ScotCHEM

TALKS

ScotCHEM Colloquia Talks Website Help

https://www.scotchem.ac.uk/talks

Contents

ScotCHEM Talks Website

This web-based system is intended for use by all schools within ScotCHEM to advertise colloquia, seminars, and other talks. The aim is to provide a single system where one can find talks across different departments and member institutions, with the aim of making it easier to find talks.

To advertise talks, please register and sign in, and create a list (if one does not already exist) for the colloquium, seminar, or talk series.

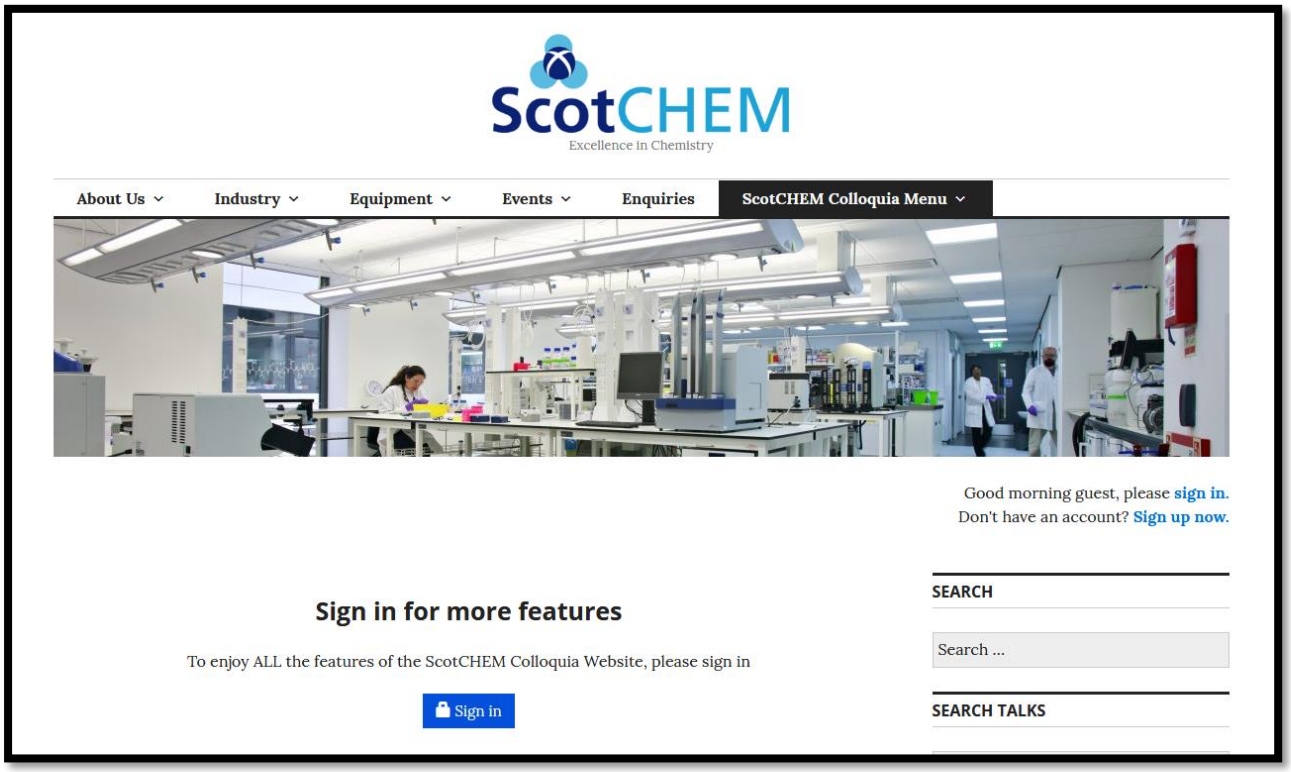


Figure 1 ScotCHEM Talks Website

The Talks Menu bar

The Talks menu bar is the starting point for navigating the Talks website.

Figure 2 The Talks website standard menu bar, shown to all visitors

Quite a number of options are inaccessible on the Talks website to visitors not signed into ScotCHEM SSO system.

Signing in

To sign in, use the **sign in** button on the homepage or the **sign-in** link at the top of any page.

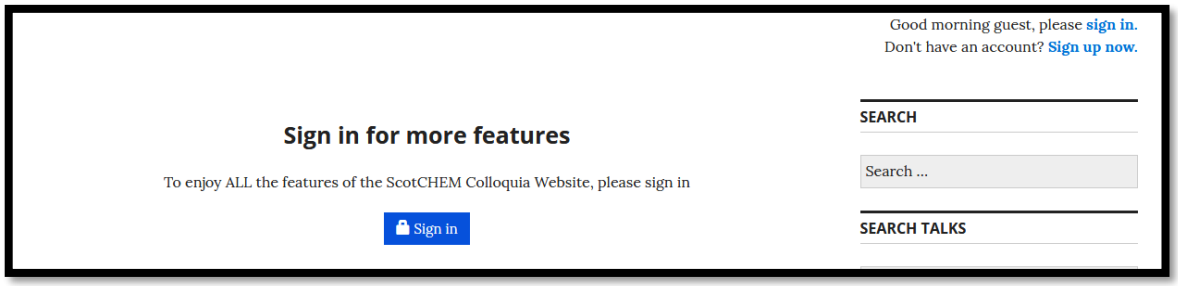


Figure 3 TO sign in use the Single Sign on button on the homepage or the Sign-in link at the top of any page

Signed in users have access to submenus that are hidden to visitors, as shown below.

Figure 5 A special submenu is visible to only sign-in users

What can be done (and from where)?

The following features are available to the user. Some features require the user to be signed in.

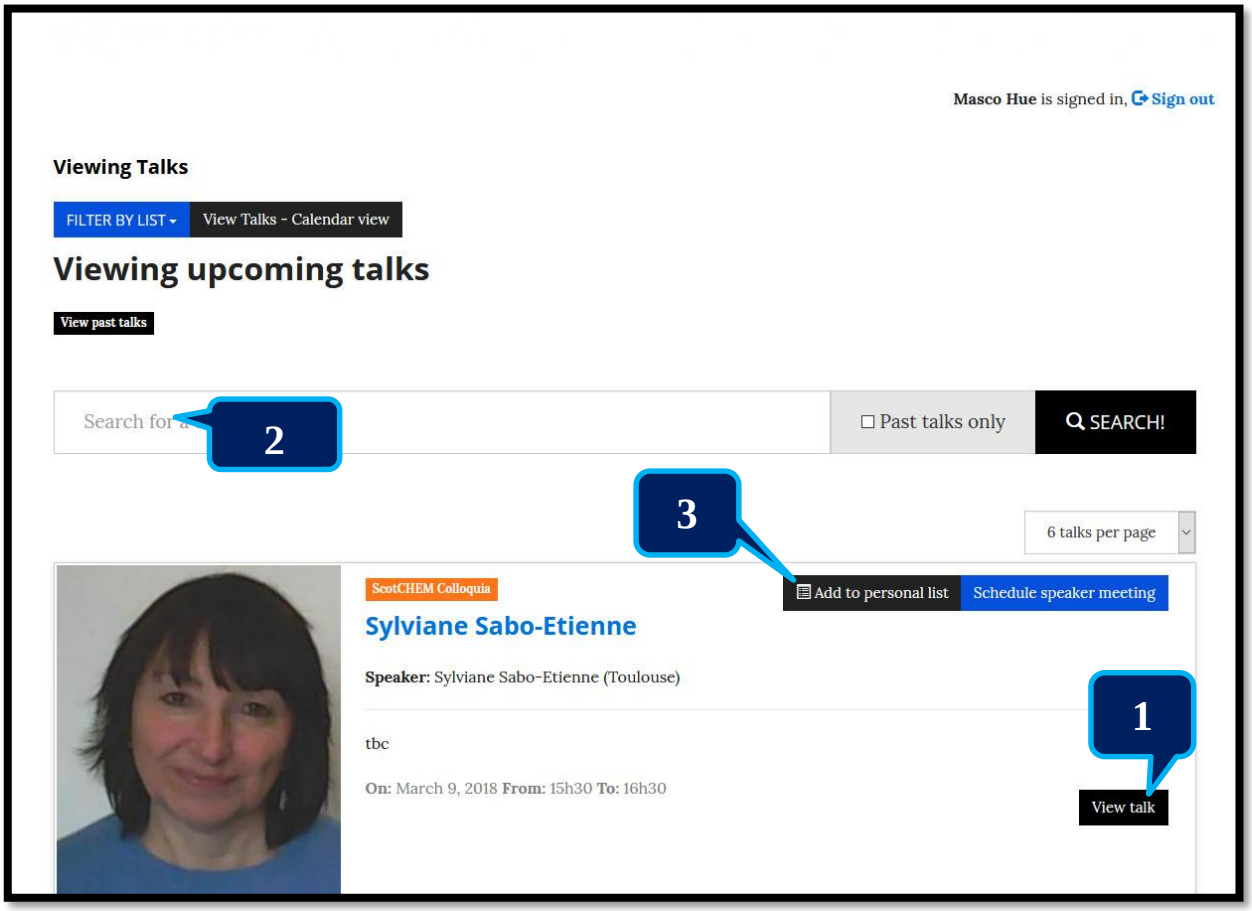
List Actions	From which page
Add a List	Manage Lists
Add Talk	Manage Lists (under *Add Talk column*)
Edit List	Manage Lists (under Tasks column - *Select Drop Down*)
Activate or deactivate List	Manage Lists (under Active column)
List Managers	Manage Lists (under Tasks column - *Select Drop Down*)
Import talks via Excel	Manage Lists (under Tasks column - *Select Drop Down*)
Email Templates (Add, edit and delete)	Manage Lists (under Tasks column - *Select Drop Down*)
Scheduled emails	Manage Lists (under Tasks column - *Select Drop Down*)
Mailing lists (Add, edit and delete)	Manage Lists (under Tasks column - *Select Drop Down*)
Send to mailing list	Manage Lists (under Tasks column - *Select Drop Down*)
Remove List	Manage Lists (under Tasks column - *Select Drop Down*)
Add list to personal list	View Lists (under ***Subscribe*** button), View List detail (Top right) – *option available only when signed in*
Subscribe to List via email	View Lists
Unsubscribe email	Email unsubscribe from list (Signed in users submenu)
Get list embed codes	View Lists, (under subscribe button of selected list)

Talk Actions	From which page
Add Talk	Manage Lists (under *Add Talk column*)
Edit Talk	Manage Talks (under Tasks column - *Select Drop Down*)
Scheduled emails	Manage Talks (under Tasks column - *Select Drop Down*)
Send emails	Manage Talks (under Tasks column - *Select Drop Down*)
Remove Talk	Manage Talks (under Tasks column - *Select Drop Down*)
Add to personal list	View Talks, Talk detail (Top right) – *option available only when signed in*
Activate or deactivate Talk	Manage Talks (under Active column)
Add to my calendar	Talk detail (Top right)
Make speaker available for meetings	Manage Talks (under Meetings column)
Schedule to meet with speaker	View talks - *option available only when signed in and speaker is available for meeting*
Manage Schedule to meet with speaker	View talks - *option available only when signed in and speaker is available for meeting*

The View Talks page

The View Talks page displays available talks. Talks not shown can be found by using the search field provided on the home page or on the View Talks page.

