



Checklist Software Basics September 15-19 '25

Let's streamline our organization and make sure we don't forget anything!

 **Always copy the [blank version](#) of this checklist (because this is the one that is being updated)** 

Before the training

Setting up documents and more

- ☐ Regarding naming: Is it a workshop or a training event
- ☐ Create a new folder in our drive in the folder "20YY/our_workshops/YYYYMM_name_of_workshop"
- ☐ Copy this document there and call it "checklist"
- ☐ Create an overview document "planning": Use this for all the relevant planning info
- ☐ Create a document "post_mortem": Collect everything that goes wrong in this document
- ☐ Create an open slack channel "name-monthYY", e.g., "swb-may24"
- ☐ Create a private slack channel "educators-name-monthYY", e.g., "educators-sw-b-may24"
- ☐ Add links to indico, planning doc, checklist, post-mortem to slack channel as bookmarks
- ☐ Create a mailing list for the event with google groups
 - ☐ Make sure that posting permissions are set to "everyone on the web"
- ☐ Make sure to use the same email address in the indico landing page, registrations page, and post-survey. Remember to change the 'email us' link on the landing page.
- ☐ Make sure that google pre-survey forms return a confirmation code.

Conceptualization

- ☐ Check last post-mortem for things to improve on the next time

Recruitment

- ☐ Start google slides deck for introduction of all instructors
 - ☐ Send around to all the instructors to add their profiles

- ☐ Make sure to credit all instructors/mentors/facilitators

Pre-workshop survey

- ☐ Ask about operating systems.
 - ☐ Separately include WSL
 - ☐ Add examples for “Linux distribution”
- ☐ Mostly better to add “Other” but not let people specify much there if we think we cover all options (e.g., for OS)
- ☐ Make sure to double check that the unique identifier question is absolutely clear. In the past we missed to specify the number of characters for the street
- ☐ Limit to one response (google form setting)
- ☐ Allow response editing (google form setting)
- ☐ Remove questions about “formal training” etc.
- ☐ Make sure that google pre-survey forms return a confirmation code.

Indico agenda

- ☐ Include links to surveys in the side menu bar (can be done with manage > layout > menu). Set visibility to “only participants”.
- ☐ Include note to participants that some links only become visible if they have logged in to indico
- ☐ Add 30 minute session “Join here if your setup is not working” before the introduction session
- ☐ Include a code of conduct tab
- ☐ Create pre-workshop survey and set it to accept submission
- ☐ **Registration**
 - ☐ Make sure that people can hide their name from the participant list
 - ☐ Add:
 - ☐ checkbox “I have read and accept the code of conduct”
 - ☐ Checkbox “I know that the sessions will be recorded”
 - ☐ Checkbox: “I accept the terms and conditions for obtaining certificate” (if we have conditions there)
 - ☐ Checkbox: “I will fill out the post-workshop survey even if I do not attend the event”
 - ☐ Make sure that these boxes are required to be checked
 - ☐ Consider not to use a deadline for the registration. Instead do “Please register before XX. If you register after XX, please also write us an email so that we can forward you relevant pre-workshop emails.”
- ☐ Make sure that timetable is published: If you go to “manage” and then “Timetable”, you see a yellow bar warning you if it isn’t already published
- ☐ Make sure that link to carpentries workshop website is updated
- ☐ Make sure that list of educators is updated
- ☐ Setup instructions:
 - ☐ If there are data files to download, make that part of the setup instructions to not lose time during the workshop

Announcement

- ☐ Draft Announcement email
 - ☐ Make sure to also advertise the training center in the email

Pre-workshop emails

- ☐ Make #general channel on slack admin-only and add pinned messages pointing people to the right channel: “Hi all! If you’re joining for the software basics workshop, please join #swc-jun25 (and that’s also the best place to say hi to or post your questions). For the time being, I’ve made posting in #general admins-only. “
- ☐ “Welcome to the software basics training! You can find the link to the indico and the zoom connection in the top bar. To keep an overview in this chat, please use the “Reply in thread” button when following up with questions. “
- ☐ Send first email to students:
 - ☐ Include slack invite
 - ☐ Make sure to remind everyone to do the setup BEFORE the workshop
 - ☐ Send reminder: Join 20 minutes earlier if you have trouble with the setup
 - ☐ Copy email to google drive for reference
 - ☐ Remind people that in order to get a certificate, they need to document their work
 - ☐ Include Zoom link
 - ☐ Remind people to download python dataset
- ☐ If educators are not registered to Indico, make sure to send them the Zoom link

Prepare post-workshop survey

- ☐ Include a link to our recruitment form
- ☐ Include question about why people dropped out
- ☐ Add separate survey with simple questions (including email) to qualify for certificates (rather than our usual “send us proof of work”)

During the workshop

- ☐ Remind people that in order to get a certificate, they need to document their work
- ☐ Have some mentors join 30 minutes early to help people who’s setup isn’t working
- ☐ Zoom: Make sure all instructors have the numeric password to make themselves host
- ☐ Take a group picture! Ideally, right after the introduction, where we have most people
 - ☐ Make sure that everyone knows that this picture will be used and published to the web
 - ☐ Put the group picture into our google drive folder for later use
- ☐ Last day: Set the post-workshop survey to accept answers
 - ☐ Include specific questions: Maybe we tried something new and want to know if it worked? Maybe one speaker used a split screen and the other didn’t etc.

Constant

- Don't forget to restart recording after break!
 - Best to record in several chunks rather than using the "pause" button, because else the files become really hard to handle when downloading them
- Use a screen-saver to remind ourselves :)
- Frequently ask to use the thumbs up/go slower/go faster reactions
- Make sure that participants use the thumbs-up reactions if they are being asked if they are doing well (much nicer for the speaker)
- After break in multi-session block: Ask if people feel lost/bored/happy using Slido or zoom poll
- Add 10 minute "time for question/exercises" before every break (so that students and educators can take their breaks in peace)
- Zoom: Make sure to always make instructors co-host

After the workshop 🙌

- ☐ Send reminders about post-workshop survey
- ☐ Upload recorded sessions to youtube or indico
 - ☐ If possible, include a link to recordings in the material pages for self-study students.
- ☐ Organize a post-mortem event after the survey results are in
 - ☐ Make sure to update the post-mortem document in the drive
- ☐ Stitch together group picture
- ☐ Make sure you have added/updated all educators' profiles for [our community page](#)
- ☐ Count the number of students and add the number to google sheet
- ☐ Hand out certificates upon request
- ☐ Propagate relevant changes to this workshop-specific checklist back to the [Workshop checklist](#)
 - ☐ Also include anything relevant from the post-mortem session