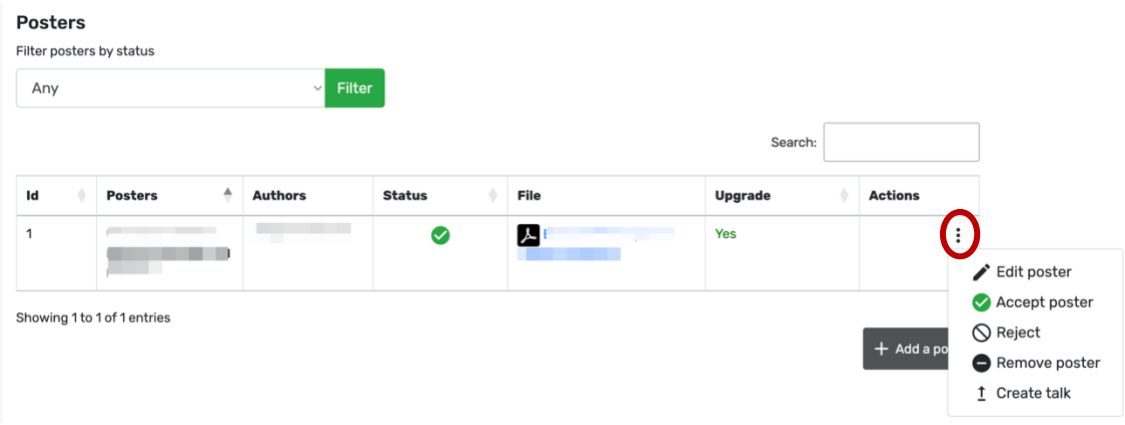
A form will appear in a pop-up window for you to fill.

Start by selecting the speaker's name in the dropdown menu. If the name you're looking for is missing from the list, please go back to the participants tab and identify the person as "speaker" as explained here. Check the affiliation, add co-authors if applicable, complete the title and the abstract's text, add any relevant DOI reference and choose the status as “accepted”. Please do not enter references without using the DOI option as they will not be properly displayed. Do not forget to click on “Save”.



Manage posters

Posters submitted by participants (incl. title, abstract & poster picture) will appear in the second table on this tab.

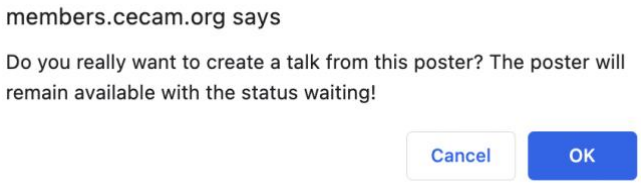


By clicking on the 3 dots, you can edit, accept, reject, remove or upgrade to talk the poster posters submitted by participants in their "my participation" tab.

Once a poster is accepted, it will be visible on the event public webpage, under the tab “Abstracts (poster & talk)”.

Upgrade a poster to a talk

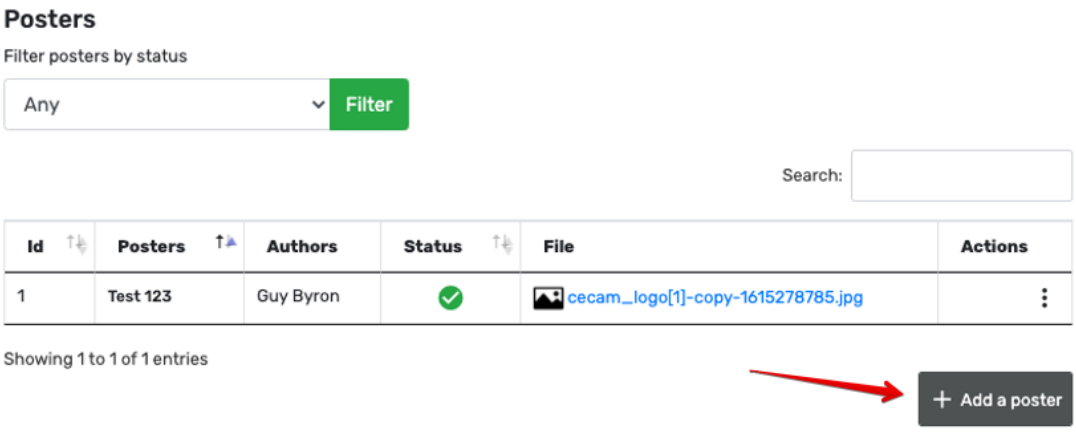
Click on the three dots and then on “Create talk”. A pop-up will appear, asking you to re-confirm that you would like to upgrade this poster to a talk.



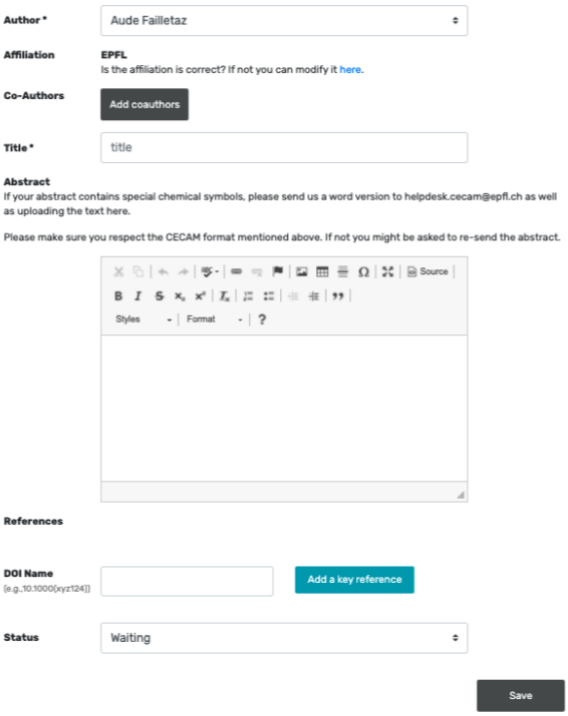
Click on “OK” and the title and abstract will automatically appear as accepted in the “Talks” section. The poster will remain in the “Poster” section with the status “waiting”.

Add a poster

To add a new poster, click on "add a poster" at the bottom right of the “Posters” table.



A form will appear in a pop-up window for you to fill. Start by selecting the author's name in the dropdown menu. Then, check the affiliation, add co-authors if applicable, complete the title and the abstract's text, add any relevant DOI reference and choose the status as “accepted”. Please do not enter references without using the DOI option as they will not be properly displayed. Do not forget to click on “Save”.



