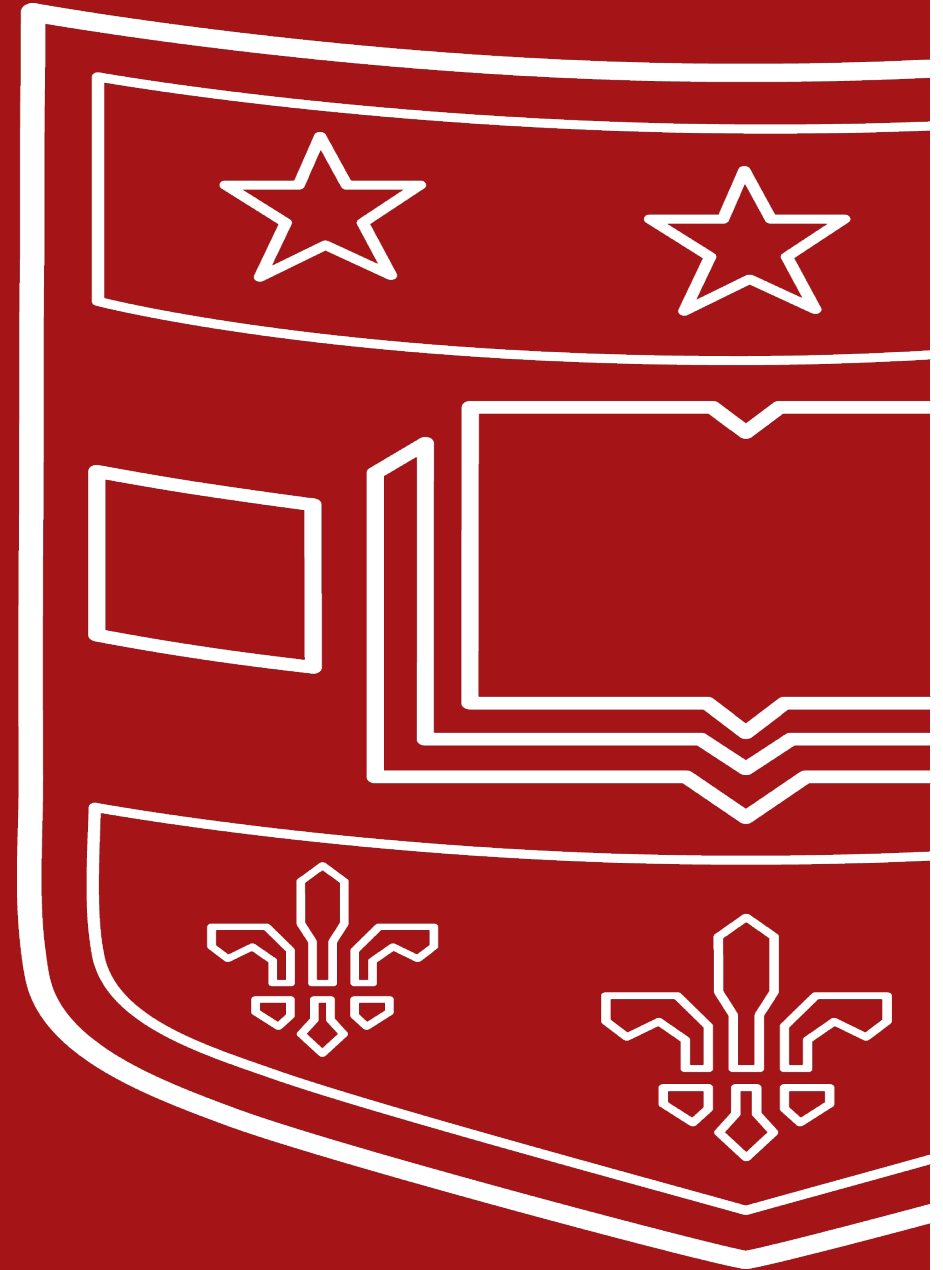


Academic conference sites in idloom



Washington University in St. Louis



Why use Idloom for academic conferences?