Figure 6 The View Talks page



1. Using the View Talk button displays the **details** of the talk.
2. Past talks are placed in the archive automatically by the system. To view all talks including archived talks, click on the “View past talks” link.
3. Signed in users can edit talks (only if the talk is created by the administrator user or the user is a list manager of the Talks list) and Schedule meetings with the speaker (if only the speaker is available for meetings – set from the **Manage Talks** page).

View Talks (Calendar View)

This page displays talks on an interactive calendar. Clicking on a talk displays the details in an alert box with the possiblity of viewing the talk in even more detail from there by uising the “View talk details” button.

Figure 8 The View talks (Calendar view) page

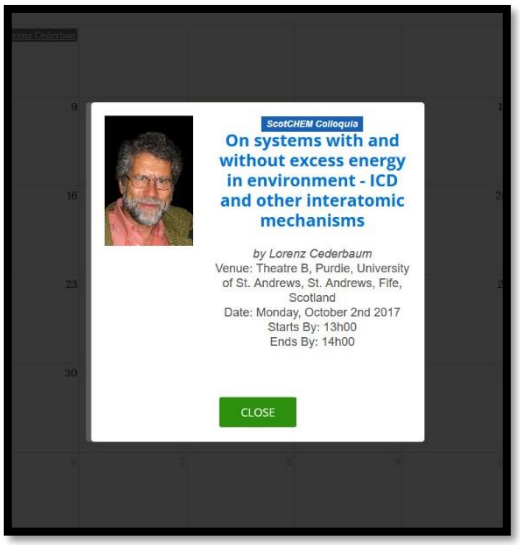
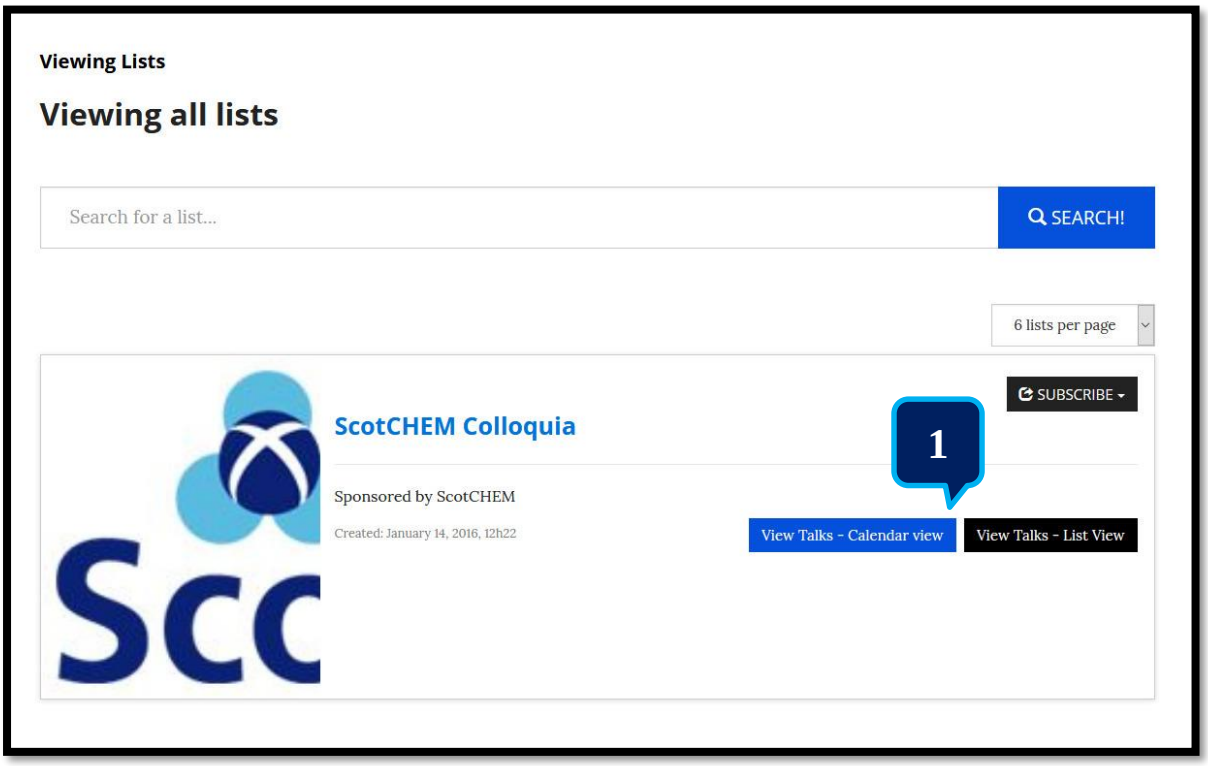


Figure 7 A talk clicked on the calendar is shown briefly in an alert box, use the view talk details button for more detail

The View Lists page

The View Lists page holds all existing lists, clicking on the title of a list displays more information related to the list.



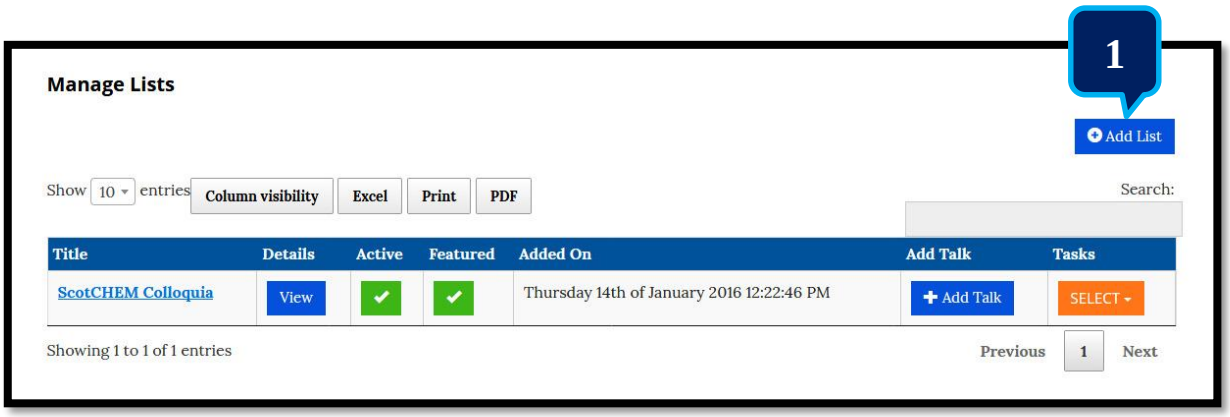
1. All talks in the list can be viewed by using either of two buttons - the “View Talks - Calendar view” or “View Talks - List View”.

   The calendar view simply displays the talks in the selected list on an interactive calendar.

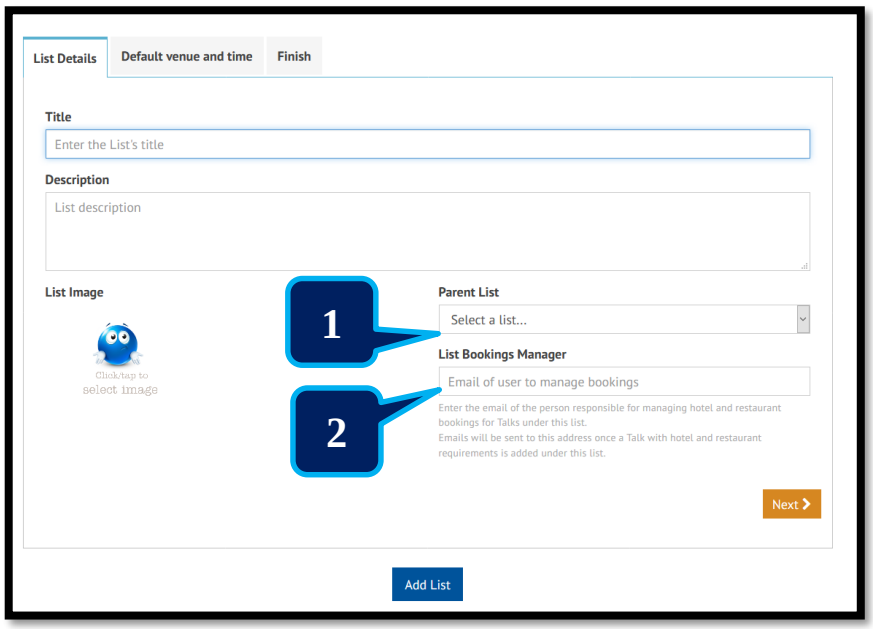
Adding a List

The Talks site allows all signed in users to create List of Talks under which talks can be added. There is currently no limit to the number of lists a user can add.

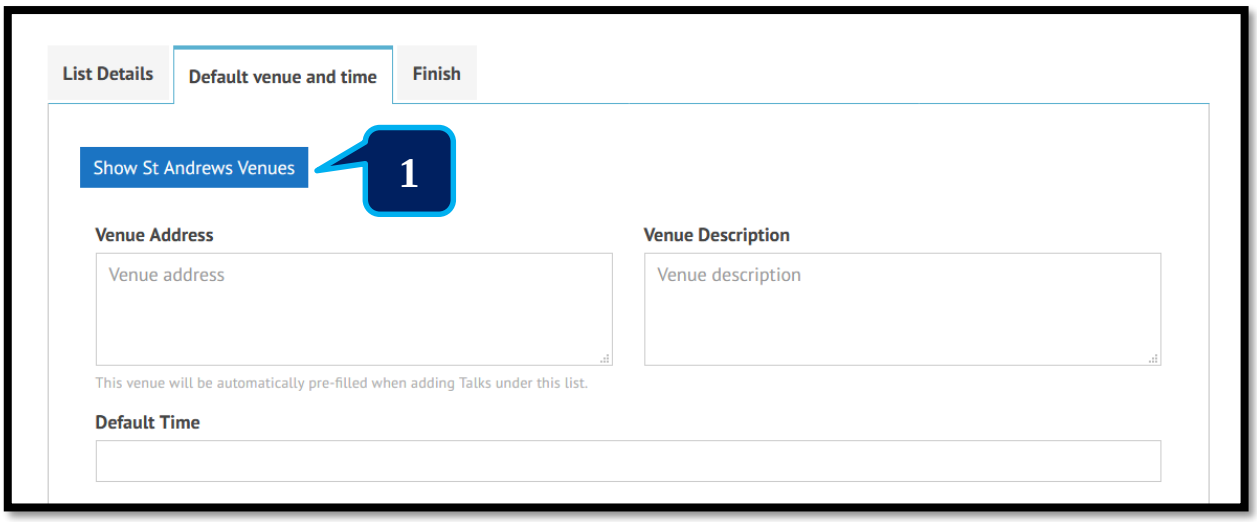
1. To add a list, use the Manage Lists menu to view the Manage lists page. Use the button “Add List” to add a list.



Lists can be added in three easy steps. Enter the title, a description.



