

Chapter 3: Setup and Configuration of Event Scheduling

- [Prerequisites for this Module](#)
- [Event Scheduling Implementation Guide](#)

Prerequisites for this Module

Before implementing the **Event Scheduling** module, the **People Management** module must be configured. Follow the guides in the [People Management](#) book to ensure you have:

- Created an organisational structure,
- Imported users,
- Configured user roles and permissions, and
- Completed users' reporting lines.

Event Scheduling Implementation Guide



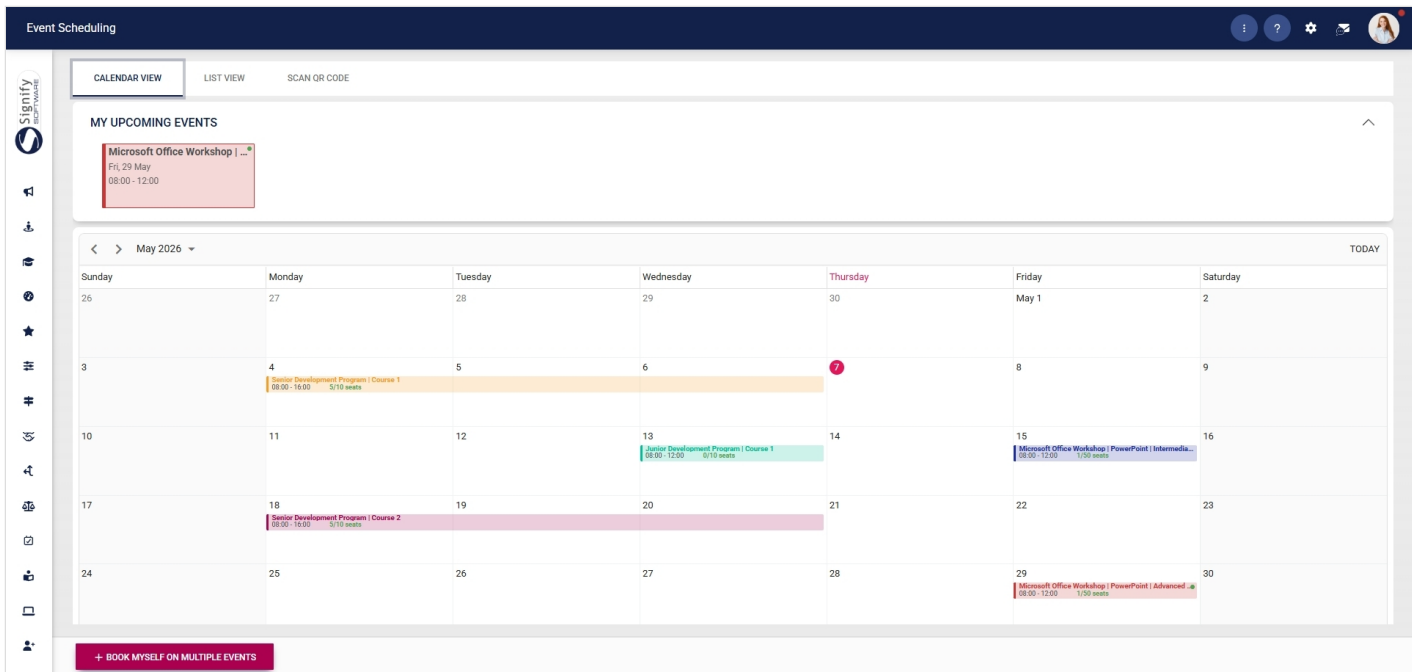
This guide focuses on the **Event Scheduling** module and the features available to administrators.

Beyond training, the module can serve as a **central coordination tool** for structured events, such as workshops, onboarding sessions, or internal initiatives.

- Companies can **manage venues, facilitators, approvals**, and **attendance** in one place, reducing administrative overhead and duplication.
- HR or employee development teams can schedule recurring **programmes**, segment employees into **targeted groups**, and **monitor completion** and **competence** levels.

By following the outlined procedures, administrators can:

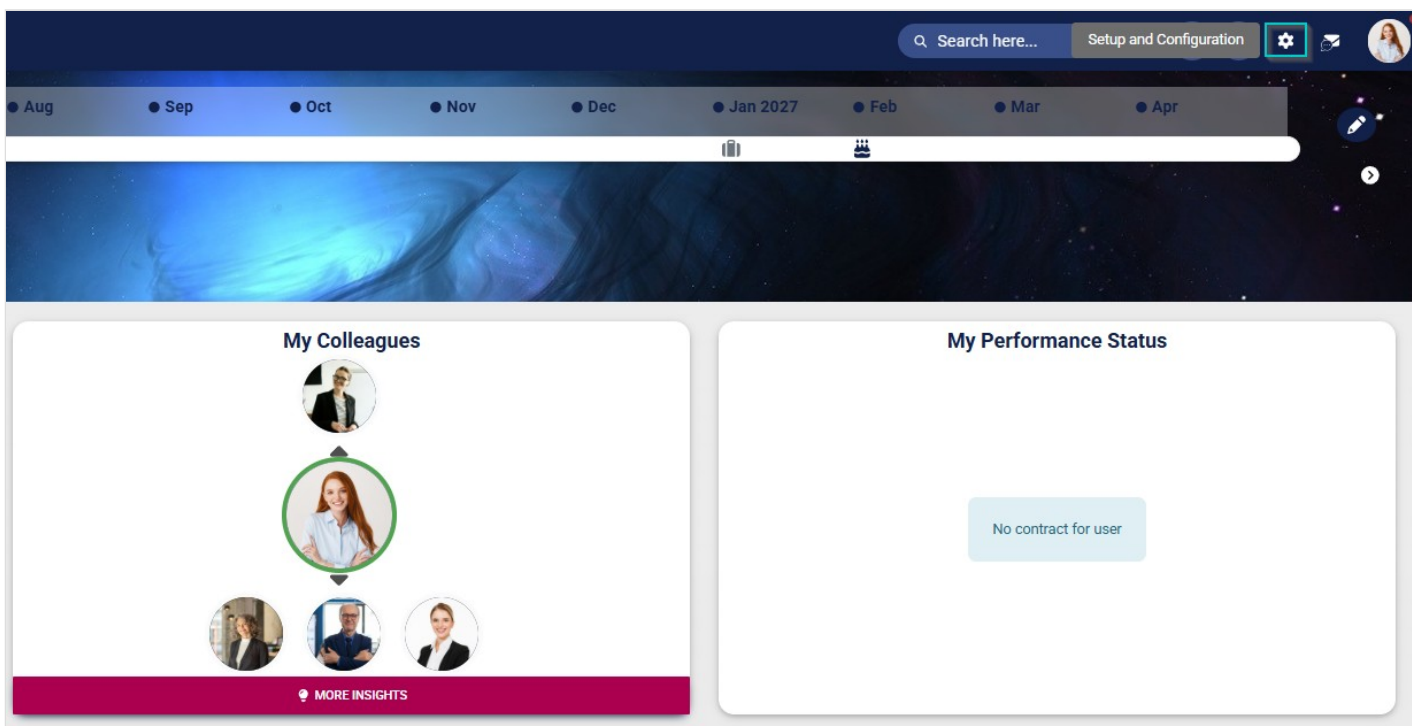
- Configure the **Event Scheduling** module and permissions,
- Set up the master data required,
- Create and manage events, and
- Record attendance and completion.



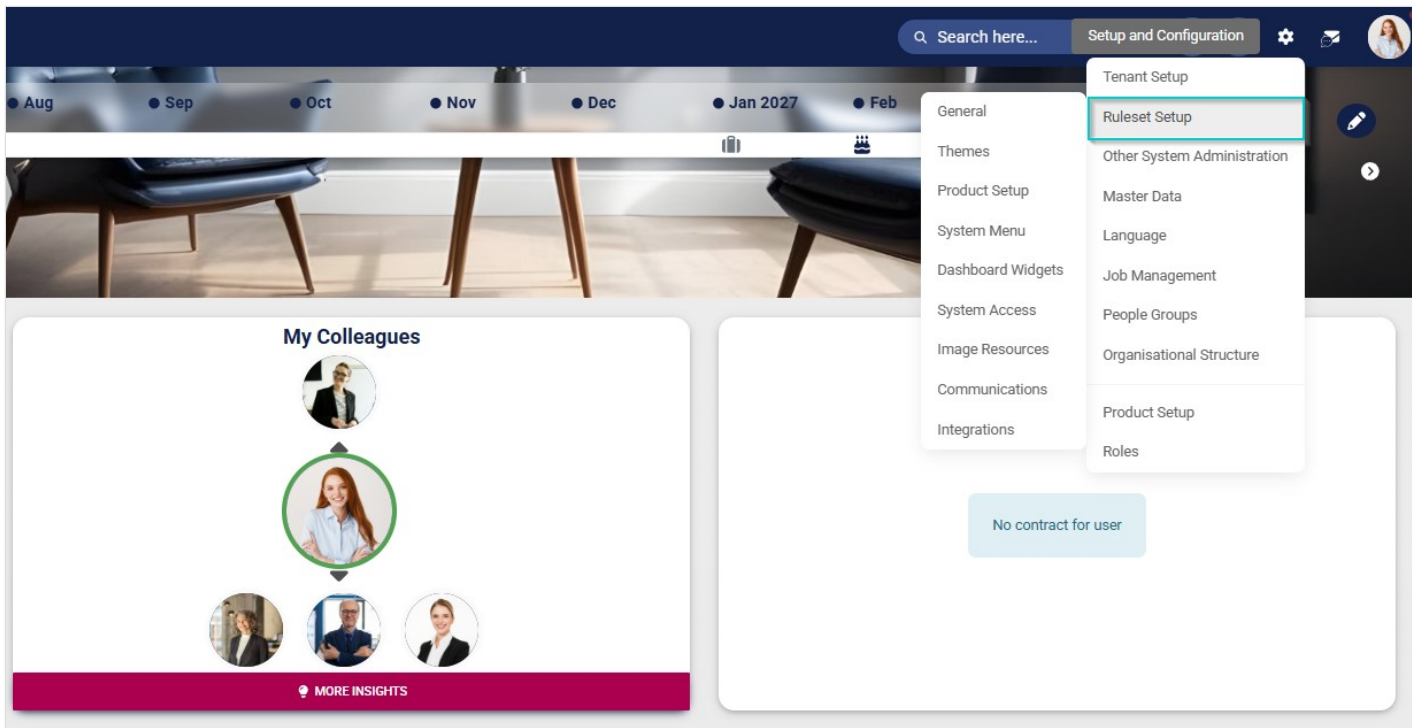
Before you can configure and use the **Event Scheduling** module, you must activate the module and assign the required user permissions.

Activate the Event Scheduling module

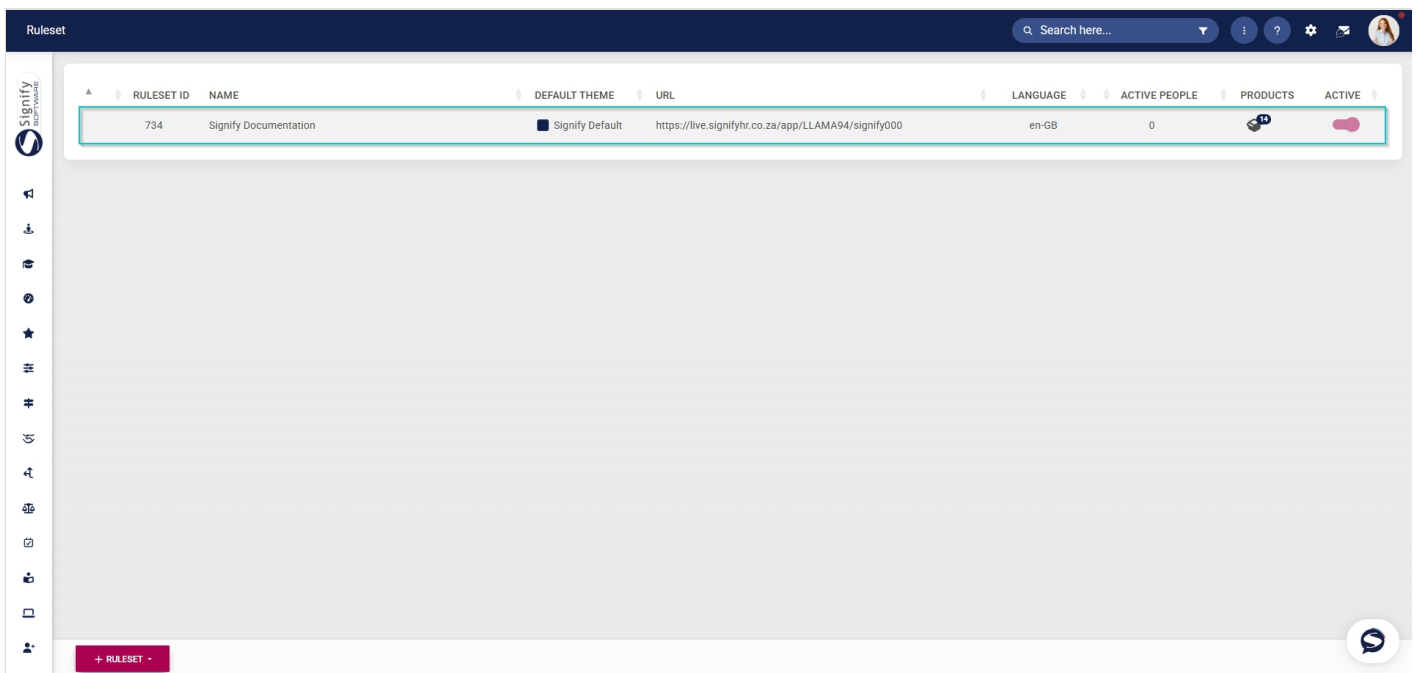
- Click the **gear icon** to access the **Setup and Configuration** menu.



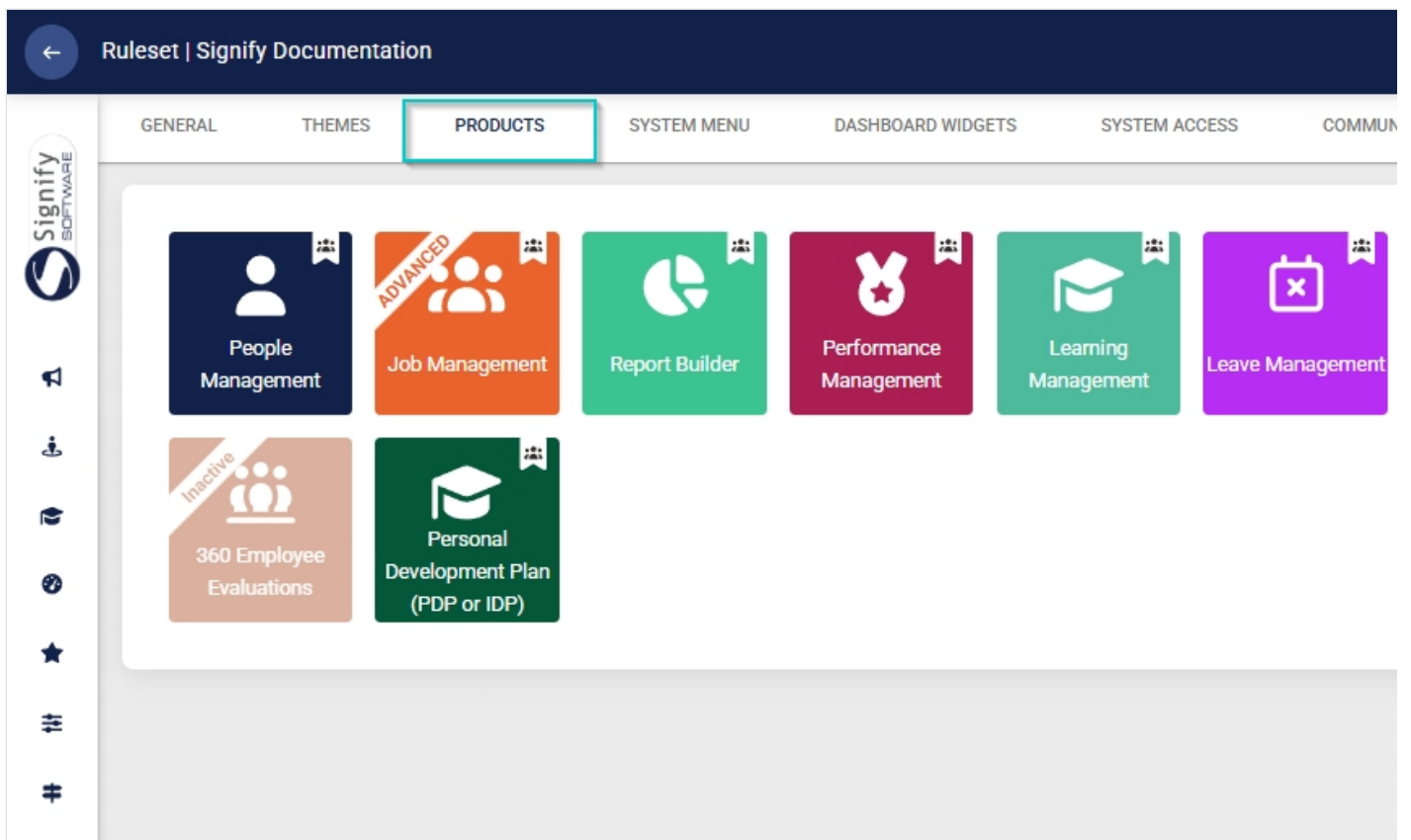
- Click **Ruleset Setup**.



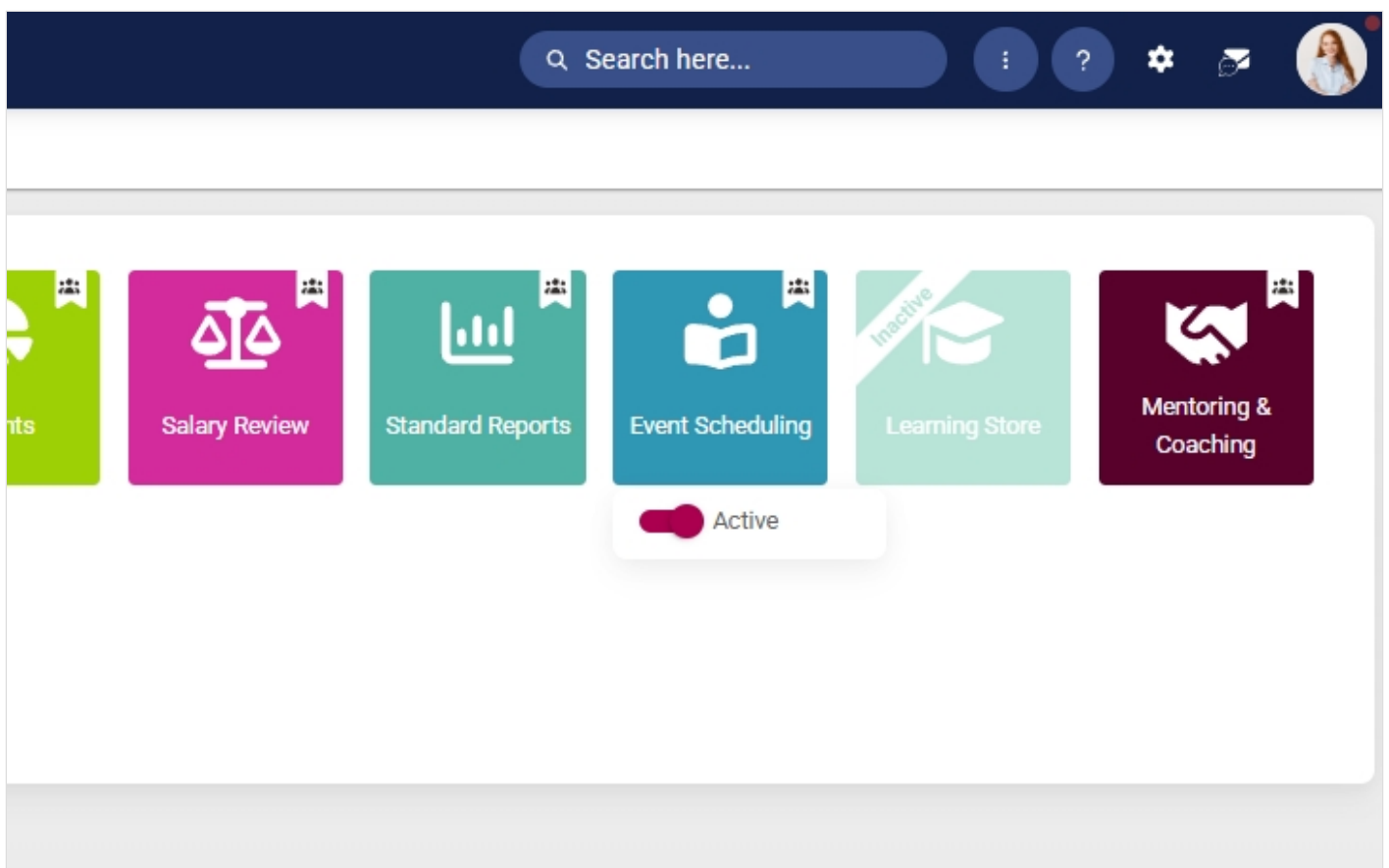
- Select the **ruleset** you would like to update.



- Navigate to the **Products** tab.

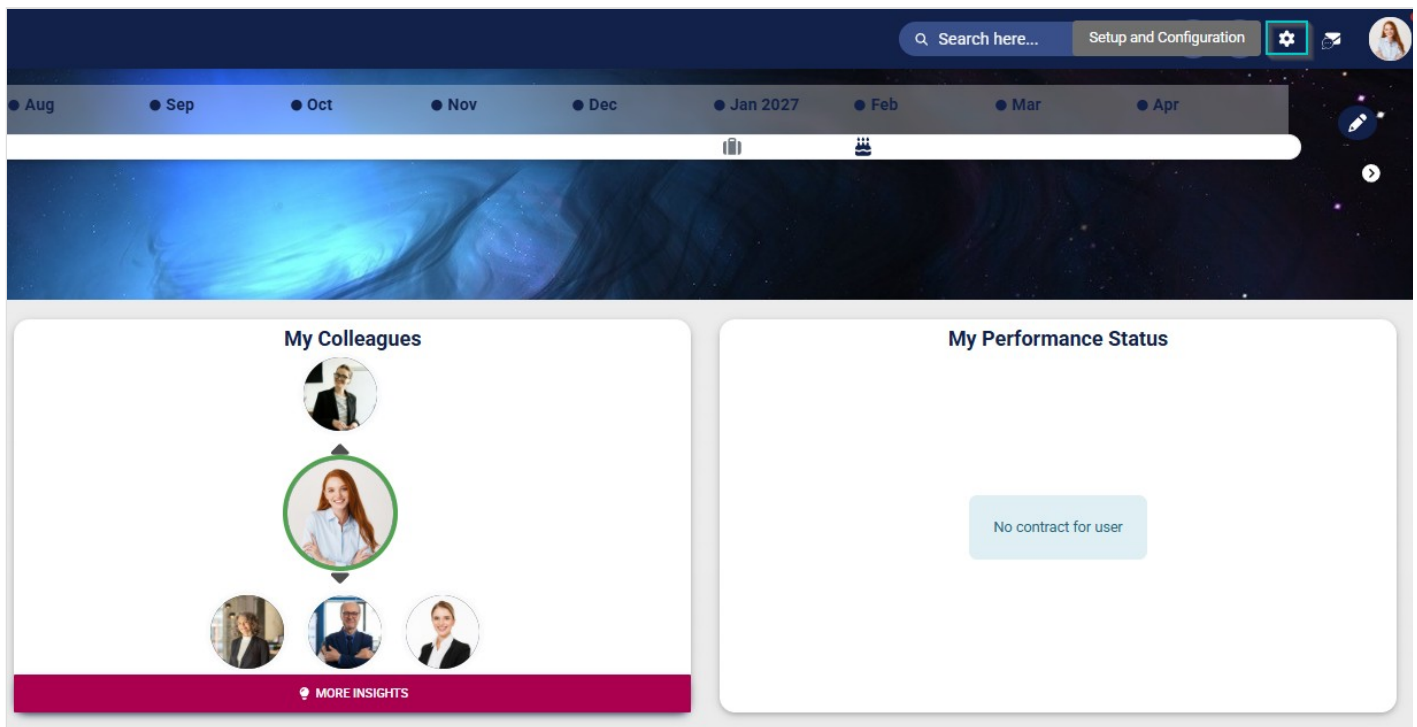


- Click on the **Event Scheduling** product card, then click the **toggle button** to set the product's status to **Active**.