- Idloom is a secure, user-friendly event management software that lets event managers easily develop dedicated multi-tab websites for academic conferences.
- Event Managers plan, create and manage the conference websites.
- M&C web developers administrate the Idloom platform and provide support.
- **Idloom is required for conferences that take payments.** Collection of payments for paid events will be done using native CashNet integration. Accounting will create an item code for each conference in the shared WashU Olin CashNet Store.
- Conferences have a vanity URL and can be private or public (crawled by search engines).
- Idloom conferences are integrated with the Olin master calendar and can be featured on olin.wustl.edu.

Example idloom conferences: <https://event.olin.wustl.edu/lagconf> <https://event.olin.wustl.edu/WFA-CFAR-Conference>

Governance: when and how to use idloom



- Any faculty or staff member may use it for academic research and related conferences.
- Idloom is the recommended solution to manage event website and registration UNLESS an event's primary audience is managed in Salesforce, then event registration should be managed in Salesforce. Contact your M&C brand manager for advice and support.
- If an event organizer chooses Idloom to manage website and Salesforce to manage registration please contact web developer for advice and support how to hide Registration tab from the Idloom website.
- If an event organizer chooses a different platform, M&C cannot support, trouble-shoot or vouch for the functionality, branding, security and archive process.
- WashU library intellectual property lawyer advises not hosting papers on our web servers so we avoid liability for retaining and sharing papers we don't own. As such, web team will remove PDFs from Idloom within 30 days of conference concluding.
- Common practice has been to hyperlink paper PDFs to a web page with conference agenda. We recommend use of a Department WUSTL Box for storing papers, so after the conference an archive already exists and shared links can be disabled.
- Past agendas and the conference site should remain accessible year-round if the conference will be repeated.
- Idloom can develop customized functionality for a fee, time permitting. If faculty/center does not have funding, they should contact Todd Milbourn.

Ask M&C for advice: idloom or Salesforce



Event Process - Decision Tree

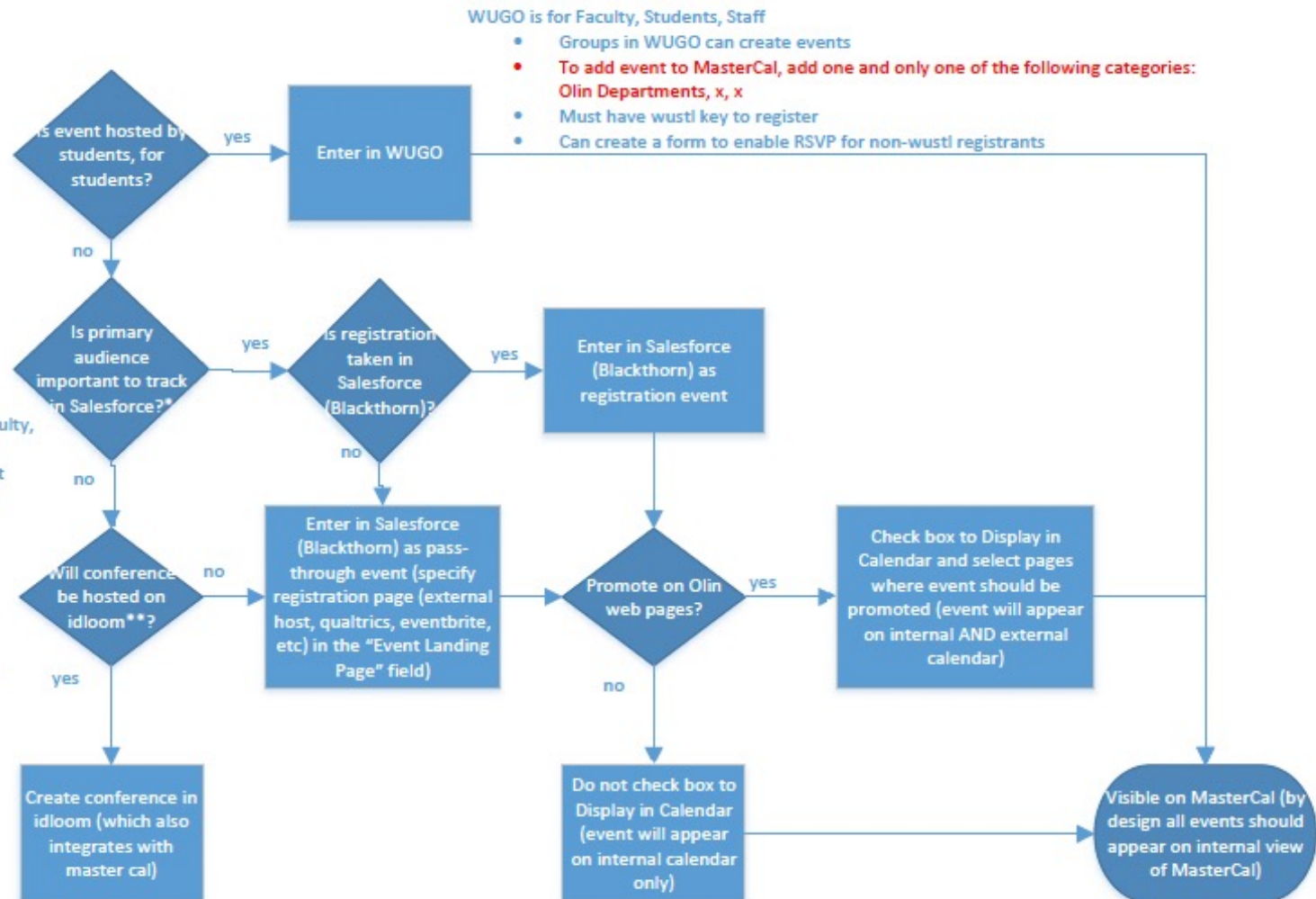
For determining the appropriate system/process for capturing event registration and promoting events