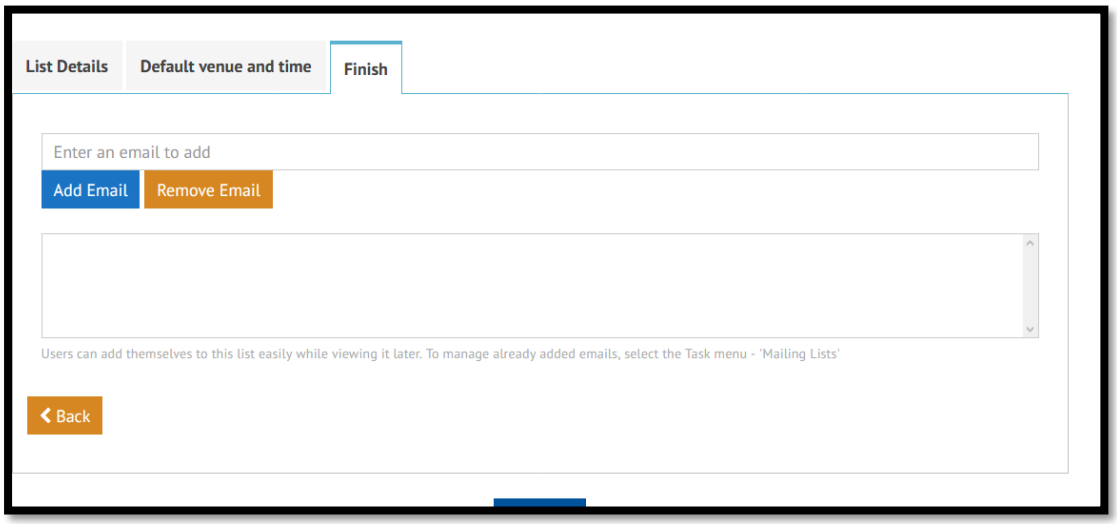
1. If the list is under another list, select that list as the “parent list”.
2. Enter the list bookings manager’s email, this is the person that gets to manage hotel, restaurant and transport bookings for the speaker.



1. Using the "**Show St Andrews Venues**" button displays a list of Venues in ScotCHEM by Buildings and Rooms. The optional venue description can contain helpful information for those intending to go to the venue, for instance, *the front door is inaccessible but the side door is currently open, with a bold sign that reads "Talk" overhead*.

The third tab, allows the addition of subscriber emails during the creation of the list, if this information is not on hand, skipping this field is totally OK.

Also, on the **Manage List** screen there is a more efficient and fast way to add subscriber emails via simple text file upload (Under the Tasks column - **Mailing List**).

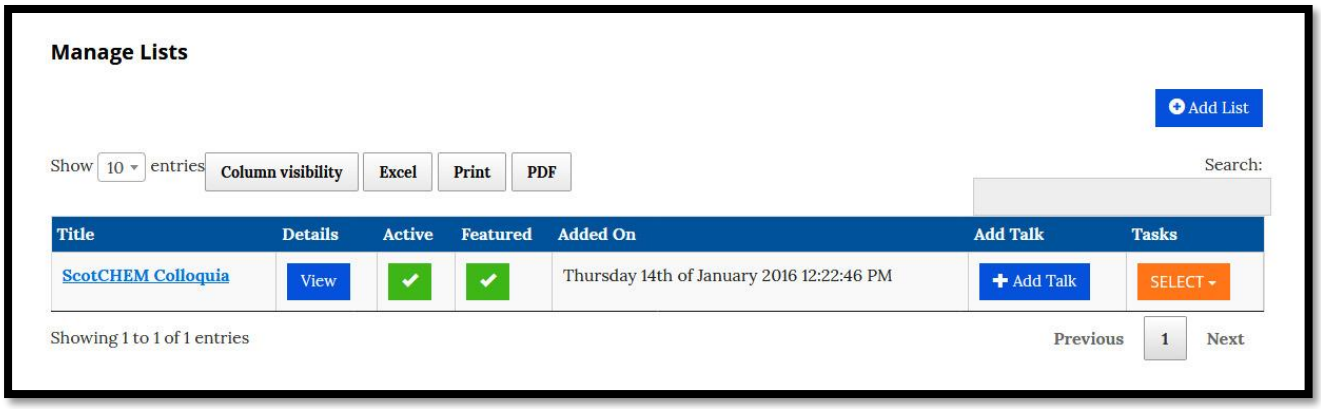


Additionally, other signed in users can add themselves to the list of subscribers at the click of a button while viewing the list detail or talks in the list.

Manage Lists

Everything that can be done to a list happens from the **Manage Lists** page. This page shows lists that have been added by the signed in user and lists that the signed in user has been assigned to as a Manager.

Users can be assigned as managers to a list created by the signed in user from the Manage Lists page under the List Manager menu of the Selct button on the tasks Column.



The lists are displayed in tabular format and each row contains the information about the list and actions/tasks that can be carried out on the list.

Actions on the Manage Lists page include:

List Actions	
Add a List	Add a list button – top right corner
Add Talk	Manage Lists (under *Add Talk column*)
Edit List	Manage Lists (under Tasks column - *Select Drop Down*)
Activate or deactivate List	Manage Lists (under Active column)
List Managers	Manage Lists (under Tasks column - *Select Drop Down*)
Import talks via Excel	Manage Lists (under Tasks column - *Select Drop Down*)
Email Templates (Add, edit and delete)	Manage Lists (under Tasks column - *Select Drop Down*)

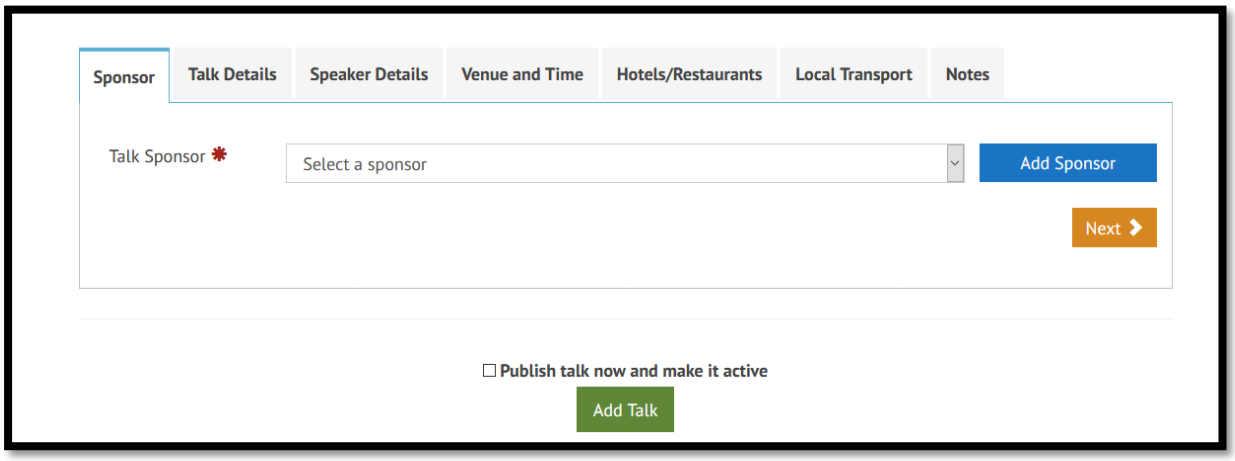
Scheduled emails	Manage Lists (under Tasks column - *Select Drop Down*)
Mailing lists (Add, edit and delete)	Manage Lists (under Tasks column - *Select Drop Down*)
Send to mailing list	Manage Lists (under Tasks column - *Select Drop Down*)
Remove List	Manage Lists (under Tasks column - *Select Drop Down*)

Adding a talk

Talks can **ONLY** be added to a list. As such, talks can be added from the **Manage List** screen only.

To add a talk from the Manage Lists page, use the **Add talk button** on the list row.

The **Add Talk** page contains 7 tabs, some of which contain fields that are not compulsory to be filled. Some fields must be entered like the title, sponsor and speaker details, look out for the bold red asterisks (✱). It will be impossible to Add a talk if all required fields are NOT filled out.

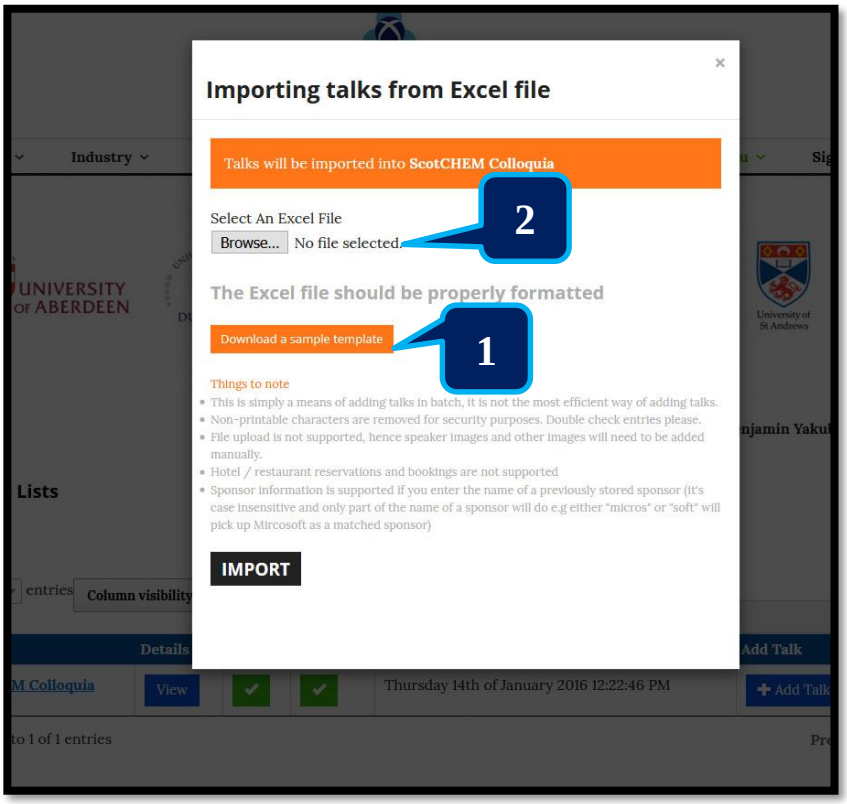


Import talks via Excel

The easiest, fastest and perhaps *most limited* way of adding talks is via the Import Talks via Excel menu option on the Manage List page under the Select drop down on the Tasks column.

This is "most limited" due to the fact that uploading talks via CSV currently leaves out certain aspects of a talk such as image upload, bookings etc (a full list of limitations is provided on the page). Although once uploaded, talks can be edited individually and missing details added.

To import talks via Excel:



1. Download an example Excel file using the **Download a sample template** button and enter the details of the talks as shown in the sample. Each row represents a single talk.

2. You can rename the file if need be. Save the Excel file, Select it here after all the data has been entered.

3. Tap/click **Import**, the Manage Lists page will be shown and a message displayed showing the number of talks uploaded.