SINCE 1969

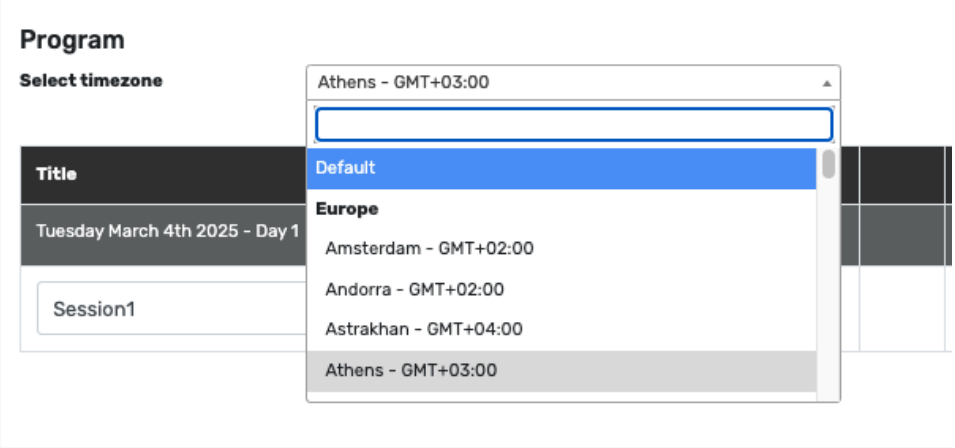
Program tab

In the "Program" tab, you can create and modify the program of your event. Once completed and saved, the program will appear on your event's public webpage. Remember that this action should be performed after (1) participants have been accepted; (2) speakers have been identified; (3) abstracts have been accepted or added by you.

Time Zone

Please indicate the time zone in which your event will take place, by selecting the corresponding local time in the drop-down list. This choice will be mentioned in the program page on your event's public webpage. Participants will be able to see your program in their own time zone, if they wish to.

If this selection is left as "default", the "Europe/Zurich - GMT+02:00" will be displayed.



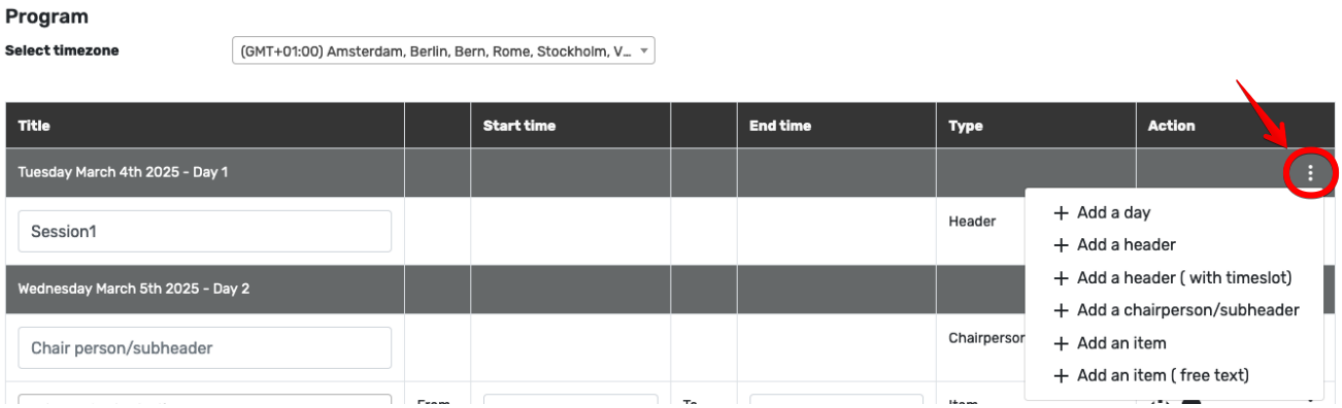
Build the program

Different agenda items can be added by clicking on the 3 dots (in the column "Action"). Each agenda item will appear as a new line.

You can add:

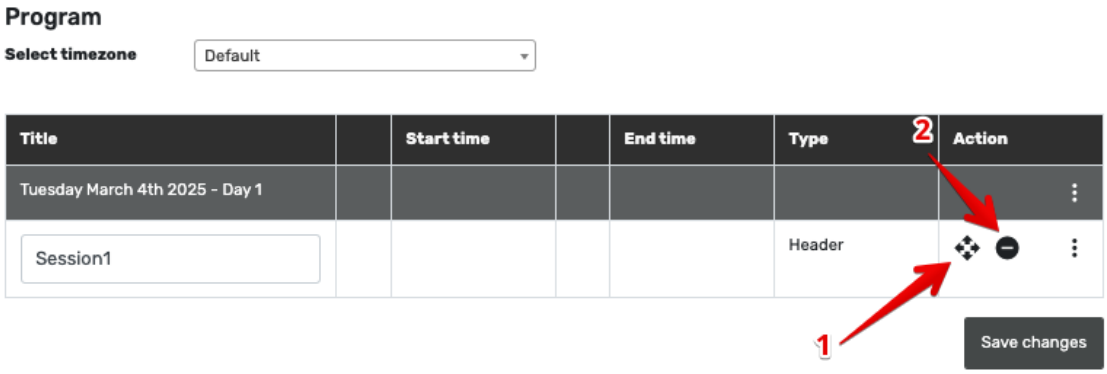
- a day;
- a header, with or without timeslot;
- a chairperson or a subheader;
- a simple agenda item, with two options:
  - "Add an item" will add a drop-down menu with standard agenda items such as a lunch, a coffee break or a talk by one of your speakers (after having accepted her/his abstract as explained here).
  - "Add an item (free text)" will add a blank cell for you to write your own item.

For each agenda item, you will be asked to indicate start and end time.

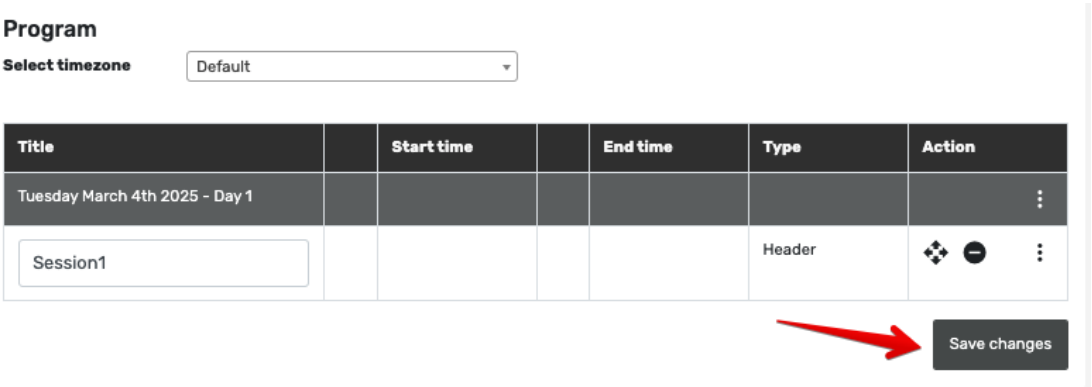


Move or delete items

An item can be moved by clicking on the 4 arrows and dragging it up or down (1 in figure) in the column "Action". A line can also be deleted by clicking on the "delete" icon (2 in figure) in the same column.