- For access to WUGO or Salesforce, contact your Olin M&C Brand Manager

<https://wustl.app.box.com/file/743649428900>

*If primary audience is students, faculty, or staff and event is not managed in Salesforce (Blackthorn), then it is not important to track in Salesforce. Ex. Thanksgiving dinner on campus

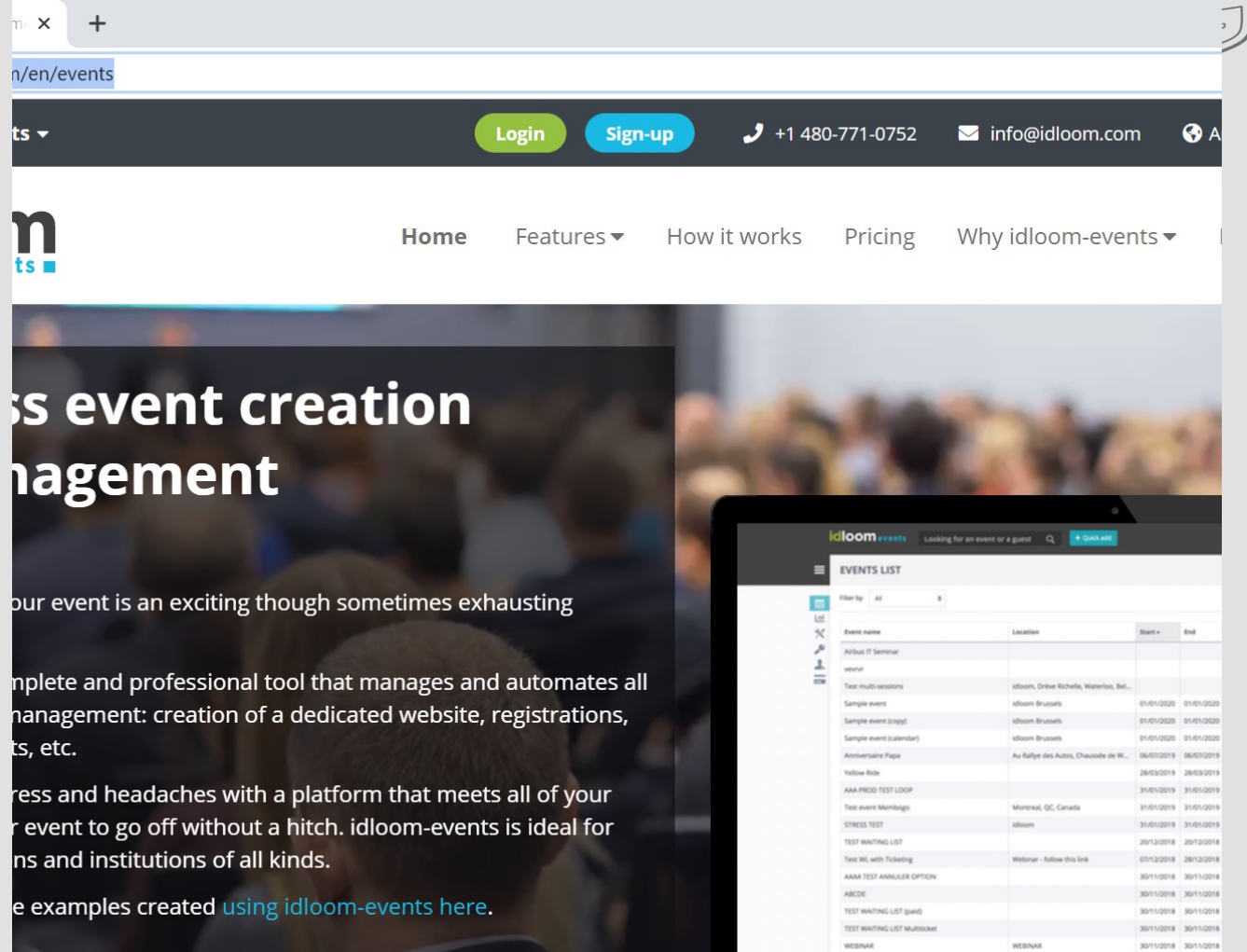
**Typically academic conferences for academic audience