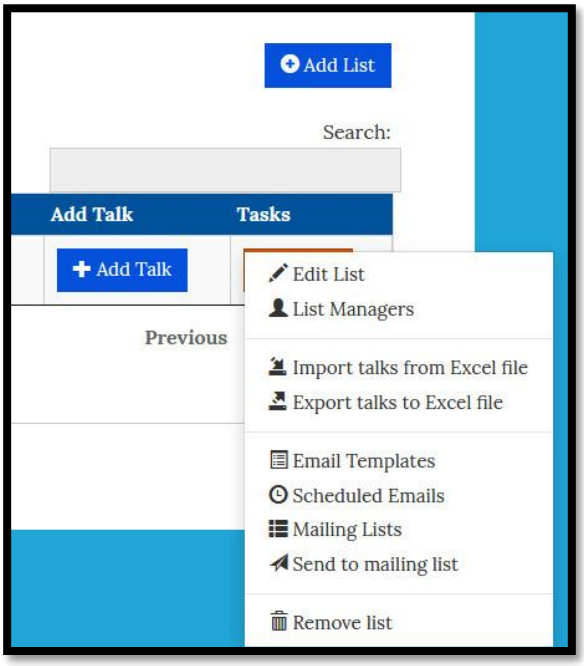
Limitations of Importing talks via Excel

- Non printable characters are removed for security. Ensure input is double checked for any.
- No file uploads, so no speaker images are added, abstract PDFs or any file whatsoever. Those must be added by editing the talk after upload from the **Manage Talks** page.
- Hotel and restaurant reservations and bookings are not supported
- Sponsor information is added if you enter the name of an existing sponsor already stored in the system

Edit List

To edit a list, from the Manage List screen, simply use the Select button under the Tasks column, locate the Edit List menu option.

The Select button under the Task Column

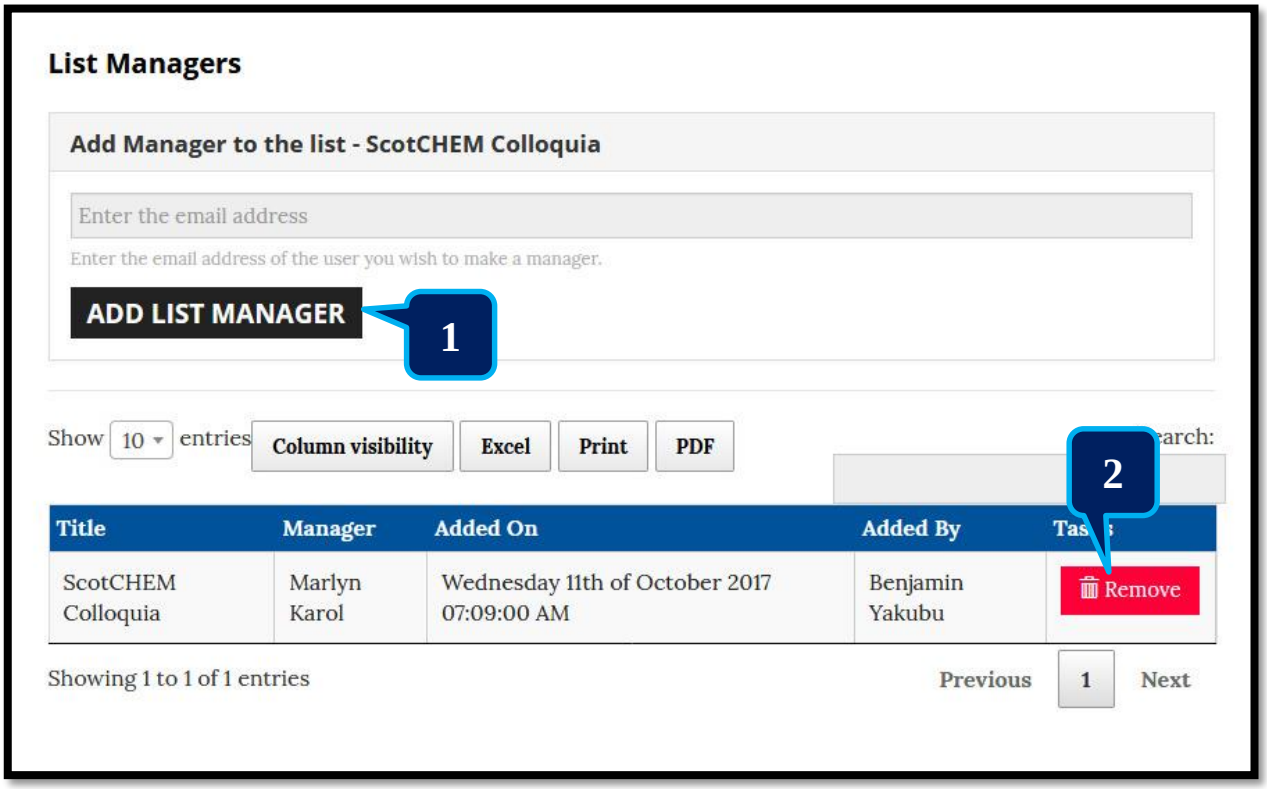


Under the Tasks column, the select button holds many actions that can be carried out on the corresponding list on that row.

1. Lists can be edited.
2. List Managers can be added or removed.
3. Talks can be imported to the list via Excel.
4. Email templates can be created for automatically sent emails related to talks in the list.
5. Emails can be scheduled to be sent automatically for Talks under the list at predefined times like 2 hours to the beginning of talk or 2 days and 5 hours to the beginning of a talk etc.
6. Every list has an associated mailing list. Users with emails in this mailing list are mostly reminded of upcoming talks automatically (according to the schedule) or the list owner (or manager) can send out emails with any content.
7. Emails can be sent to people in a list's mailing list.
8. The list can be removed. This is irreversible and everything associated with the list including talks,templates, emails, managers etc will cease to function.

List Managers

A list manager can be added and available managers viewed using the List Manager Tasks column Select button sub menu.



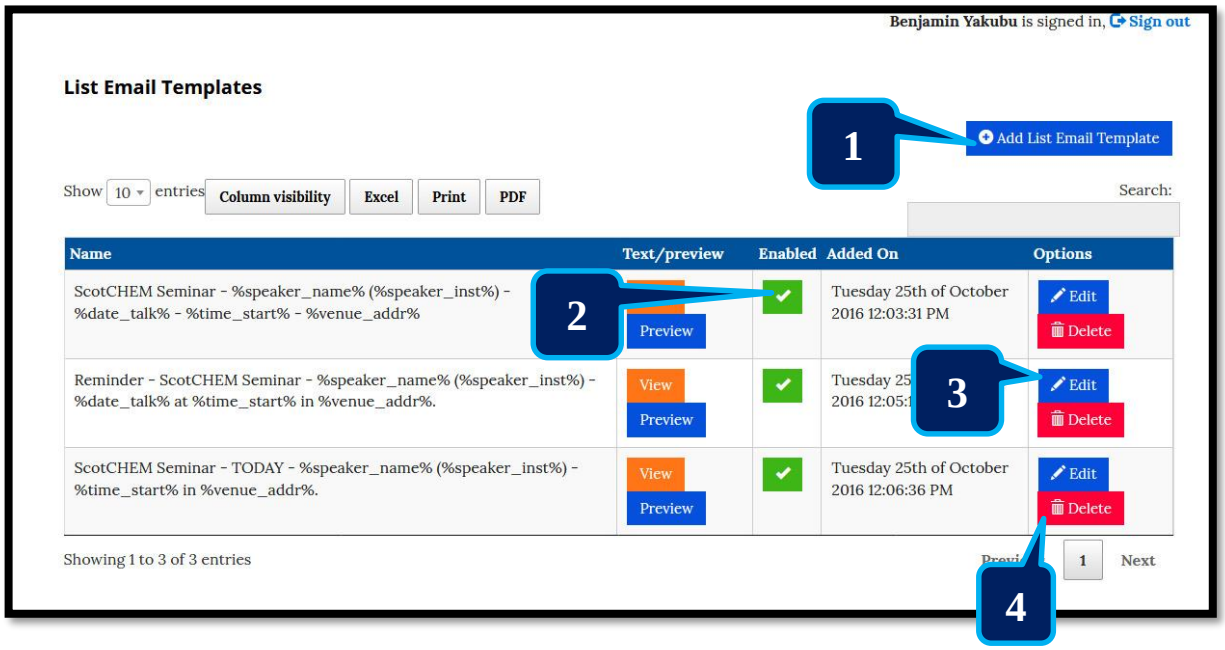
1. To add a list Manager, Enter the list manager email address and use the “Add List Manager” button. If the email address is not found, a notification is displayed otherwise the list manager is added.

2. To Remove a list manager simply use the Remove button on the row of available List Managers displayed.

Creating email templates

Email templates help reduce the redundancy in having to send the same kind of mail whenever the need arises. An email template is simply like mail merge, only with the added benefit of creating as many as you wish and reusing them really fast. To create one, enter the text and within it, place template codes (or placeholders) that get replaced automatically by the system before the mail is sent.

Under the "Tasks" column simply select "Email templates" to view the List email Templates page.

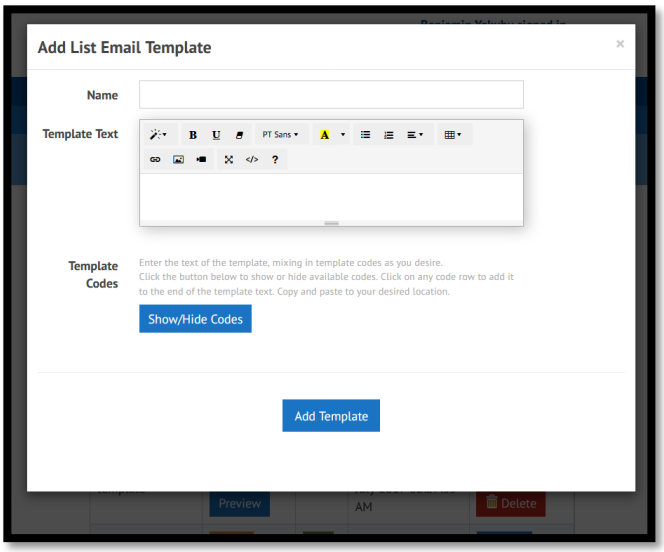


To create an email template:

1. From the List email template page click/tap **Add List Email Template**, a form is displayed.

   a. Enter the name of the template

   b. Enter the template text and use the "Show Hide Code" button to display (or hide) the list of placeholders that can be embedded in the email



template. Simply click on any to add to the cursor location within the template text

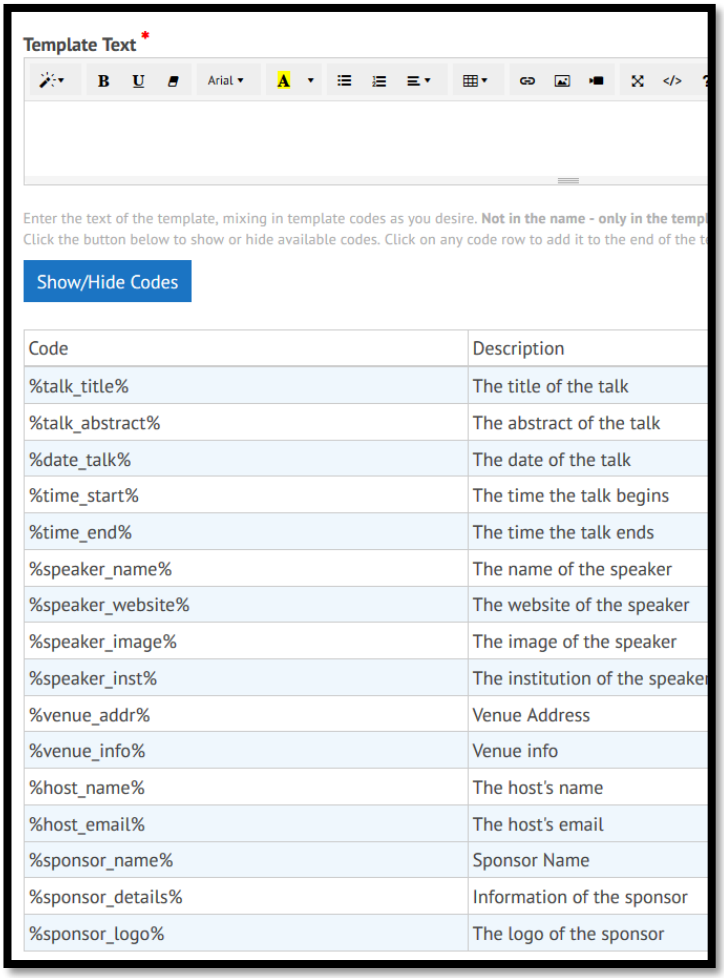
c. Use the Submit template button to store the template in the system.