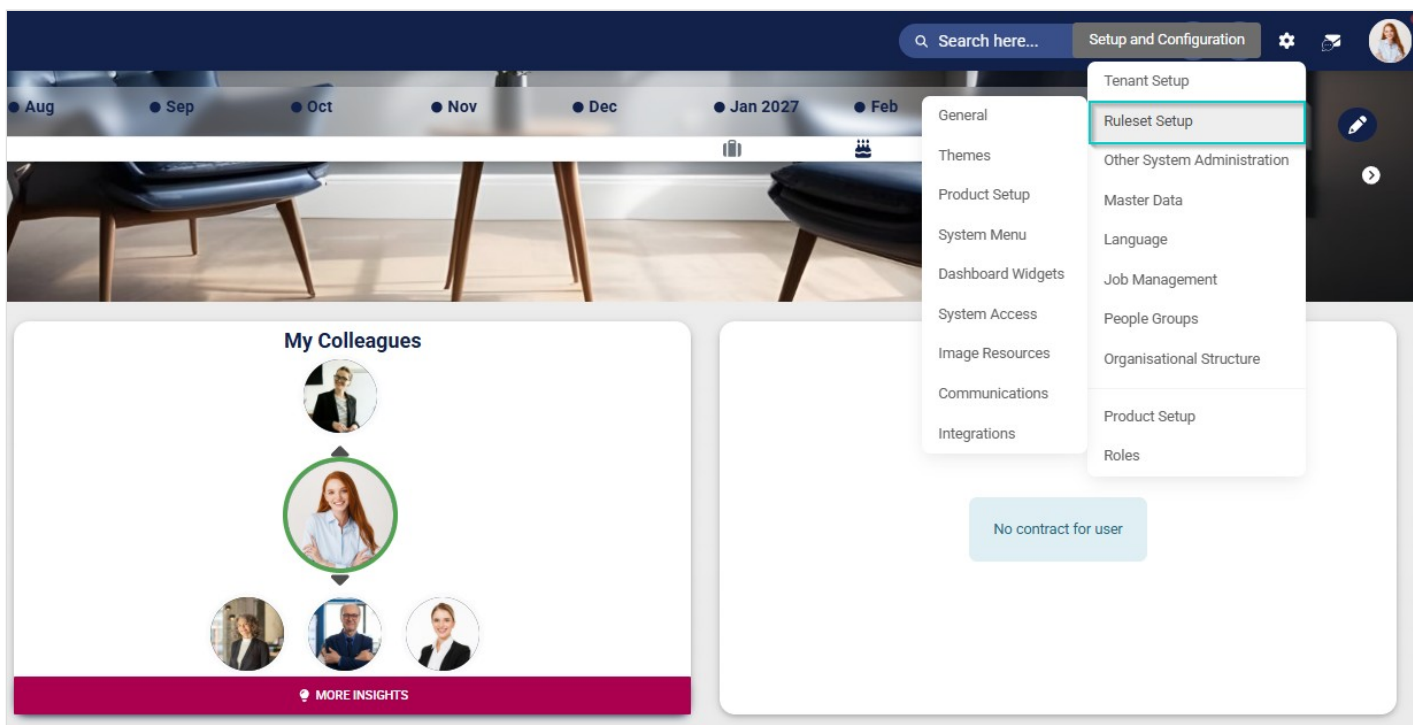


Add Event Scheduling to the system menu

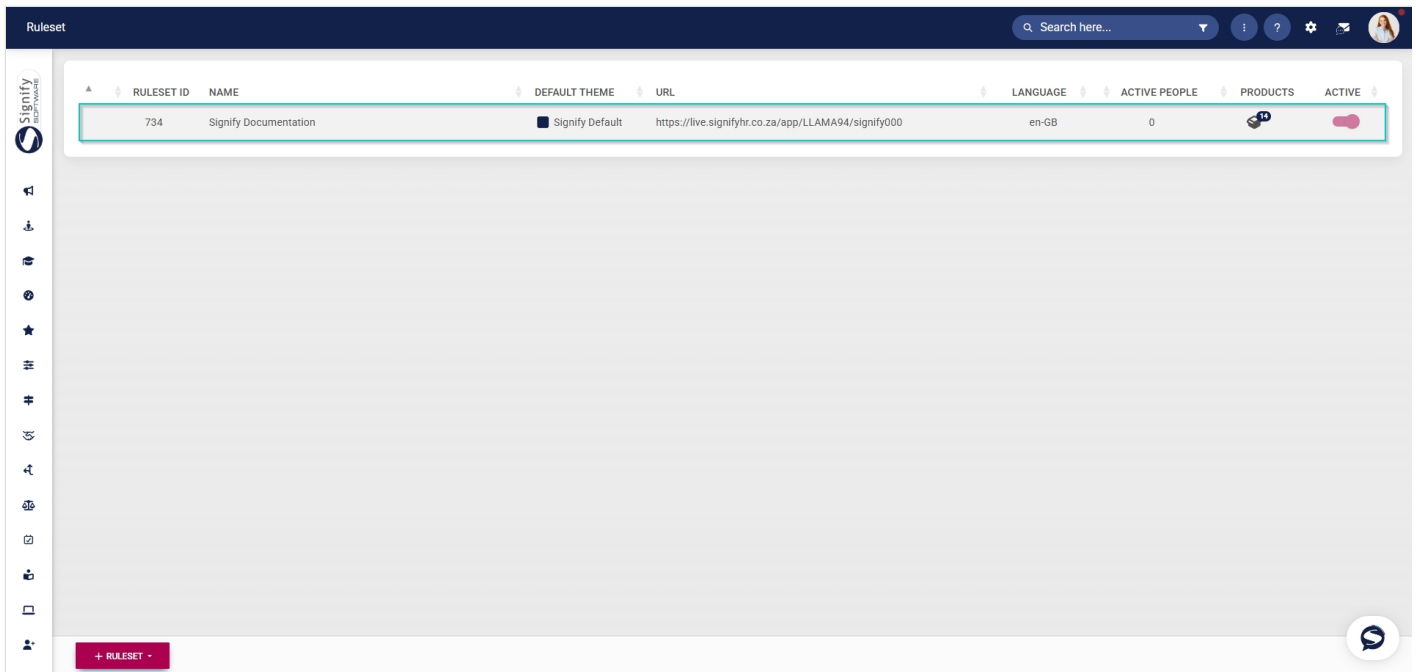
- Click the **gear icon** to access the **Setup and Configuration** menu.



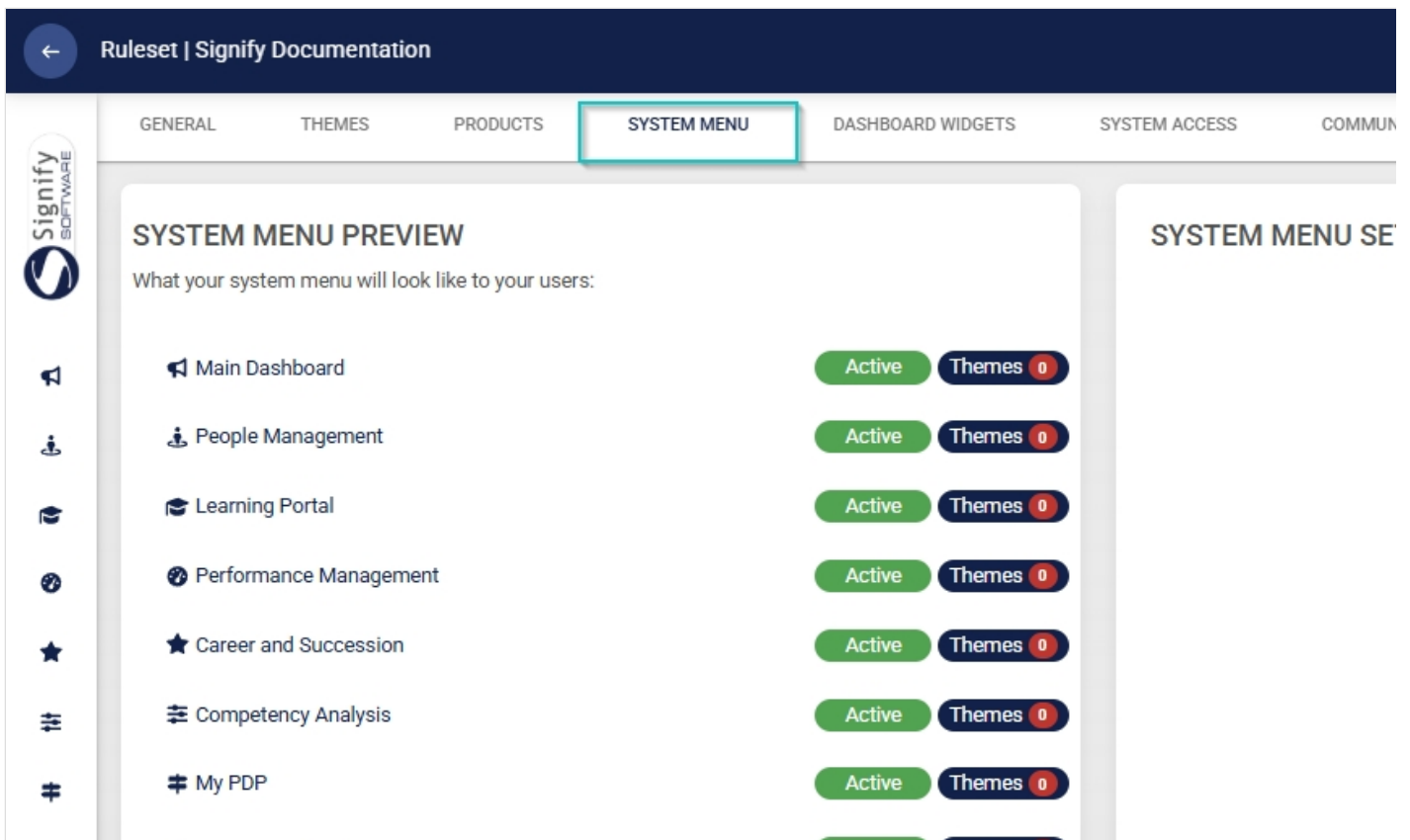
- Click **Ruleset Setup**.



- Select the **ruleset** you would like to update.



- Navigate to the **System Menu** tab.



- Click the **Event Scheduling** menu item in the system menu preview.
- Click the **toggle button** to set the system menu item's status to **Active**.

Ruleset | Signify Documentation

GENERAL THEMES PRODUCTS **SYSTEM MENU** DASHBOARD WIDGETS SYSTEM ACCESS COMMUNICATIONS IMAGE RESOURCES INTEGRATIONS

SYSTEM MENU PREVIEW
What your system menu will look like to your users:

- Main Dashboard
- People Management
- Learning Portal
- Performance Management
- Career and Succession
- Competency Analysis
- My PDP
- My Career Planning
- Mentoring and Coaching
- Salary Review
- Leave
- Event Scheduling**
- Training Schedule
- Recruitment Requisition
- Advertised Positions

System Menu Setup

Active

Menu Heading *
Event Scheduling

TRANSLATE

Name of the item as displayed on the system menu.

CHANGE ICON

Display for following theme(s)
0 Themes Selected

People Groups

NAME
No data available in table

SAVE PEOPLE GROUP TARGET AUDIENCE CANCEL

- You can select an icon for the **Event Scheduling** module by clicking **CHANGE ICON**.

Ruleset | Signify Documentation

GENERAL THEMES PRODUCTS **SYSTEM MENU** DASHBOARD WIDGETS SYSTEM ACCESS COMMUNICATIONS IMAGE RESOURCES INTEGRATIONS

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System Menu Setup

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Name of the item as displayed on the system menu.

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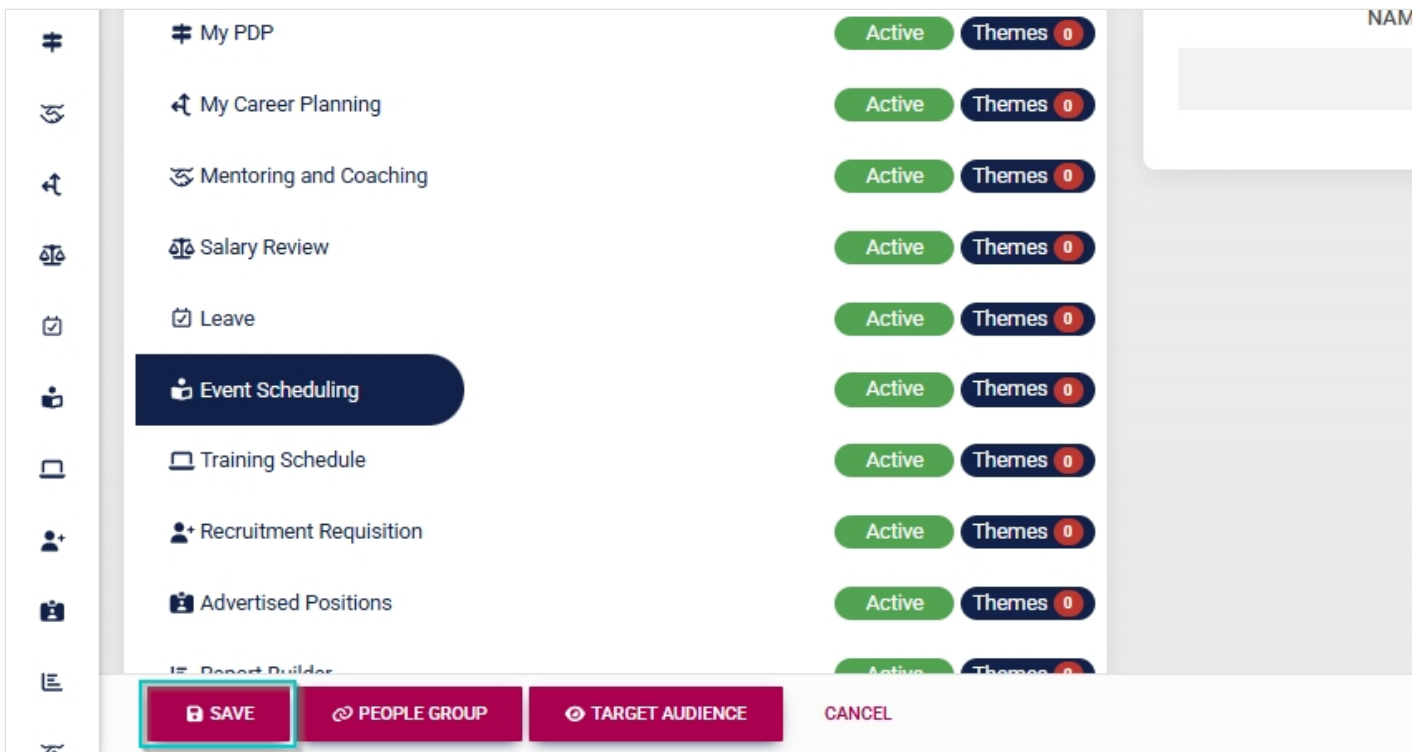
Display for following theme(s)
0 Themes Selected

People Groups

NAME
No data available in table

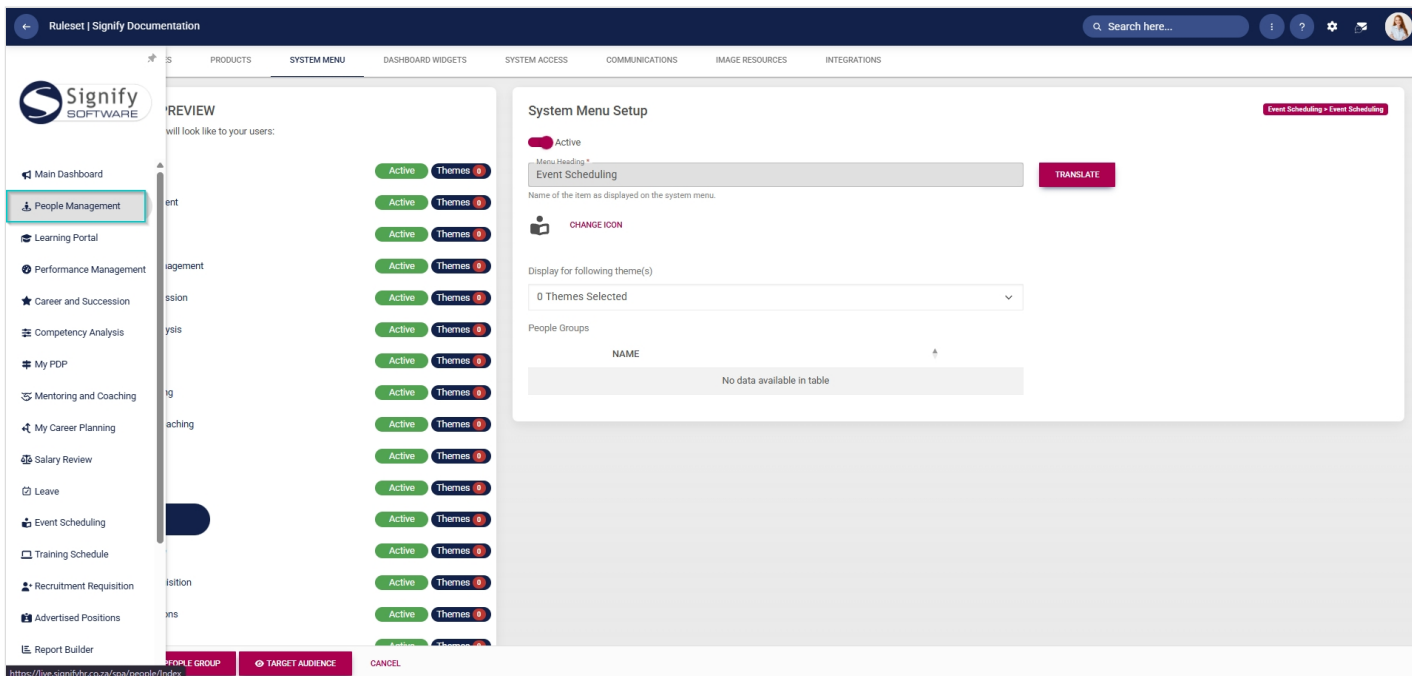
SAVE PEOPLE GROUP TARGET AUDIENCE CANCEL

- Click **SAVE** to continue or **CANCEL** to discard your changes.

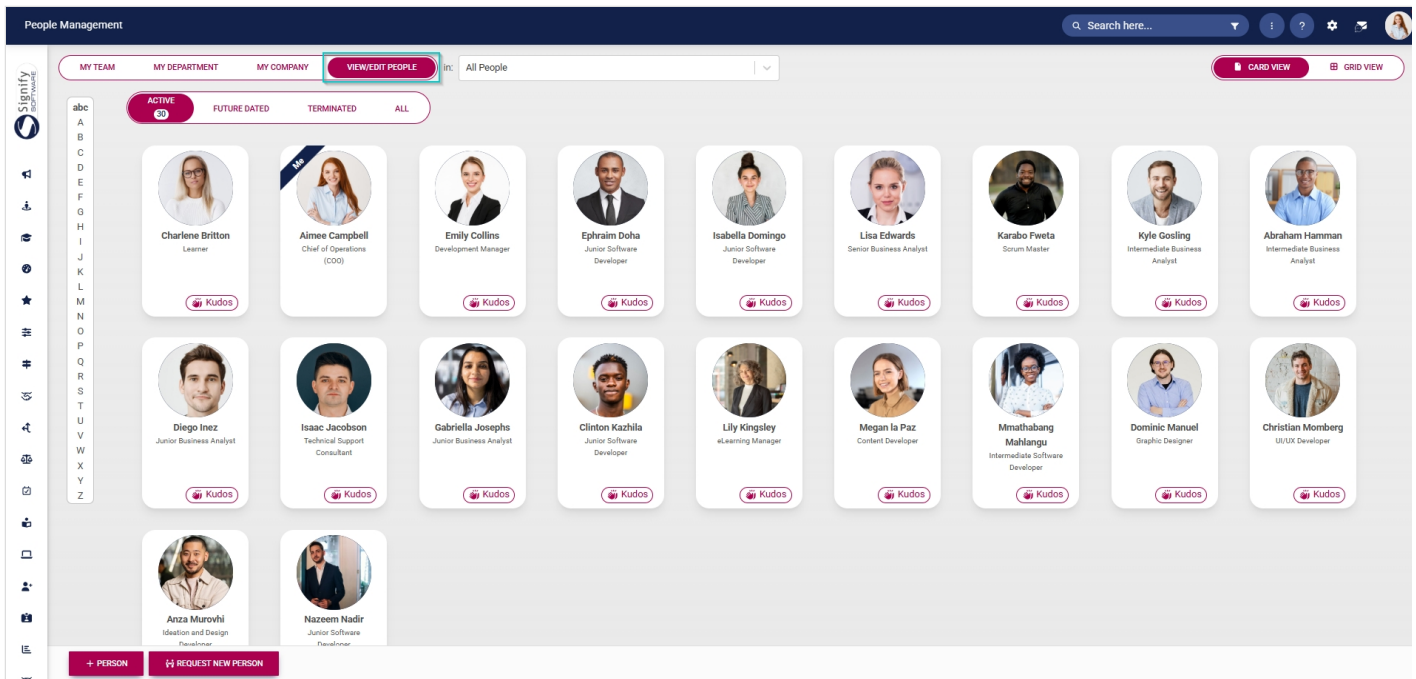


Assign the Event Scheduling administrator permission

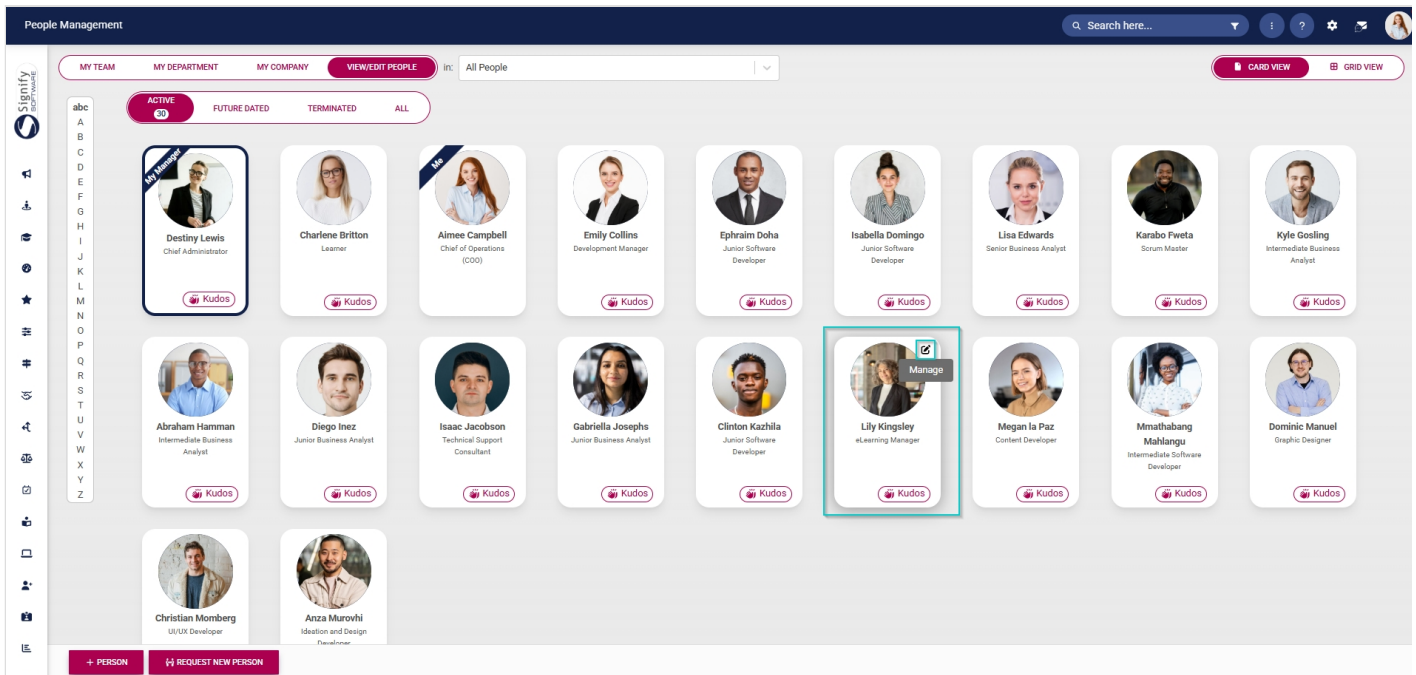
- Hover over the **sidebar** menu, then click **People Management**.