Web Developer role

Administrate Idloom platform for Academic Conferences

- Create and maintain settings profile
- Create and maintain user accounts
- Design, develop and troubleshoot websites
- Serve as liaison, coordinate, and collaborate with software vendor, event managers, and accounting department (if payment)



The screenshot displays the idloom-events website interface. At the top, there is a navigation bar with a 'Login' button, a 'Sign-up' button, a phone icon with the number '+1 480-771-0752', an email icon with 'info@idloom.com', and a globe icon. Below the navigation bar, the main header features the idloom logo and a menu with 'Home', 'Features', 'How it works', 'Pricing', and 'Why idloom-events'. The main content area has a large background image of a crowd at an event. Overlaid on this is a dark box with the text 'Event creation management'. Below this, there is a paragraph: 'Your event is an exciting though sometimes exhausting... complete and professional tool that manages and automates all management: creation of a dedicated website, registrations, etc.' followed by another paragraph: 'Stress and headaches with a platform that meets all of your... event to go off without a hitch. idloom-events is ideal for... ns and institutions of all kinds.' and a final sentence: 'See examples created [using idloom-events here](#).' In the bottom right corner, there is a tablet displaying the 'idloom events' interface with a search bar and a table titled 'EVENTS LIST'. The table has columns for 'Event name', 'Location', 'Start', and 'End'. The table contains several rows of event data, including 'Airbus IT Seminar', 'Test multi versions', 'Sample event', 'Sample event (copy)', 'Sample event (calendar)', 'Annuaire Page', 'Yellow Note', 'AAA-PROD TEST LOOP', 'Test event Membre', 'STRESS TEST', 'TEST WANTING LIST', 'Test M. with Ticketing', 'AAAA TEST ANNULER OPTION', 'ABCDE', 'TEST WANTING LIST (paid)', 'TEST WANTING LIST MURBOWE', and 'WEBINAR'.

Event name	Location	Start	End
Airbus IT Seminar			
Test multi versions	idloom, Drive Richelle, Waterloo, Bel...		
Sample event	idloom Brussels	01/01/2020	01/01/2020
Sample event (copy)	idloom Brussels	01/01/2020	01/01/2020
Sample event (calendar)	idloom Brussels	01/01/2020	01/01/2020
Annuaire Page	Au Rallye des Autos, Chaussée de W...	06/07/2019	06/07/2019
Yellow Note		28/03/2019	28/03/2019
AAA-PROD TEST LOOP		31/01/2019	31/01/2019
Test event Membre	Montreal, QC, Canada	31/01/2019	31/01/2019
STRESS TEST	idloom	31/01/2019	31/01/2019
TEST WANTING LIST		20/12/2018	20/12/2018
Test M. with Ticketing	Webinar - follow this link	01/12/2018	28/12/2018
AAAA TEST ANNULER OPTION		30/11/2018	30/11/2018
ABCDE		30/11/2018	30/11/2018
TEST WANTING LIST (paid)		30/11/2018	30/11/2018
TEST WANTING LIST MURBOWE		30/11/2018	30/11/2018
WEBINAR	WEBINAR	30/11/2018	30/11/2018