2. To activate or deactive a template click or tap the button under the “Active” column

3. To edit an email template, click/tap the Edit button under the Options column.

   Once done editing simply use the Submit template button and the template is saved.

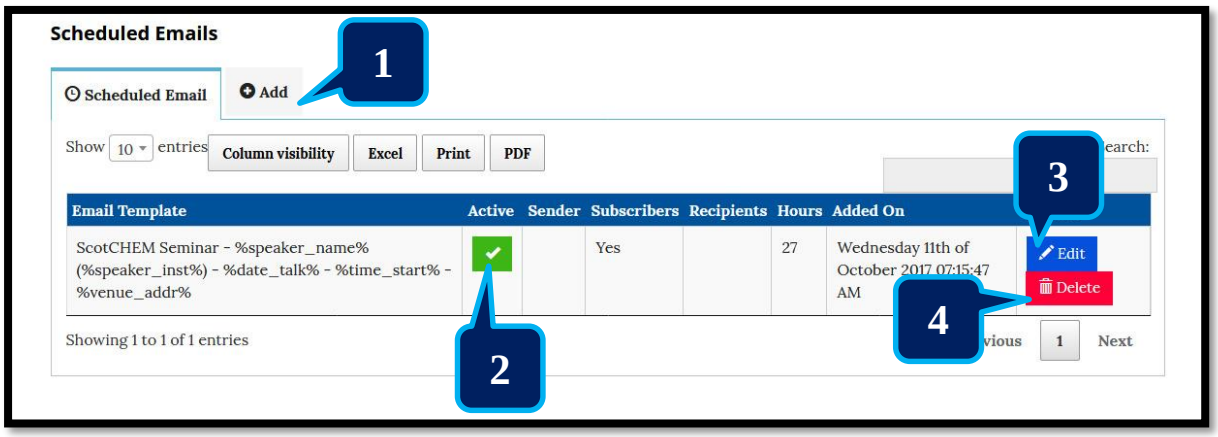
4. Deleting is possible by using “Delete”



Code	Description
%talk_title%	The title of the talk
%talk_abstract%	The abstract of the talk
%date_talk%	The date of the talk
%time_start%	The time the talk begins
%time_end%	The time the talk ends
%speaker_name%	The name of the speaker
%speaker_website%	The website of the speaker
%speaker_image%	The image of the speaker
%speaker_inst%	The institution of the speake
%venue_addr%	Venue Address
%venue_info%	Venue info
%host_name%	The host's name
%host_email%	The host's email
%sponsor_name%	Sponsor Name
%sponsor_details%	Information of the sponsor
%sponsor_logo%	The logo of the sponsor

Scheduled Emails

The Talks system can automatically send out emails at a predefined number of hours relative to the start time of a talk.
Talk schedules can be managed and new ones added by using the **Scheduled Emails** option under the **Select menu** under the Tasks column of the Manage List page.



To add a new schedule:

1. Use the Add tab. Ensure an email template exists as the schedule cannot be added without one.

   a. Select the template

   b. Choose whether or not to send to subscribers.

   c. Enter the sender email address

   d. Enter the number of hours or days before the talk at which to send the emails.

2. A schedule can be activated or deactivated by using the button under the Active column.

3. A schedule can be edited by clicking/tapping **Edit**.

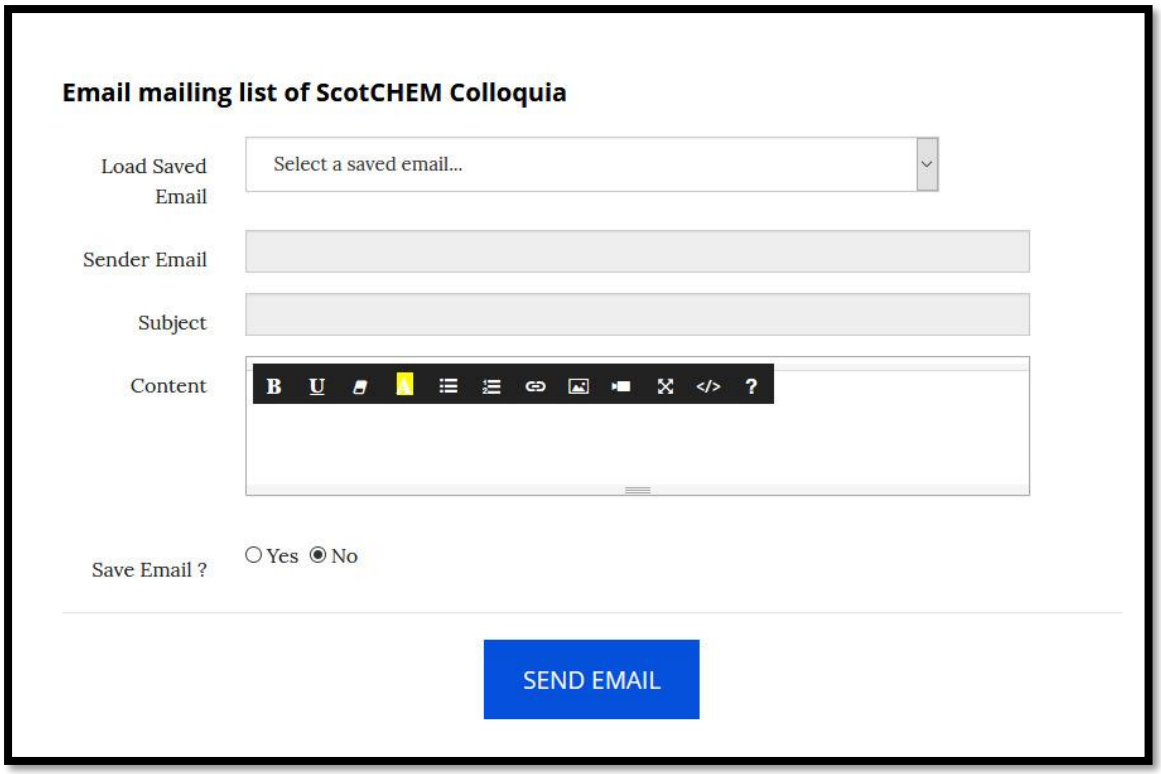
4. A schedule can be deleted by clicking/tapping **Delete**.

Send to mailing list

This brings up a page that allows an email to be sent to subscribers in the mailing list.

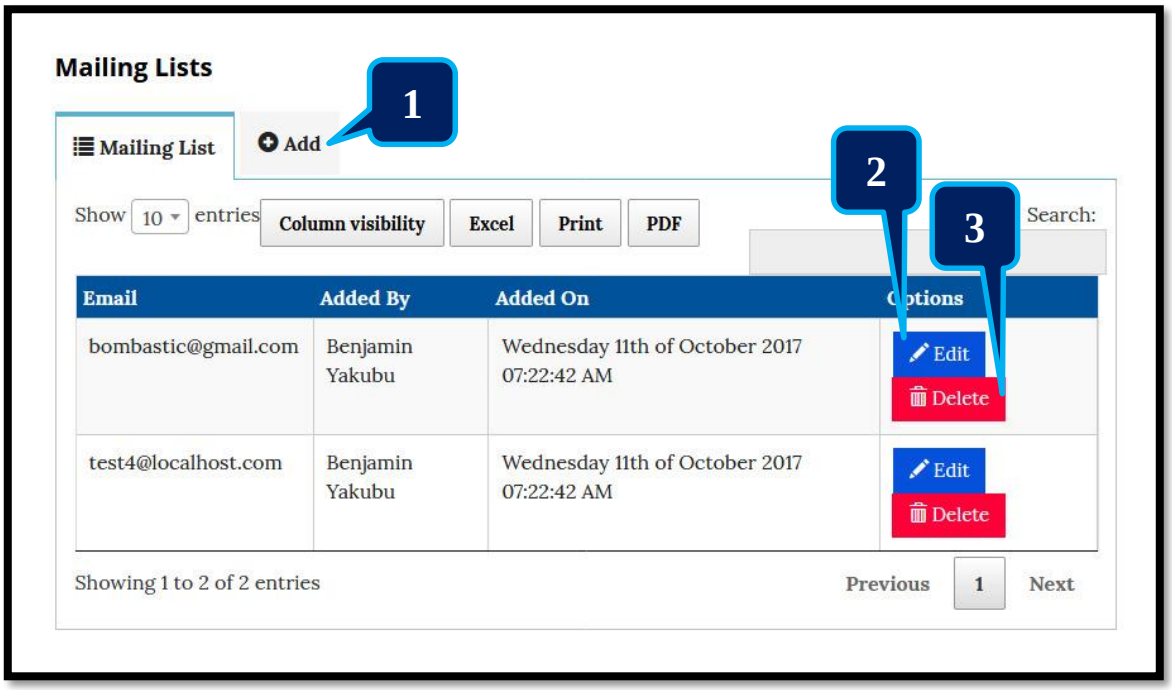
There is an option to save the sent mail and reuse later.

This is different from an email template. There are no template codes or placeholders in here.

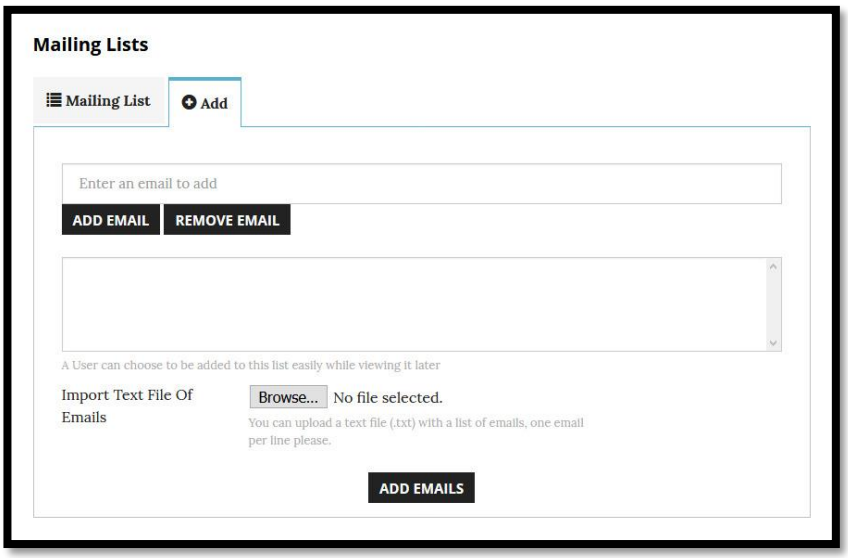


Mailing list

The "**Mailing list"** option enables more emails to be added to the list's mailing list.