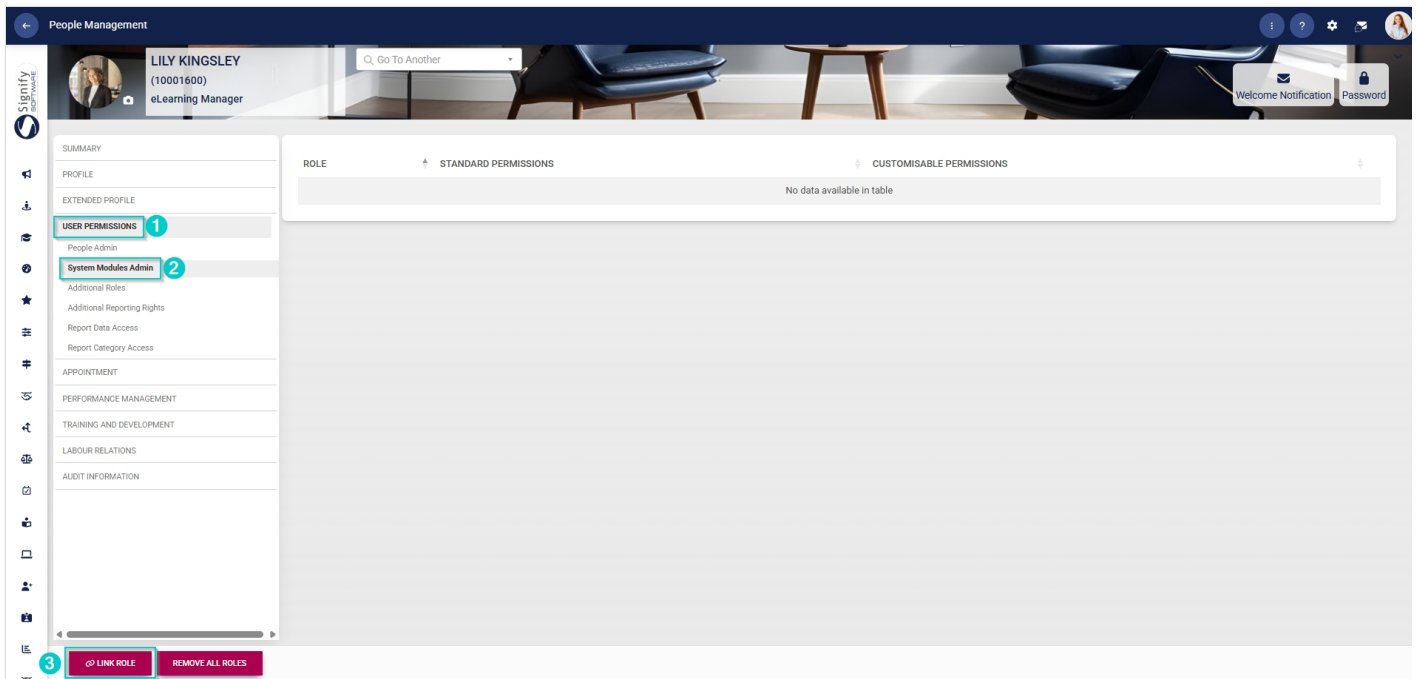
- Click to navigate to the **View/Edit People** tab.



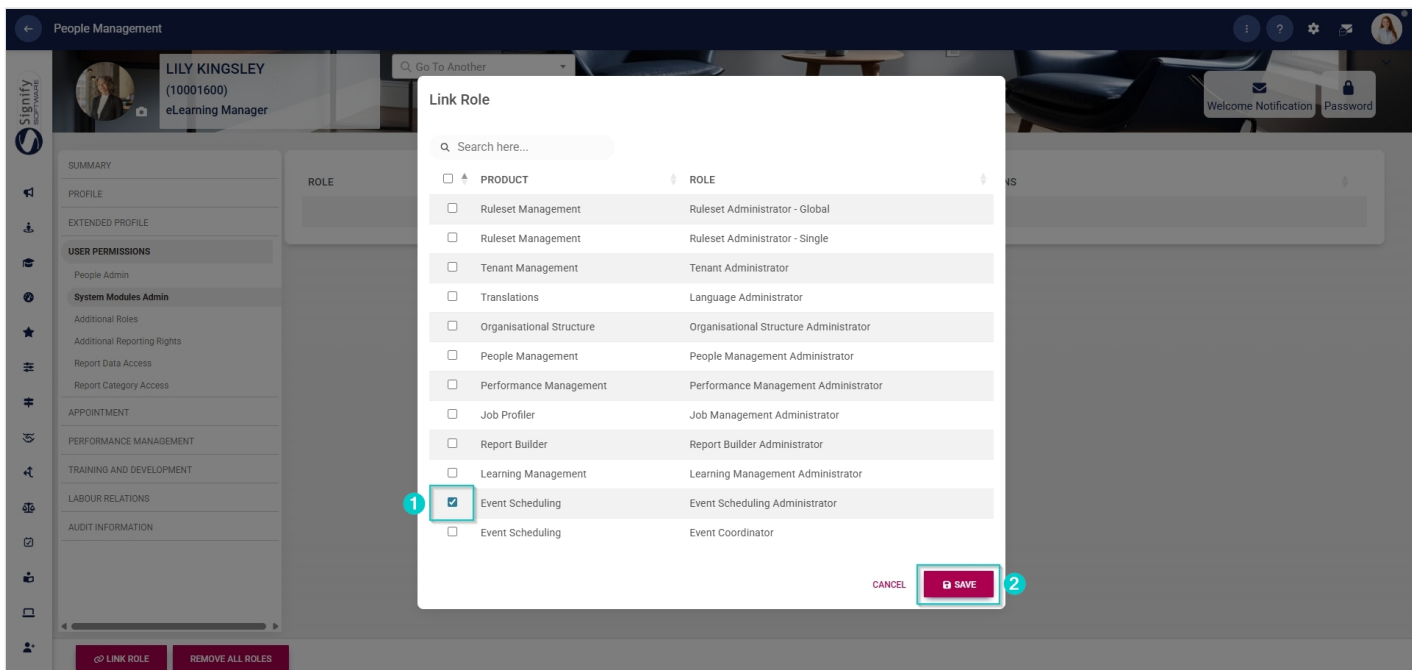
- Click the **pencil icon** to manage the person whose profile you want to edit.



- In the **left-hand menu**, navigate to **User Permissions**, then click **System Modules Admin**.
- Click the **LINK ROLE** button.

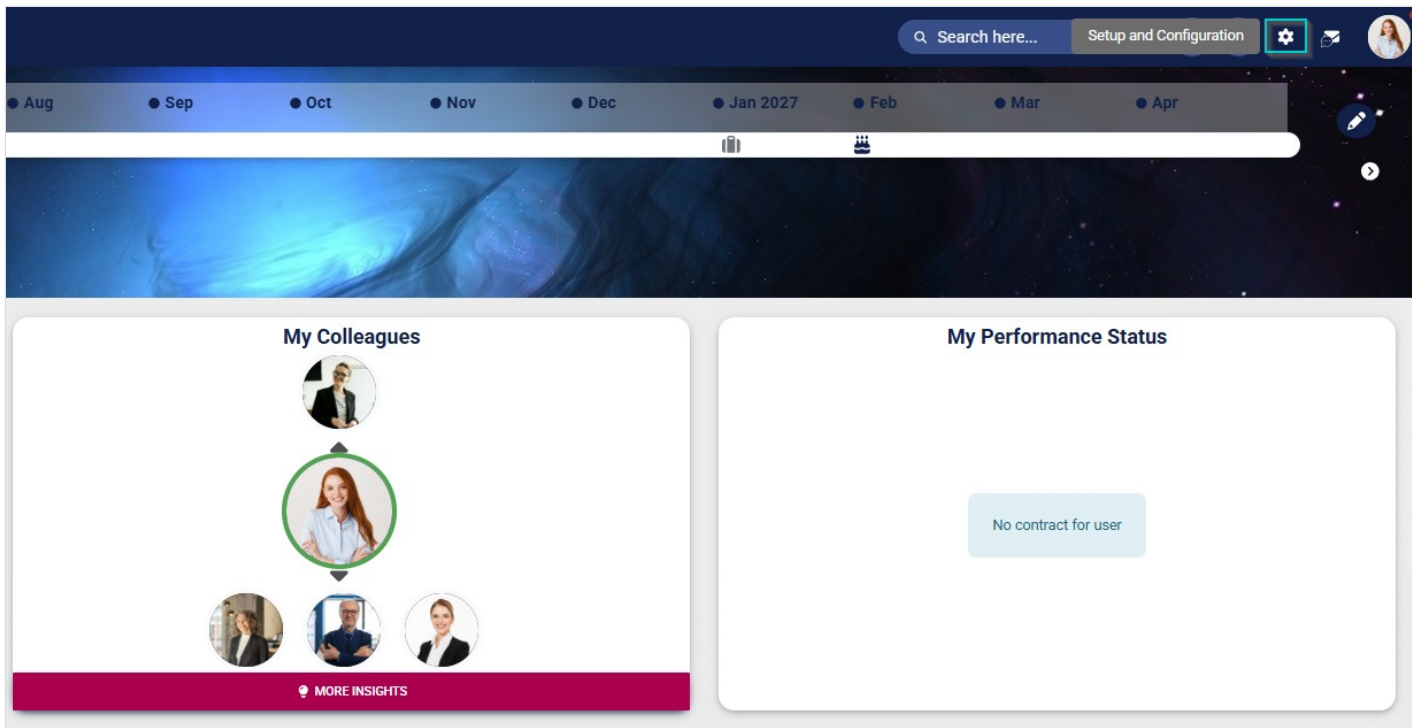


- Tick the **checkbox** next to **Event Scheduling** in the table to assign the Event Scheduling administrator role to the user.
- Click **SAVE** to continue or **CANCEL** to discard your changes.

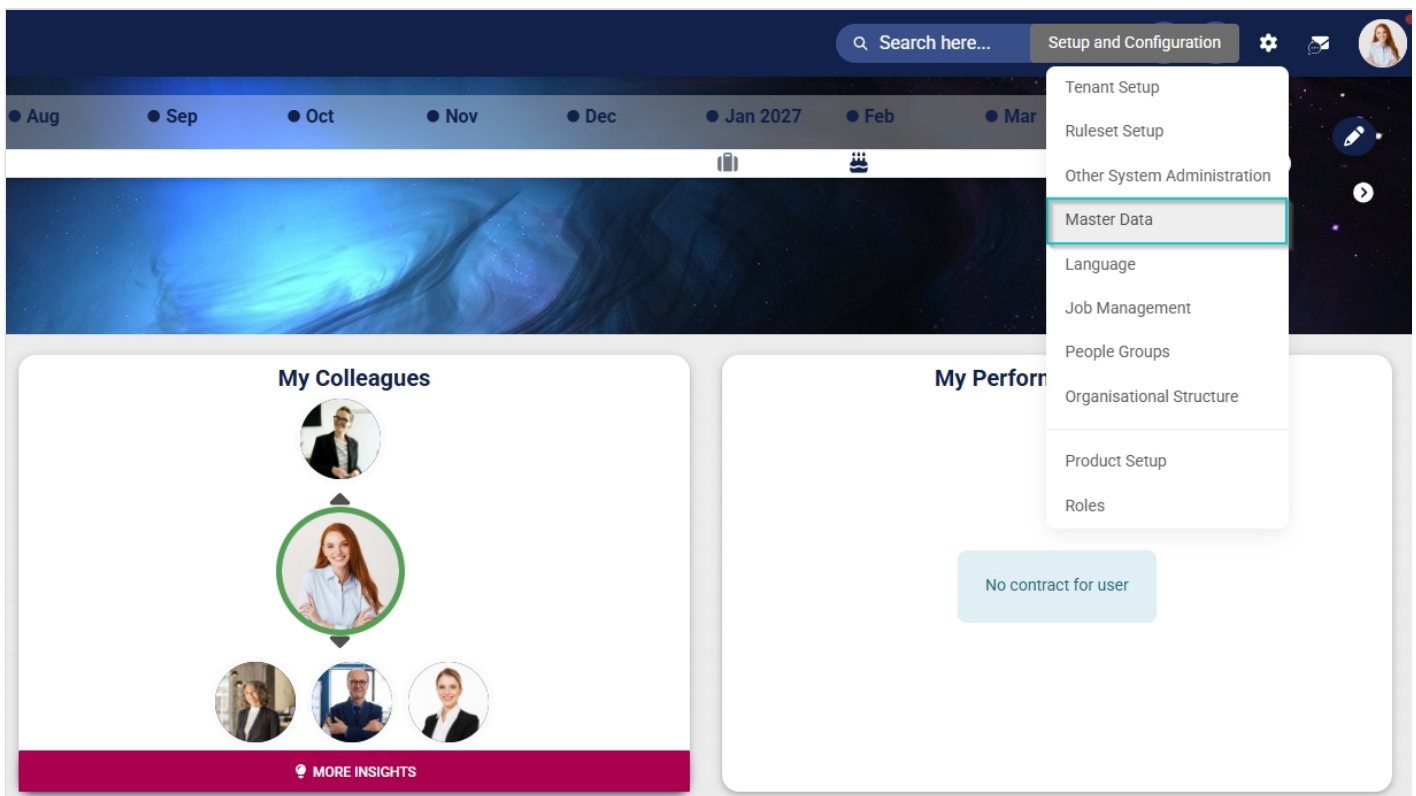


Update the Master Data Library

- Click the **gear icon** to access the **Setup and Configuration** menu.



- Click **Master Data**.



- The **Master Data Library** lists the categories for which administrators can create master data. Use the **search bar** at the top of the screen to filter the search results by **Event Scheduling**.

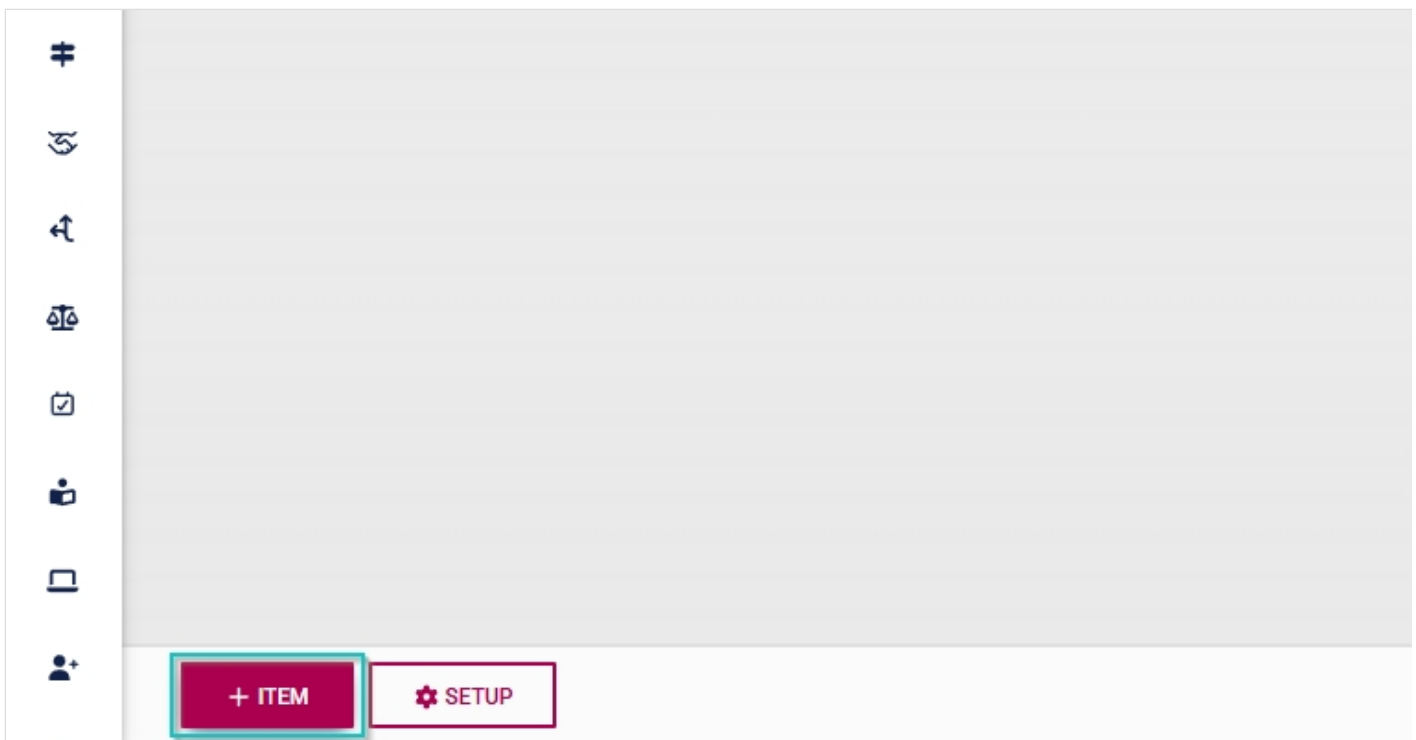
Master Data			Search here...					
TITLE	DESCRIPTION	PRIMARY PRODUCT						
Performance Management Section Items		Performance Management						
Organisational Units		Job Profiler						
Appointment Types		Job Profiler						
Grading Scales		Job Profiler						
Grading Types		Job Profiler						
OFO Codes		Job Profiler						
Occupational Categories		Job Profiler						
Occupational Levels		Job Profiler						
Termination Reasons		Job Profiler						
Training Intervention Competencies		Job Profiler						
Citizenships		People Management						
Currencies		People Management						
Disabilities		People Management						
Genders		People Management						
Home Languages		People Management						
Initials		People Management						
Marital Statuses		People Management						
Permit Types		People Management						
Races		People Management						

Classifications

- Click on the **Classifications** category to continue.

Master Data			event schedul					
TITLE	DESCRIPTION	PRIMARY PRODUCT						
Classifications		Event Scheduling						
Course Types		Event Scheduling						
Categories		Event Scheduling						
Rooms		Event Scheduling						
Venues		Event Scheduling						
Motivations for Booking		Event Scheduling						

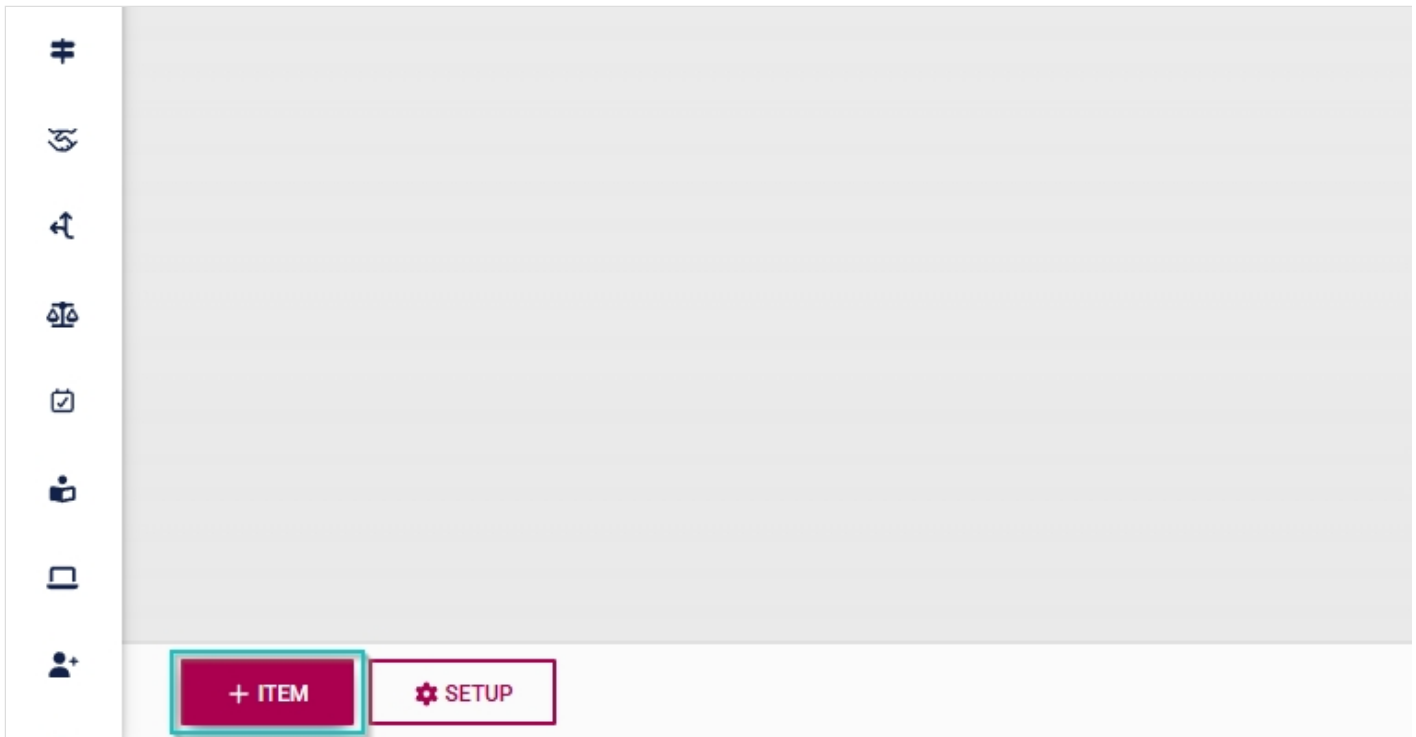
- To add a new master data item, click on **+ITEM**.



- Click the **toggle button** to set the classification's status to **Active**.
- Enter a name for the classification.
- Click **SAVE** when you are finished, **SAVE ADD NEW** to add another master data item or click **CANCEL** to discard your edits.

A screenshot of a form titled 'ADD NEW CLASSIFICATION ITEM'. Below the title is a note: 'Please note that you are creating/editing the stored value of master data directly, and not the translated value.' The form contains a toggle switch labeled 'Active' with a red circle next to it, followed by a red circle with the number '1'. Below this is a text input field with a red border, containing the text 'Local', followed by a red circle with the number '2'. At the bottom right of the form are three buttons: 'CANCEL', 'SAVE ADD NEW', and a red button labeled 'SAVE' followed by a red circle with the number '3'.

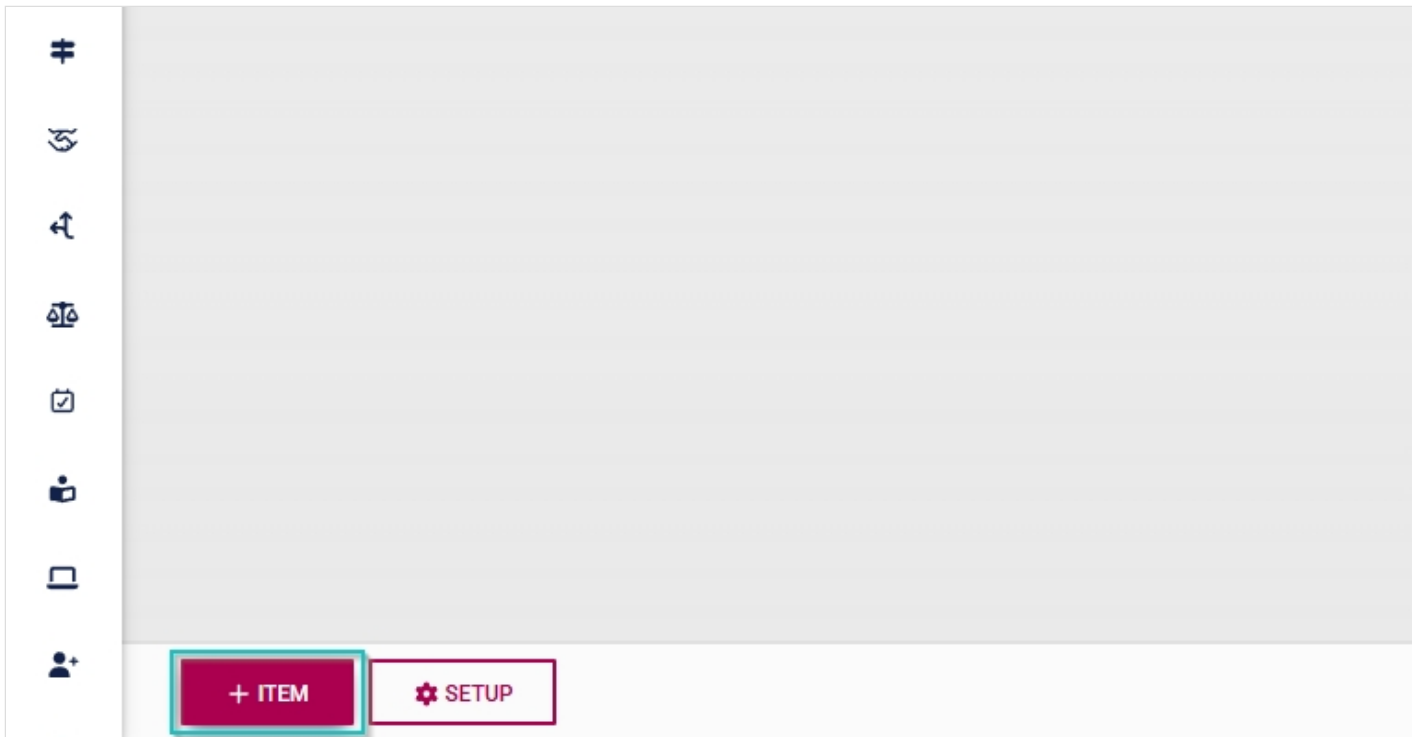
- Click the **back arrow** to navigate back to the **Master Data Library** once you are finished.



- Click the **toggle button** to set the course type's status to **Active**.
- Enter a name for the course type.
- Click **SAVE** when you are finished, **SAVE ADD NEW** to add another master data item or click **CANCEL** to discard your edits.

A screenshot of a form titled 'ADD NEW COURSE TYPE ITEM'. Below the title is a note: 'Please note that you are creating/editing the stored value of master data directly, and not the translated value.' The form contains a toggle switch labeled 'Active' with a red circle next to it, followed by a red circle with the number '1'. Below this is a text input field with a red asterisk and the label 'Name', containing the text 'eLearning', followed by a red circle with the number '2'. At the bottom right are three buttons: 'CANCEL', 'SAVE ADD NEW', and a red button labeled 'SAVE' with a red circle and the number '3' next to it.

- Click the **back arrow** to navigate back to the **Master Data Library** once you are finished.



- Click the **toggle button** to set the category's status to **Active**.
- Enter a name for the category.
- Click **SAVE** when you are finished, **SAVE ADD NEW** to add another master data item or click **CANCEL** to discard your edits.

A screenshot of the 'ADD NEW CATEGORY ITEM' form. The form is white with a gray border. At the top, it says 'ADD NEW CATEGORY ITEM'. Below that, a note reads: 'Please note that you are creating/editing the stored value of master data directly, and not the translated value.' There are three numbered callouts: 1 points to a red toggle switch labeled 'Active'; 2 points to a text input field containing 'Management and leadership'; 3 points to a red 'SAVE' button. Other buttons visible are 'CANCEL', 'SAVE ADD NEW', and a red '+ ITEM' button in the sidebar.