Event Manager role

Plan, create and manage conference websites

- Plan and manage events from start to finish
- Manage conference websites
- Create and update content
- Maintain guest information
- Collaborate with web developer and accounting department
- Download submitted papers (see tips for asset management in dept. Box)
- Maintain agenda page – use paper URLs provided by Authors, not Olin-hosted copies!
- Run archive process at the conclusion of each conference

Contact your M&C brand manager or email olin-webapps@olin.wustl.edu to arrange training and account access.

Login to idloom at <https://www.idloom.com/en/events>



The screenshot shows the 'Permissions' page in the idloom events system. The page title is 'PERMISSIONS' with a subtitle '6 users'. There are two buttons: 'Edit roles' and '+ Add a user'. A search bar at the top says 'Looking for an event or a guest'. A sidebar on the left contains icons for various functions. The main content area is a table with columns: 'E-mail', 'First name', 'Last name', and 'Role'. The table lists six users with their respective email addresses, names, and roles.

E-mail	First name	Last name	Role
alutes@wustl.edu	Amber	Lutes	Limited Access
chib@wustl.edu	Siddhartha	Chib	Limited Access
obrien@wustl.edu	Lexie	O'Brien	Admin
stroker@wustl.edu	Leslie	Stroker	Limited Access
svaughn@wustl.edu	Sandra	Vaughn	Limited Access
vilzam@wustl.edu	Matt		Admin

At the bottom, there is a 'Show' dropdown set to '20' and 'entries'. On the right, there are 'Previous', '1', and 'Next' navigation links.

Managing papers

If you use the paper submission feature in idloom, we recommend having the author also provide a URL for use on the conference agenda.

Note:

Presented paper PDFs saved in idloom Documents folder will be deleted by idloom admin 30 days after conference ends.

Copyright and intellectual property law precludes Olin Business School from keeping these on our web servers.

Event managers should download papers from Documents List and save them to a secure location, such as WUSTL Box. See slide 12 for instructions.