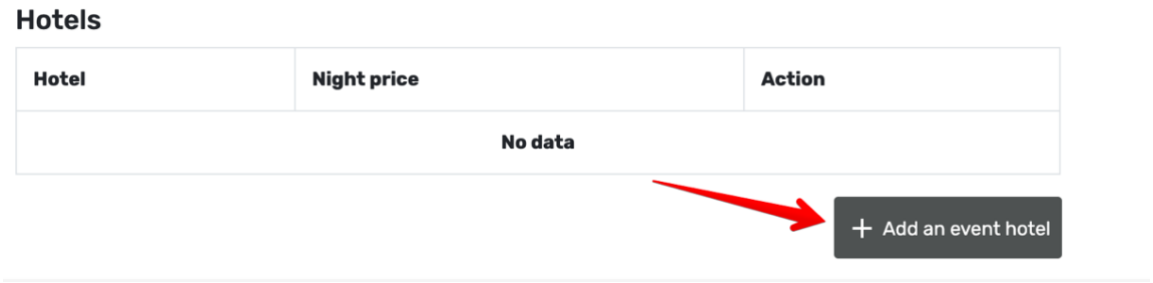


All changes must be saved by clicking on the "Save changes" (Bottom right). Do not forget to click on "save changes" regularly while entering your program as changes are not saved automatically!

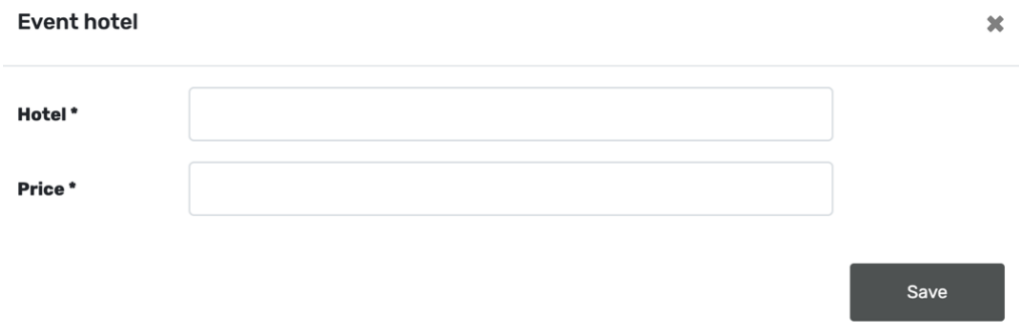


Hotel tab

In this tab, you will be able to add one, or more, hotel(s) for your on-site or hybrid event.
First, click on “Add an event hotel”. This will open a pop-up window.



Then, indicate the name and the price per night for the hotel in the corresponding boxes and click on save.



Repeat the process to add more hotels.
Once hotels are entered, you will be able to assign a hotel to each participant, as described here.

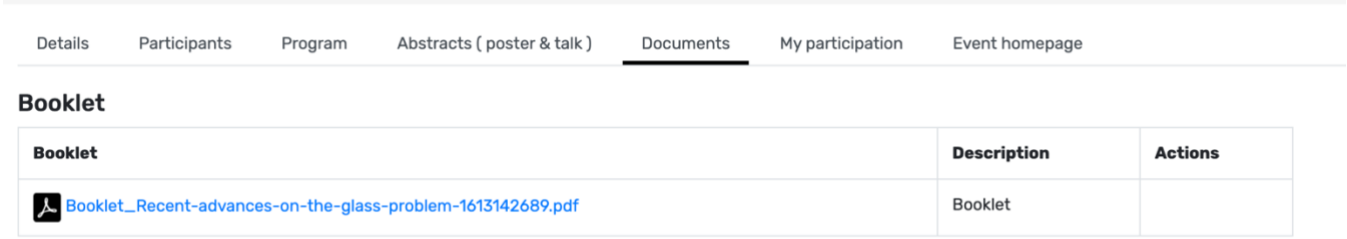
Documents tab

This tab contains all uploaded documents, including the ones that participants submit in their "my participation" tab. It has the following sub-sections:

- Booklet;
- Presentation;
- Files;
- Links & videos.

Booklet

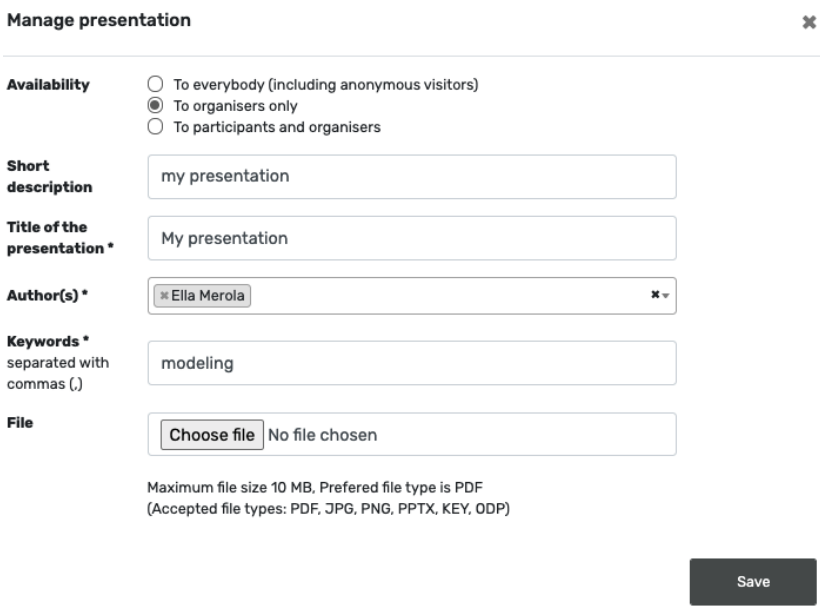
In the tools tab, you will be able to extract a booklet including the program, the book of abstracts and the list of participants. Once finalised, the booklet will be uploaded here in PDF format. This document will be visible to all participants and will also be displayed on the public webpage for the event, in the documents tab. It is important to proof read the booklet to ensure, in particular, that equations and formulas appear correctly and that titles are formatted as uniformly as possible (e.g. capitalization). Please note that changes in the booklet are not automatically reflected on the website.



