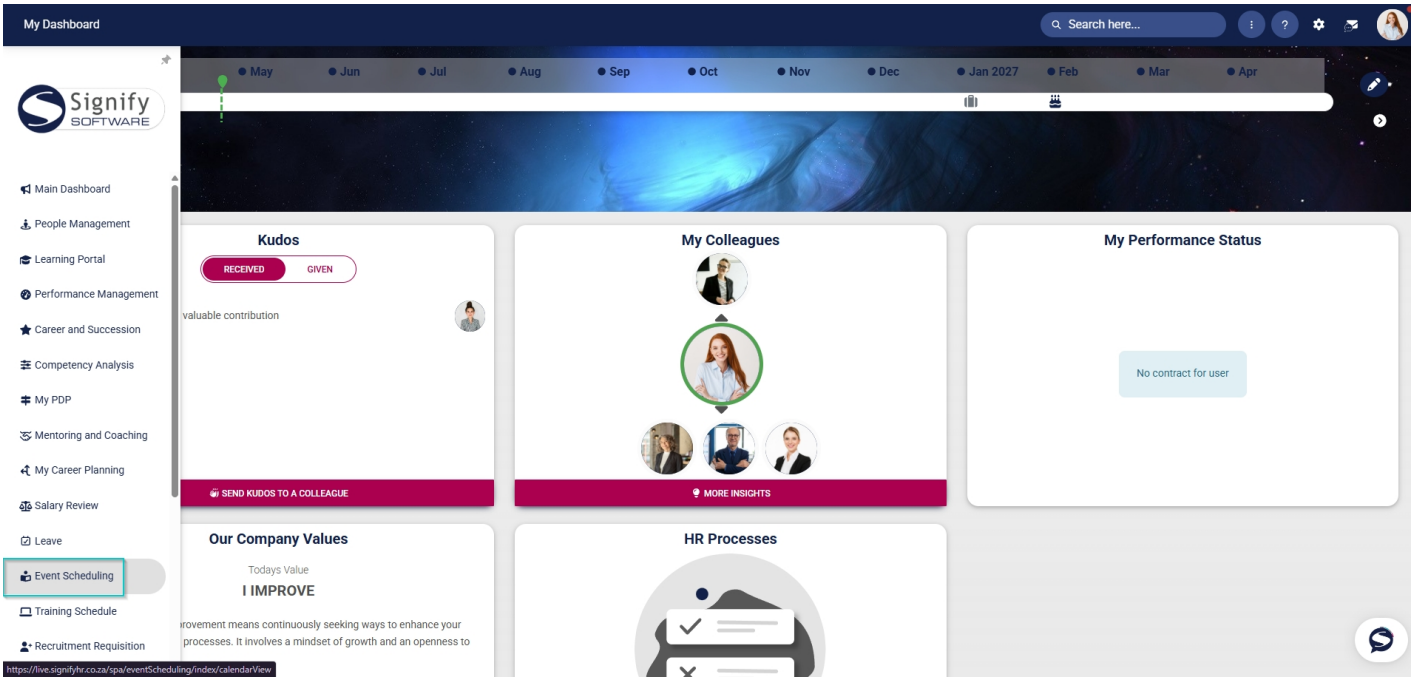
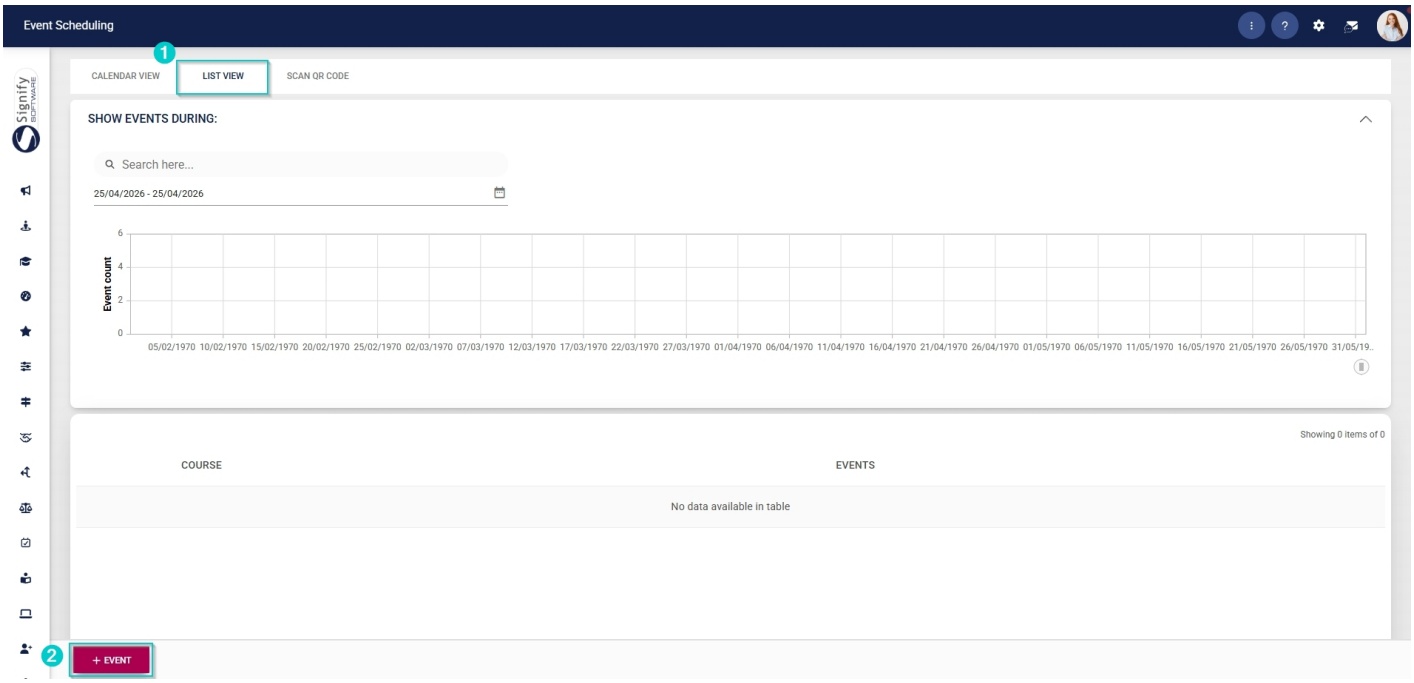
Add Event Details