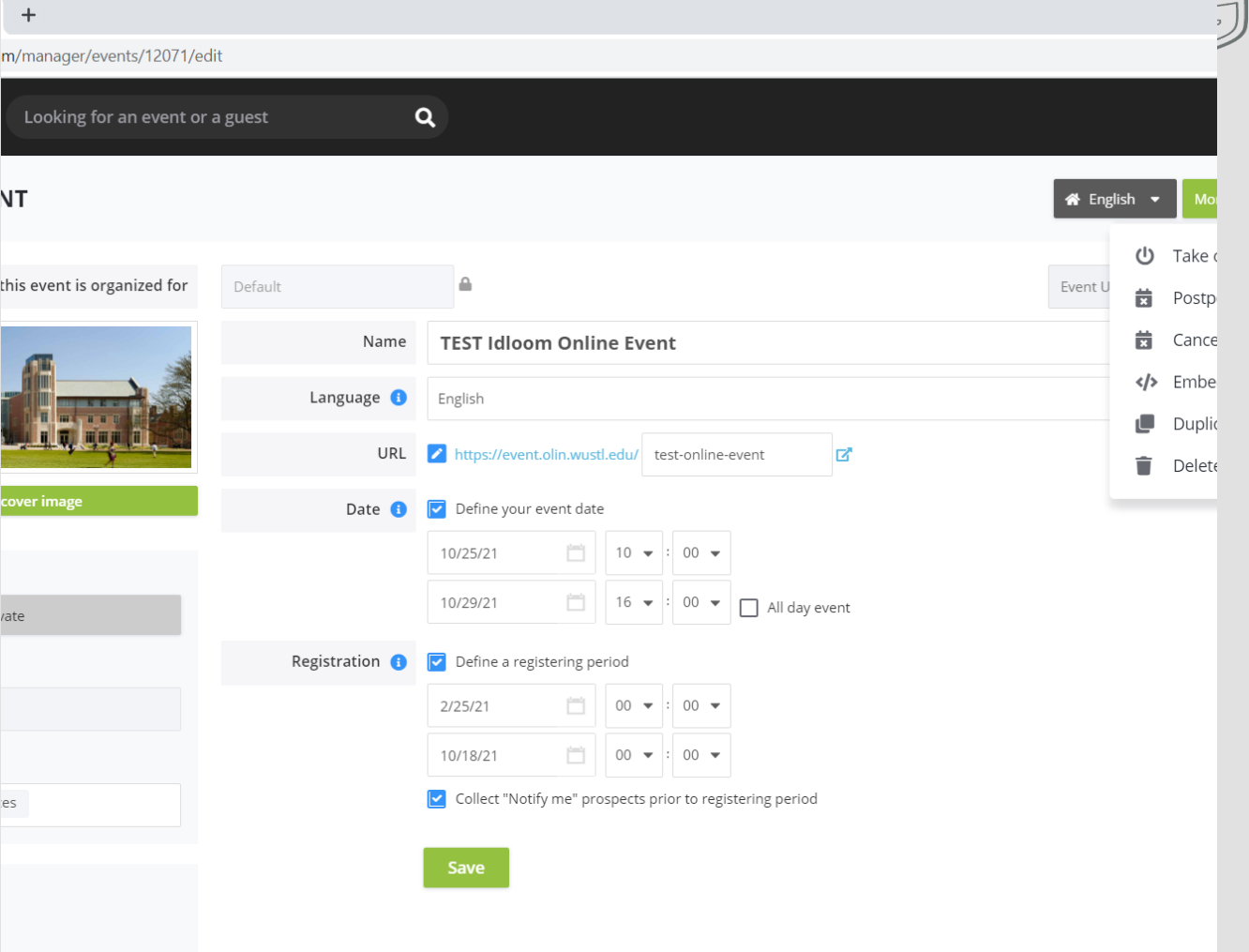
A screenshot of a web browser showing the 'Documents list of TEST Idloom' page. The browser's address bar shows the URL 'events.idloom.com/manager/documents/12071'. The page has a dark header with the 'idloom events' logo and a search bar. A sidebar on the left contains various icons for navigation. The main content area is titled 'DOCUMENTS LIST OF TEST IDLOOM ONLINE EVENT' and shows '1 document'. Below this is a table with columns for 'E-mail', 'Last name', 'First name', and 'Choose File'. One entry is visible: 'vilzam@wustl.edu', 'Vilza', 'Matt', with a green checkmark in the 'Choose File' column. At the bottom of the table, it says 'Show 20 entries'. The footer includes a 'Need help' link and the '© idloom' logo.

E-mail	Last name	First name	Choose File
vilzam@wustl.edu	Vilza	Matt	✓

Archive process

At the end of the conference, within three weeks, event managers should remove from the agenda/program any hyperlinks to papers hosted on Olin servers.

Previously shared URLs from Box should be disabled. Change Share settings per [Box FAQ](#).



The screenshot displays the 'm/manager/events/12071/edit' page in a web browser. At the top right, there is a logo featuring three stars above an open book. Below the browser address bar is a search bar with the placeholder text 'Looking for an event or a guest'. The main content area is titled 'NT' and includes a language dropdown set to 'English'. On the left, a section labeled 'this event is organized for' shows a cover image of a building and a green 'cover image' button. The main form fields include: 'Name' (TEST Idloom Online Event), 'Language' (English), 'URL' (https://event.olin.wustl.edu/test-online-event), and 'Date' (10/25/21 to 10/29/21, 10:00 to 16:00, with an 'All day event' checkbox). The 'Registration' section has checkboxes for 'Define your event date', 'Define a registering period' (with dates 2/25/21 to 10/18/21), and 'Collect "Notify me" prospects prior to registering period'. A green 'Save' button is at the bottom. A right-hand sidebar contains a menu with options: 'Take o', 'Postp', 'Cance', 'Embe', 'Duplic', and 'Delete'.