Presentations

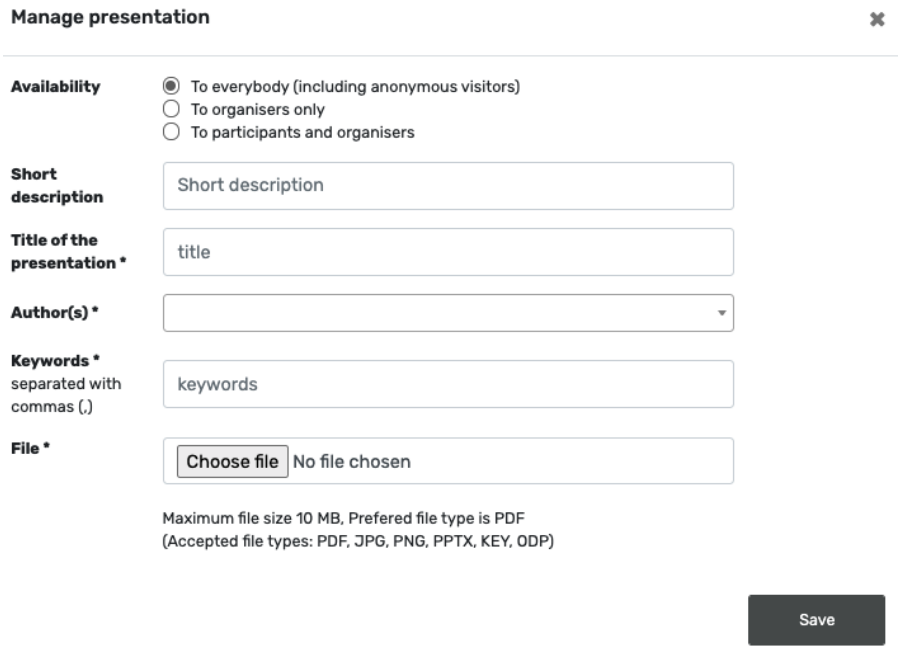
Presentations uploaded by participants will appear in this table. As a default, they will be viewable by organisers only, to enable screening of the content before making them available to participants or the general public. You can modify the parameters of the presentation by clicking on the three dots and then on “Edit”.

This will open a pop-up window. You can then choose the availability (to everybody, to organisers or to organisers and participants) and modify the description, title or keywords if you need to.



You can also delete a presentation, if needed, by clicking on the three dots and then on “Delete”.
If you would like to add a presentation, click on “add a presentation”.

This will open a pop-up window for you to fill. First, choose if the presentation should be available to all, organisers & participants only or organisers only. Then, fill in the description, title, author and keywords and upload the file. Click on “save” when completed.

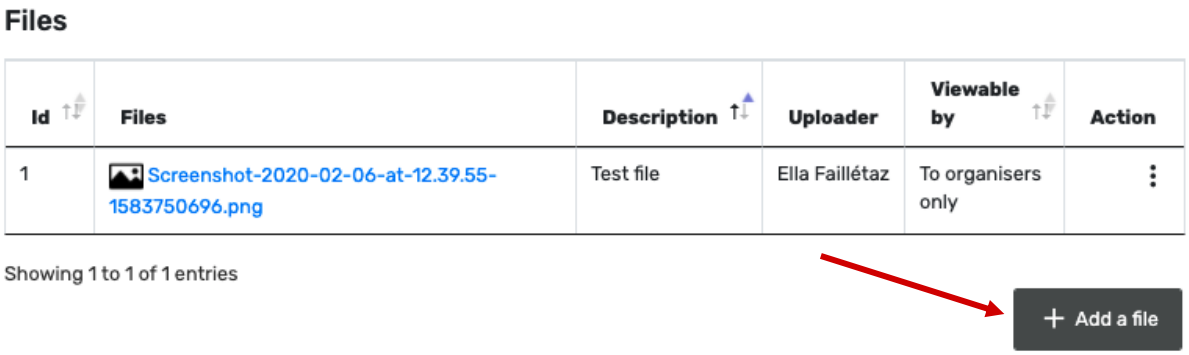


Files

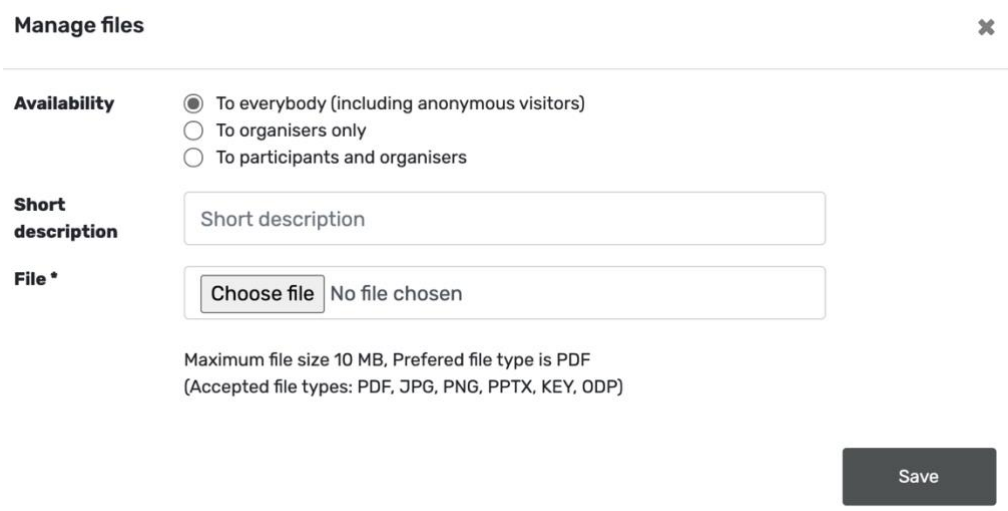
This section is

SINCE 1969

Add a file by clicking on “add a file”.