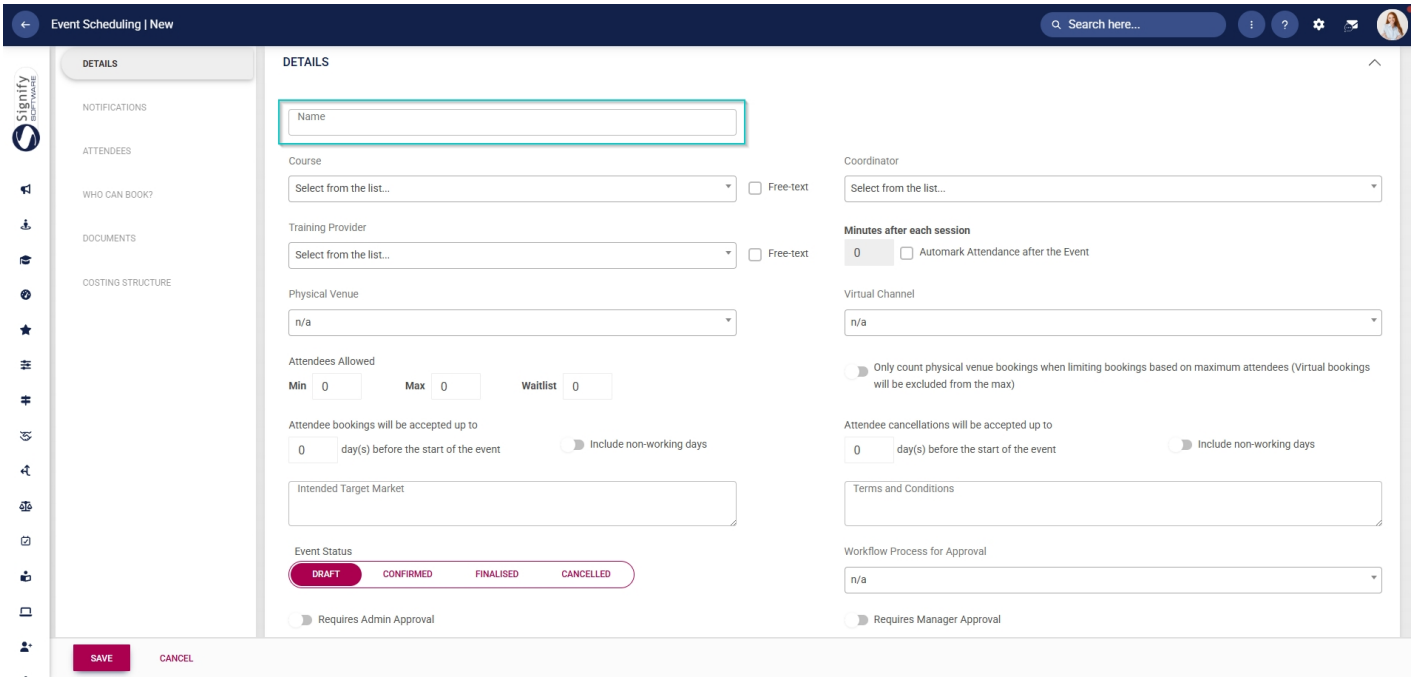
- Hover over the **sidebar** menu, then click **Event Scheduling**.



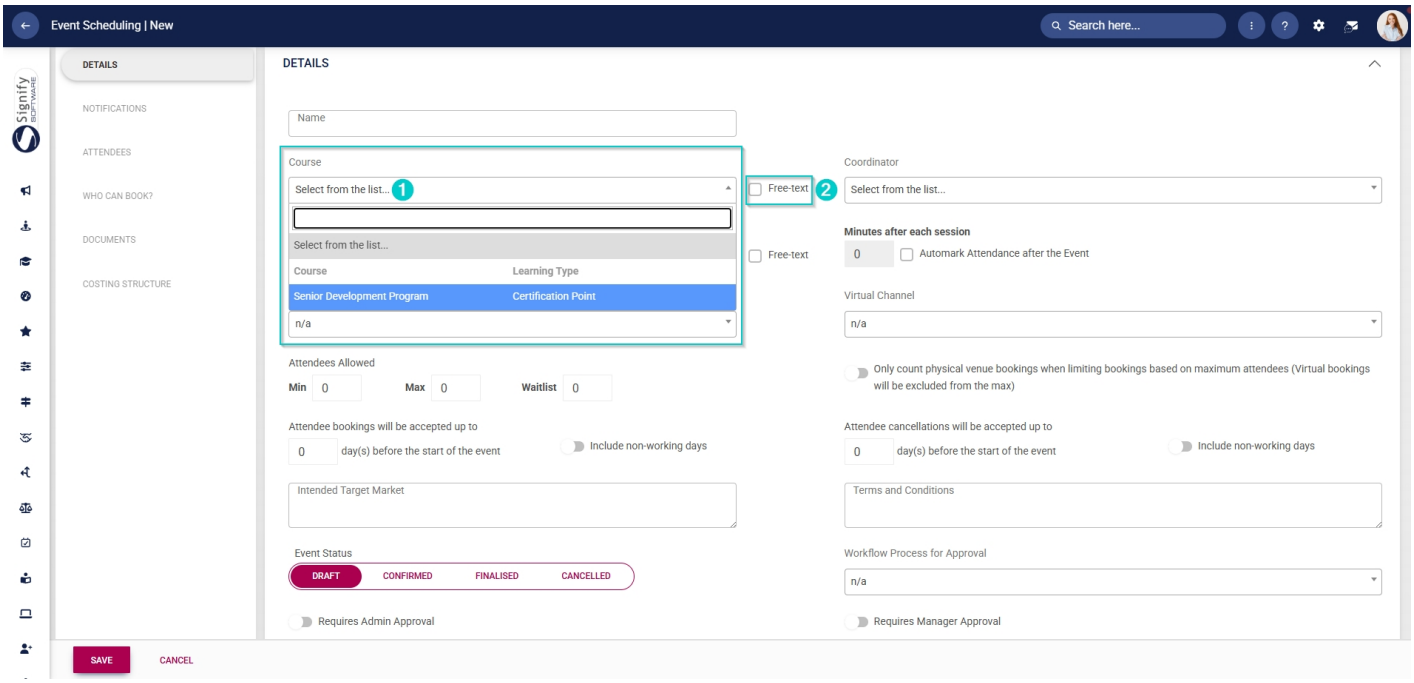
- Click to navigate to the **List View** tab, then click **+EVENT**.



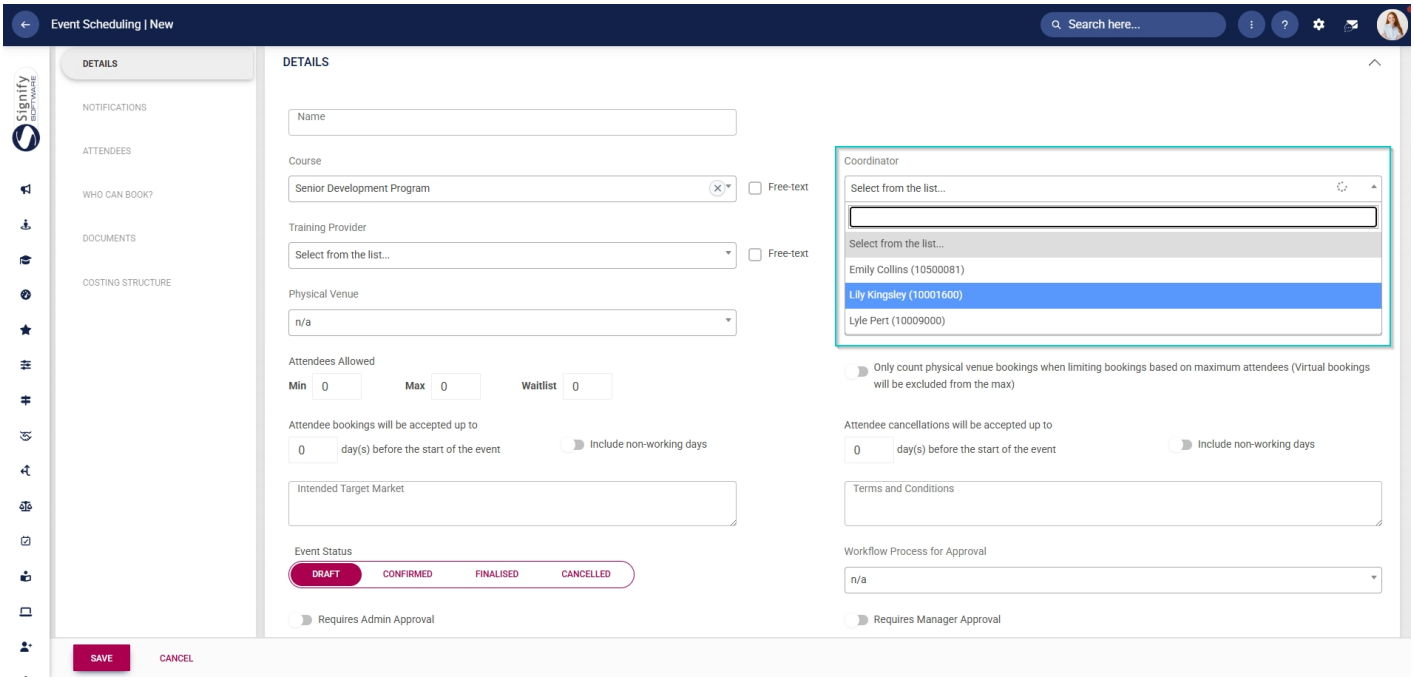
- Enter a **name** for the event.