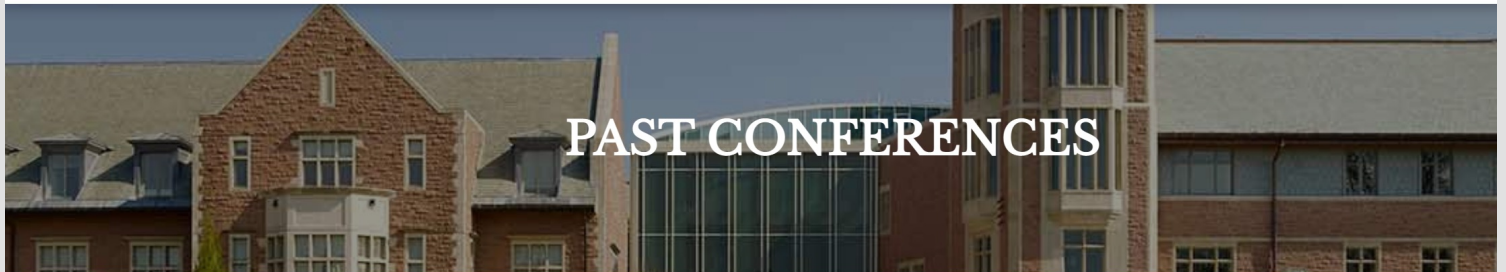


Save a PDF of the conference program/agenda

Most reoccurring conferences feature a list of past conferences. You can make a PDF of the program web page or save a Word document as a PDF and upload it to idloom for future use.



[HOME](#) [PROGRAM](#) [CONTACT](#) [PAST CONFERENCES](#)



Please click on the links below to view the past conferences:

[Corporate Finance Conference 2019](#)

[Corporate Finance Conference 2018](#)

[Corporate Finance Conference 2017](#)

[Corporate Finance Conference 2016](#)

[Corporate Finance Conference 2015](#)

[Corporate Finance Conference 2014](#)

[Corporate Finance Conference 2013](#)

[Corporate Finance Conference 2012](#)

Archive registrants

At the end of the conference, event managers should export the registrant information and save it on a secure server.

Then, delete registrants listed on the Guest List.

We should not store personal information long-term on third-party servers.



events.idloom.com/manager/guests/12071

idloom events Looking for an event or a guest

← GUEST LIST OF TEST IDLOOM ONLINE EVENT

1 registration (1 completed, 0 cancelled) / 1 attendees (1 check-ins, 0 check-outs)

[Export guests](#) [More](#)

Filter by status
All

Filter by payment status
All

Filter by categories
All

Filter by options
All

<input type="checkbox"/>	Last name	First name	Company	Cou...	Created	Updated	Price	Status	Add
<input type="checkbox"/>	Vilza	Matt	WU		12/21/20, 11:17 AM	12/22/20, 2:28 PM	\$20.00	Registratio...	

Show 20 entries


Need help

© idloom 20

Ready for the next use

After archive process, we recommend that the site remain online. Previously public sites will appear in Google search results, and if taken offline, 404 page/site not found errors will damage our Google quality score.

However, if the event will not be offered again, the event manager can contact the web developer to take the event offline and place a redirect from the event URL to a URL specified by the event manager or suggested by the M&C web team.




Looking for an event or a guest

EDIT AN EVENT

English More actions Navigation

Profile this event is organized for



Change cover image

Default

Name **TEST Idloom Online Event**

Language English

URL <https://event.olin.wustl.edu/test-online-event>

Date ☒ Define your event date

10/25/21 10 : 00

10/29/21 16 : 00 ☐ All day event

Registration ☒ Define a registering period

2/25/21 00 : 00

10/18/21 00 : 00

☒ Collect "Notify me" prospects prior to registering period

Save

Privacy ☐ Private

Topic Other

Tag Academic Conferences

Lock Unlocked

- Take off-line
- Cancel event
- Maintain event
- Embed link
- Duplicate
- Delete

Request a department WUSTL Box



Having a department Box ensures continuity so files aren't "lost" if the person who originally shared them leaves WashU.