1. Emails can be added by using the "Add" Tab.
2. Edit an email by using the Edit button
3. To delete an added email, use the Delete button.



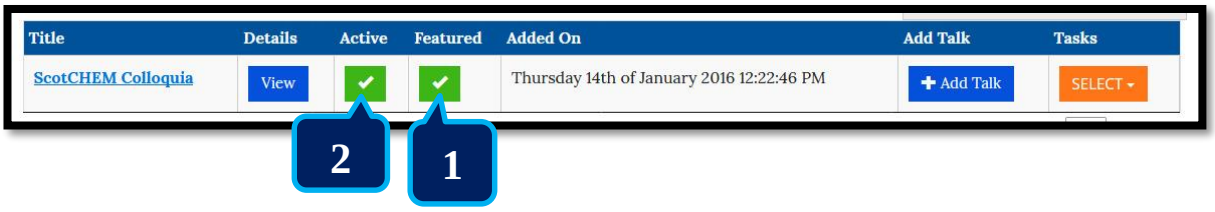
Mails can be added directly using the Add email or Remove email button or best of all, as an uploaded plain text file (with the .txt extension) containing one email per line.

Once the **Add emails** button is used, all emails from both methods will be uploaded. For instance if a few emails are entered into the list box and a file containing emails is selected, using the Add Emails button will add emails in the list box and emails from the file. Of course, the choice of which method to use rests with the user.

Make a list featured

Featured lists are displayed on the front page and only ***Administrator*** users are allowed the option of doing this. Send a request via the Contact Us page if a list is needed to be featured – requests go to select Administrator users.

1. To make a list featured, simply click the red 'x' icon under the featured column on the Manage List page, to undo, simply click the green tick mark icon.



Make a list active or inactive

A list must be 'active' to be visible in the Talks website. Inactive lists don't show up in searches or listings.

2. To make a list active simply click the red 'x' mark icon under the Active column, to undo and make a list inactive, simply click the green tick mark icon. Green tick mark means it's active, red icon means it's inactive.

Remove List

To remove a list, ensure all talks under the list are deleted. After this is done, on the Manage Lists page, use the Select button under the Tasks column, **Remove List** is at the bottom of the menu. Removal of a list cannot be undone.

Manage Talks

The manage talks page displays a table of all the talks under the lists owned/managed by a user.

Clicking on the title of a talk shows more information about the talk. Talks with dates in red are in the past.

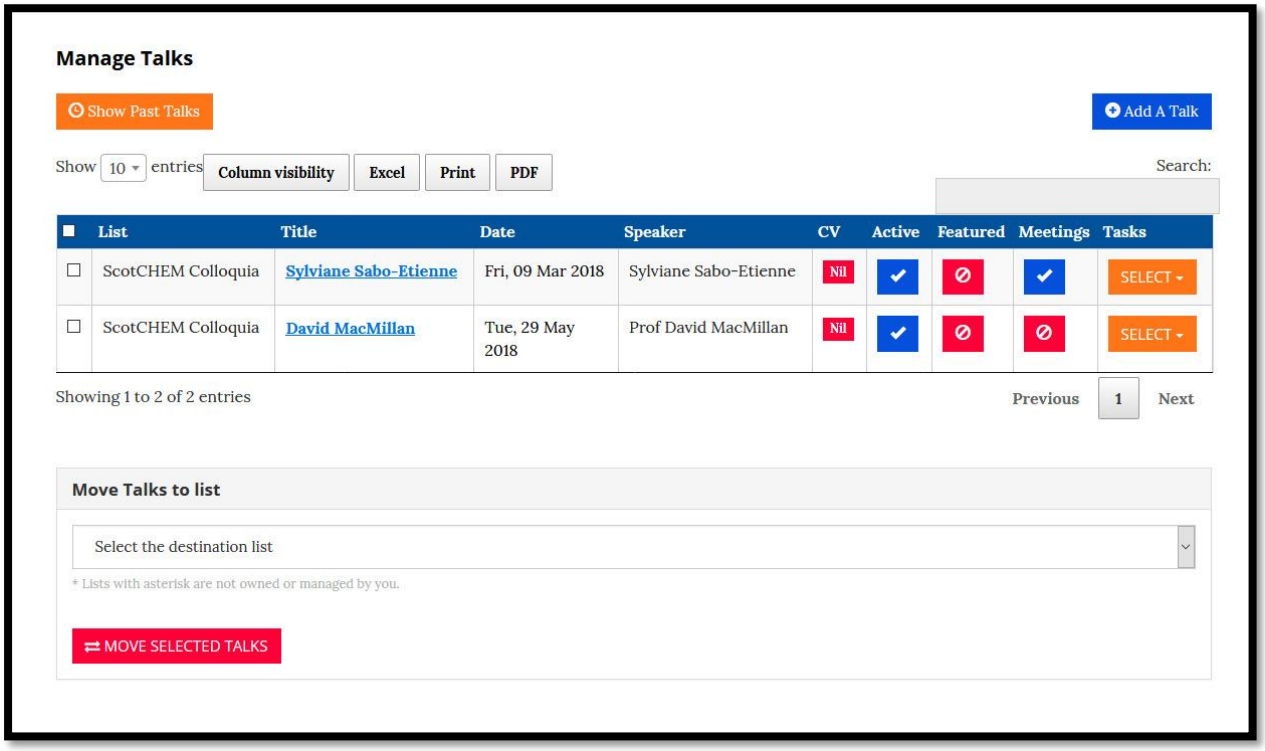


Figure 9 Manage Talks page

A number of operations are possible on talks listed on this page, namely:

1. **Make a talk featured:** Featured talks are displayed on the front page and only Administrator users are allowed to do this. To make a talk featured simply click the red icon under the featured column, to undo, simply click the green tick mark icon. If it is desired that a talk be featured and you are not an administrator, send a request via the Contact Us page.

2. **Make a talk active:** A talk must be 'active' to be visible in the talks system. Inactive talks don't show up in searches etc. To make a talk active simply click the red icon

under the Active column, to undo and make a talk inactive, simply click the blue tick mark icon. Green tick mark means it's active, red icon means it's inactive.

3. **Editing a talk:** A talk can be edited by using the Edit talk sub menu of the Select button under the Task column of the Manage talks page.

4. **Removing a talk:** To remove a talk, on the Manage Talks page, use the Remove Talk sub menu of the Select button under the Task column. Once a talk is removed, it cannot be recovered.

5. **Manage Talk Bookings:** By using the Bookings submenu option of the Select button under the Task column, bookings can be managed for talks. The booking detail page is shown and bookings can be confirmed from there.

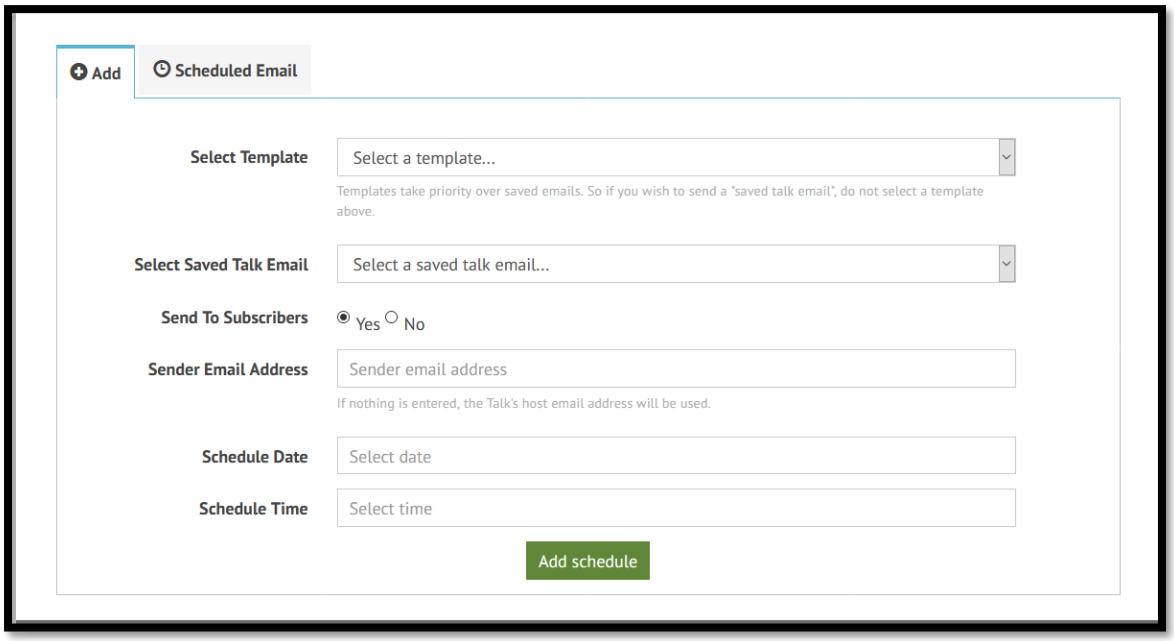
Talk email operations

The talk email operations are found under the Tasks column (Select button drop down). The following email operations are possible for talks:

- Scheduled emails
- Send email

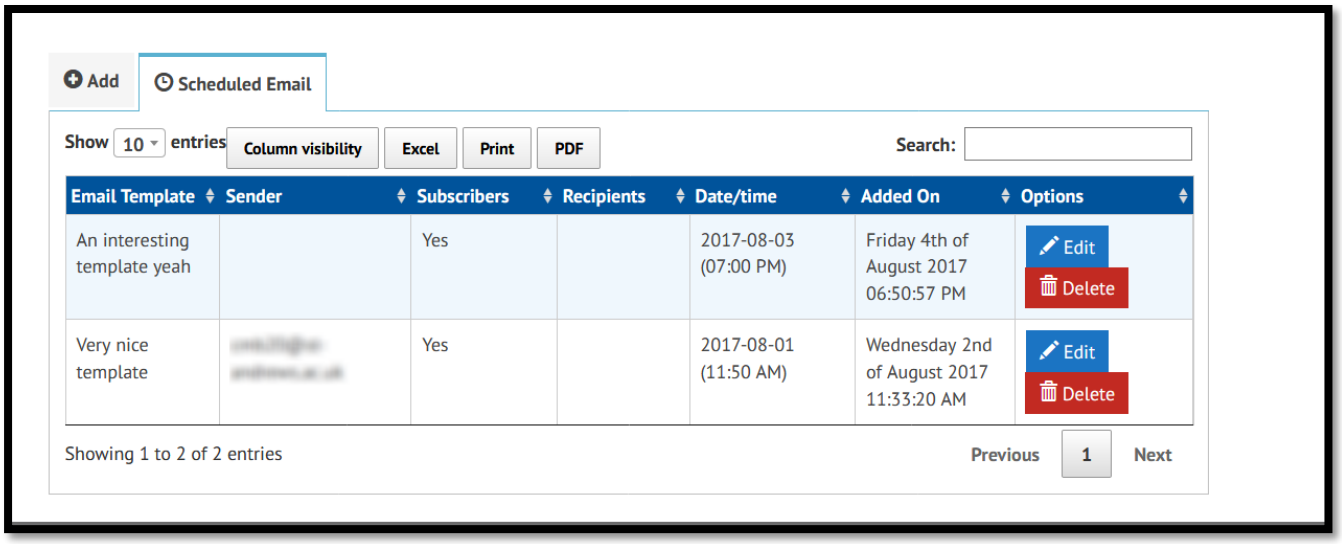
Scheduled email that is automatically sent to subscribers/selected email regarding the talk

Emails can be scheduled to be sent for talks, saved emails or loaded email templates can be used.