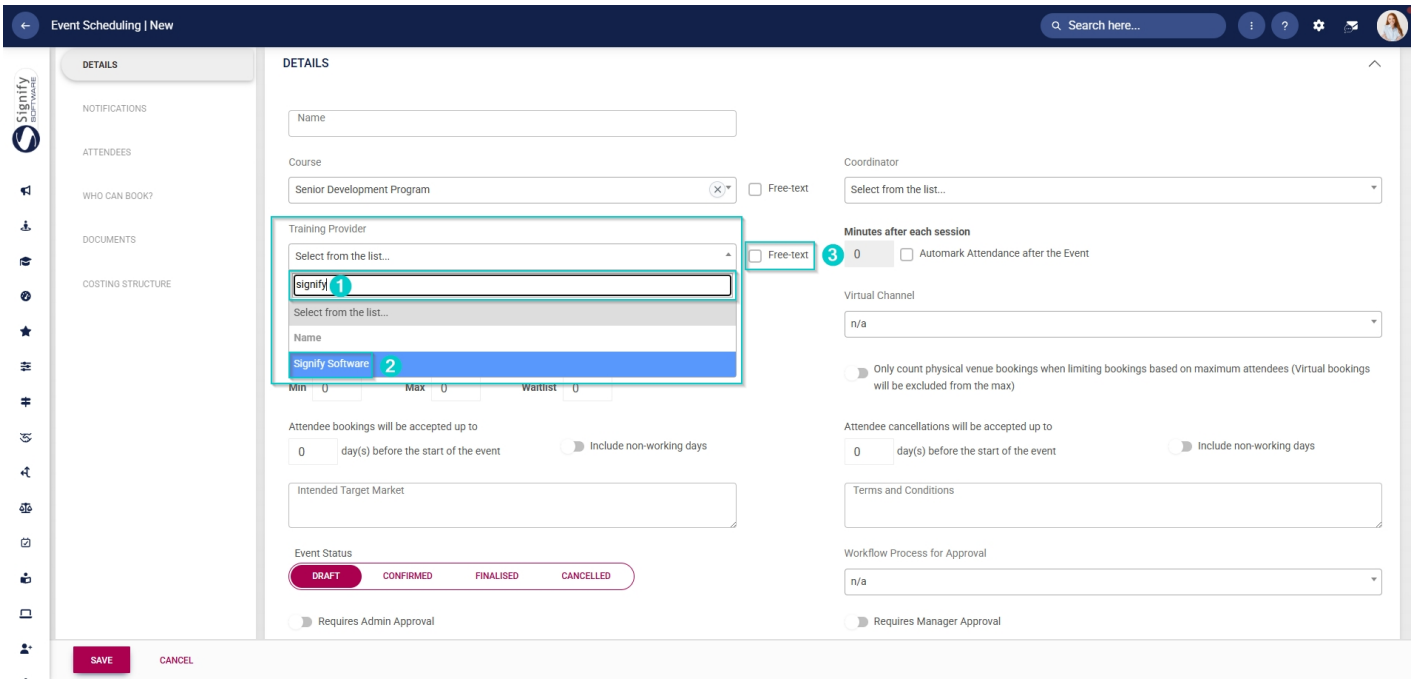
- To create a learner record for attendees, link a **training intervention** from the **Training Intervention Library** using the Course field. If a learner record should not be created, provide a name for the course and tick the **Free text checkbox**.



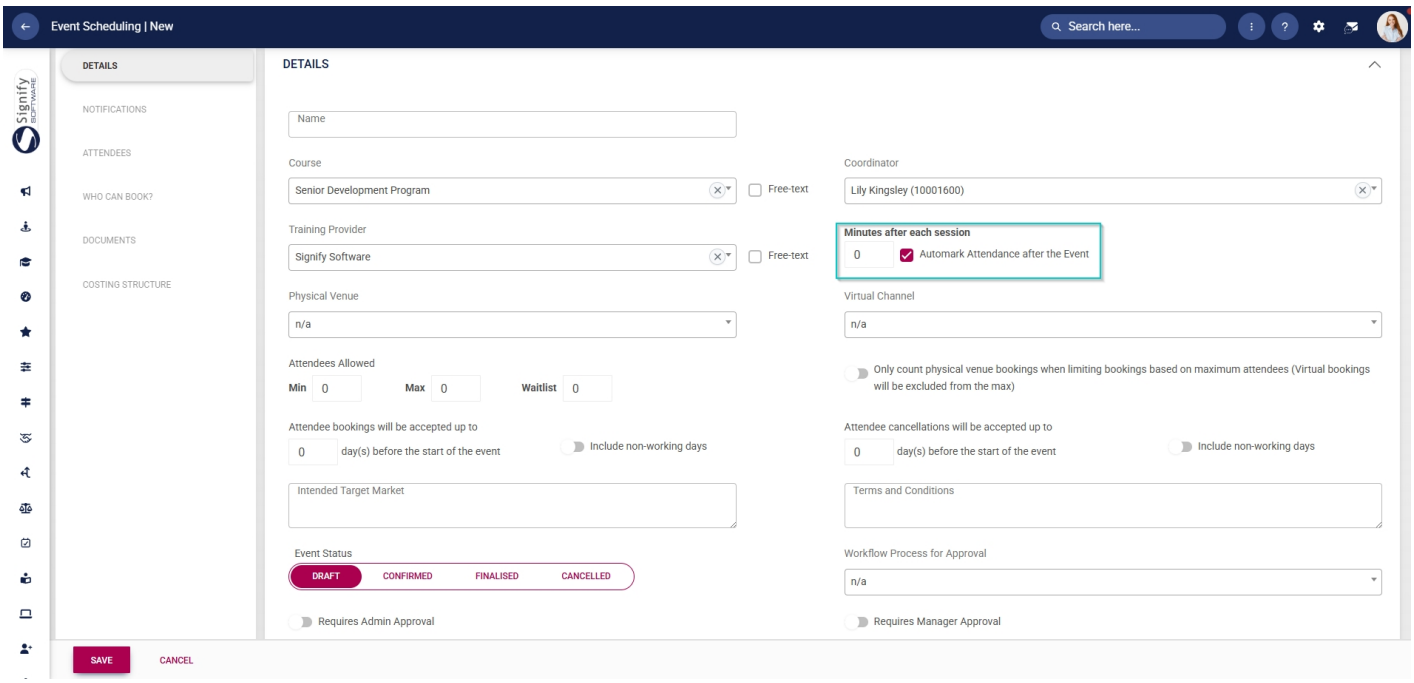
- From the **dropdown menu**, select the event's **coordinator**.



