Chapter 5: FAQs

FAQs for Managers and Employees

FAQs for Managers

How do I find the training requests that need my approval?

How do I find the training requests that need my approval?

Training requests can be found through the **HR Processes** widget on the **Dashboard** when it is enabled, or through the envelope icon in the **System Inbox**. From there, open the **HR Processes** module and review the requests waiting for your approval.

The employee’s manager is also notified by email when approval is required. The email contains a link to the training request on the **HR Processes** module.

What does it mean when a request is waiting for my approval?

What does it mean when a request is waiting for my approval?

It means an employee has submitted a booking request for an event that requires manager approval. The request is pending your review before the employee can attend.

What information do I get before I approve or decline a request?

What information do I get before I approve or decline a request?

The approval screen shows the event details, including the event name, start and end dates, and the session schedule. You can also add notes and upload files if needed.

Using the **REQUEST MORE INFO** button on the approval screen, you can ask the employee for additional information before approving or declining the request.

How do I approve or decline training requests?

How do I approve or decline training requests?

From the System Inbox, open the **HR Processes** module. Go to **Awaiting Your Approval**, and select **APPROVE/DECLINE** to process the request.

Once you approve the request, the employee may attend the event, and the booking is moved forward in the system. If you decline the request, the employee will not be approved for that event.

If the **HR Processes** widget is enabled on the **Dashboard,** you can navigate directly to the **HR Processes** module.

How do I view historical approval requests I handled before?

How do I view historical approval requests I handled before?

Historical approvals can be accessed from the left-hand menu in the **HR Processes** module.

Do I need to be an Event Scheduling administrator to approve requests?

Do I need to be an Event Scheduling administrator to approve requests?

No – a line manager with the relevant managerial rights can handle manager approvals without being a system administrator. Some events require manager approval, some require administrator approval, and some may require both.

Can an administrator override my decision?

Can an administrator override my decision?

Yes, Event Scheduling administrators can override manager approvals.

Can I attach notes or supporting documents to my approval decision?

Can I attach notes or supporting documents to my approval decision?

Yes, the approval screen allows the manager to add notes about the request. Additionally, managers can upload files from their devices in the approval pop-up window.

What if the employee has already booked something else at the same time?

What if the employee has already booked something else at the same time?

The system warns employees about conflicting bookings when they try to register for a new event. This suggests that you should review the request carefully to check for timing conflicts.

Can I book employees onto events myself?

Can I book employees onto events myself?

Yes, managers can book employees from specified people groups onto events.

Can I view attendance or completion status for my team after the event?

Can I view attendance or completion status for my team after the event?

If a manager has the required access rights, they can pull an attendance report for an event. Additionally, a completion and compliance report can be pulled once an event is completed.

FAQs for Employees

How do I find events that I can book onto?

How do I find events that I can book onto?

Employees can access available events through the Calendar View or List View in the **Event Scheduling** module. They can view upcoming events, session dates, event details, and booking availability directly from these views.

Why can I see some events but not others?

Why can I see some events but not others?

Employees only see events they have been linked to, events that are open for booking, or events they already have access to through configured booking permissions.

Why can’t I book onto a specific event?

Why can’t I book onto a specific event?

There are several possible reasons:

- The event may require manager approval, administrator approval, or both.
- Booking deadlines may have passed.
- The event could already be full. If there is an active waitlist with available spots, you will be added to it.
- The event may not be available to your people group.

What happens after I request to book onto an event?

What happens after I request to book onto an event?

Depending on the event configuration, your booking may either be confirmed immediately or routed for approval. If approval is required, the request will be sent to your manager, an Event Scheduling administrator, or both. You can view the event details on the Calendar View and download any available documents.

How do I know whether my booking has been approved?

How do I know whether my booking has been approved?

Email notifications are used throughout the booking and approval process. You will receive an email notifying you that the manager has approved or declined your booking request. Additionally, you can view the booking status in the **Event Scheduling** module.

Can I cancel or reschedule my own booking if I can no longer attend?