- Click the **back arrow** to navigate back to the **Master Data Library** once you are finished.

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Master Data | Categories

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ORDER	ACTIVE	NAME	SET ORDER BY
1	☒	Management and leadership	
2	☒	Soft skills and communication	
3	☒	ICT and systems training	
4	☒	Health and safety	
5	☒	Compliance and regulatory	
6	☒	Sales and customer service	
7	☒	Finance and governance	
8	☒	Human resources	
9	☒	Project management	
10	☒	Personal development	

Regions

- Click on the **Regions** category to continue.

Master Data

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Evaluation Periods	Performance Management
Moderation Reasons	Performance Management
Classifications	Event Scheduling
Course Types	Event Scheduling
Categories	Event Scheduling
Rooms	Event Scheduling
Venues	Event Scheduling
Motivations for Booking	Event Scheduling
Grades	Learning Management
Years	Learning Management
Regions	People Management
Inherent Requirements	Job Profiler
Public holidays	People Management
Registration decline reasons	
Communication Categories	Communication Portal
Communication Priorities	Communication Portal
Position Statuses	Job Profiler
Importance	Importance of each competency that is linked to the job
Import Column Exclusions	List of columns to ignore when importing
Showing 1 to 50 of 60 entries	

First

Previous

1

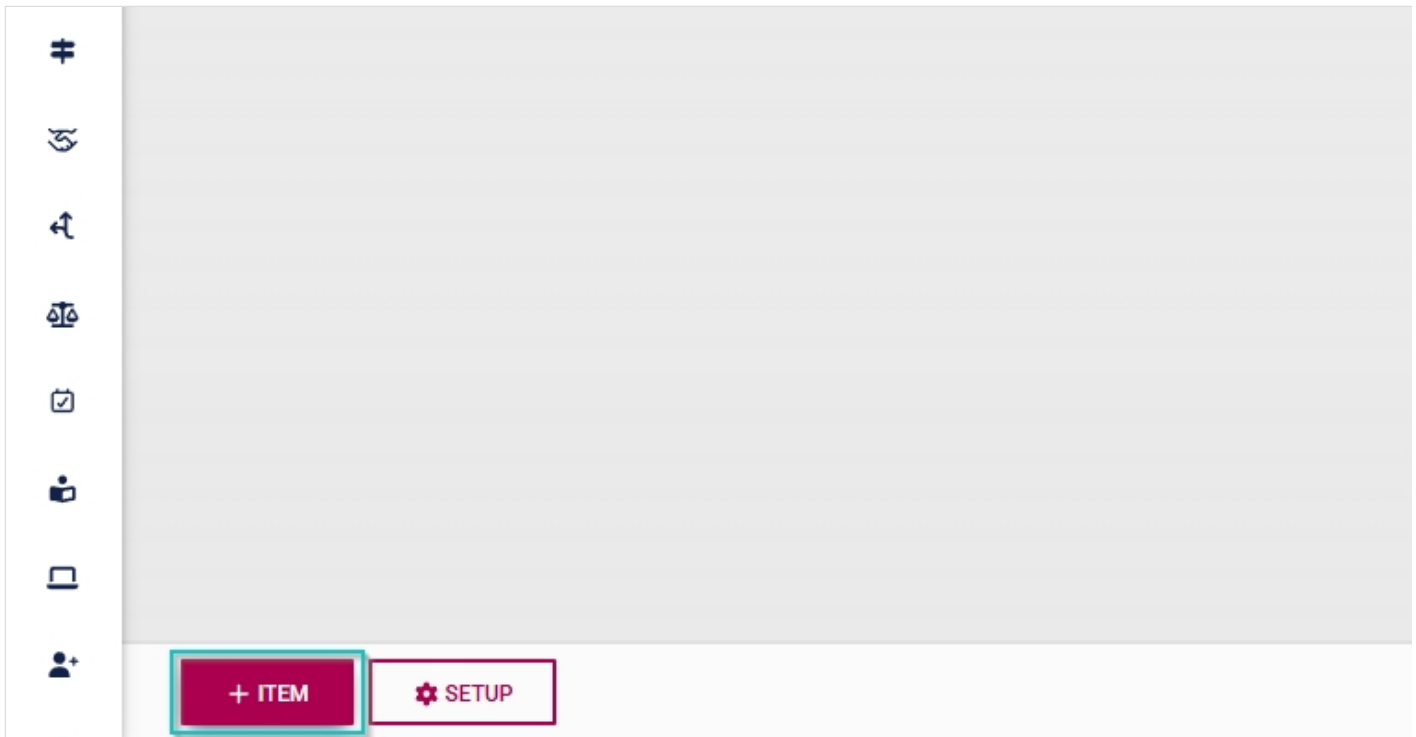
2

Next

Last

Steam

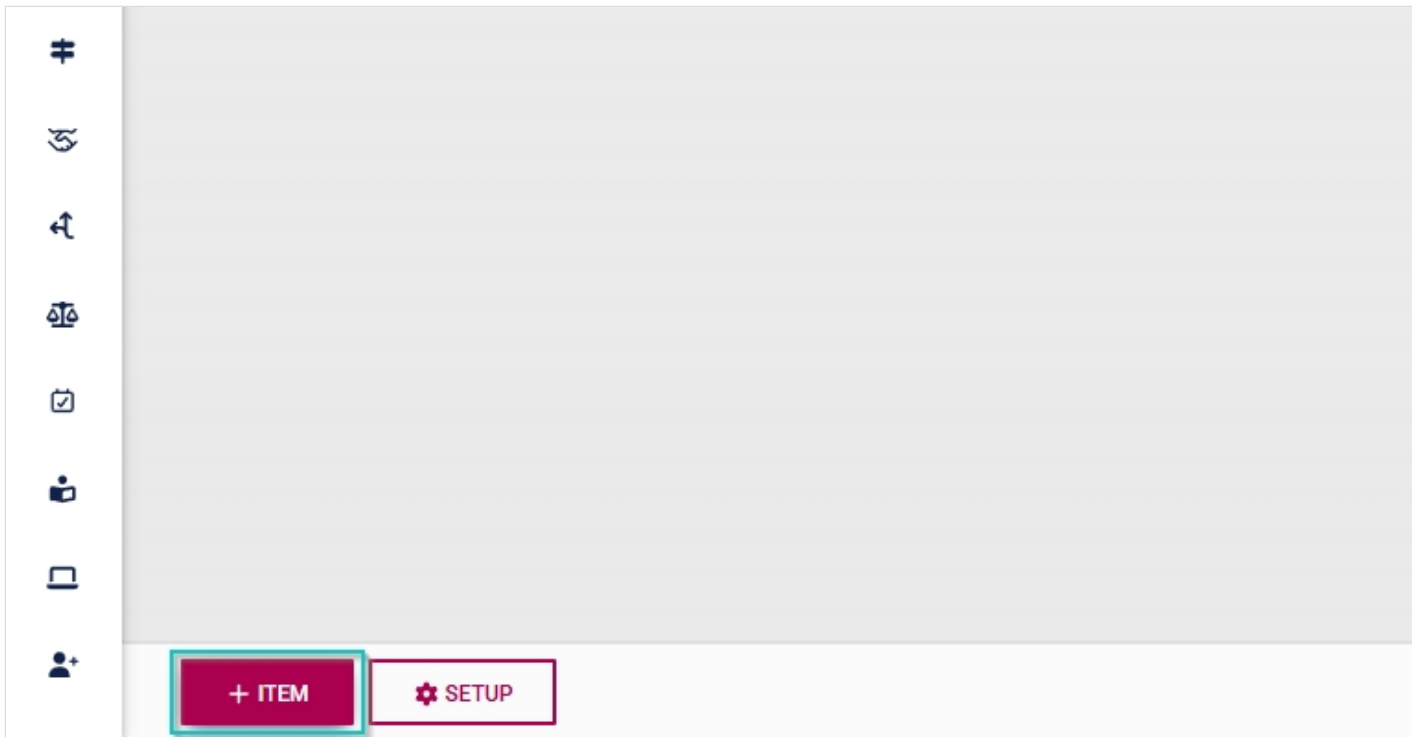
- To add a new master data item, click on **+ITEM**.



- Click the **toggle button** to set the region's status to **Active**.
- Select the country from the **drop-down menu**.
- Enter a name for the region.
- Click **SAVE** when you are finished, **SAVE ADD NEW** to add another master data item or click **CANCEL** to discard your edits.

A screenshot of the 'ADD NEW REGION ITEM' form. The form is white with a gray background. At the top, it says 'ADD NEW REGION ITEM'. Below that is a note: 'Please note that you are creating/editing the stored value of master data directly, and not the translated value.' The form contains three main input fields: 1. A toggle switch labeled 'Active' with a red circle next to it, highlighted with a red border and a red circle containing the number 1. 2. A dropdown menu labeled 'Country *' with 'South Africa' selected, highlighted with a red border and a red circle containing the number 2. 3. A text input field labeled 'Name *' with 'Johannesburg' entered, highlighted with a red border and a red circle containing the number 3. At the bottom right, there are three buttons: 'CANCEL', 'SAVE ADD NEW', and a red 'SAVE' button highlighted with a red border and a red circle containing the number 4.

- Click the **back arrow** to navigate back to the **Master Data Library** once you are finished.



- Click the **toggle button** to set the venue's status to **Active**.
- Enter a name for the venue.
- Click **SAVE** when you are finished, **SAVE ADD NEW** to add another master data item or click **CANCEL** to discard your edits.

A screenshot of a form titled 'ADD NEW VENUE ITEM'. Below the title is a note: 'Please note that you are creating/editing the stored value of master data directly, and not the translated value.' The form contains a toggle switch labeled 'Active' with a red circle containing the number '1' next to it. Below the toggle is a text input field labeled 'Name *' containing the text 'Head Office – Sandton', with a red circle containing the number '2' next to it. At the bottom right of the form are three buttons: 'CANCEL', 'SAVE ADD NEW', and a red 'SAVE' button with a red circle containing the number '3' next to it.

- Click the **back arrow** to navigate back to the **Master Data Library** once you are finished.

Master Data Venues		
ORDER	ACTIVE	NAME
		SET ORDER BY
1	☒	Head Office – Sandton
2	☒	Regional Office – Cape Town
3	☒	Regional Office – Durban
4	☒	Training Centre – Johannesburg
5	☒	Conference Centre – Midrand
6	☒	Client Site – On-site training
7	☒	Hotel Conference Facility
8	☒	External Training Provider Campus

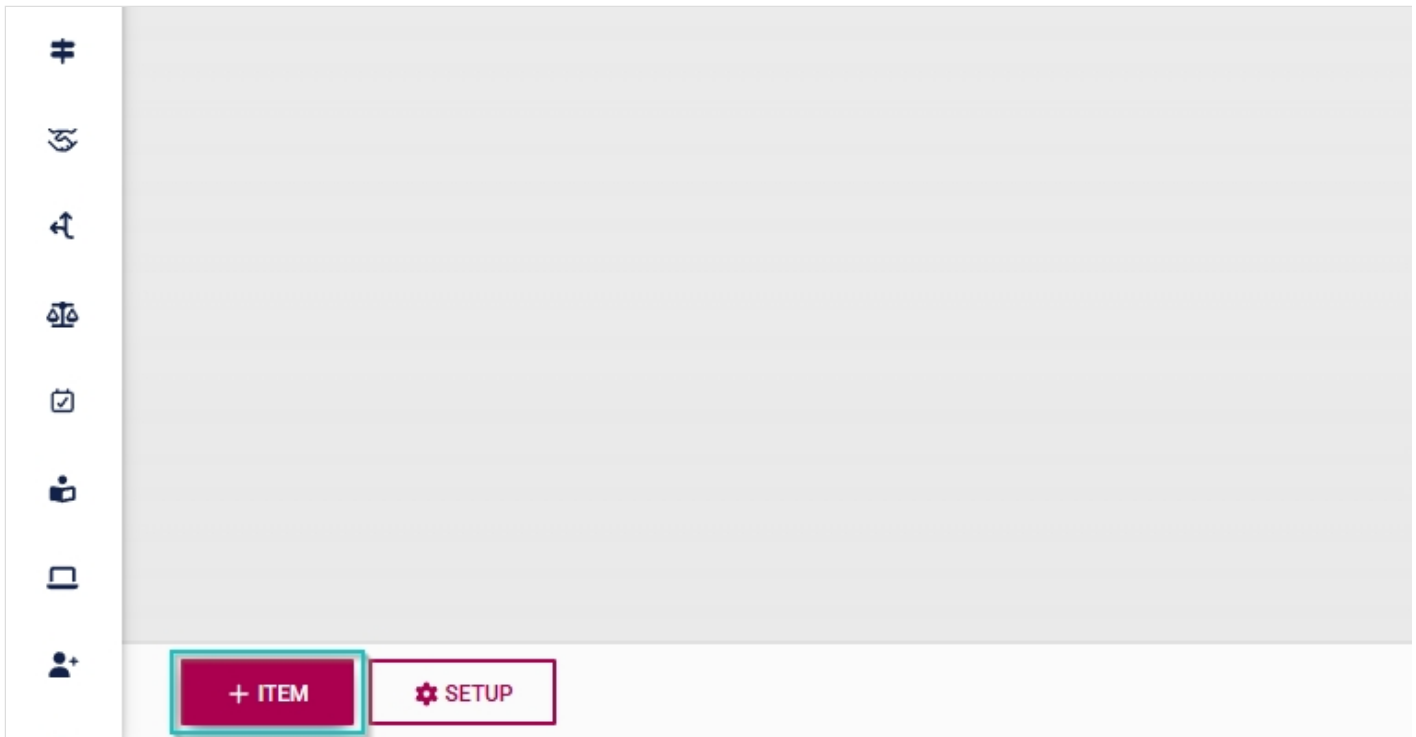
Rooms

Rooms are linked to venues; therefore, you should first compile the **Venues** master data items before you can add rooms.

- Click on the **Rooms** category to continue.

Master Data		
event schedul		
TITLE	DESCRIPTION	PRIMARY PRODUCT
Classifications		Event Scheduling
Course Types		Event Scheduling
Categories		Event Scheduling
Rooms		Event Scheduling
Venues		Event Scheduling
Motivations for Booking		Event Scheduling

- To add a new master data item, click on **+ITEM**.

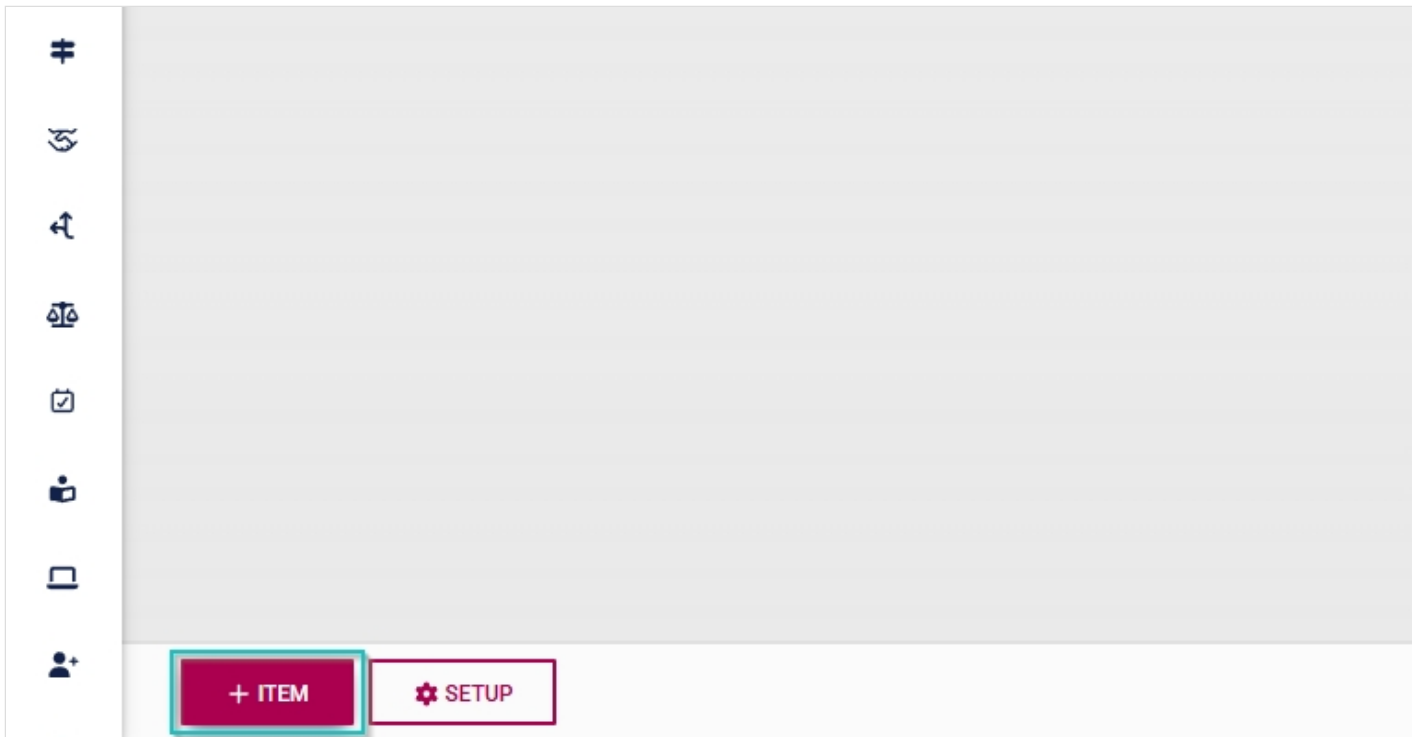


- Click the **toggle button** to set the room's status to **Active**.
- Enter a name for the room.
- Select the venue from the **drop-down menu**.
- Click **SAVE** when you are finished, **SAVE ADD NEW** to add another master data item or click **CANCEL** to discard your edits.

A screenshot of a form titled 'ADD NEW ROOM ITEM'. Below the title is a note: 'Please note that you are creating/editing the stored value of master data directly, and not the translated value.' The form contains the following elements:

- A toggle switch labeled 'Active' with a red circle next to it, highlighted with a red box and a red circle with the number 1.
- A text input field labeled 'Name *' containing the text 'Training Room 1', highlighted with a red box and a red circle with the number 2.
- A dropdown menu labeled 'Venue *' with the selected option 'Head Office – Sandton', highlighted with a red box and a red circle with the number 3.
- At the bottom right, there are three buttons: 'CANCEL', 'SAVE ADD NEW', and a red button labeled 'SAVE' which is highlighted with a red box and a red circle with the number 4.

- Click the **back arrow** to navigate back to the **Master Data Library** once you are finished.



- Click the **toggle button** to set the item's status to **Active**.
- Enter a name for the item.
- Click **SAVE** when you are finished, **SAVE ADD NEW** to add another master data item or click **CANCEL** to discard your edits.

A screenshot of a form titled 'ADD NEW MOTIVATION FOR BOOKING ITEM'. Below the title is a note: 'Please note that you are creating/editing the stored value of master data directly, and not the translated value.' The form contains a toggle switch labeled 'Active' with a red circle next to it, followed by a red circle with the number '1'. Below this is a text input field labeled 'Name *' containing the text 'Training required as per PDP', followed by a red circle with the number '2'. At the bottom right are three buttons: 'CANCEL', 'SAVE ADD NEW', and a red button labeled 'SAVE' with a red circle and the number '3' next to it.

- Click the **back arrow** to navigate back to the **Master Data Library** once you are finished.

Master Data Motivations for Booking		
       	ACTIVE	NAME SET ORDER BY
		Mandatory compliance requirement
		Personal interest in topic
		Other
		Training required as per PDP
		Preparing for promotion
		Health and safety training requirement
		Regulatory certification requirement
		Audit or legal requirement
		Skills enhancement
		Knowledge expansion
		Cross-functional learning

Create people groups

A target audience, or a **People Group**, can be created to identify users based on specific criteria.

Create people groups for coordinators

- Click the **gear icon** to access the **Setup and Configuration** menu.

Search here...