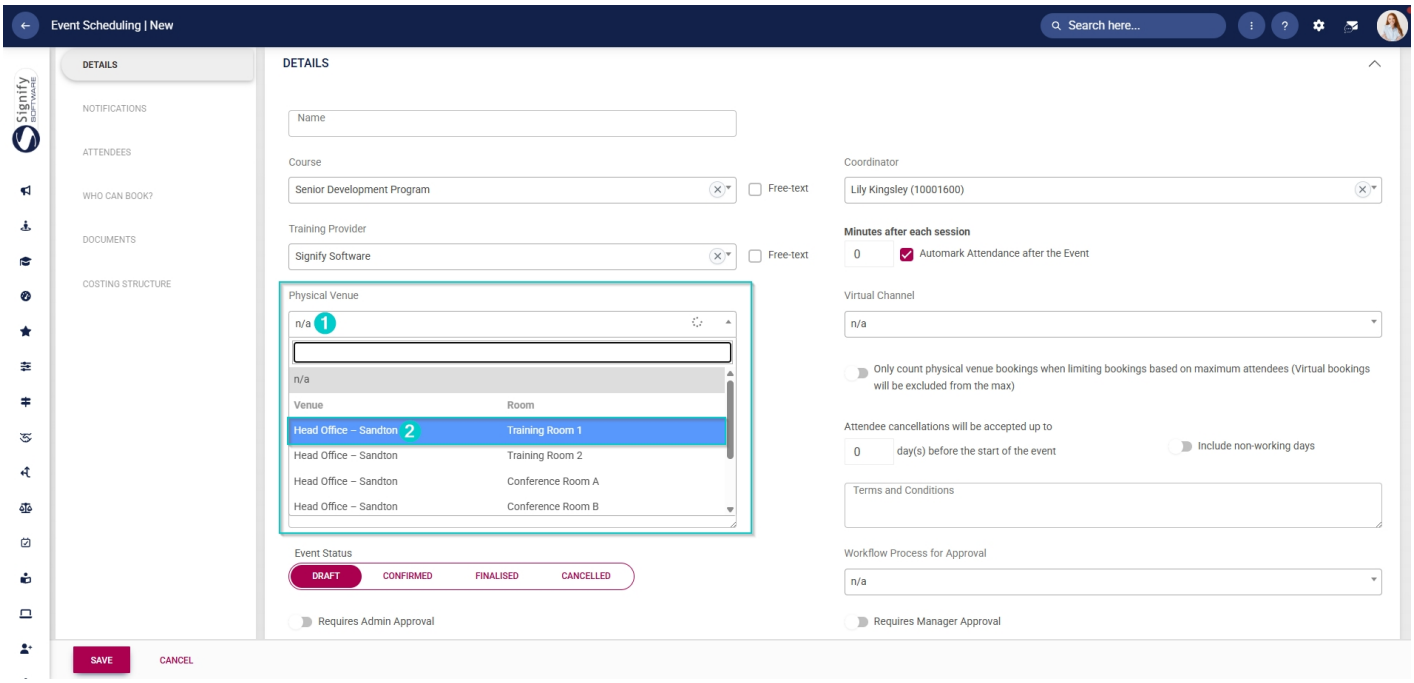
- From the **drop-down menu**, select the event's **training provider**.
- Use the **search bar** to easily find the training provider in the list of dropdown menu items, then click on the training provider's name.
- If the training provider is not listed in the **Master Data Library**, provide a name for the training provider and tick the **Free text checkbox**.



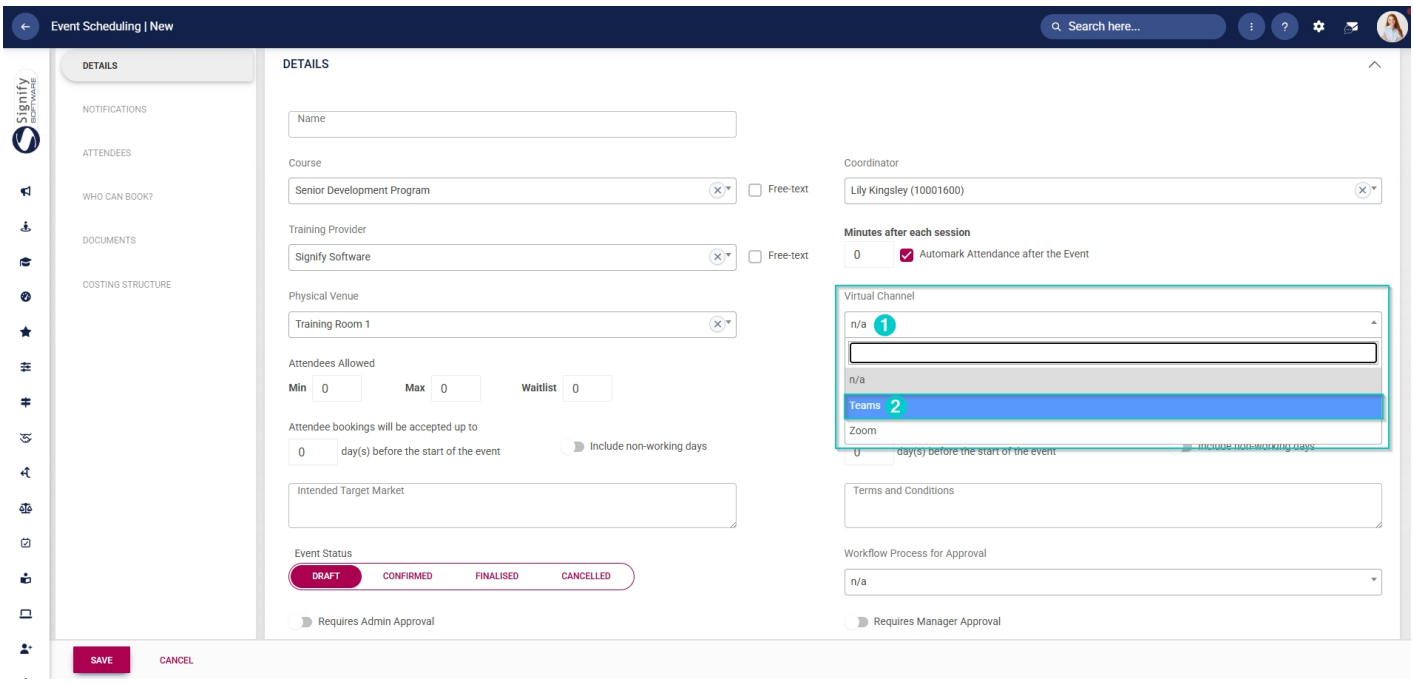
- Attendance can be automatically marked by selecting the number of minutes after each session. To do this, tick the **Automark Attendance after the Event checkbox**.



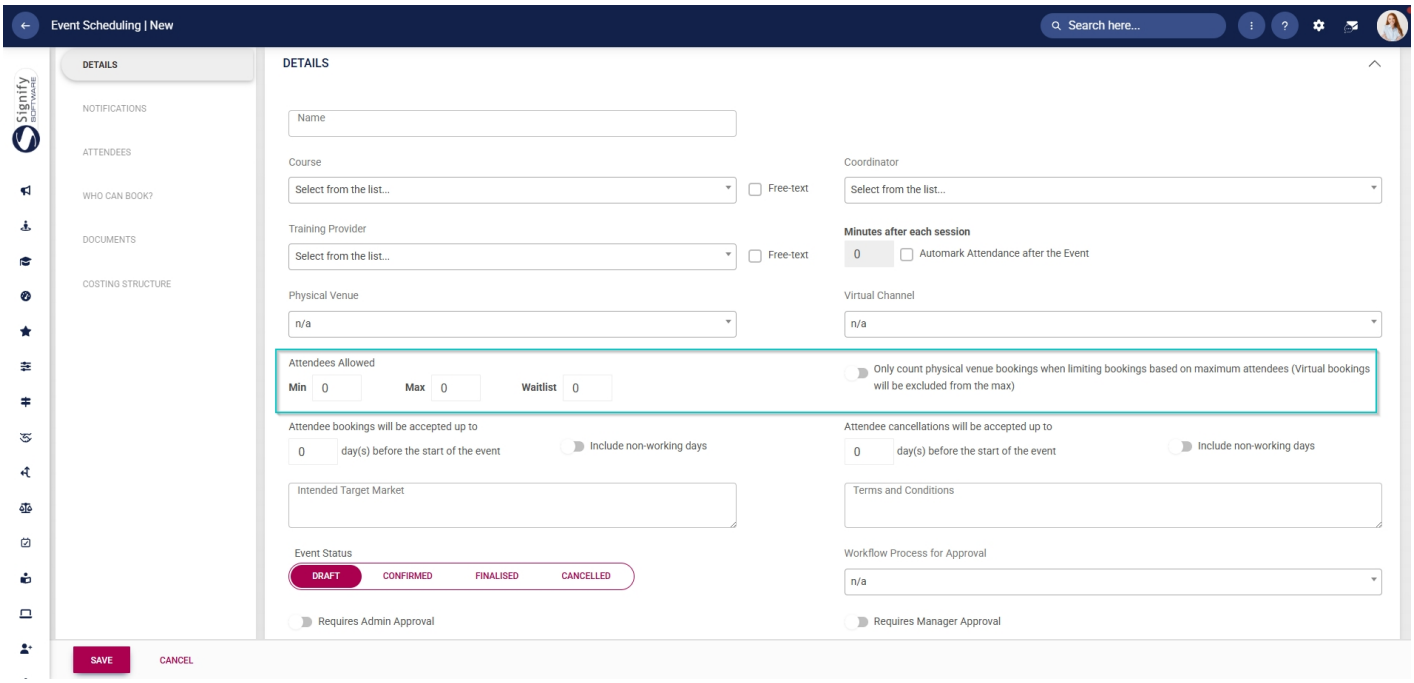
- From the dropdown menu, select the physical **venue** and the **room**.