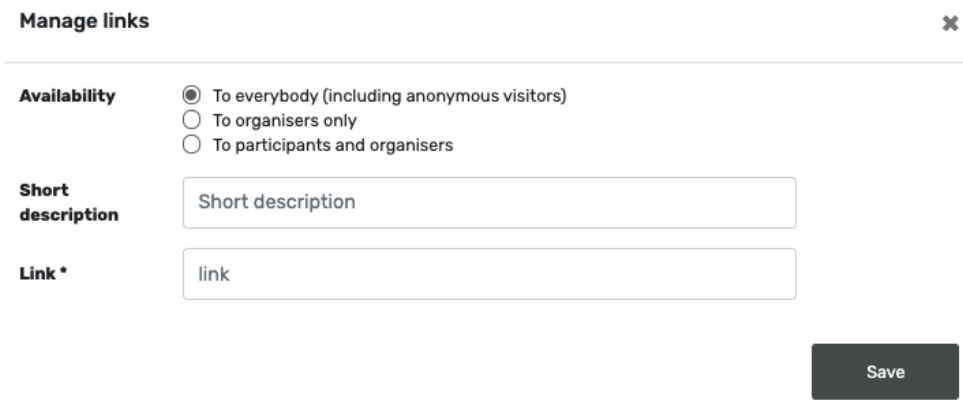
This will open a pop-up window for you to fill. First, choose if the file should be available to all, organisers & participants only or organisers only. Then, fill in the description and upload the file. Click on “save” when the form is completed.



Links & Videos

This section is meant for links to documents and videos.

Add a link by clicking on “Add a link”.



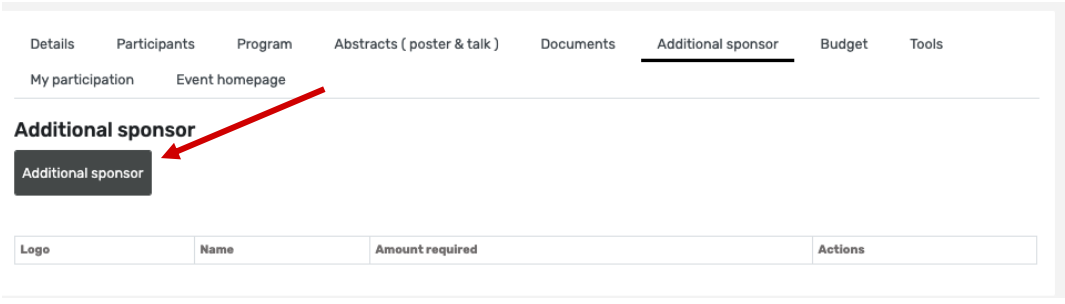
This will open a pop-up window for you to fill. First, choose if the link should be available to all, organisers & participants only or organisers only. Then, fill in the description and copy-paste the link. Click on “save” when completed.

Additional sponsor tab

If you have secured additional funding from another institution, you must add it in this tab.

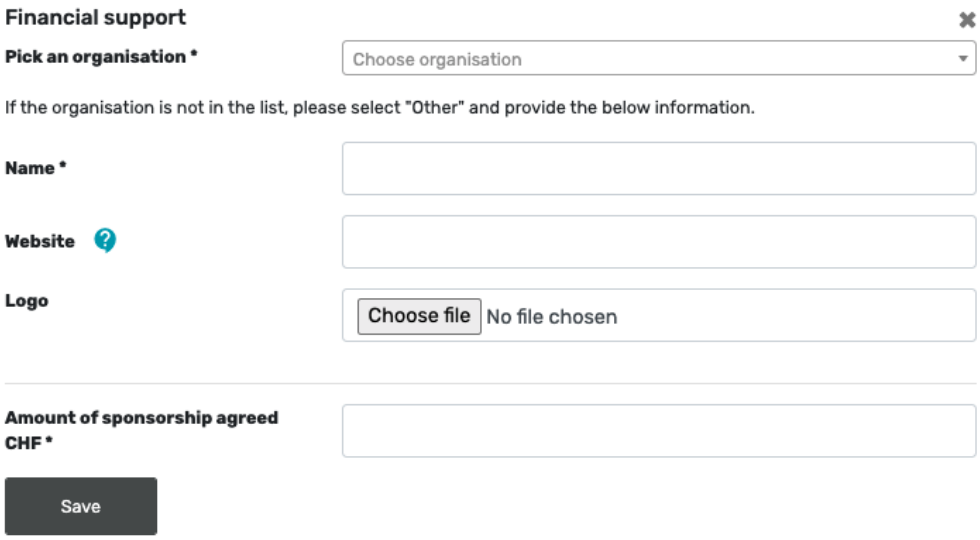
Add a sponsor

Click on “Additional sponsor”.



A pop-up window will open for you to fill. Start by searching the organization in the drop-down list. If you cannot find it, please select “other” and fill in the boxes below with the name (mandatory), website and logo from the organization. Then, enter the amount of sponsorship agreed (in CHF) and click on “Save”.

The logo and name of the sponsor will appear on your event's public webpage, under the event's title.



Budget tab

In this tab, you will see a recap of all the costs related to your event.

The budget table shows first participants-related costs, such as hotel, per-diem and travel. Each line recaps the expenses that you have associated to each participant in this section.

Budget

Edit Costs

Type	Participant	Arrival	Departure	Total nights	Nights covered by the event	Total hotel costs covered by the event	Travel	Per-diem	Total
00	Aude Failletaz aude.failletaz@epfl.ch	2022-02-06	2022-02-09	3	3	415.50 CHF	150 CHF	60.00 CHF	625.5 CHF