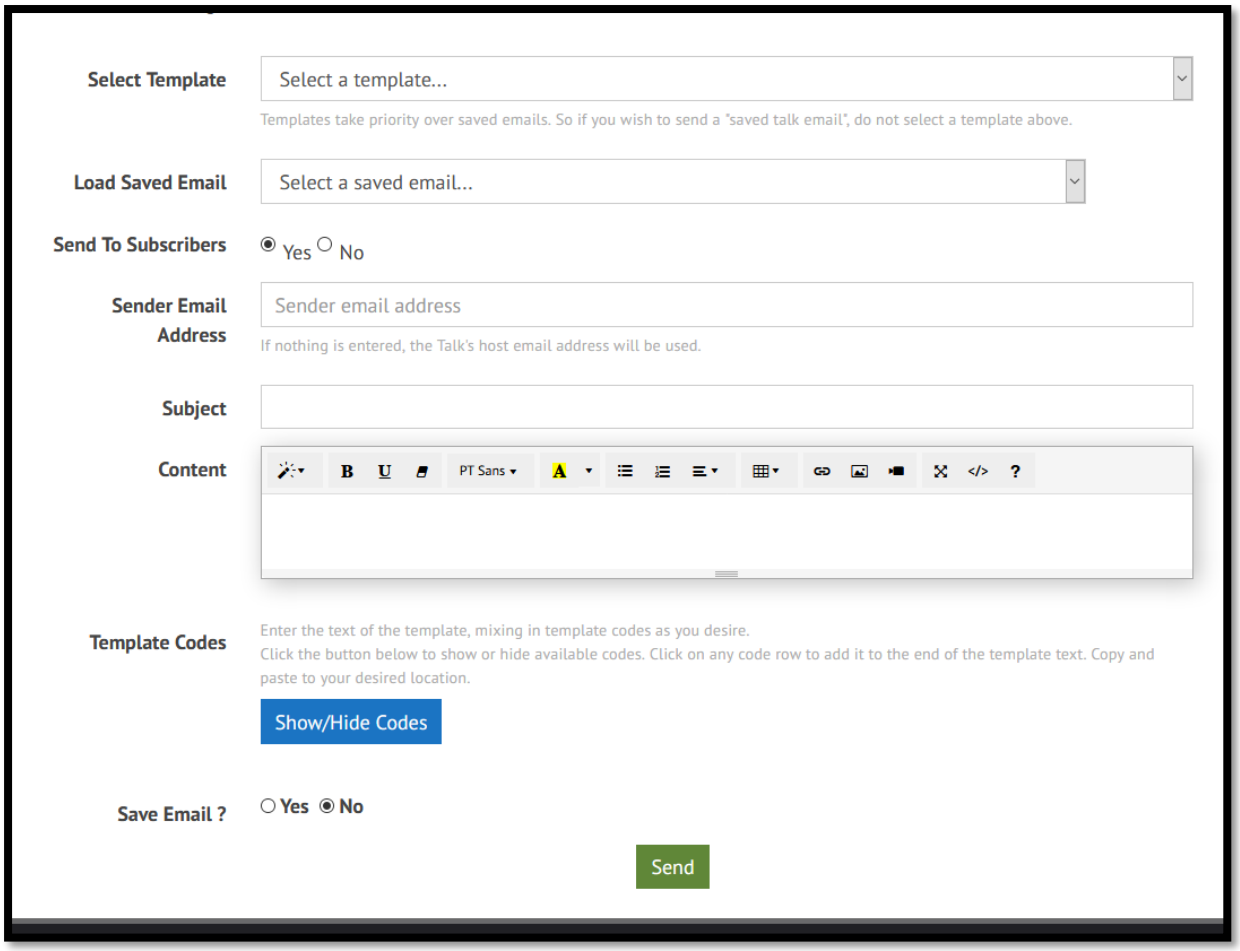
Manage Schedules

Added schedules can be managed from the Scheduled email tab. Schedules can be edited or deleted easily from here.



Send email

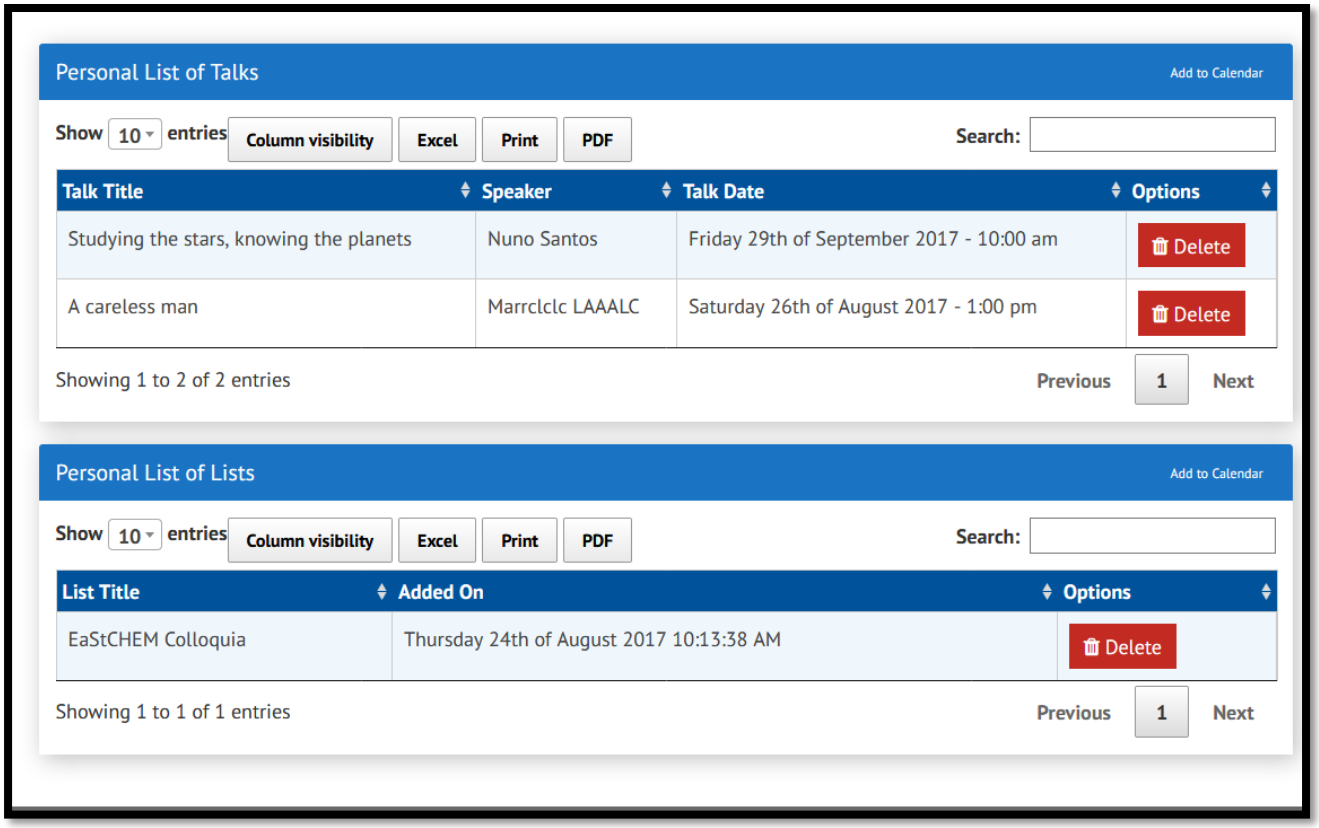
Emails can be sent to subscribers of a talk or a predefined email address if you choose not to send to subscribers. This works much like the Send Emails feature on the Manage Lists page.



Add list to personal list or other list

Adding a list to one's personal list of lists is done by locating the list under the **View Lists** page and using the Add to Personal List menu option under the Subscribe dropdown button. This menu option can only be seen by signed in users.

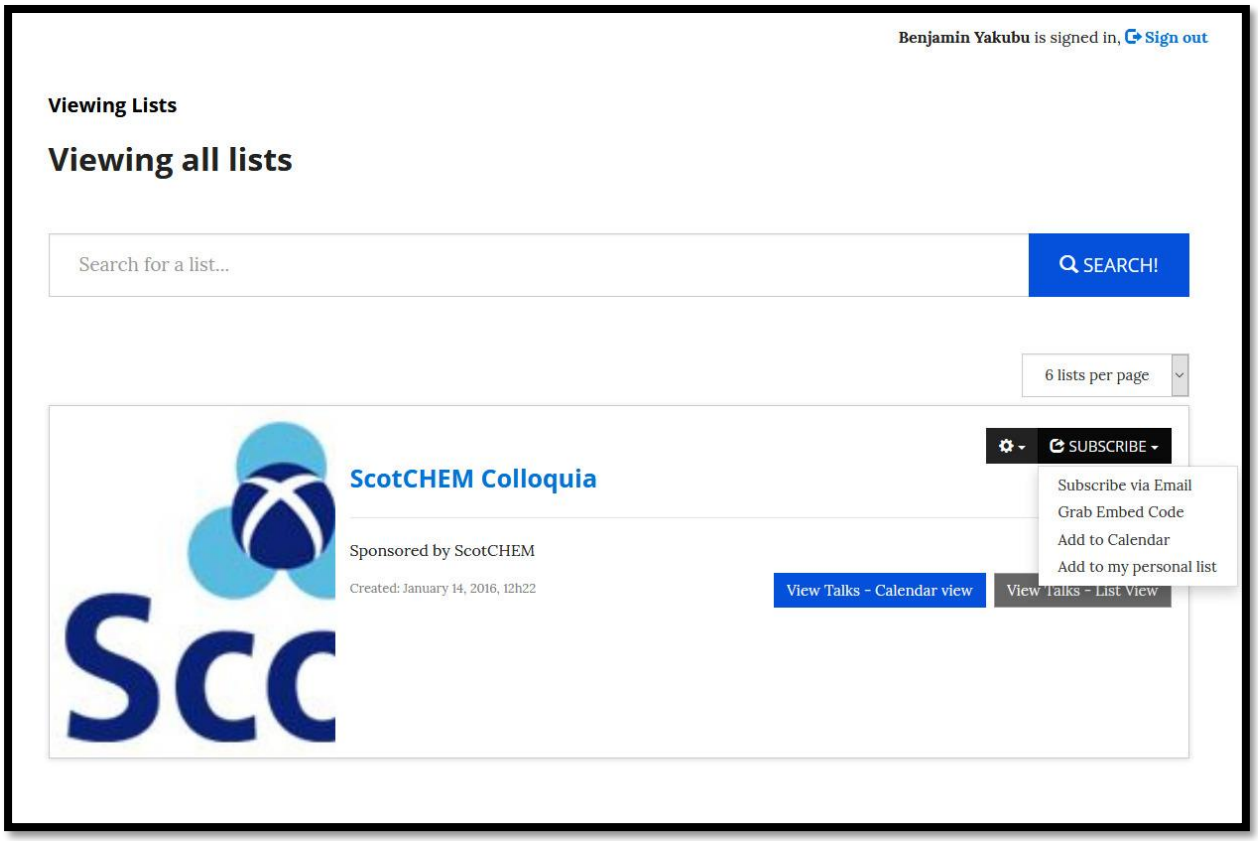
Added lists and added talks show up on the **Dashboard** page. By using the **Remove** button, talks and lists can quickly be removed from a user's personal list of lists or Talks. *Talks can be added to your personal list on the **View Talks or detail page** of the Talk.*