Can I cancel or reschedule my own booking if I can no longer attend?

Yes. Employees can use the **CANCEL BOOKING** option from the event details screen, or click **MODIFY BOOKING** to choose another slot (if available).

What happens if I try to book onto two overlapping events?

What happens if I try to book onto two overlapping events?

The system warns you when an event overlaps with another booking in your calendar. When this happens, you must either cancel the conflicting booking or select a different event timeslot.

Can I book onto more than one event at the same time?

Can I book onto more than one event at the same time?

Yes. On the Calendar View, there is a **BOOK MYSELF ON MULTIPLE EVENTS** option that allows employees to submit bookings for multiple events.

How do I get more information about an event?

How do I get more information about an event?

The event details include venue and session information. Events can take place in physical venues, rooms, or via virtual channels such as Teams or Zoom. The session start and end times, as well as the event date, are also included in the event details. For more information, you can contact the event coordinator.

What documents can I download from an event?

What documents can I download from an event?

Employees can download attendee-facing documents that administrators upload to the event. Documents such as venue directions, training materials, event programs, and other informative materials can be downloaded from the event details section.

How is attendance recorded for an event?

How is attendance recorded for an event?

Attendance can be captured manually by administrators or through QR code scanning.

What is the difference between attendance, completion, and competency?

What is the difference between attendance, completion, and competency?

Attendance
Attendance refers to whether a learner or attendee was present for a scheduled training event or session. Attendance simply confirms participation in the event and does not indicate whether the learner successfully completed the training or demonstrated competency.

Completion
Completion status refers to the overall outcome of a learner’s participation in a training event or course. It indicates whether the learner successfully completed the event requirements and may include statuses such as Completed, Not Completed, Cancelled, or Rescheduled. Completion status focuses on the learner’s progress and outcome rather than just their presence.

Competency
Competency status refers to whether a learner has demonstrated the required level of knowledge, skill, or capability linked to the training intervention. Competency is usually assessed against defined criteria and may include statuses such as Competent, Not Yet Competent, or Not Applicable. Competency status measures ability and proficiency, not attendance or course completion alone.

FAQs for Administrators

What do I need to switch on before the Event Scheduling module works?

What do I need to switch on before the Event Scheduling module works?

The module must be activated in Ruleset Setup under the Products tab, and the **Event Scheduling** item must also be activated in the System Menu tab. The correct administrator permission must then be assigned to the relevant user.

Why can users still not see Event Scheduling after I activated the product?

Why can users still not see Event Scheduling after I activated the product?

The product activation alone is not enough. The **Event Scheduling** menu item must also be activated in the System Menu tab, and the user must have the appropriate permission assigned in **People Management**.

Where do I assign the Event Scheduling administrator role?

Where do I assign the Event Scheduling administrator role?

Open **People Management**, go to View/Edit People, edit the required person’s profile, open User Permissions, select System Modules Admin, and link the Event Scheduling role.

What master data should be prepared before I start creating events?

What master data should be prepared before I start creating events?

Administrators should prepare classifications, course types, categories, regions, venues, rooms, and motivations for booking in the **Master Data Library**.

Why do I need to set up venues before rooms?

Why do I need to set up venues before rooms?

Rooms are linked to venues, so venue master data must exist before rooms can be added.

Can I activate or deactivate master data items later?

Can I activate or deactivate master data items later?

Yes. The master data screens include toggle buttons that allow administrators to set items to Active or manage them as needed.

When should I create People Groups rather than select people one by one?

When should I create People Groups rather than select people one by one?

People Groups should be used when the audience needs to be managed as a defined group, such as coordinators, facilitators, or a custom attendee audience. This is more practical than building the audience from scratch each time.

Grouped Conditions is a way to include or exclude people based on criteria such as job titles or organisational nodes.

What happens if I add a People Group after I have already linked individual attendees?

What happens if I add a People Group after I have already linked individual attendees?

Adding a People Group replaces the list of individual attendees already added to the event. It is best to ensure those individual attendees are part of the People Group. This can be done by opening the Setup and Configuration menu, navigating to People Groups, and editing the People Group linked to the event.