Setup and Configuration





Aug

Sep

Oct

Nov

Dec

Jan 2027

Feb

Mar

Apr

My Colleagues

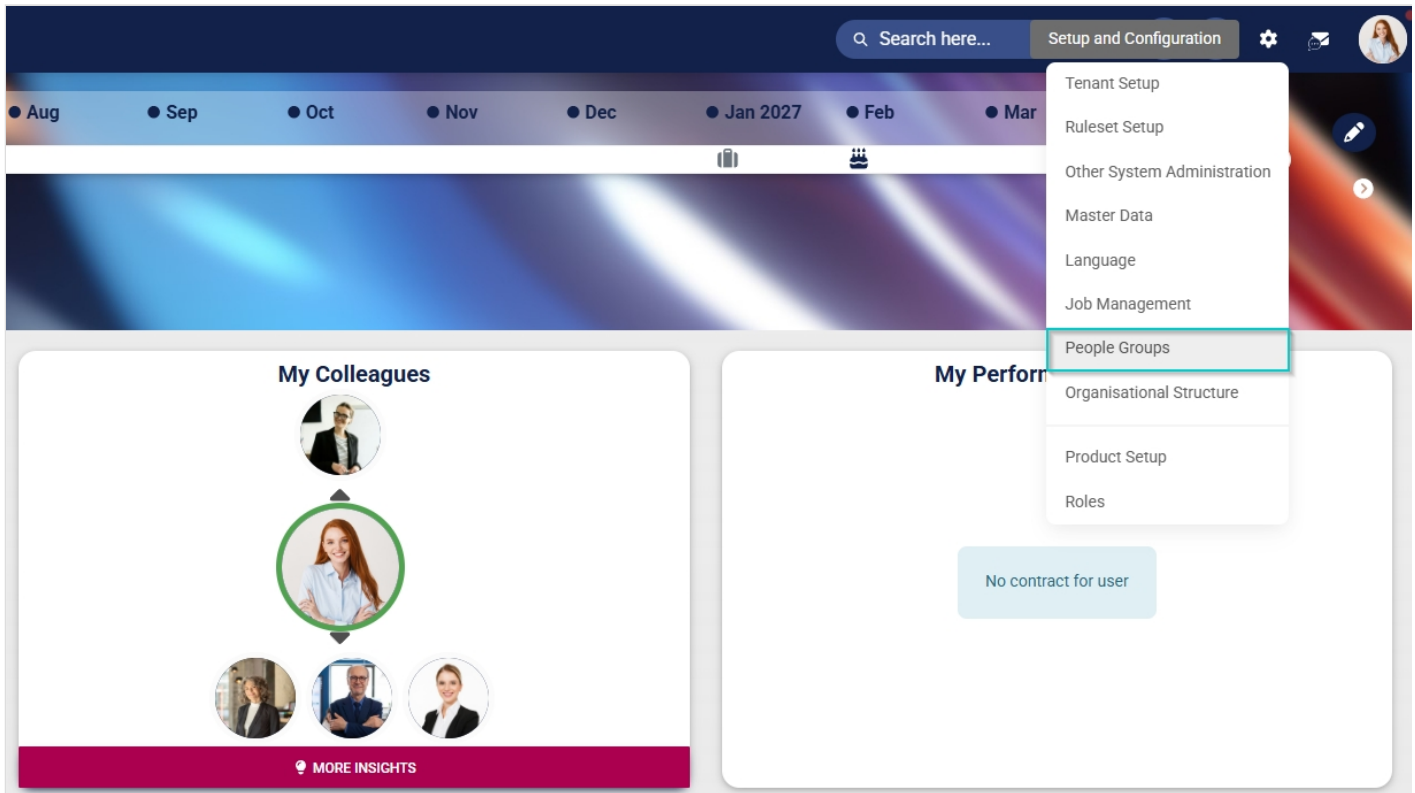


 MORE INSIGHTS

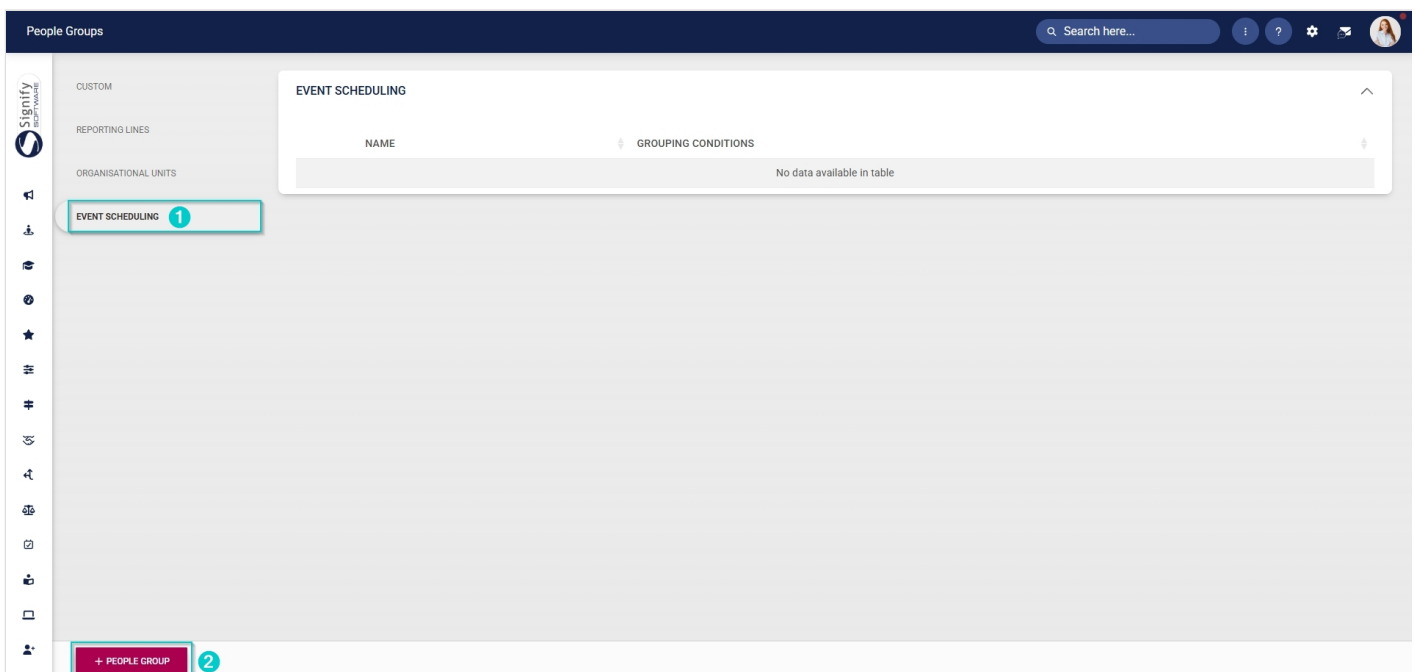
My Performance Status

No contract for user

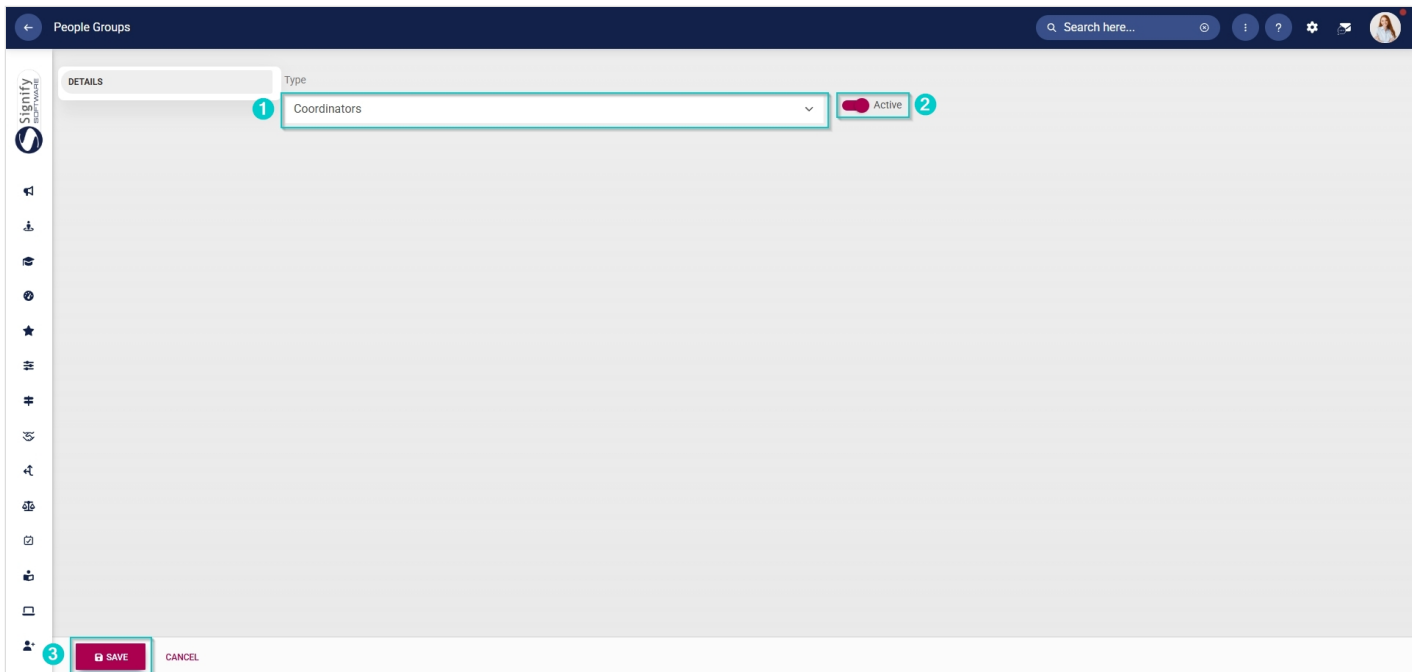
- Click **People Groups**.



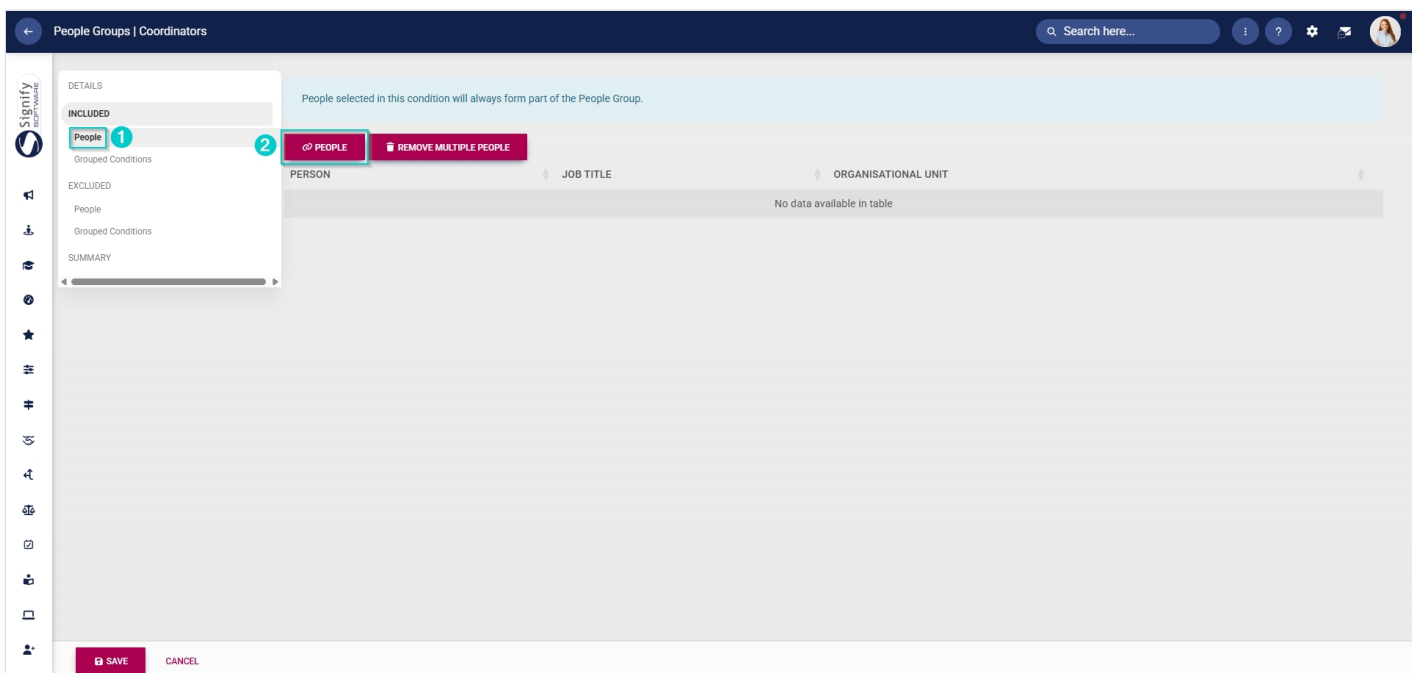
- In the **left-hand menu**, navigate to **Event Scheduling**, then click **+PEOPLE GROUP**.



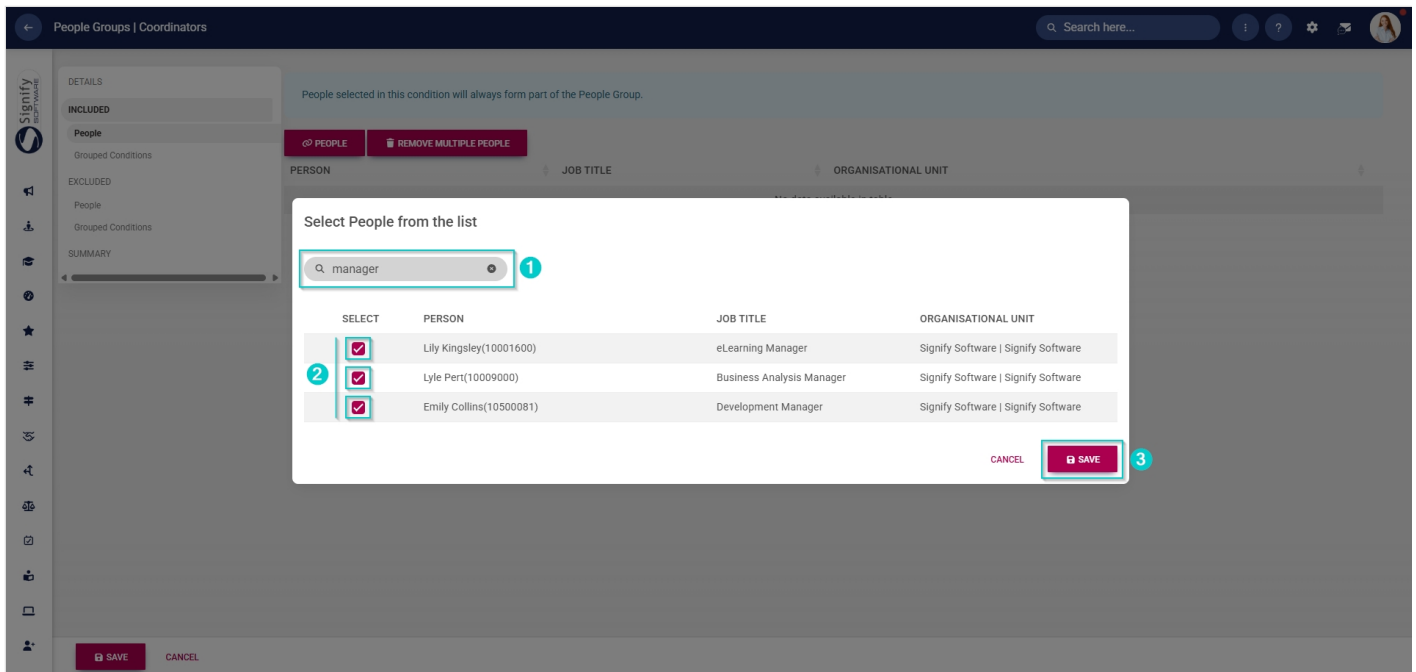
- From the **drop-down menu**, select **Coordinators**.
- Click the **toggle button** to set the status to **Active**.
- Click **SAVE** when you are finished or click **CANCEL** to discard your edits.



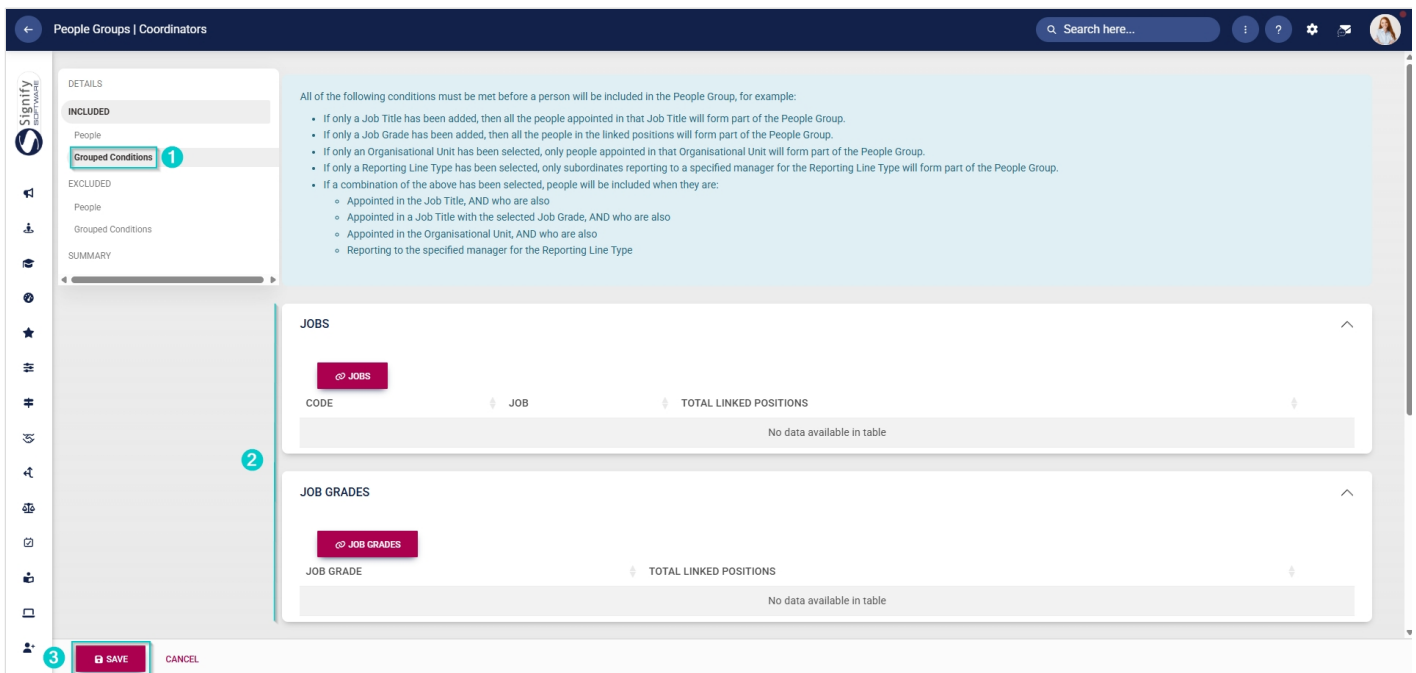
- Once the people group for coordinators has been created, you can select the people to add to it. In the **left-hand menu**, click to navigate to the **Included** section.
 - Click **People** to add individuals, then click **PEOPLE**.



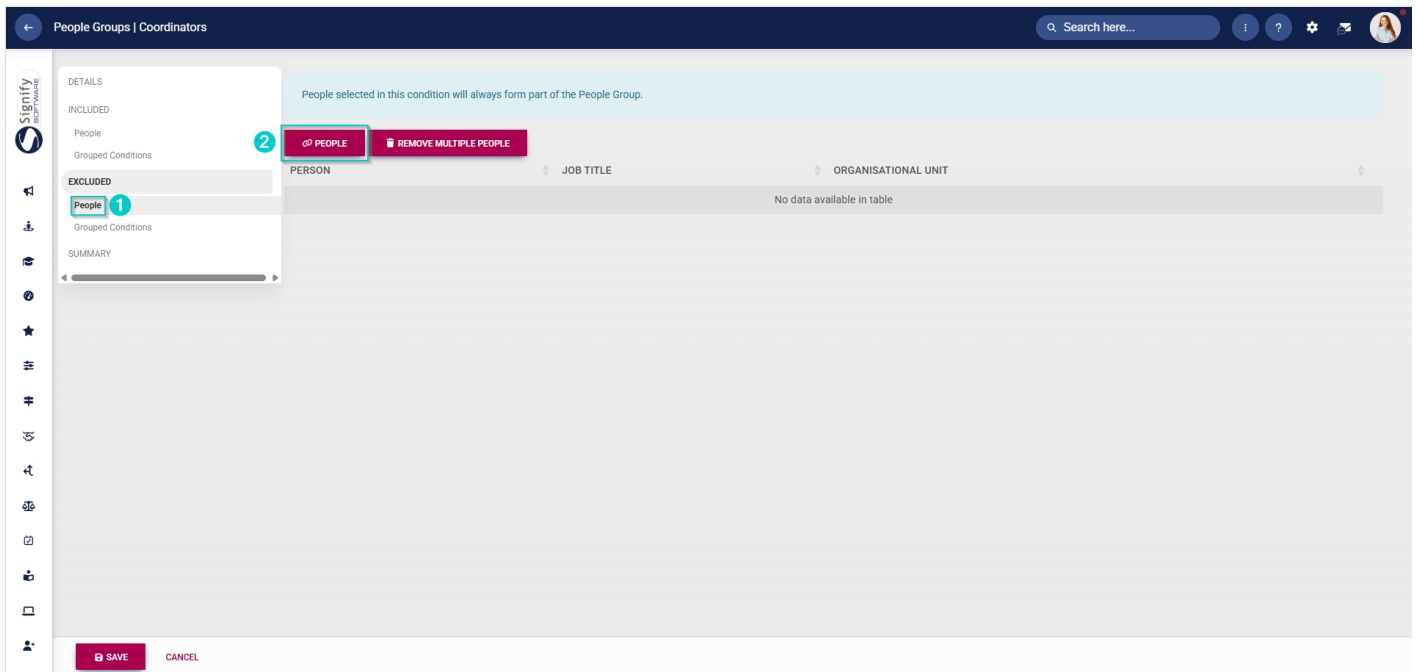
- Use the **search bar** to search for a specific person, job title, or organisational unit.
- Select the individuals from the list by ticking the **checkbox** next to a person's name.
- Click **SAVE** when you are finished or click **CANCEL** to discard your edits.



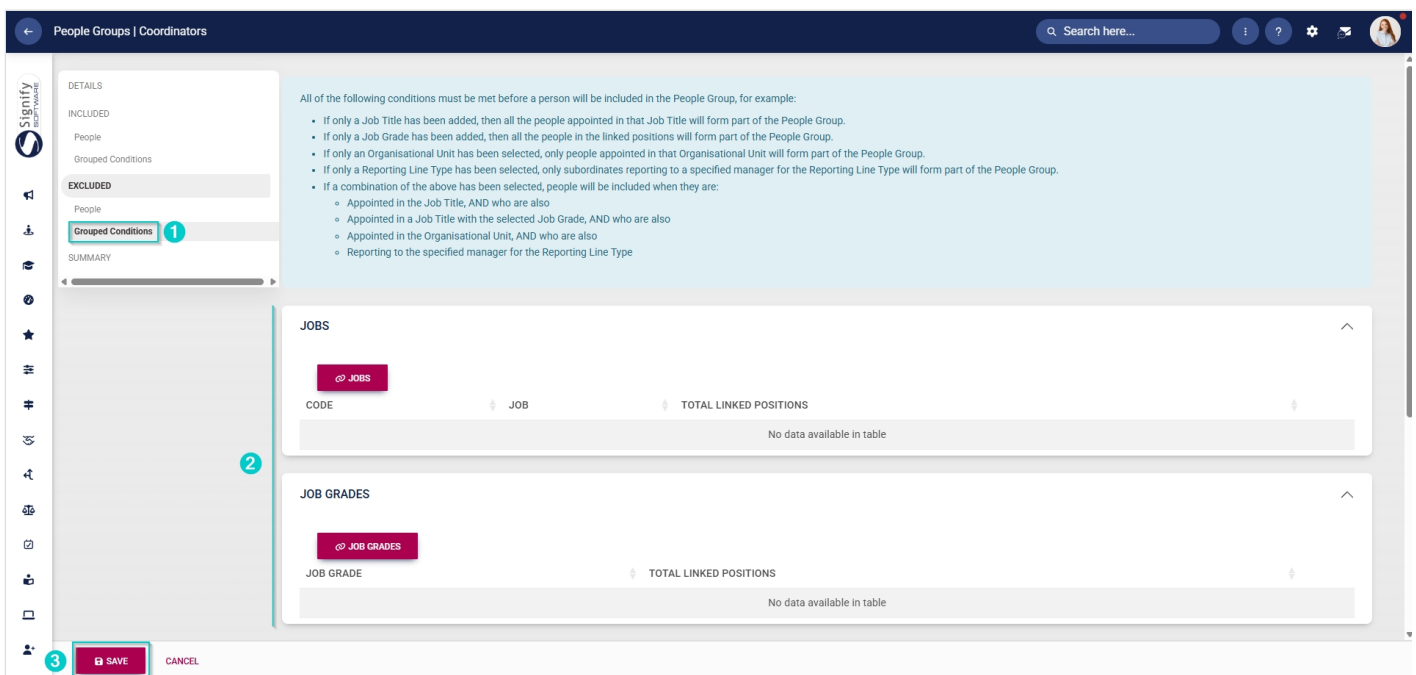
- Alternatively, click **Grouped Conditions** to add groups of people based on criteria such as job titles, organisational nodes, etc.
- Click **SAVE** when you are finished or click **CANCEL** to discard your edits.



- Additionally, you can select the people to exclude from this group. In the **left-hand menu**, click to navigate to the **Excluded** section.
 - Click **People** to exclude individuals, then click **PEOPLE**.
 - Select the people you would like to exclude.
 - Click **SAVE** when you are finished or click **CANCEL** to discard your edits.

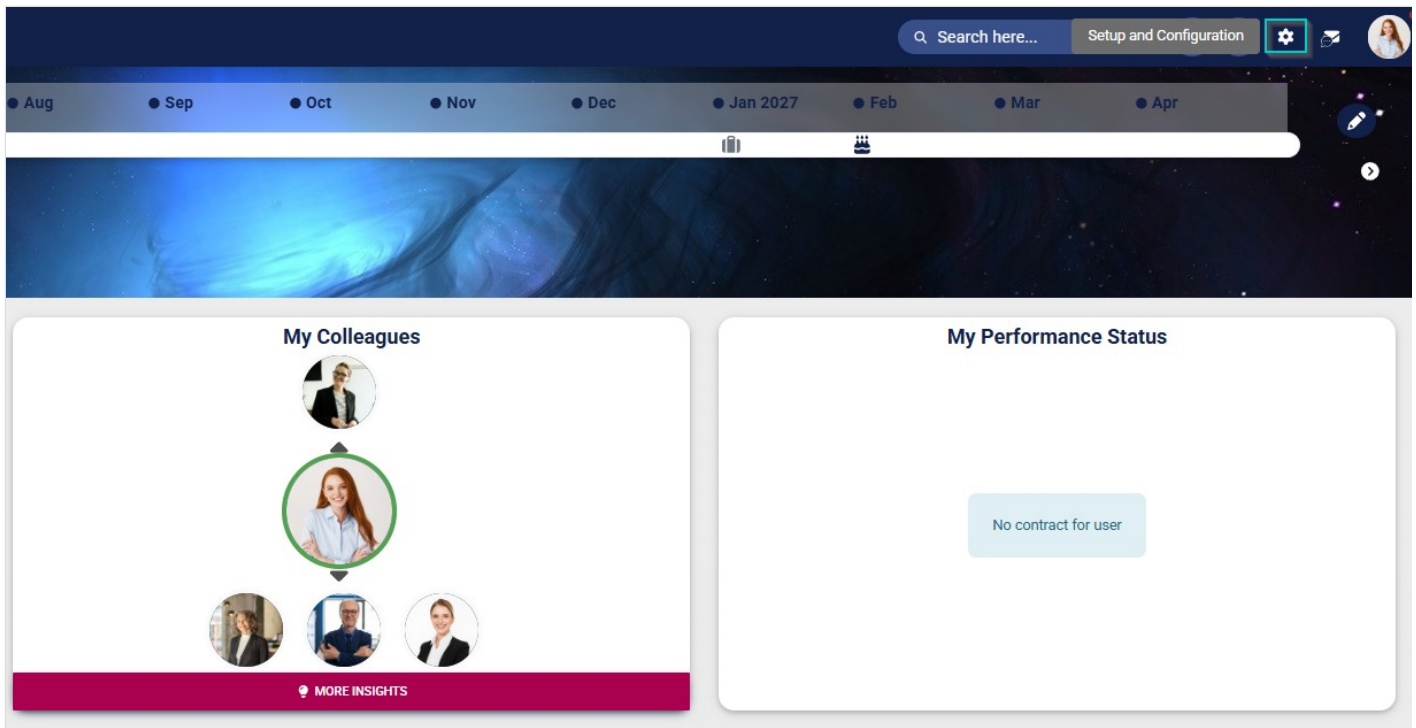


- Click **Grouped Conditions** to exclude groups of people based on criteria such as job titles, organisational nodes, etc.
- Click **SAVE** when you are finished or click **CANCEL** to discard your edits.