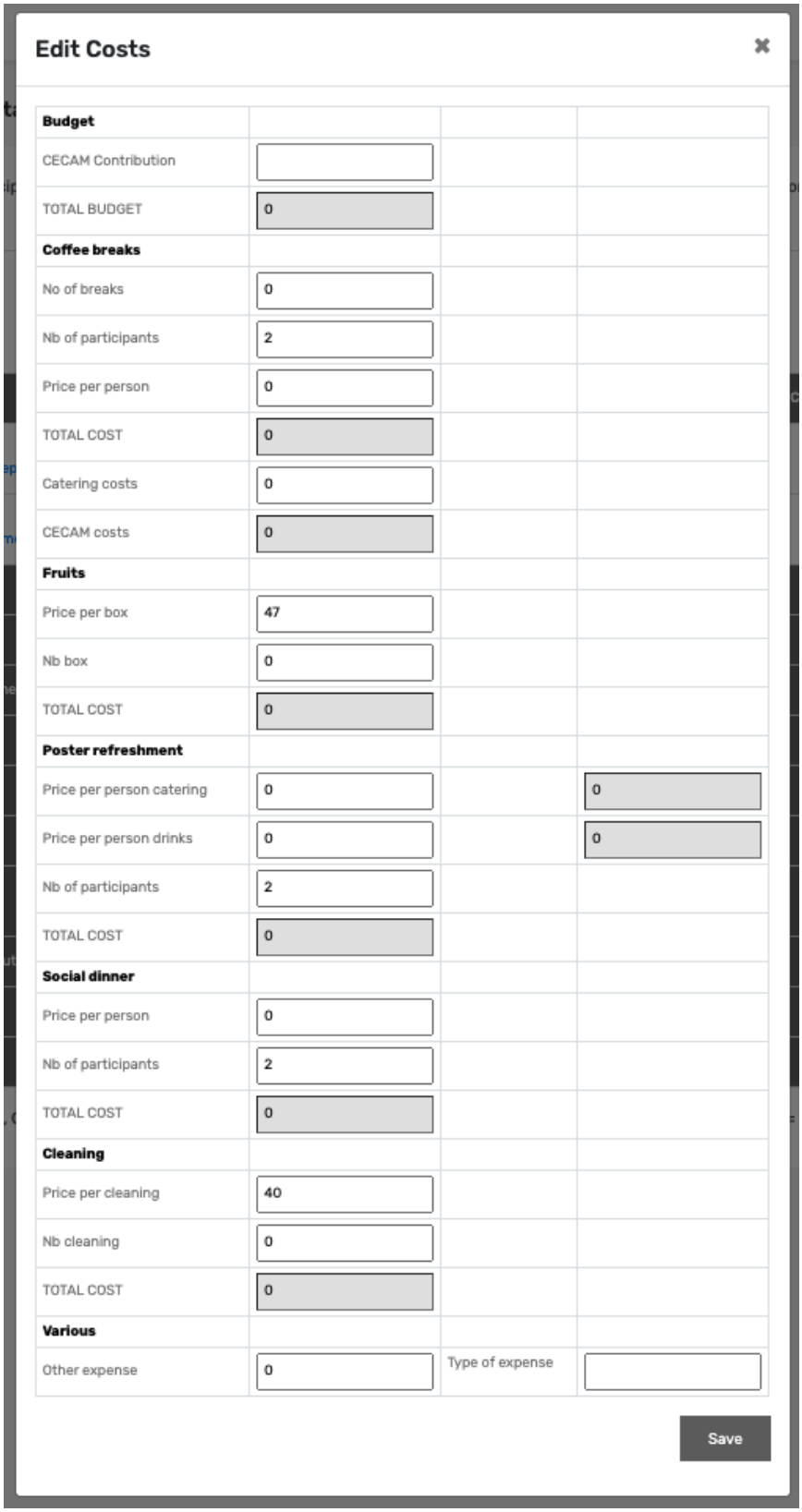
Then, the budget table shows general costs for the event such as coffee breaks, fruits, poster refreshment, dinner, cleaning and, if applicable, various (for example a poster prize or expenses for a special software, e.g. Gather.town for on-line events).

At the end of the table, you will see the total costs and the total budget, including any additional sponsorship you might have secured, as well as the remaining funds.

	Coffee breaks								0.00 CHF
	Fruits								0.00 CHF
	Poster refreshment								0.00 CHF
	Dinner								0.00 CHF
	Cleaning								0.00 CHF
	Various								0.00 CHF
	2 Total 2 organisers,			0	0	0.00 CHF	0.00 CHF	0.00 CHF	0.00 CHF
	CECAM Contribution								0.00 CHF
	Total Budget								0.00 CHF
	Available								0.00 CHF

You can edit these general costs and the total budget by clicking on the button “Edit costs”. This will open a pop-up window.

You can enter an amount in each white box. The grey boxes will be filled automatically with the total amount of the cells above it. Once filled in, do not forget to click on “Save” before closing.



Edit Costs

Budget			
CECAM Contribution			
TOTAL BUDGET	0		
Coffee breaks			
No of breaks	0		
Nb of participants	2		
Price per person	0		
TOTAL COST	0		
Catering costs	0		
CECAM costs	0		
Fruits			
Price per box	47		
Nb box	0		
TOTAL COST	0		
Poster refreshment			
Price per person catering	0		0
Price per person drinks	0		0
Nb of participants	2		
TOTAL COST	0		
Social dinner			
Price per person	0		
Nb of participants	2		
TOTAL COST	0		
Cleaning			
Price per cleaning	40		
Nb cleaning	0		
TOTAL COST	0		
Various			
Other expense	0	Type of expense	

Save

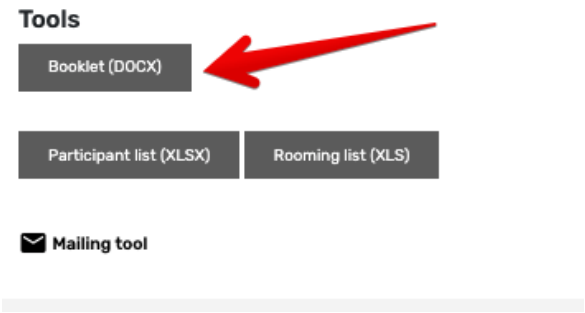
SINCE 1969

Tools tab

In this tab, you will be able to extract the booklet, the participant list and the rooming list for your event. You will also be able to send emails to specific mailing lists.

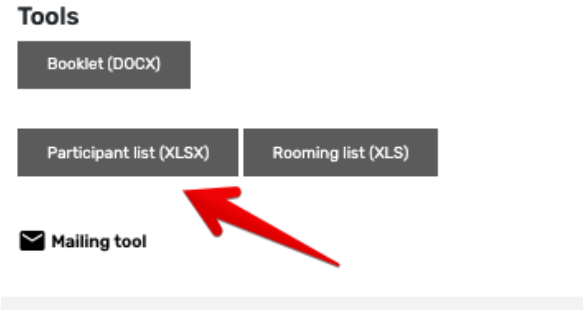
Booklet

By clicking on “Booklet (DOCX)” you will extract the title, logo, program, book of abstracts and participant list for your event in a Word format. You can then review it, modify it and once finalised, upload it in PDF format as explained here.



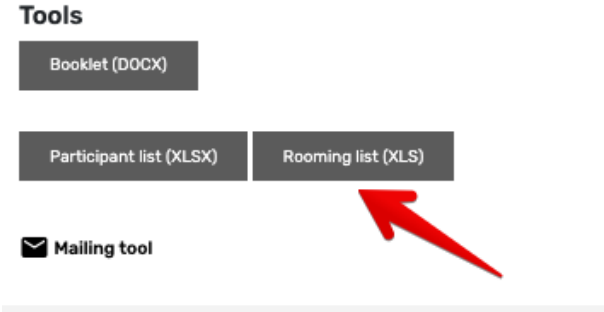
Participants list

By clicking on the button “Participant list”, you can extract an Excel file including: participants’ names, affiliations and email addresses. Any specific note you or the participant might have entered will also appear in this file.