How do I decide whether an event should be linked to a training intervention?

How do I decide whether an event should be linked to a training intervention?

If the event should create a learner record, link it to a training intervention from the **Training Intervention Library.** If a learner record is not required, use the Free text option.

Can I create an event without a training provider in master data?

Can I create an event without a training provider in master data?

Yes. If the provider does not exist in the **Master Data Library**, the administrator can enter a free-text provider name.

Can one event contain multiple sessions?

Can one event contain multiple sessions?

Yes. Events can have multiple sessions, and additional sessions can be added by copying an existing one.

Can multiple facilitators be assigned to one event?

Can multiple facilitators be assigned to one event?

Yes. When creating or editing an event, multiple facilitators can be selected.

Can Event Scheduling support both physical and virtual events?

Can Event Scheduling support both physical and virtual events?

Yes. Physical venues and rooms can be selected, and virtual channels such as Teams or Zoom can also be configured.

How do booking and cancellation deadlines work?

How do booking and cancellation deadlines work?

Administrators can set the number of days before the event during which bookings and cancellations are allowed, and choose whether non-working days are included.

Can I require approval before an attendee can book or attend?

Can I require approval before an attendee can book or attend?

Yes. Events can be configured to require administrator approval, manager approval, or both.

What is the practical difference between manager approval and administrator approval?

What is the practical difference between manager approval and administrator approval?

Manager approval sends the request to the employee’s training manager. Administrator approval allows an Event Scheduling administrator to approve the booking request. Event Scheduling administrators can override manager approvals.

How will managers know there is a request waiting for them?

How will managers know there is a request waiting for them?

When an employee makes an event booking, managers are notified by email. They can also access requests through the **HR Processes** widget on the Dashboard or through the System Inbox.

Where do I configure event notifications?

Where do I configure event notifications?

Open the Notifications section in the event setup. Email templates linked to **Event Scheduling** are listed there and can be activated or previewed.

Can I upload different documents for attendees and for facilitators?

Can I upload different documents for attendees and for facilitators?

Yes. Documents can be uploaded for attendees, and separate documents can be uploaded for facilitators or coordinators, with the latter not being visible to attendees.

How do I know whether an attendee is waiting for approval?

How do I know whether an attendee is waiting for approval?

In the Attendees section, the booking status indicates whether the attendee is awaiting approval from an administrator or a manager. Event Scheduling administrators can approve or decline requests by clicking on the status icons in the Attendees section.

How does attendance get recorded?

How does attendance get recorded?

Attendance can be updated manually by an administrator per session or via QR code scanning if that process is in use.

The attendance screen includes icons that allow the administrator to mark all attendees in a session at once.

What is the difference between attendance, overall completion, and competency status?

What is the difference between attendance, overall completion, and competency status?

Attendance records whether the person attended the session. Overall completion status records whether the event outcome was Completed, Not Completed, Rescheduled, or Cancelled. Competency status records whether the attendee is Competent, Not Yet Competent, or Not Applicable.

Can I export attendance and completion information?

Can I export attendance and completion information?

Yes. Export options are available for attendance registers and overall completion status.

How do costs work in Event Scheduling?

How do costs work in Event Scheduling?

Costing structures can be added to the event. Cost descriptions are linked through the training intervention, and then costs can be applied to the event and attendee records. Cost items can be configured as per-attendee, evenly distributed across attendees, or excluded for virtual attendees. Invoice reference numbers and invoice dates can be recorded in the costs-per-attendee area.

What does the Who Can Book tab control?

What does the Who Can Book tab control?

It controls whether the event appears on end-users’ calendars and who is allowed to book themselves on the event.

Options are provided that allow everyone to book, managers to book from specific people groups, or people from selected people groups to book themselves.

How do I know whether an event is visible to employees?

How do I know whether an event is visible to employees?

Visibility depends on the event status, booking configuration, and Who Can Book settings. The guide also indicates that confirmed events appear in Calendar View.