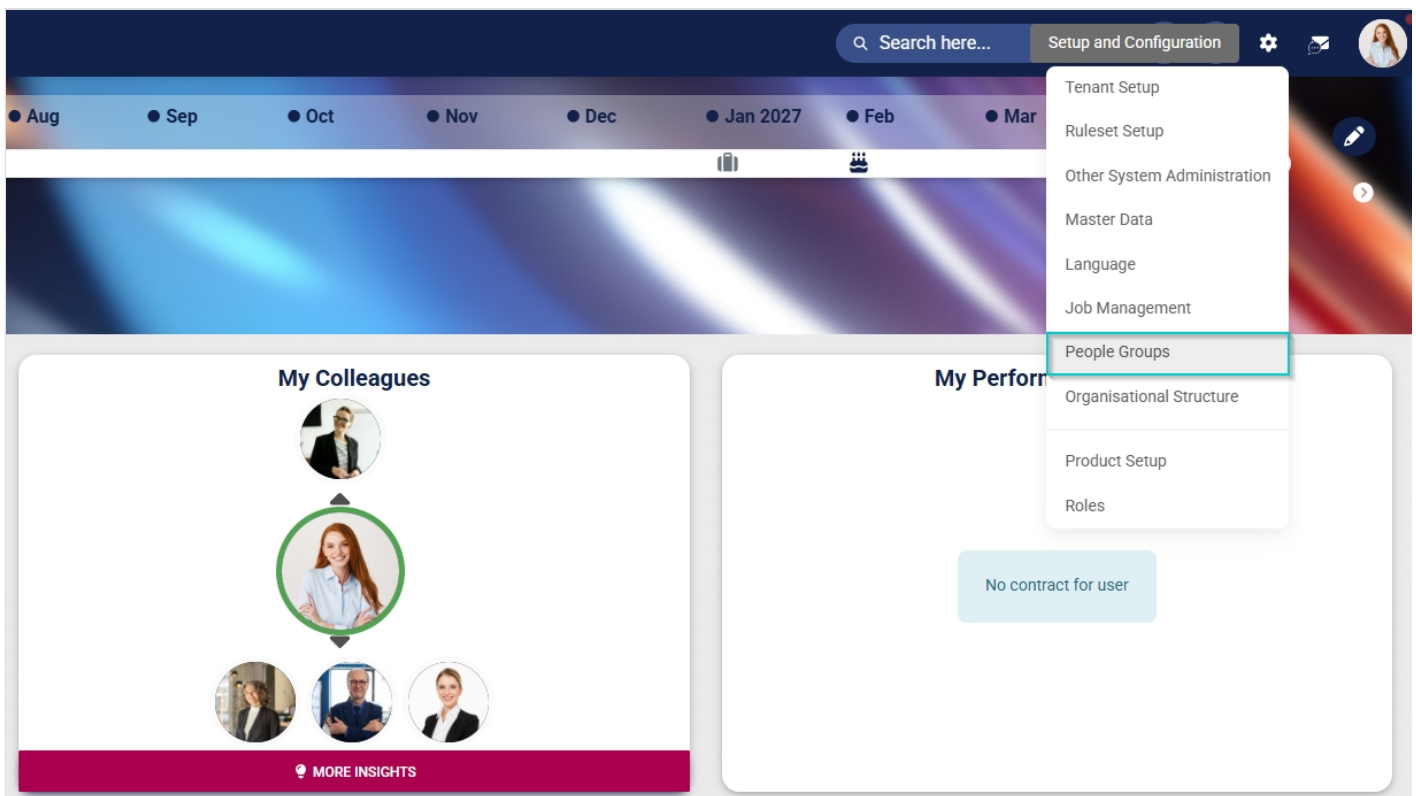


Create people groups for facilitators

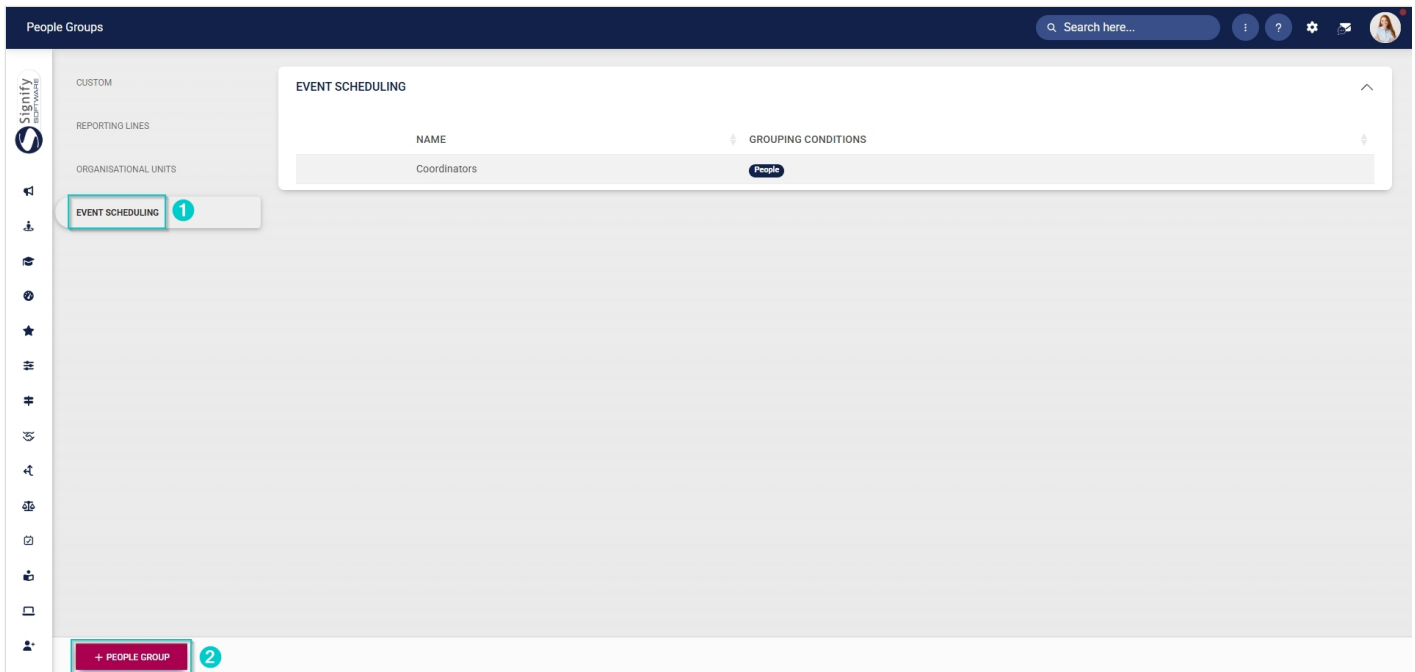
- Click the **gear icon** to access the **Setup and Configuration** menu.



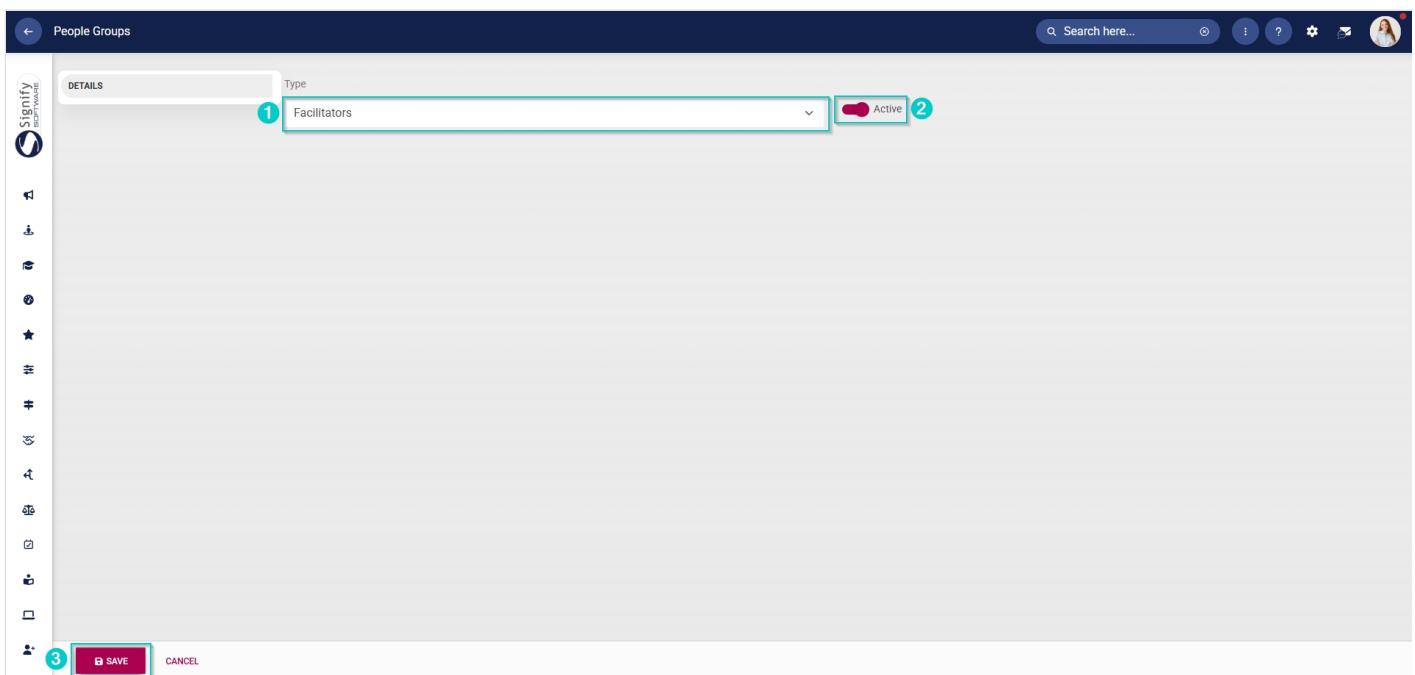
- Click **People Groups**.



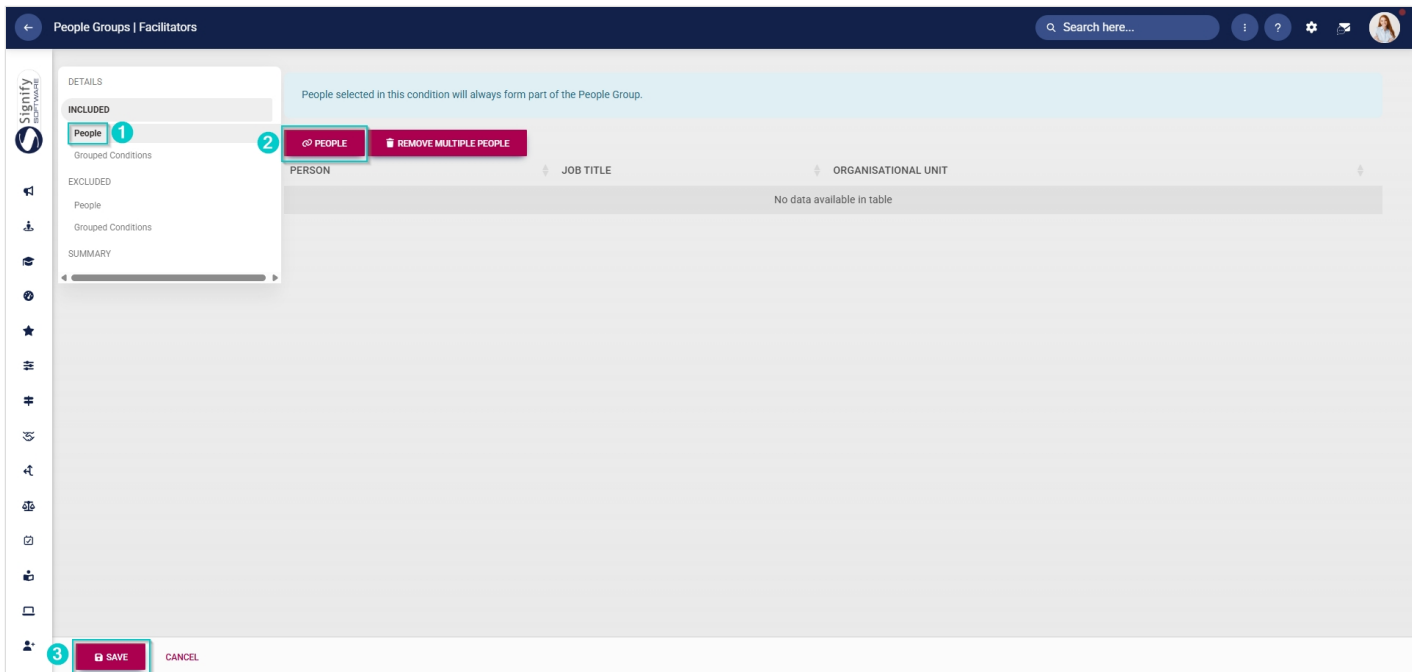
- In the **left-hand menu**, navigate to **Event Scheduling**, then click **+PEOPLE GROUP**.



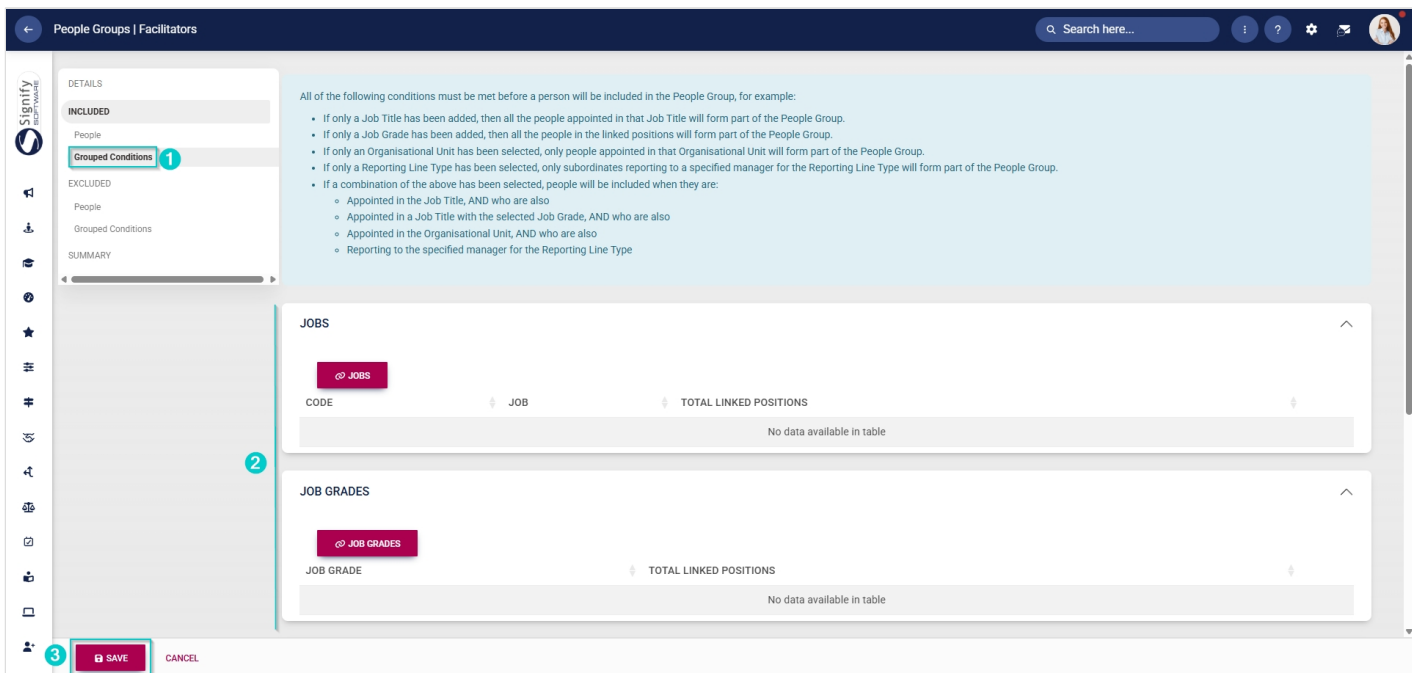
- From the **drop-down menu**, select **Facilitators**.
- Click the **toggle button** to set the status to **Active**.
- Click **SAVE** when you are finished or click **CANCEL** to discard your edits.



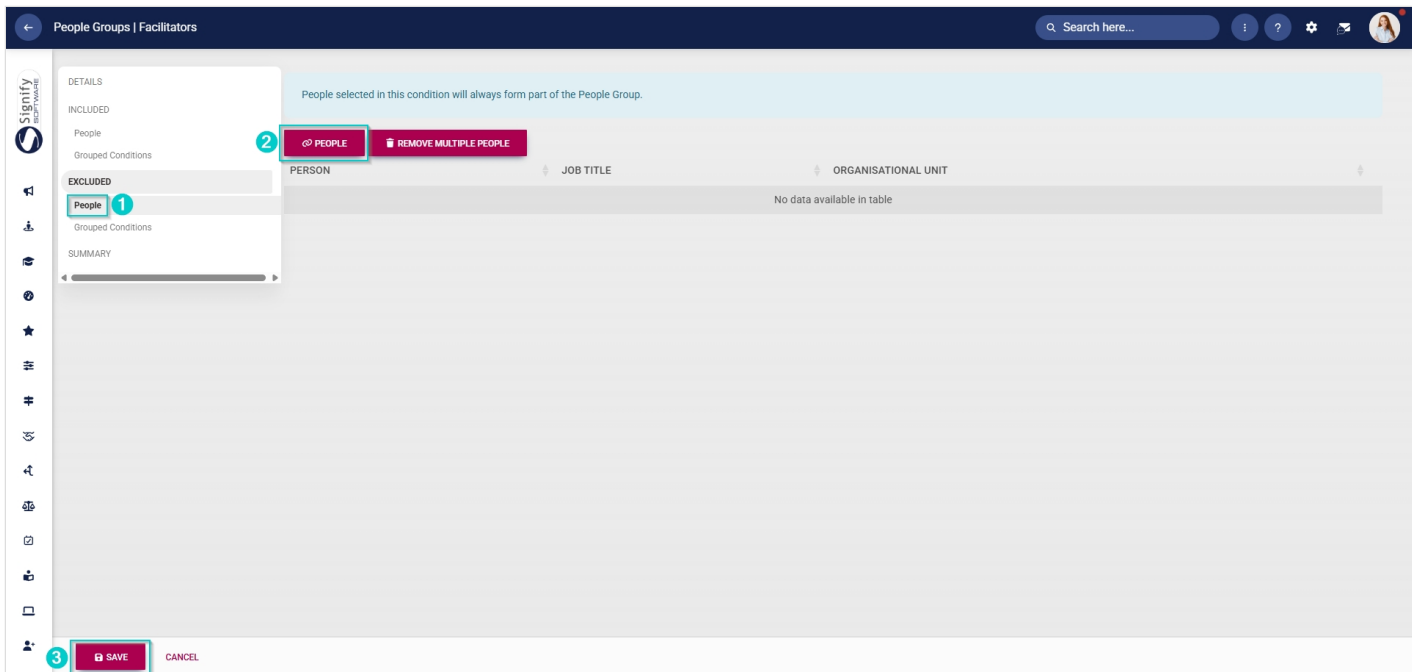
- Once the people group for facilitators has been created, you can select the people to add to it. In the **left-hand menu**, click to navigate to the **Included** section.
 - Click **People** to include individuals, then click **PEOPLE**.
 - Select the people you would like to include.
 - Click **SAVE** when you are finished or click **CANCEL** to discard your edits.



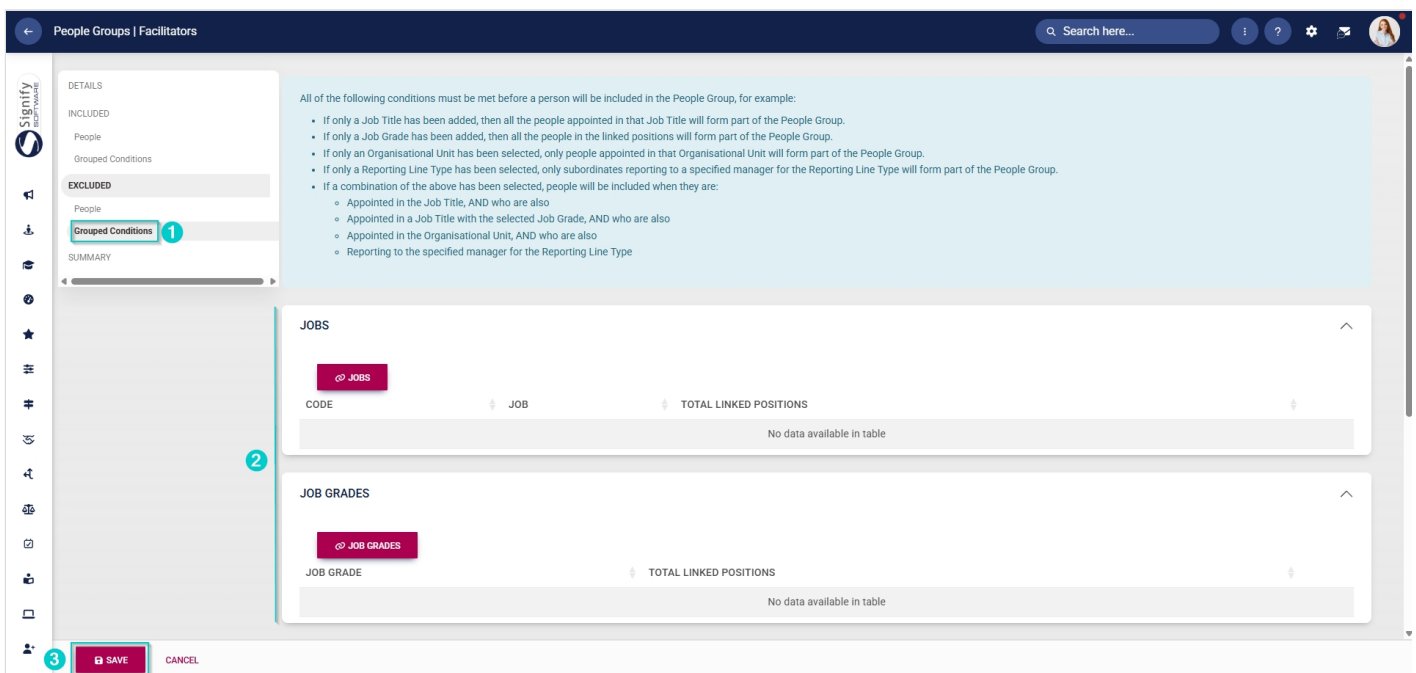
- Alternatively, click **Grouped Conditions** to add groups of people based on criteria such as job titles, organisational nodes, etc.
- Click **SAVE** when you are finished or click **CANCEL** to discard your edits.



- Alternatively, you can select the people to exclude from this group. In the **left-hand menu**, click to navigate to the **Excluded** section.
 - Click **People** to exclude individuals, then click **PEOPLE**.
 - Select the people you would like to exclude.
 - Click **SAVE** when you are finished or click **CANCEL** to discard your edits.

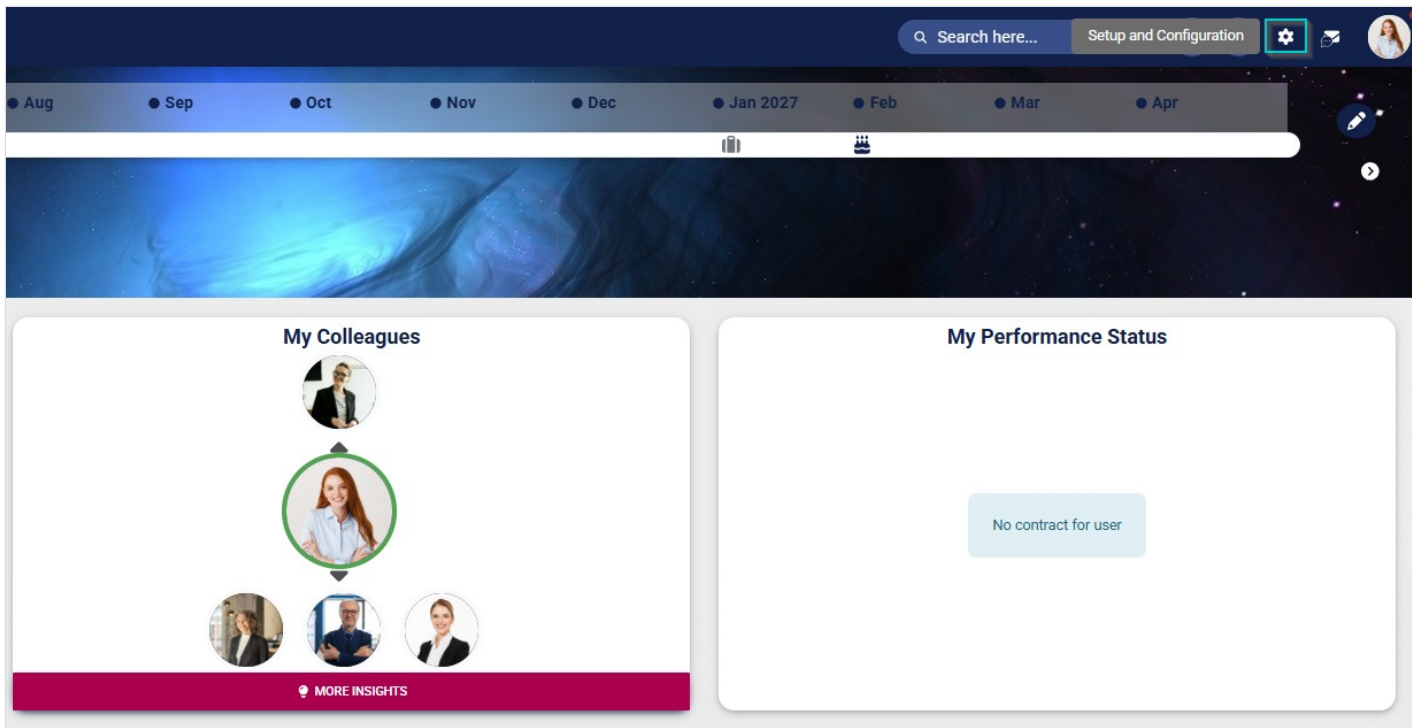


- Click **Grouped Conditions** to exclude groups of people based on criteria such as job titles, organisational nodes, etc.
- Click **SAVE** when you are finished or click **CANCEL** to discard your edits.