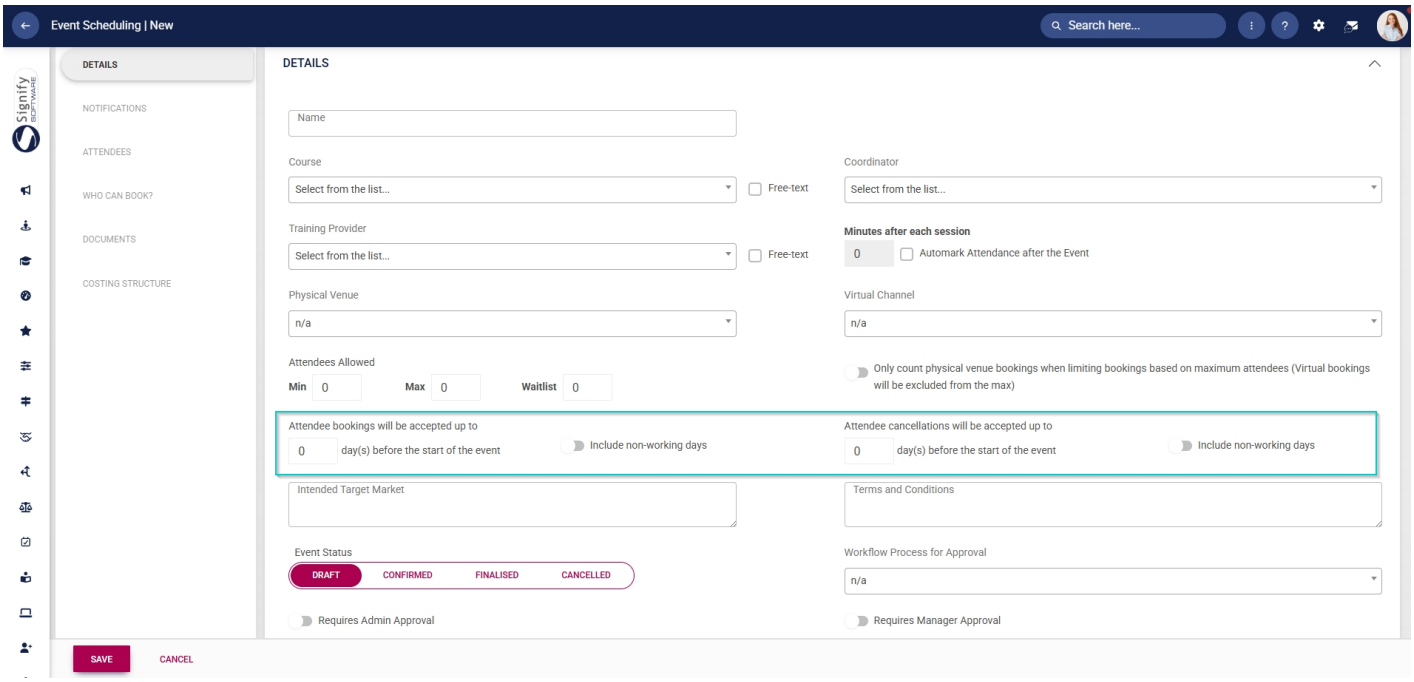
- **Virtual channels**, such as Teams or Zoom, can be selected from the **drop-down menu** to present this event online.



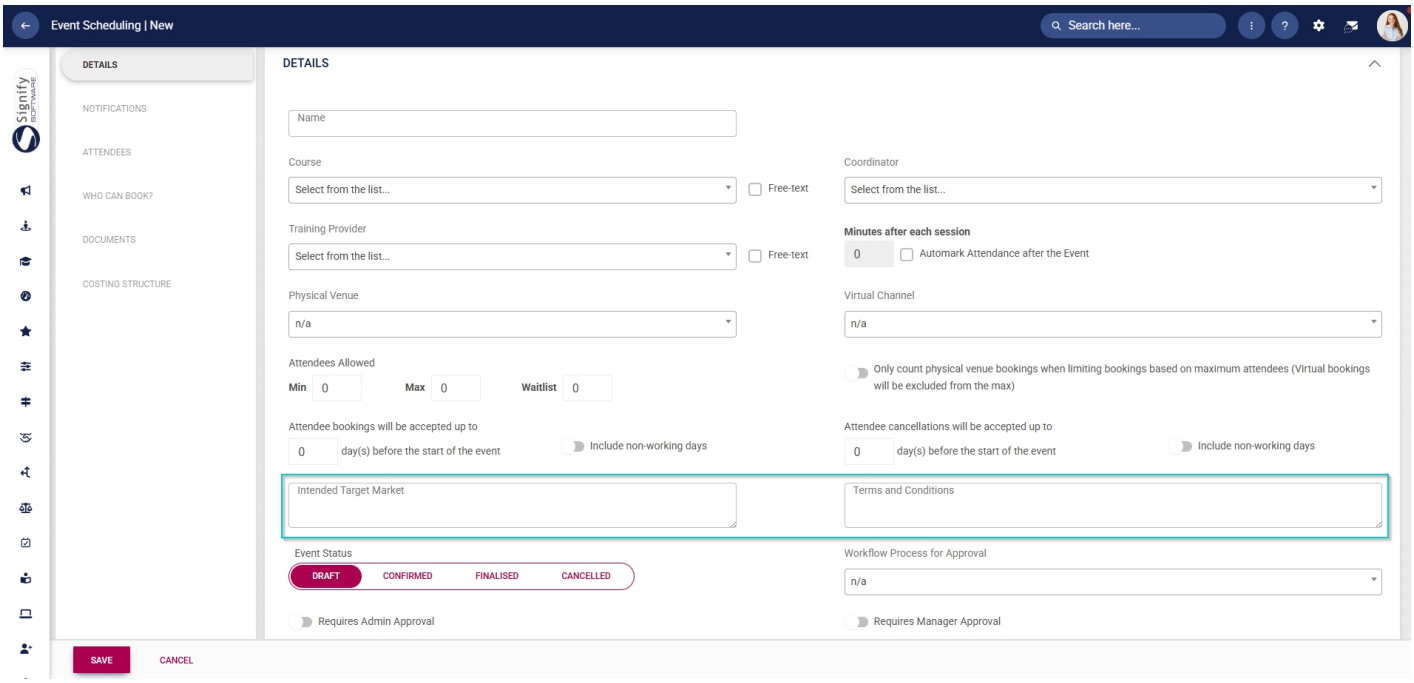
- Enter the **minimum** and **maximum** number of attendees allowed, as well as the number of **waitlist** spots for this event.
- Click the **toggle button** to count only physical venue bookings when considering booking limits for an event.