Subscribe to List (Via email or iCal)

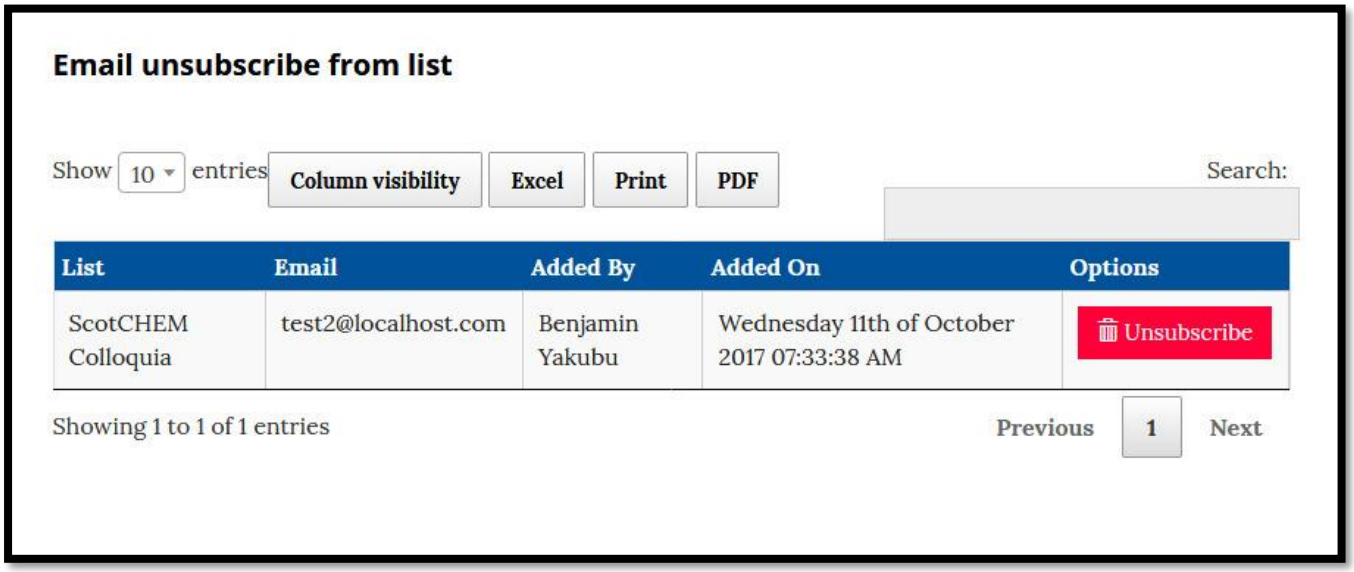
Subscribing to a list via email can be done by using the **Subscribe via email** option on the **Subscribe** dropdown button found on lists displayed on the View Lists page.

Alternatively, one could choose to subscribe to this list via their respective platform's calendar application by using the **Add to calendar** button – iOS, BlackBerry, Android, Windows, Linux (Ubuntu and Fedora tested) and MacOs supported.



Unsubscribe email

To unsubscribe from lists, use the **Email Unsubscribe from lists** menu option.

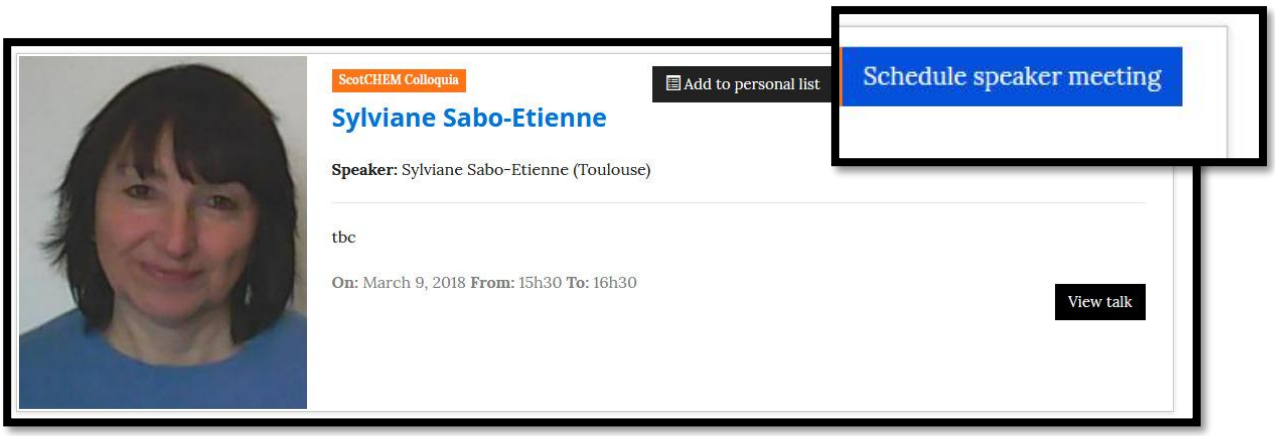


To unsubscribe, simply select the use the **Unsubscribe** button.

Add Schedule to meet with speaker

This is arguably one of the Talks Website most robust sections.

The Talks system allows meetings to be scheduled with speakers and to do this, from the View Talks page simply use the **Schedule speaker meeting** button. As usual, being signed in is required for this to be possible.



The instructions on using the scheduler are displayed in two steps on the sidebar.

1. Where

First select the venue of the meeting from the box venue.

2. Select Slot

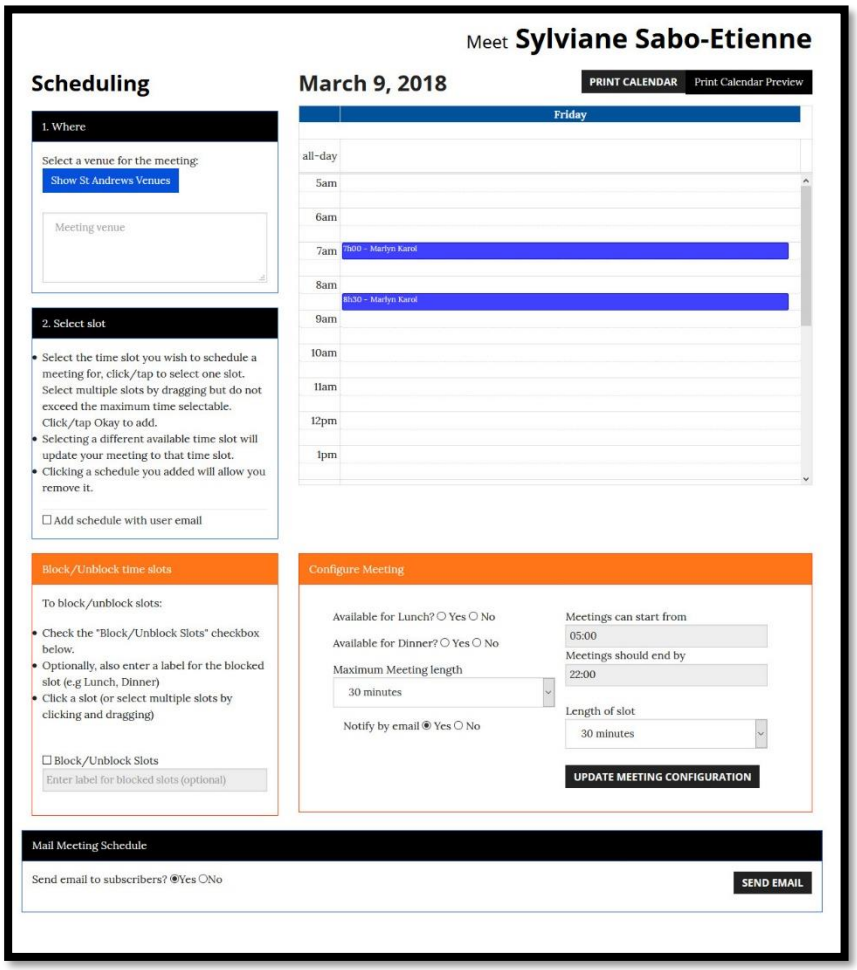
Secondly, select the time slot and add the meeting as instructed on the **2. Select slot** box

From the Manage Talks page, a talk's speaker can be made available for meetings by using the little button under the **Meetings** column. When it's red, no meetings are allowed and the Schedule meeting button will not be displayed to anyone, when blue (click/tap it to make it blue), meetings are allowed and the Schedule meeting button will be visible.

Manage/configure meeting schedules of speaker

If the list owner or manager uses the **Schedule Speaker Meeting** button, the configuration section of the talk's speaker meeting schedule is displayed. The section as shown in the image below, takes care of everything related to meeting schedule configuration.

Configuring meetings



From the **Configure Meeting** box the speaker availability for meetings can be set. If yes, users will see the button "Schedule meetings with the speaker", ***no*** makes the button invisible. If you set it to ***no*** from here, it can only be re-enabled from the Manage Talks page.

The Length of slot can be selected in minutes. The Start and end time of the meeting determines the slots available for selection on the displayed meeting calendar.

The length of slot dtermines the length of each slot on the calendar.

The minimum and maximum meeting length determine the length of meetings selected. Users must not exceed the maximum meeting length when multiple slots are selected.

Slots can be blocked and unblocked, from the block/unblock time slots box, ensure that the **Block/Unblock slots** checkbox is checked to do this. Optionally, a label can be entered relaying why the slot is blocked.

Meeting schedules can be emailed to all the users who will be meeting with the speaker by using the **Send email** button under the **Mail meeting schedule** box. Choosing not to send the email to subscribers allows an email address to be entered (the speaker's email is automatically prefilled).

Reclaiming taken slots

By clicking/tapping on a taken slot, the list owner or manager can delete that slot and make it available again.

Grab List embed codes

To embed talks from a predefined list on a website external to the talks system, the **Grab embed code** option under the **Subscribe dropdown button** on the View Lists page is used.

3 types of embed codes can be generated:

- Default view with link to talk details
- JSON output
- Plain listing - minimalist view.

To test codes simply copy the URL generated and view it with a web browser.