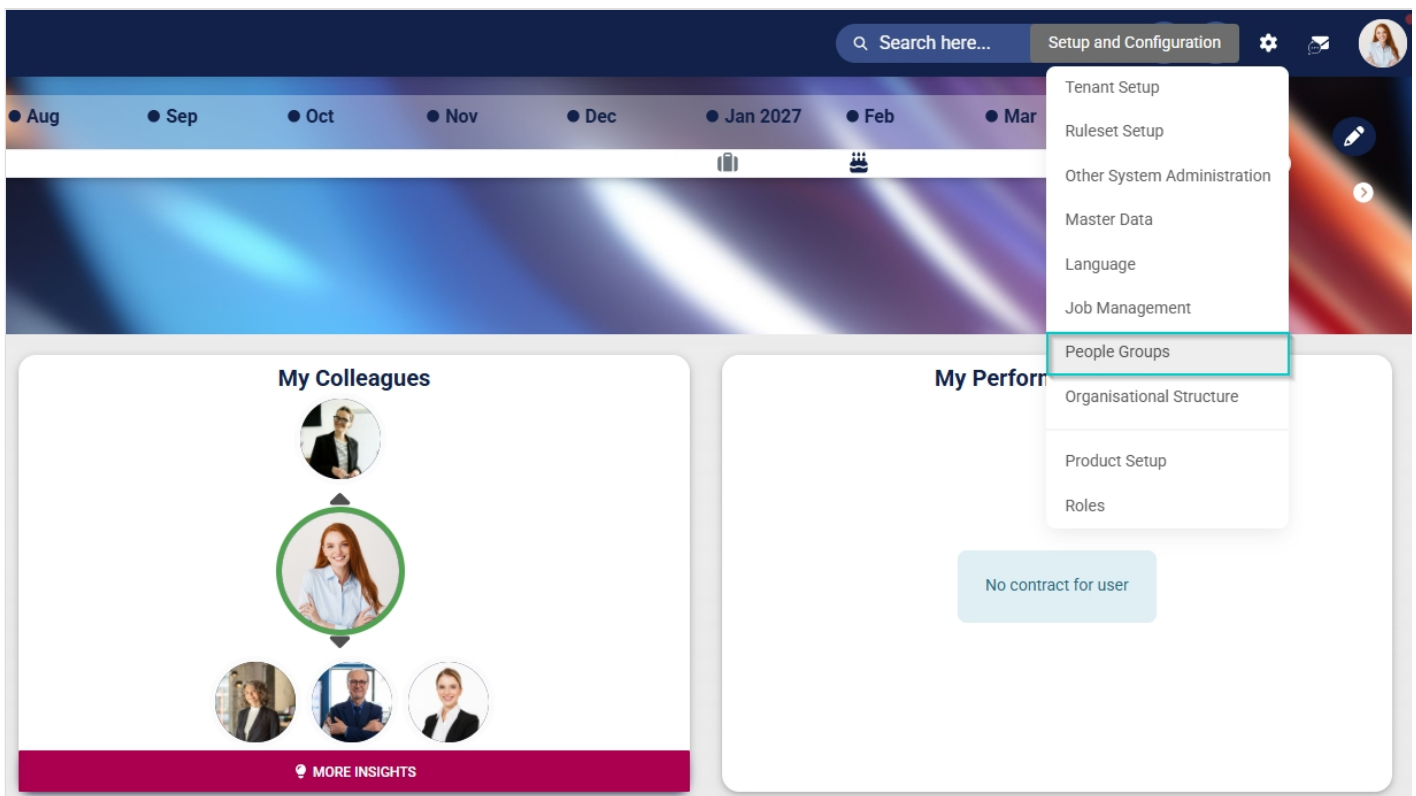


Create custom people groups for attendees

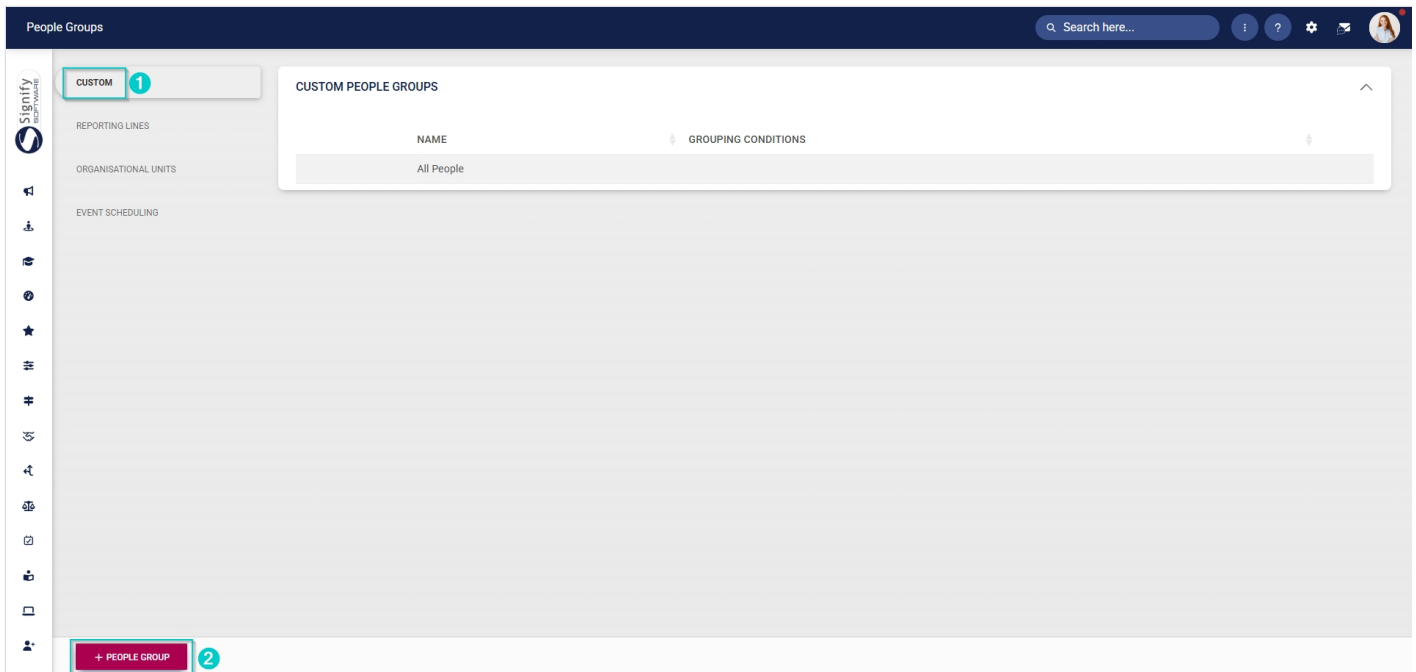
- Click the **gear icon** to access the **Setup and Configuration** menu.



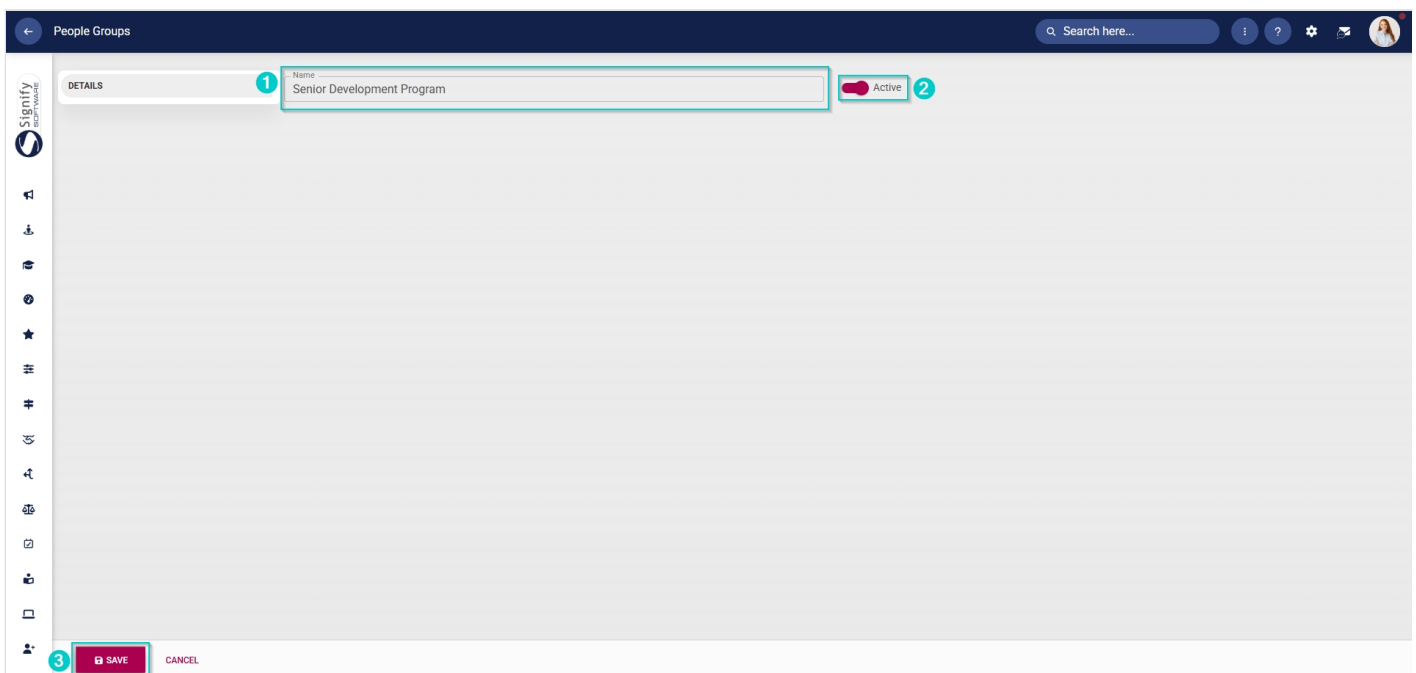
- Click **People Groups**.



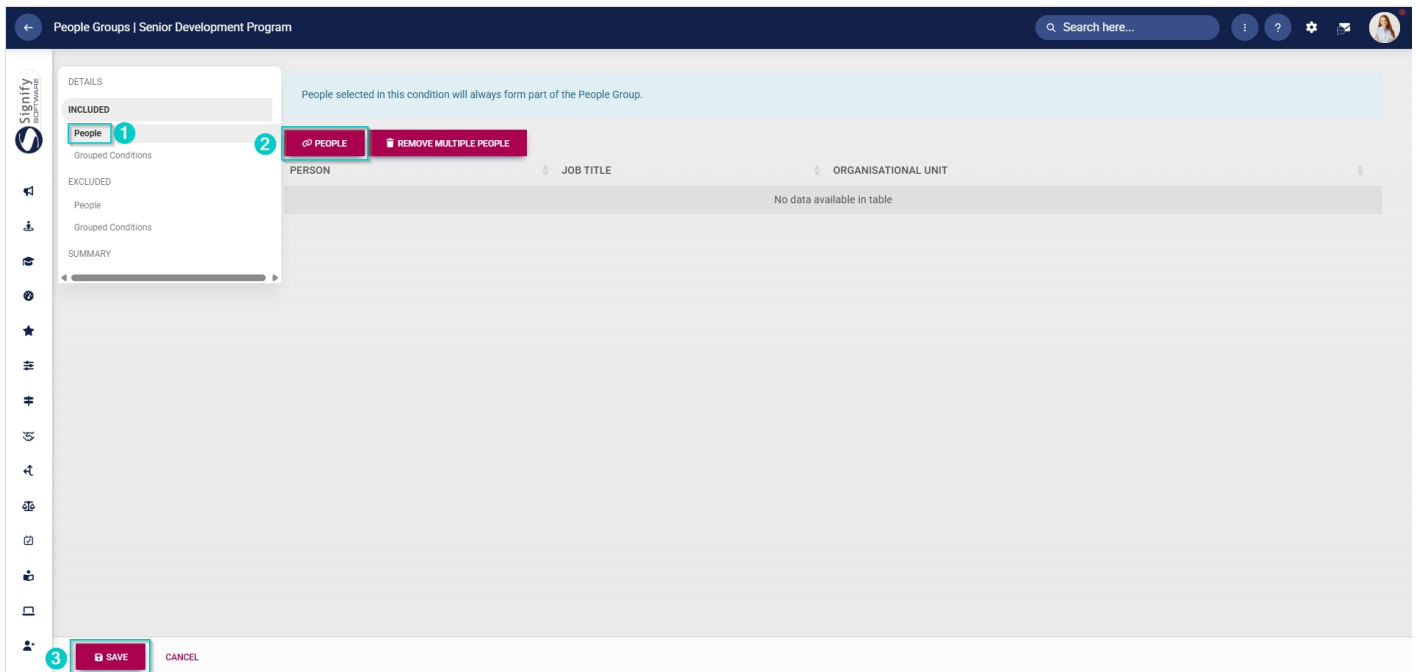
- In the **left-hand menu**, navigate to **Custom**, then click **+PEOPLE GROUP**.



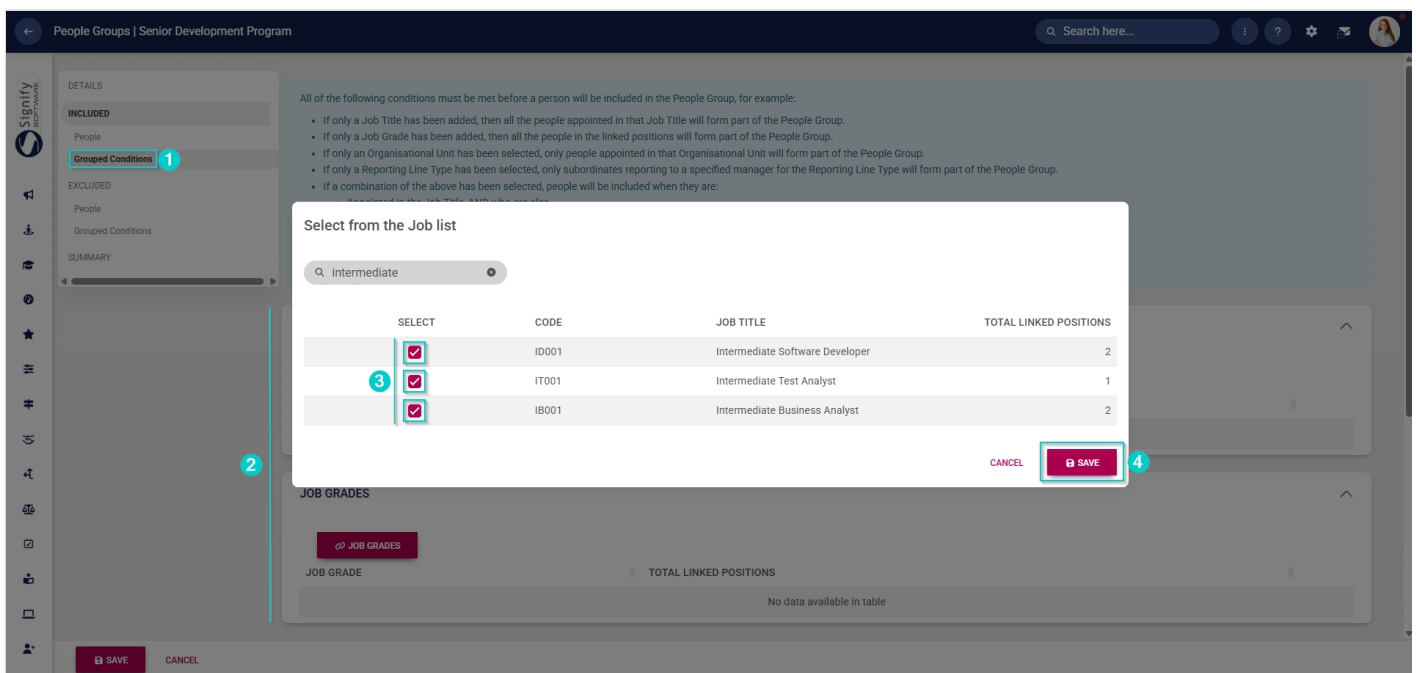
- Enter a descriptive name for the group of attendees.
- Click the **toggle button** to set the status to **Active**.
- Click **SAVE** when you are finished or click **CANCEL** to discard your edits.



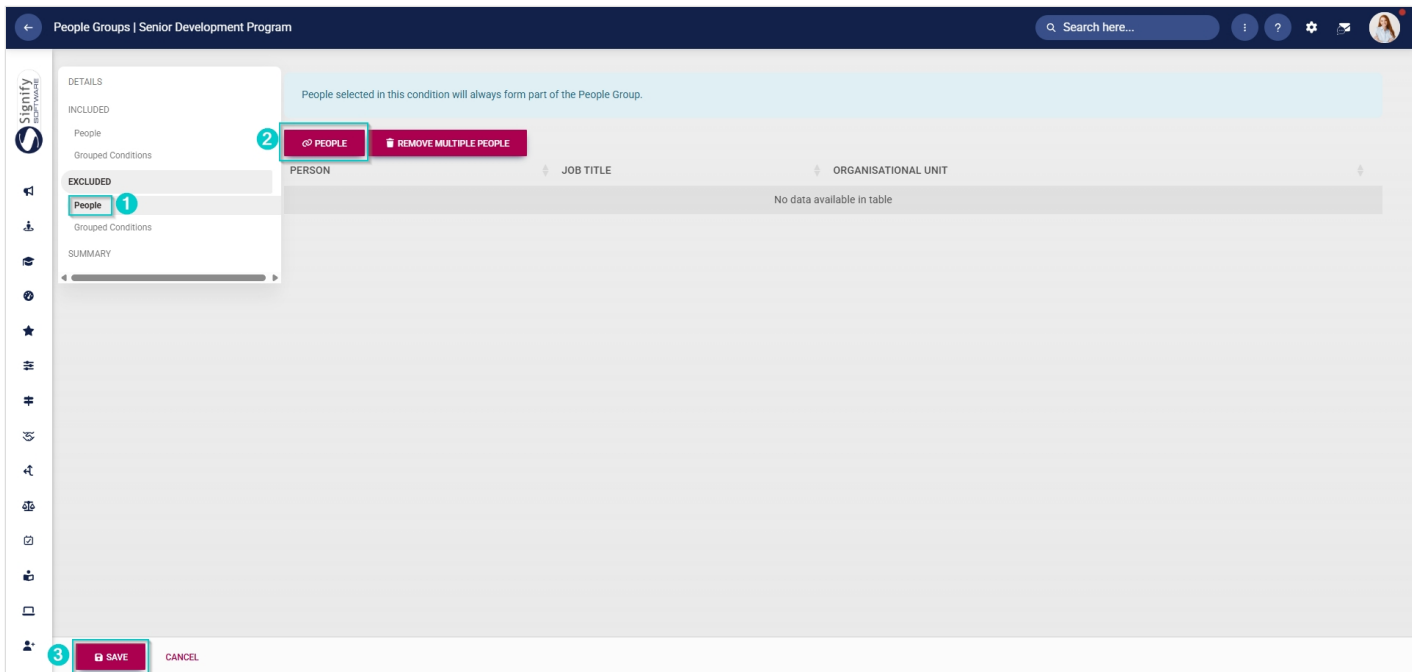
- Once the people group for attendees has been created, you can select the people to add to it. In the **left-hand menu**, click to navigate to the **Included** section.
 - Click **People** to add individuals, then click **PEOPLE**.
 - Select the people you would like to add.
 - Click **SAVE** when you are finished or click **CANCEL** to discard your edits.



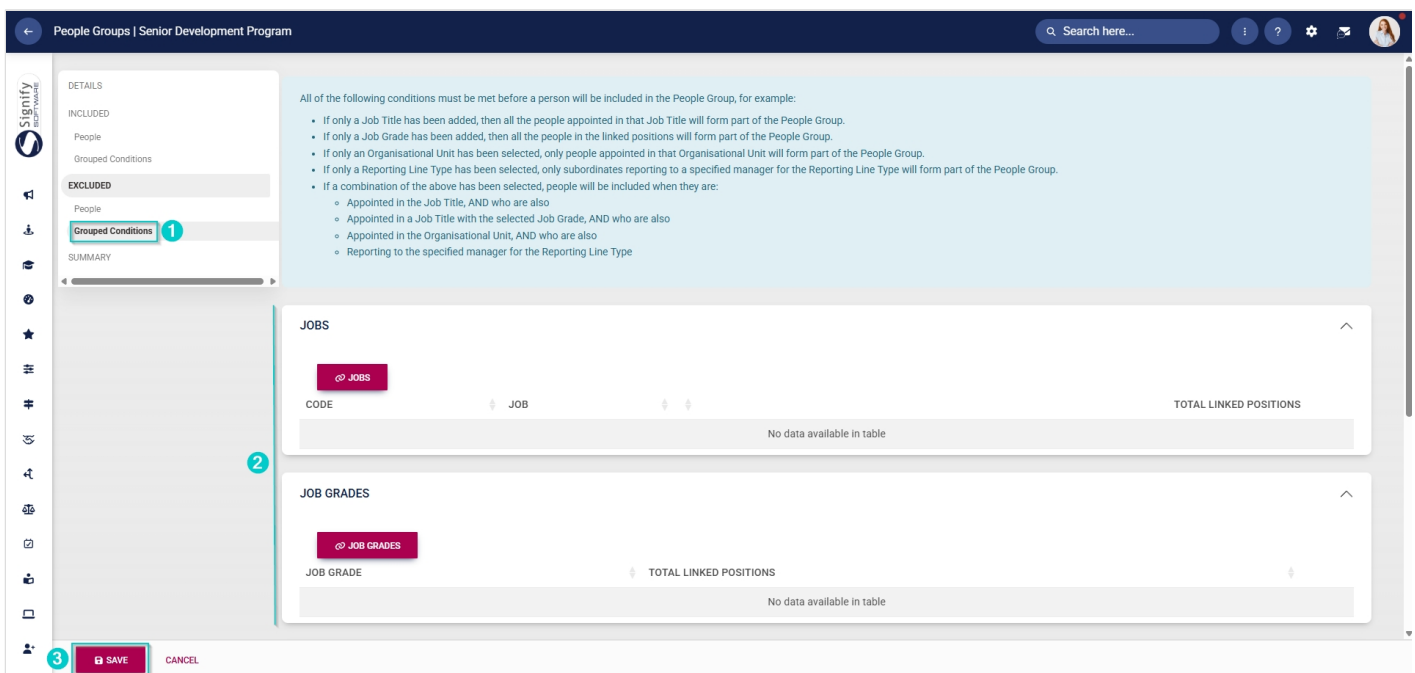
- Click **Grouped Conditions** to add groups of people based on criteria such as job titles, organisational nodes, etc.
- Click **SAVE** when you are finished or click **CANCEL** to discard your edits.



- Alternatively, you can select the people to exclude from this group. In the **left-hand menu**, click to navigate to the **Excluded** section.
 - Click **People** to exclude individuals, then click **PEOPLE**.
 - Select the people you would like to exclude.
 - Click **SAVE** when you are finished or click **CANCEL** to discard your edits.



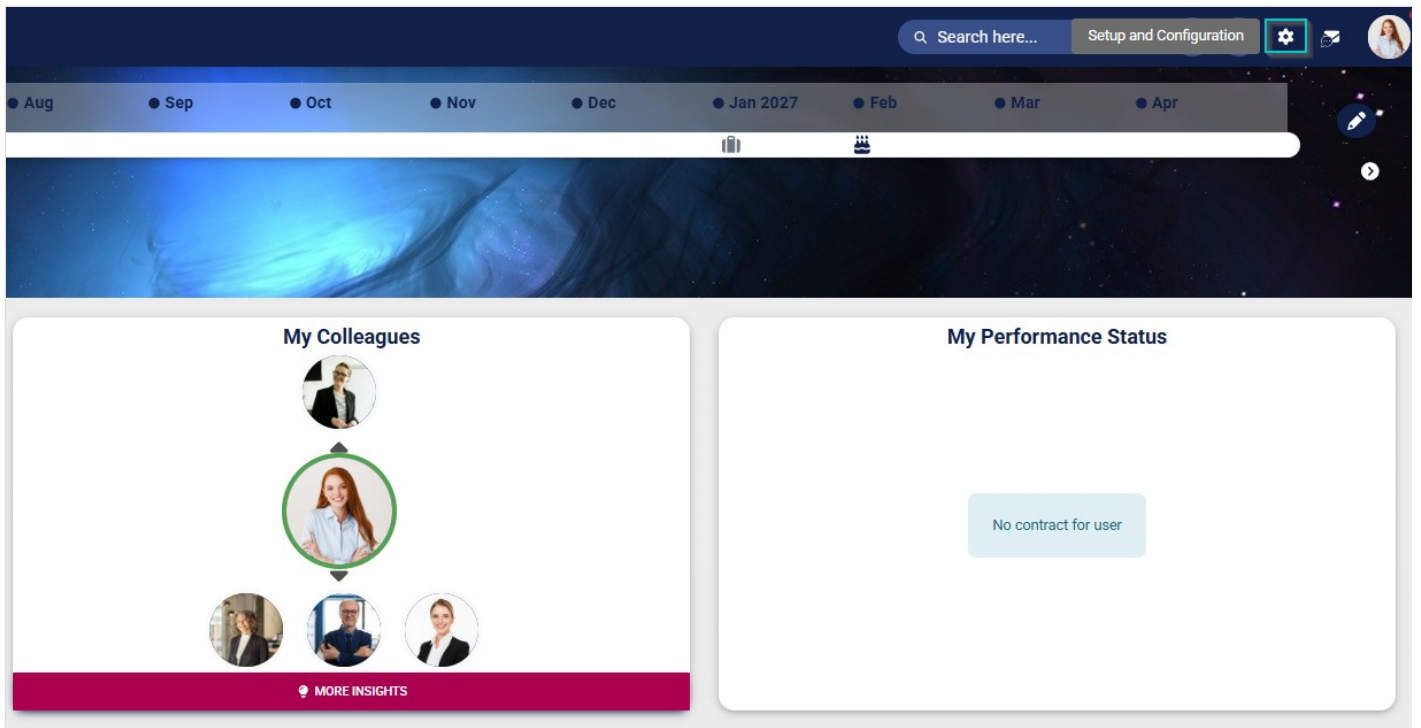
- Click **Grouped Conditions** to exclude groups of people based on criteria such as job titles, organisational nodes, etc.
- Click **SAVE** when you are finished or click **CANCEL** to discard your edits.