Rooming list

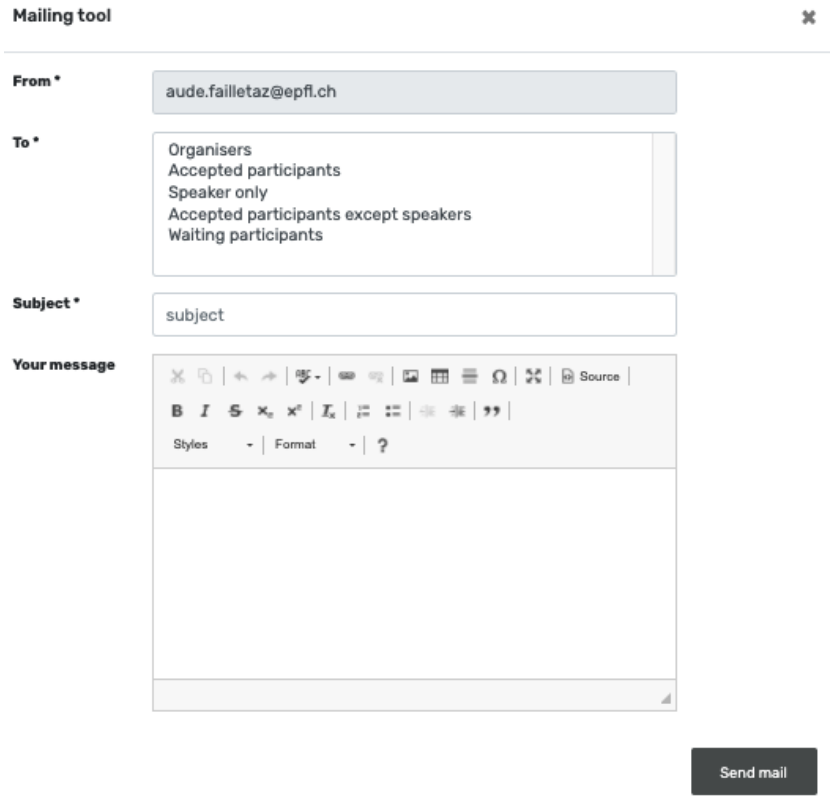
By clicking on the button “Rooming list”, you can extract an excel file including: participants’ names, their check-in/check-out dates and all other information related to their hotel stay.



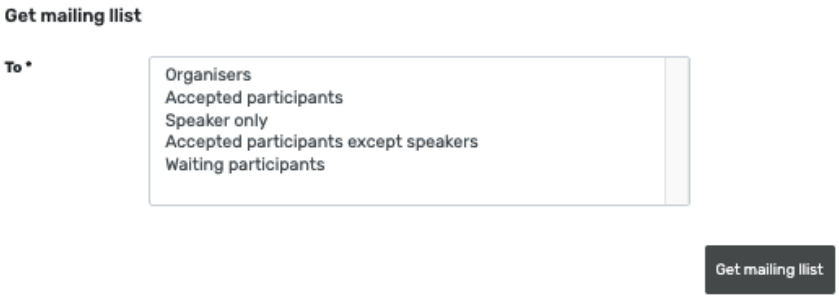
Mailing tool

With this tool, you will be able to either send directly an email to a group of participants or copy mailing lists. Click on **Mailing tool** and a pop-up window will open.

The first part will allow you to send emails directly from the platform. Click on the group(s) of participants to select them. You can select more than one group by pressing “Command” on your keyboard while selecting. Then, type in the subject of your email and your message. Kindly note that you will not be able to add an attachment or add anyone in copy of your email. When finished, click on “send mail”.



If you prefer to send an email directly from your inbox, you can copy a mailing list by clicking on the group(s) of participants to select them and then on “Get mailing list”. A new box will appear with all the related email addresses.