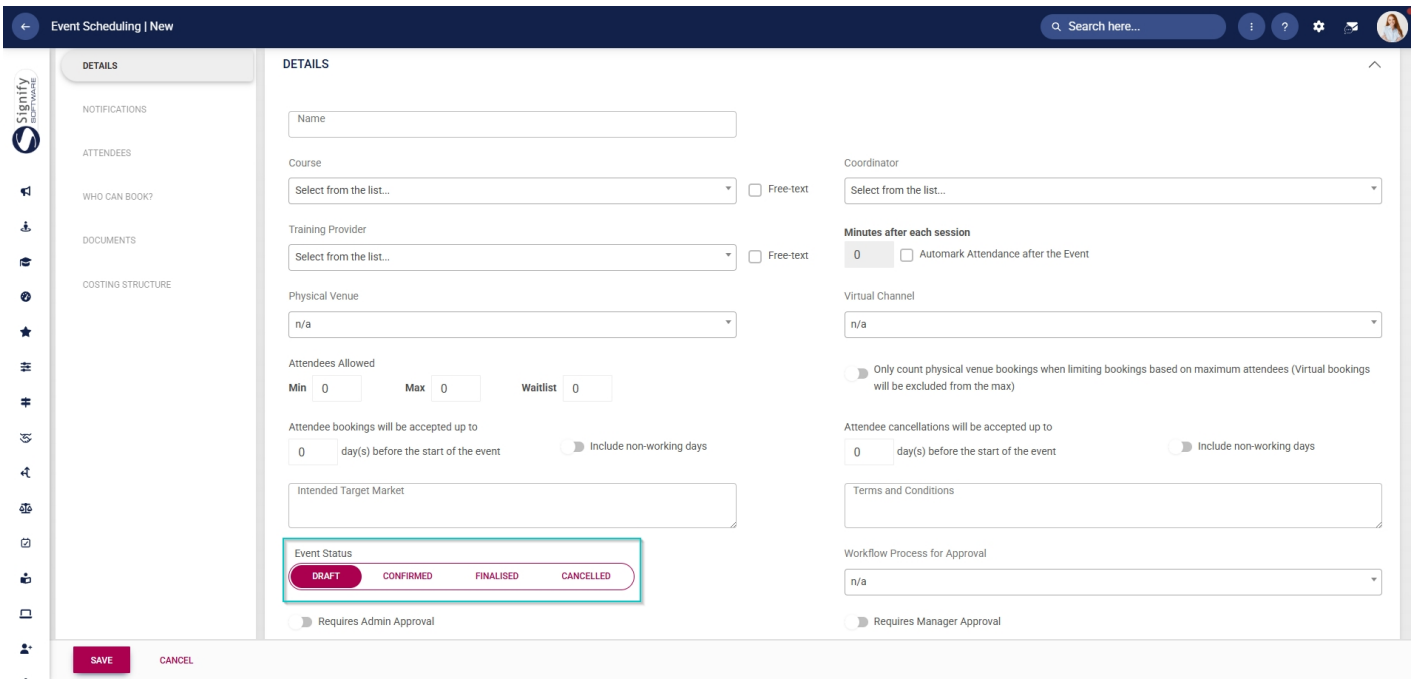
- Configure the booking and cancellation deadlines.
  - Enter the number of days before the event during which **bookings** will be accepted.
  - Click the **toggle button** to set the status to include non-working days.
  - Enter the number of days before the event during which **cancellations** will be accepted.
  - Click the **toggle button** to set the status to include non-working days.



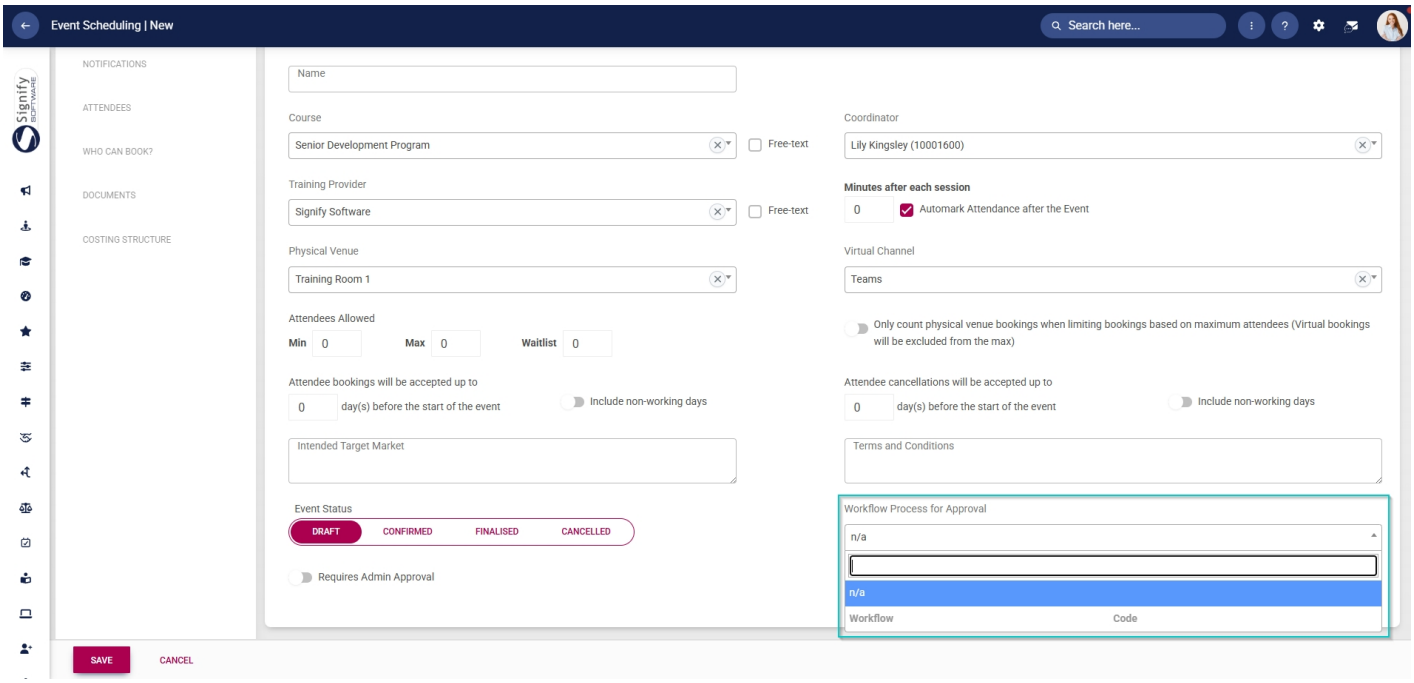
- Use the text boxes to describe the **intended target market** for this event and to list any **terms and conditions**.