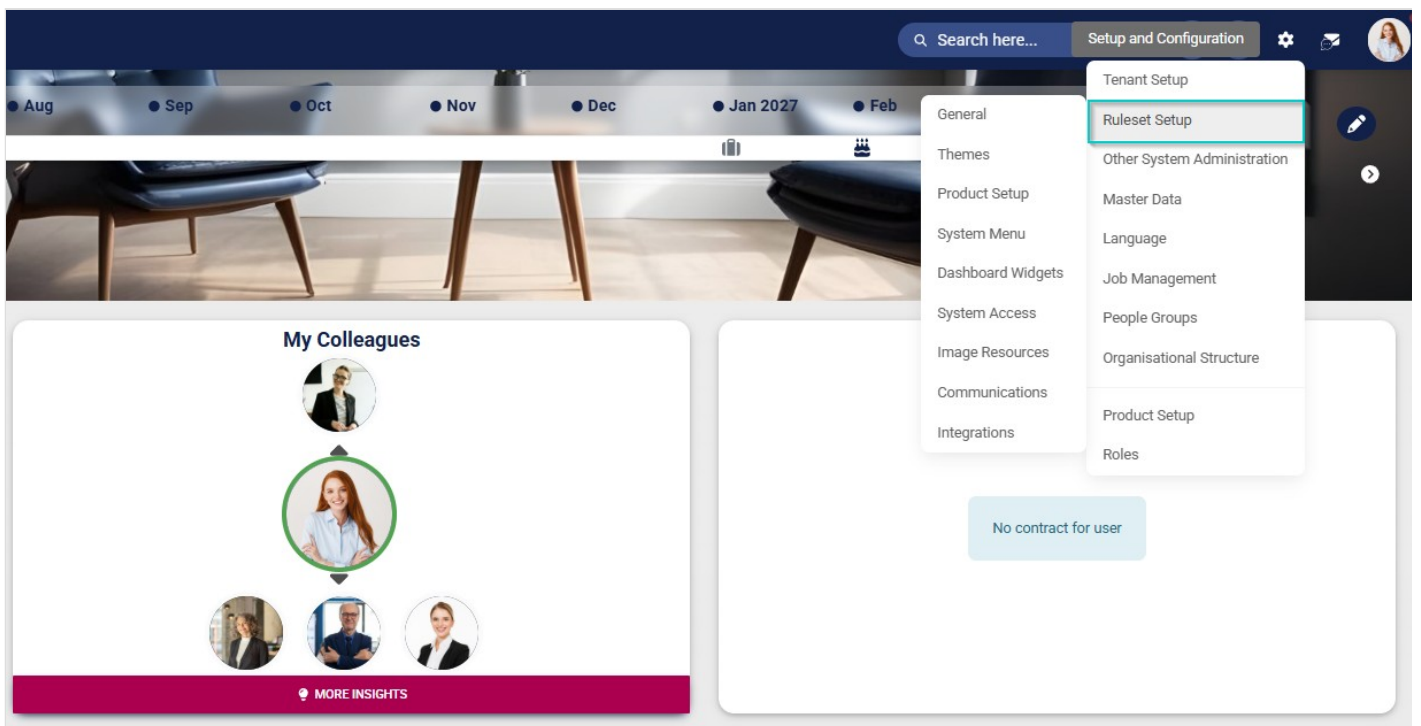
Set up approval workflows

Should an event require a manager's approval, an administrator can configure an **approval workflow**.

- Click the **gear icon** to access the **Setup and Configuration** menu.



- Click **Ruleset Setup**.



- Select the **ruleset** you would like to update.

Ruleset

Search here...

Signify SOFTWARE

<

- Navigate to the **Products** tab.

Ruleset | Signify Documentation

GENERAL

THEMES

PRODUCTS

SYSTEM MENU

DASHBOARD WIDGETS

SYSTEM ACCESS

COMMUN

People Management

Job Management

Report Builder

Performance Management

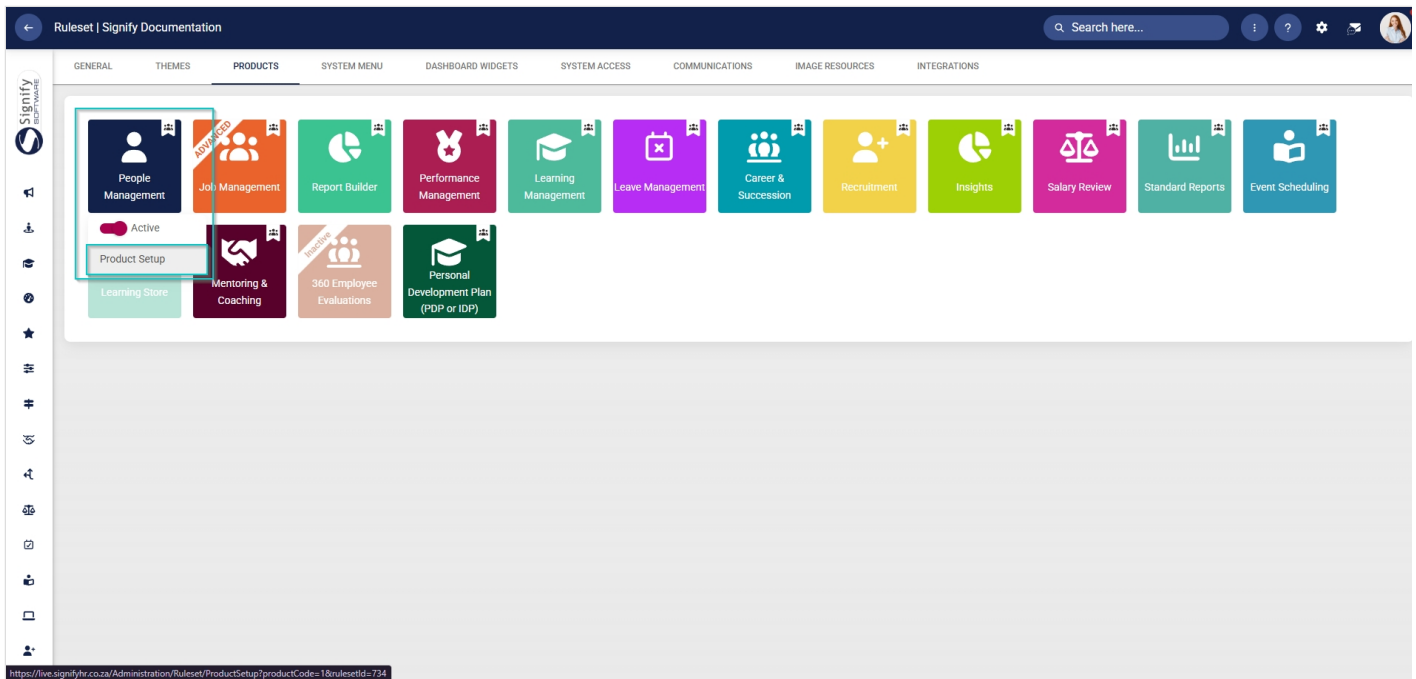
Learning Management

Leave Management

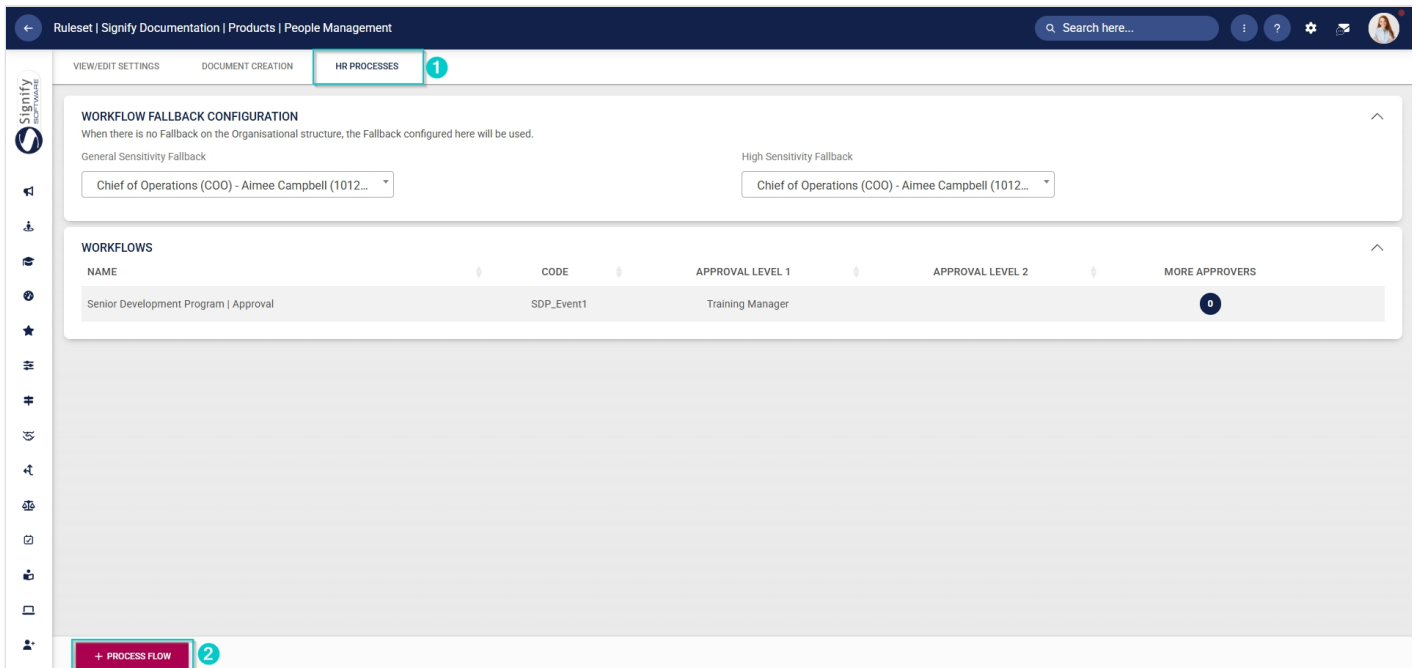
360 Employee Evaluations

Personal Development Plan (PDP or IDP)

- Click on the **People Management** product card, then click **Product Setup**.



- Navigate to the **HR Processes** tab, then click **+PROCESS FLOW**.



- Enter the **name** and the **code** for the process flow.
- Select the **workflow sensitivity fallback** from the **drop-down menu**.

ADD A PROCESS FLOW

DETAILS

Name * 1 ✖ Code * 2 ✖

The field name should align with the corresponding process flow. This code is used by SigniBot (or external systems) to link the corresponding process flow.

WORKFLOW FALLBACK

If one of the selected approval levels do not have a person linked to it, the missing person will be replaced with the workflow that is set on each organisational structure of the workflow originator.

Workflow Sensitivity Fallback 3

General Sensitivity Fallback

APPROVAL LEVELS

Select one of the options (Reporting Line or Position Title) below for each of the approval levels.

LEVEL 1

Reporting Line 1 Position Title 2

☒ Line Manager ☐ Select an option

Special Instructions to person actioning this step

Action Button Text

Approve / Decline

This is the text that will be displayed on the Action buttons

labels.postApprovalProcess

Not applicable

+

- From the **drop-down menu**, select the **reporting line** associated with the manager responsible for this approval workflow.

ADD A PROCESS FLOW

DETAILS

Name * 1 ✖ Code * 2 ✖

The field name should align with the corresponding process flow. This code is used by SigniBot (or external systems) to link the corresponding process flow.

WORKFLOW FALLBACK

If one of the selected approval levels do not have a person linked to it, the missing person will be replaced with the workflow that is set on each organisational structure of the workflow originator.

Workflow Sensitivity Fallback

General Sensitivity Fallback

APPROVAL LEVELS

Select one of the options (Reporting Line or Position Title) below for each of the approval levels.

LEVEL 1

Reporting Line 1 Position Title 2

☒ Line Manager ☐ Select an option

Special Instructions to person actioning this step

Action Button Text

Approve / Decline

This is the text that will be displayed on the Action buttons

labels.postApprovalProcess

Not applicable

+

- If required, add **special instructions** which will be displayed once the manager receives training requests for this event.
- Using the **drop-down menu**, select the **text** to display on the **action buttons** on the training request.

ADD A PROCESS FLOW

DETAILS

Name * Code *

The field name should align with the corresponding process flow. This code is used by SigniBot (or external systems) to link the corresponding process flow.

WORKFLOW FALLBACK

If one of the selected approval levels do not have a person linked to it, the missing person will be replaced with the workflow that is set on each organisational structure of the workflow originator.

Workflow Sensitivity Fallback
General Sensitivity Fallback

APPROVAL LEVELS

Select one of the options (Reporting Line or Position Title) below for each of the approval levels.

LEVEL 1

Reporting Line ☐ Training Manager Position Title ☐ Select an option

Special Instructions to person actioning this step
Review the following training request, and approve or decline the employee's request. 1

Action Button Text
Approve / Decline 2
This is the text that will be displayed on the Action buttons

Labels.postApprovalProcess
Job Management

+ PROCESS FLOW

- Click **SAVE** when you are finished or click **CANCEL** to discard your edits.

ADD A PROCESS FLOW

DETAILS

Name * Senior Development Program | Approval Code * SDP_Event1

The field name should align with the corresponding process flow. This code is used by SigniBot (or external systems) to link the corresponding process flow.

WORKFLOW FALLBACK

If one of the selected approval levels do not have a person linked to it, the missing person will be replaced with the workflow that is set on each organisational structure of the workflow originator.

Workflow Sensitivity Fallback
General Sensitivity Fallback

APPROVAL LEVELS

Select one of the options (Reporting Line or Position Title) below for each of the approval levels.

LEVEL 1

Reporting Line ☐ Training Manager Position Title ☐ Select an option

Special Instructions to person actioning this step
Review the following training request, and approve or decline the employee's request.

Action Button Text
Approve / Decline
This is the text that will be displayed on the Action buttons

Post-approval process
Not applicable
This action will execute upon approval of this step

CANCEL SAVE

- The new workflow will be displayed in the **Workflows** table.

Ruleset | Signify Documentation | Products | People Management

VIEW/EDIT SETTINGS DOCUMENT CREATION HR PROCESSES

WORKFLOW FALLBACK CONFIGURATION

When there is no Fallback on the Organisational structure, the Fallback configured here will be used.

General Sensitivity Fallback: Chief of Operations (COO) (5a2e7593)

High Sensitivity Fallback: Chief of Operations (COO) (5a2e7593)

WORKFLOWS

NAME	CODE	APPROVAL LEVEL 1	APPROVAL LEVEL 2	MORE APPROVERS
Senior Development Program Approval	SDP_Event1	Training Manager		0

+ PROCESS FLOW

Create training interventions

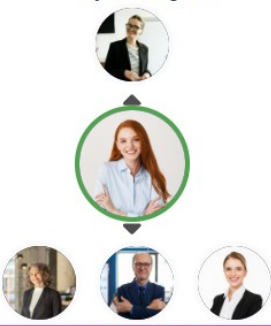
If an event should be logged to the attendee's training history, a **training intervention** should be linked to it. However, before creating the event, the training intervention needs to be added to the **Training Intervention Library**.

- Click the **gear icon** to access the **Setup and Configuration** menu.

Search here... Setup and Configuration

Aug Sep Oct Nov Dec Jan 2027 Feb Mar Apr

My Colleagues

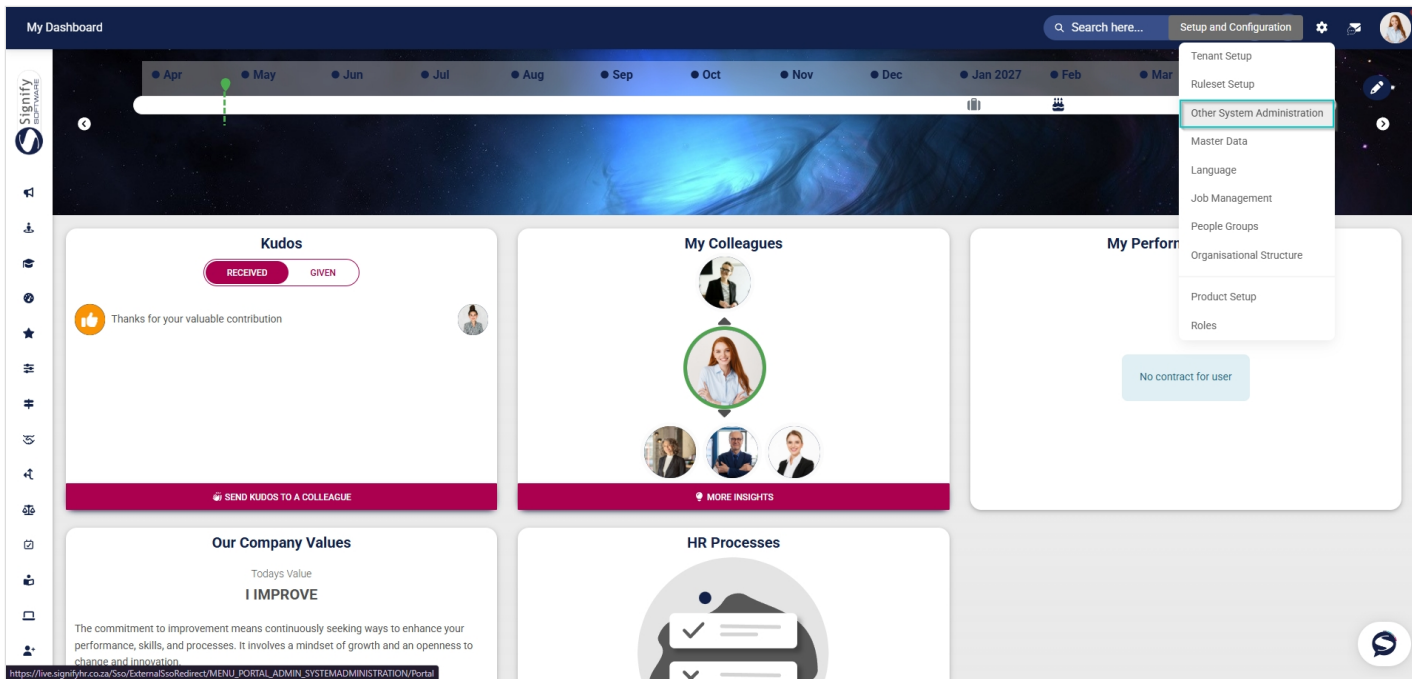


MORE INSIGHTS

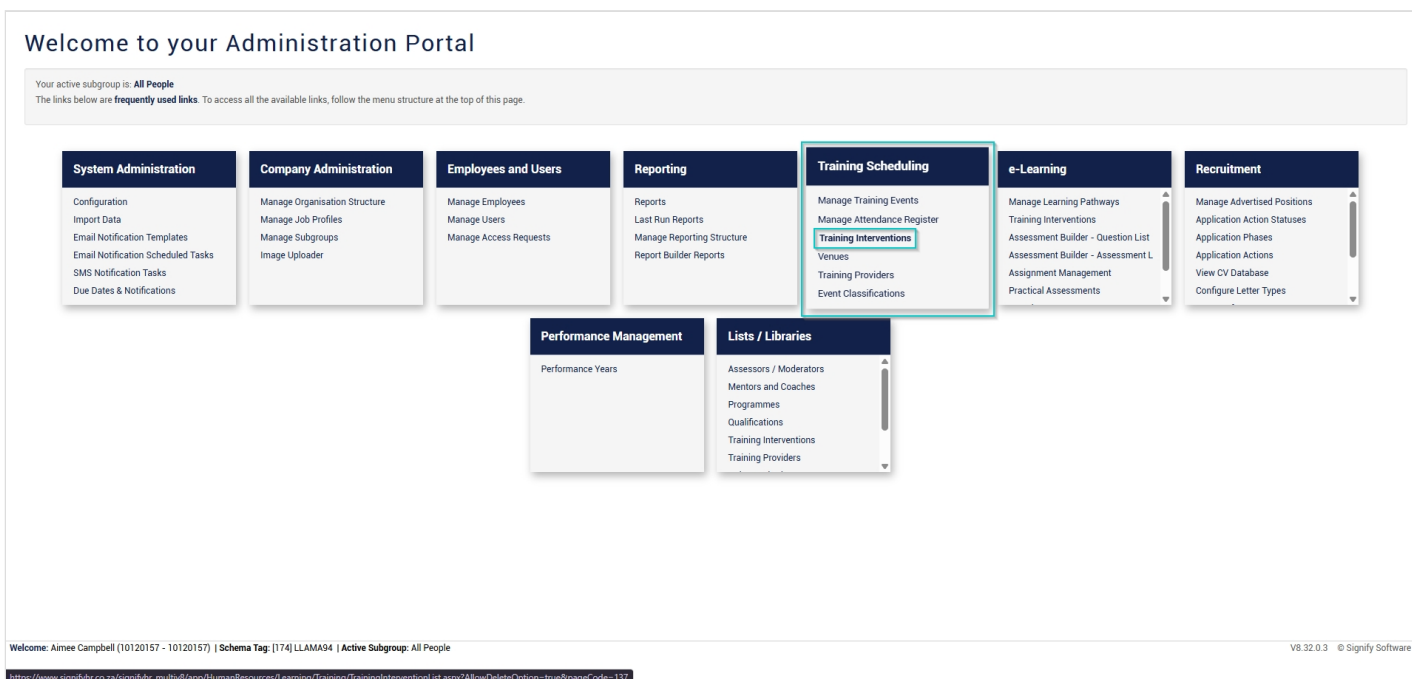
My Performance Status

No contract for user

- Click **Other System Administration**.



- In the new tab that opens, click **Training Interventions** in the **Training Scheduling** block.



- The **Training Intervention Library** will open in a new tab. To add a new training intervention, click **ADD**.

Learning Type • 1

Classroom

Nature of Learning • 2

Internal

Training Classification • 3

Local Training

Legislative First Category

Legislative Second Category

Mobile Application Template

The template contains a transcript and is viewed on the mobile application when the attempt is completed and has been synced to the LMS from the mobile application

Is PIVOTAL Training

☐

Is Mandatory

☐

This is only for reporting purposes.

Hours

0

Automatic Certification

☐

SADA Accreditation

☐

Allow viewing of transcripts

☐

Only applicable to Assessment Pathway Step Type training interventions.
When selected, all transcripts can be viewed in a single view on an employee (Manage Employees -> Employee Development -> Assessment List)

Documentation Required

☐

Documentation needs to be uploaded when a learner record is created for this intervention.
Licence approval workflows will only be created when documentation is provided.

Exclude from Reports

☐

Only available on specific reports

Training Category • 4

E - Work-Integrated Learning

Sub Category

Skills Priority • 5

Other

Learnership options

Update mentor manually

☐

Only applicable when this training intervention forms part of a learnership's requirements.
When selected a mentor needs to be selected for this training intervention. If not selected, an employee's line manager will be their mentor on this training intervention.

For NGF aligned courses only

Welcome: Aimee Campbell (10120157 - 10120157) | Schema Tag: [174] LLAMA94 | Active Subgroup: All People

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- If required for compliance purposes, select when the learner record will expire.

Learner record expiry options

Please Note: The expiry details potentially have a system-wide impact and therefore it is crucial that the correct expiry information is captured. Some implications of an expired learner record is e.g. that a course is marked as outstanding on an employee's PDP or that a pathway is seen as not completed. The functionality exists to send expiry warning notifications.

A learner record created for this course never expires.

Learner records for this course expire

months after a learner has completed it.

months before the expiry date (called the advance warning period), the course will be re-opened and if a learner repeats the course again from the advance warning period onwards, he will receive a new learner record for this course. If the course is repeated before the advance warning period commences, the learner's existing learner record for this course is updated with the new results.

Expire all learner records completed before

(All learner records with an end date before (and including) this specified date, will be displayed as expired)

Printing of Certificates

When a Certificate template is selected, the administrator will always be able to print a Certificate via the Bulk Certificate Report.

When to print the Certificate

When they have been found competent

When they have completed the course

Who can print the Certificate?

Allow the learner to print the Certificate

Certificate Details

Certificate Template

Certificate Display Name

Training Intervention Image (300px x 200px)

SELECT IMAGE

CLEAR IMAGE

Badges

Show as Badge

☐

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- Configure certificate printing for the course (if required).