SINCE 1969

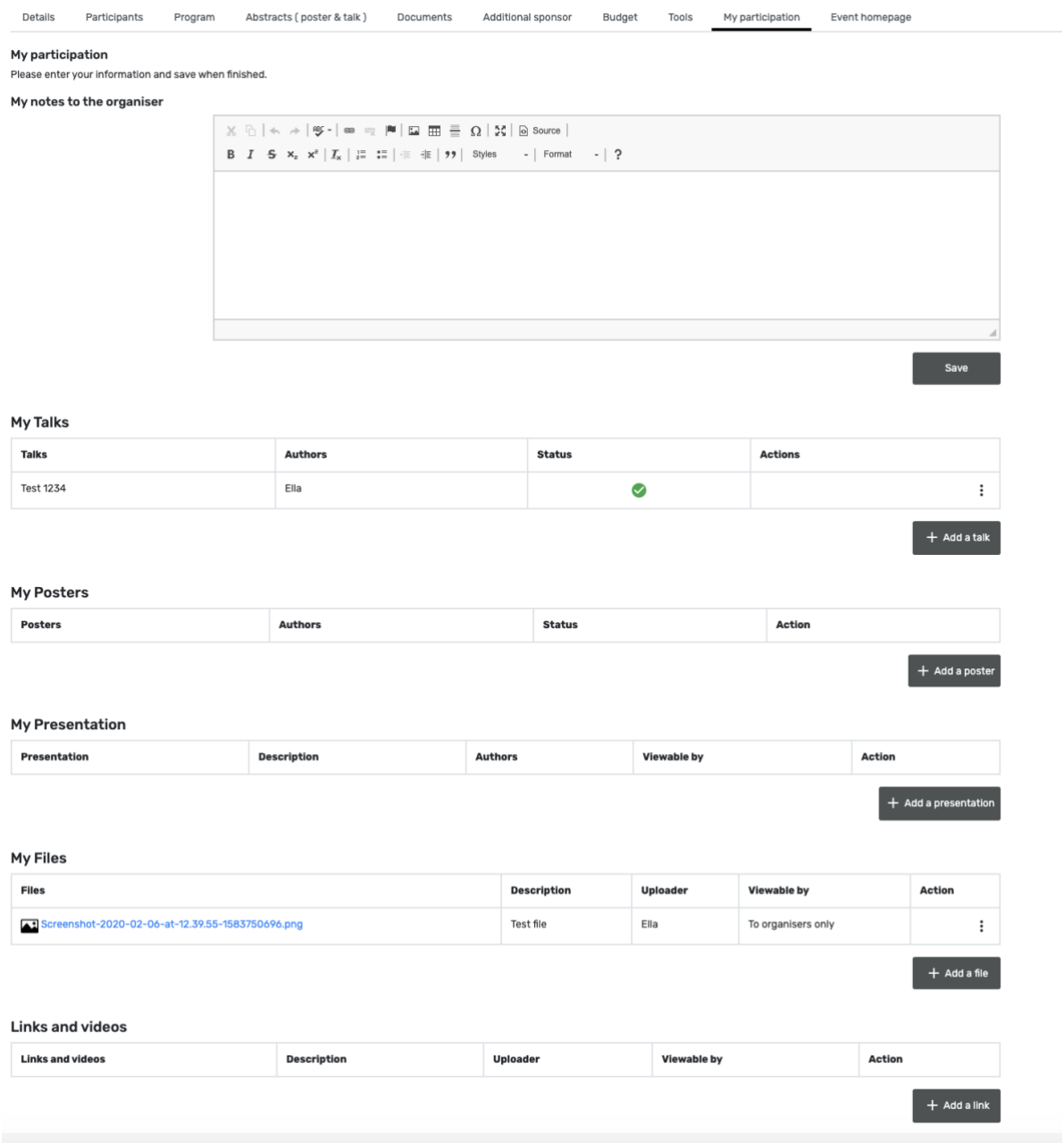
My participation tab

This tab will be used by each participant to input information relevant to their participation to your event. You can therefore also manage your own participation in this tab. Anything you enter in this tab will be reflected in your profile in the participant management explained here.

Depending on the configuration of your event (on-line, on-site or hybrid), participants will see different sections.

On-line

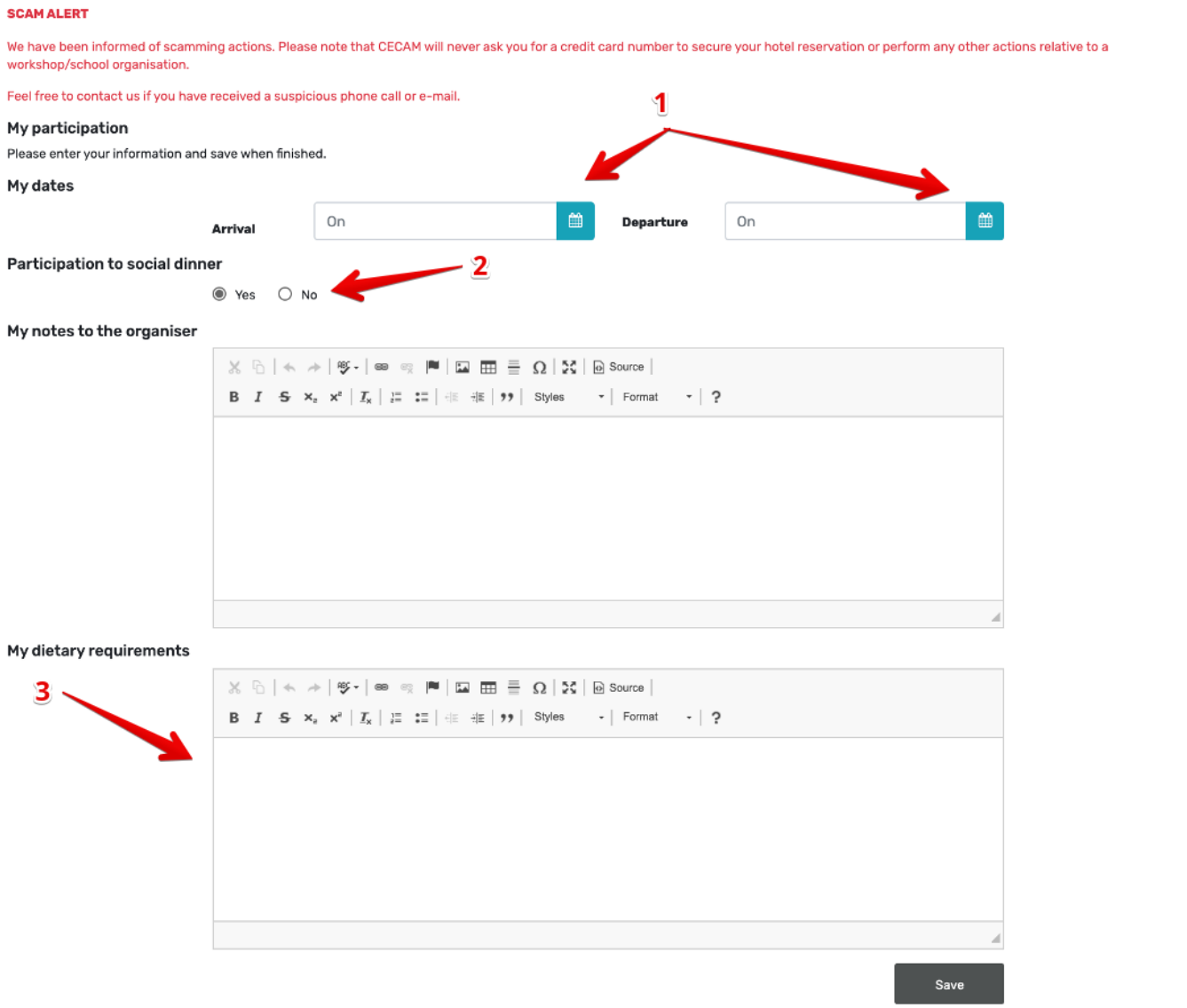
If you are attending on-line, you will be able to add notes, submit a talk (only if you are identified as speaker), a poster, a presentation, a file or a link. As explained above, all files uploaded here will be displayed in the relevant tab (Abstracts tab or Documents tab).



SINCE 1969

On-site

If the event is taking place in-person, you will have more option than those available for on-line events. First, you will be able to input your arrival and departure dates, by clicking on the blue calendar (1 in figure). Then, you can confirm your presence to the social dinner, by selecting "Yes" in "Participation to social dinner" (2 in figure). Finally, you will be able to add notes and mention any dietary restrictions you might have (3 in figure).



Hybrid

For a hybrid event, the participation type (on-line or on-site) specified by you or the attendees in the participants' tab defines which of the two options above will be displayed.

Event homepage tab

By clicking on this tab, you will automatically be redirected to your event's public page on CECAM website.