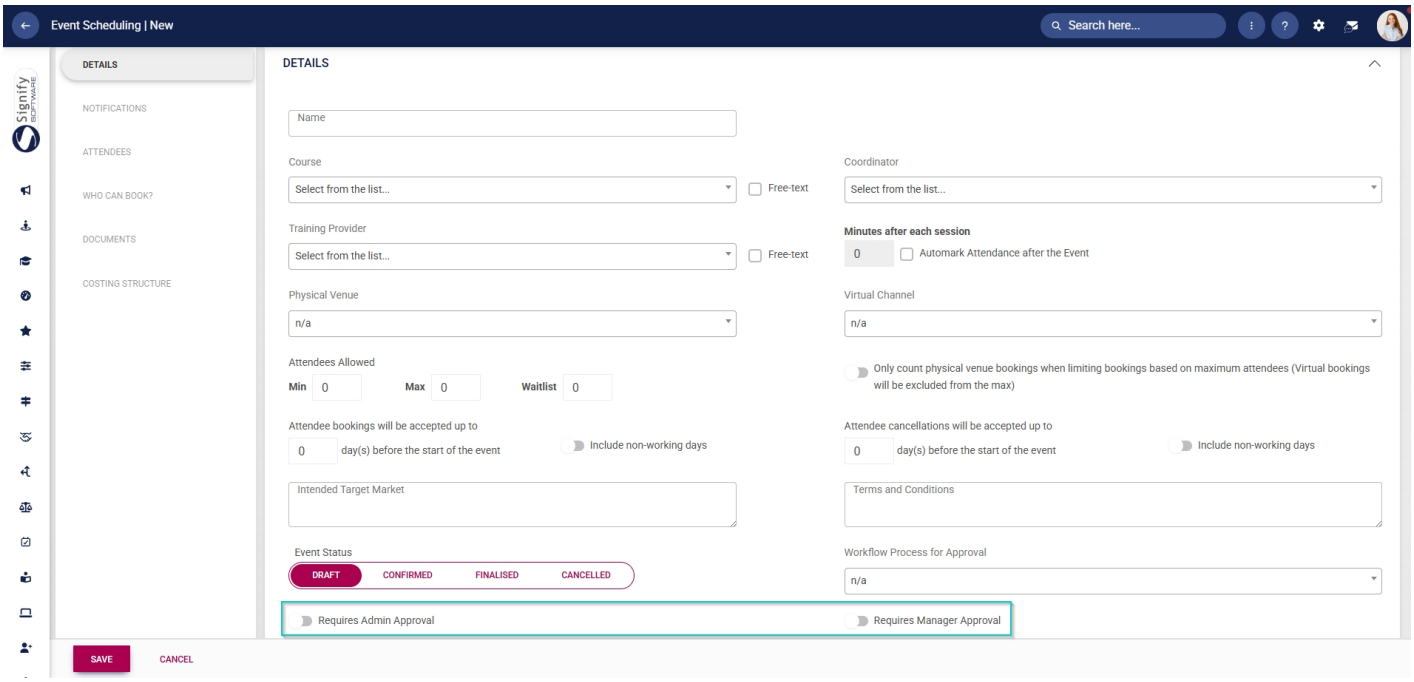
- Select the **event status**, such as Draft, Confirmed, Finalised, or Cancelled.
  - Only confirmed events will be displayed in the Calendar view.



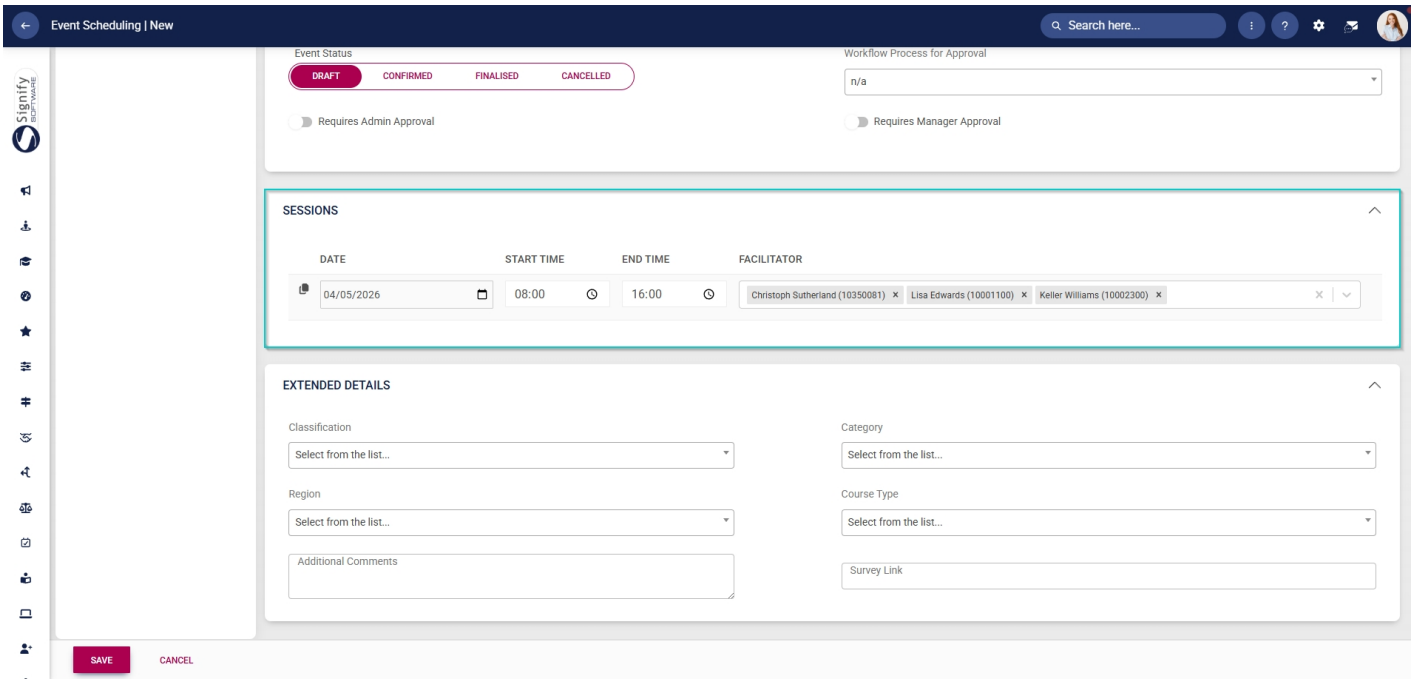
- Use the **drop-down menu** to select a pre-configured workflow process for the event's approvals.



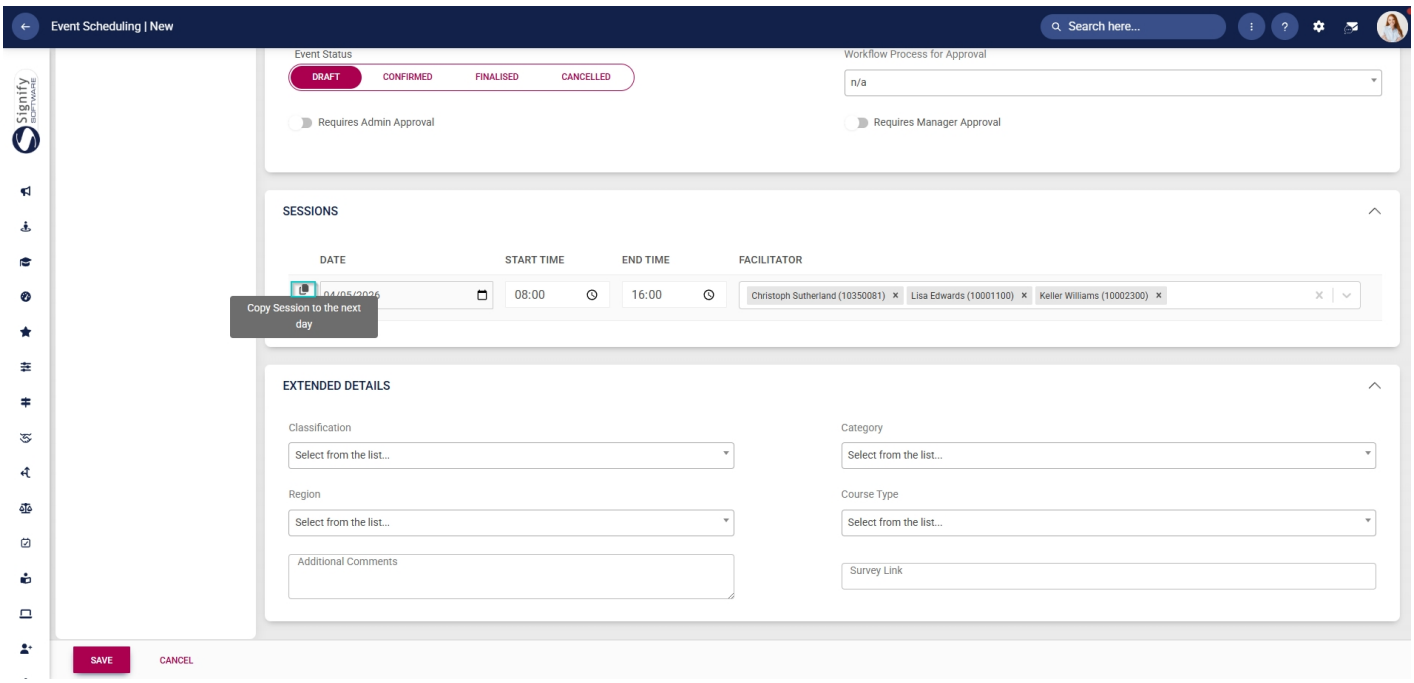
- Click the **toggle button** to set the status to require administrator approval.
  - If an administrator's approval is required, any event scheduling administrator can approve an attendee's registration request.
- Click the **toggle to set the status to require manager** approval.
  - If a manager's approval is required, then the employee's training manager will be notified. Event scheduling administrators can override manager approvals.