To request: email John Bailey, WUIT manager of Cloud Services, jwbailey@wustl.edu

He needs to know:

- Name of the department that will be using the Box storage account.
- Requested name for the department Box folder.
- Name and email address for 1 or more (preferably at least 2) people who will be "co-owner" on the new departmental Box folder and can create sub-folders and manage access. (No limit on number of co-owners)

Once WUIT sets it up, the DEPT Box folder will immediately appear in designated co-owners' Box accounts. Note that the "owner" for this folder will be listed as "WUSTL Box Storage."

The screenshot shows a Box account interface for 'Washington University in St. Louis'. The main view is 'All Files > Olin Marketing and Communications DEPT Box'. The interface includes a search bar, navigation tabs, and a list of folders. The folders listed are:

- Beijing (Jul 9, 2021 by Wools, Katie, 21 Files)
- Digital Sign Selfies (Aug 18, 2021 by Someone, 4 Files)
- Graduate Website Elements (Aug 20, 2021 by Haith, Alicia, 0 Files)
- mcrutt@wustl.edu - Cruitt, Molly... (May 14, 2021 by Hanford, Olivia, 5,330 Files)
- MktgComm-Video (Mar 4, 2019 by Olin BusinessVideo, 43,342 Files)
- Olin digisigns 2021 (Jul 26, 2021 by O'Brien, Lexie, 4 Files)
- Photos for Web Optimization (Apr 2, 2021 by O'Brien, Lexie, 11 Files)
- SEO (Brado) (Apr 9, 2021 by Buschardt, Erik, 2 Files)
- speaker event videos (May 20, 2021 by Runnels, Kiva, 32 Files)
- Style Guides (Mar 25, 2021 by Buschardt, Erik, 1 File)
- Video Students (Apr 5, 2021 by Hanford, Olivia, 12,968 Files)

The sharing sidebar on the right shows the following co-owners and sharing options:

- WS WUSTL Box Storage (Owner)
- OL O'Brien, Lexie (Co-owner)
- Greenbaum, Kurt (Co-owner)
- VB Van Groningen, Brooke (Co-owner)
- BE Buschardt, Erik (Co-owner)
- +20 People Externally Shared
- Shared Link (Invited people only)
- File Request Enabled

Upload and share from department WUSTL Box



Functionality is the same as personal Box. See tips at [WUSTL Box FAQs](#)

We recommend that each conference have its own folder, and within that folder, a subfolder for Papers Presented.

Create and Manage Shared Links

Step 1: Click Share, toggle Share Link, choose People with the link, then open Link Settings. Another dialog box will open.

Step 2: Choose a Link Expiration date, or uncheck box if you don't want it to expire.

Step 3: Check Allow Download, if desired.

Step 4: Scroll down to Direct Link and copy. Note that the URL will include the file type extension, in this case .pdf

Note: for hyperlinks on the conference agenda page, to observe intellectual property and copyright law, we recommend you use a link provided by the paper author.

Step 1: choose the desired Share Link properties

Share 'Conferences best practices.pdf' 74.6 KB

Invite People Shared with VM VS CP 549 Files

Add names or email addresses 12.6 KB

Invite as Editor 19.6 KB

Share Link 1 MB

☒ Shared link is created [Link Settings](#)

<https://wustl.box.com/s/ne97ajc4feykhe1i6zs> Copy

People with the link Can view and download

- ✓ **People with the link**
Publicly accessible and no sign-in required
- People in your company**
Anyone in your company with the link or people invited to this file can access
- Invited people only**
Only invited people can access this file

Step 5: After the conference is over, to archive presented papers, change the Share link from People with the link to “People in your company” (WUSTL) or “Invited people only.” The public URL created previously won't work anymore per this [Box FAQ](#).

Steps 2-4: Choose settings and create a Direct Link for fastest download speed

Shared Link Settings

This content is publicly available to anyone with the link, and can be viewed or downloaded. [Learn more about shared link settings.](#)

Link Expiration

☒ Disable Shared Link on

Mon, Aug 1, 2022

Password Protect

☐ Require password

Non-private custom URL

☐ Publish content broadly with a custom, non-private URL

Allow Download

☒ Allow users with the shared link to download this item

Direct Link

<shared/static/ne97ajc4feykhe1i6zs7ksiv79x2lfx2.pdf> Copy

Cancel Save