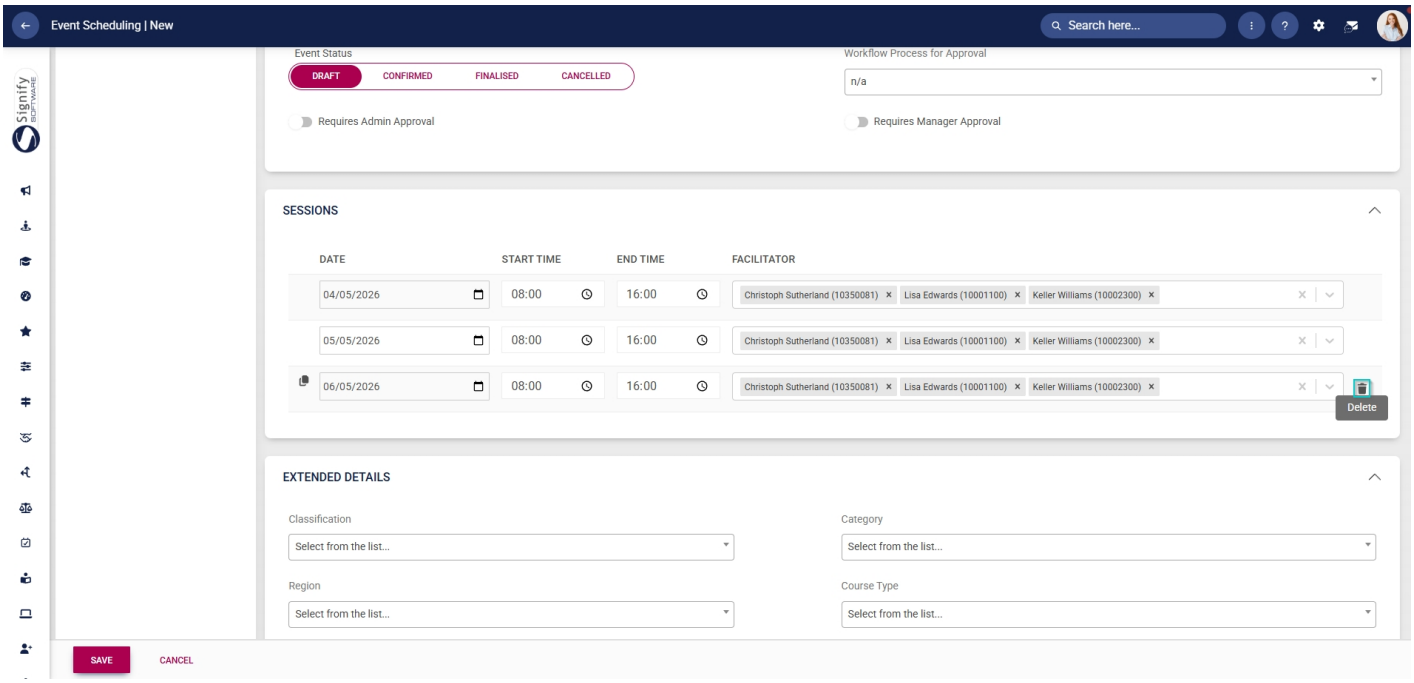
- Choose the **date**, **time range**, and **facilitators** for the event. Multiple facilitators can be selected for a single event.



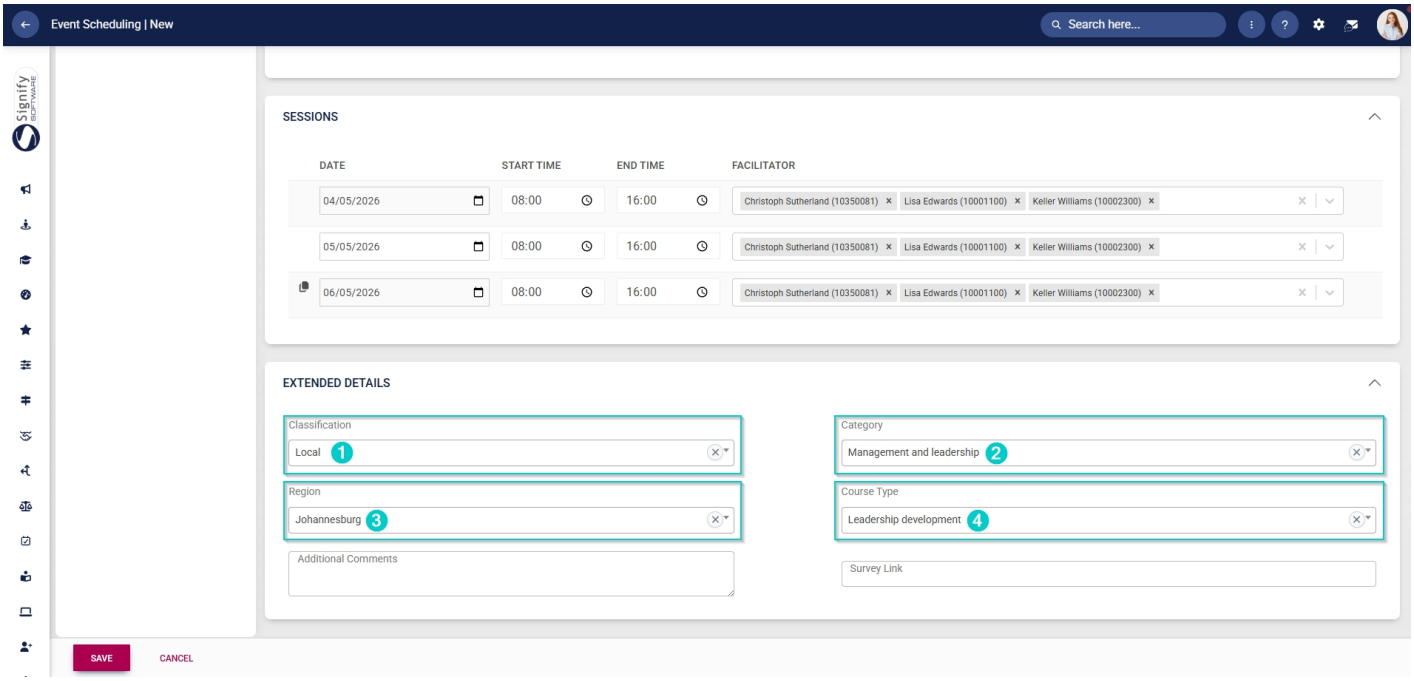
- If the event spans over multiple days, another session can be added by clicking on the **copy icon**.



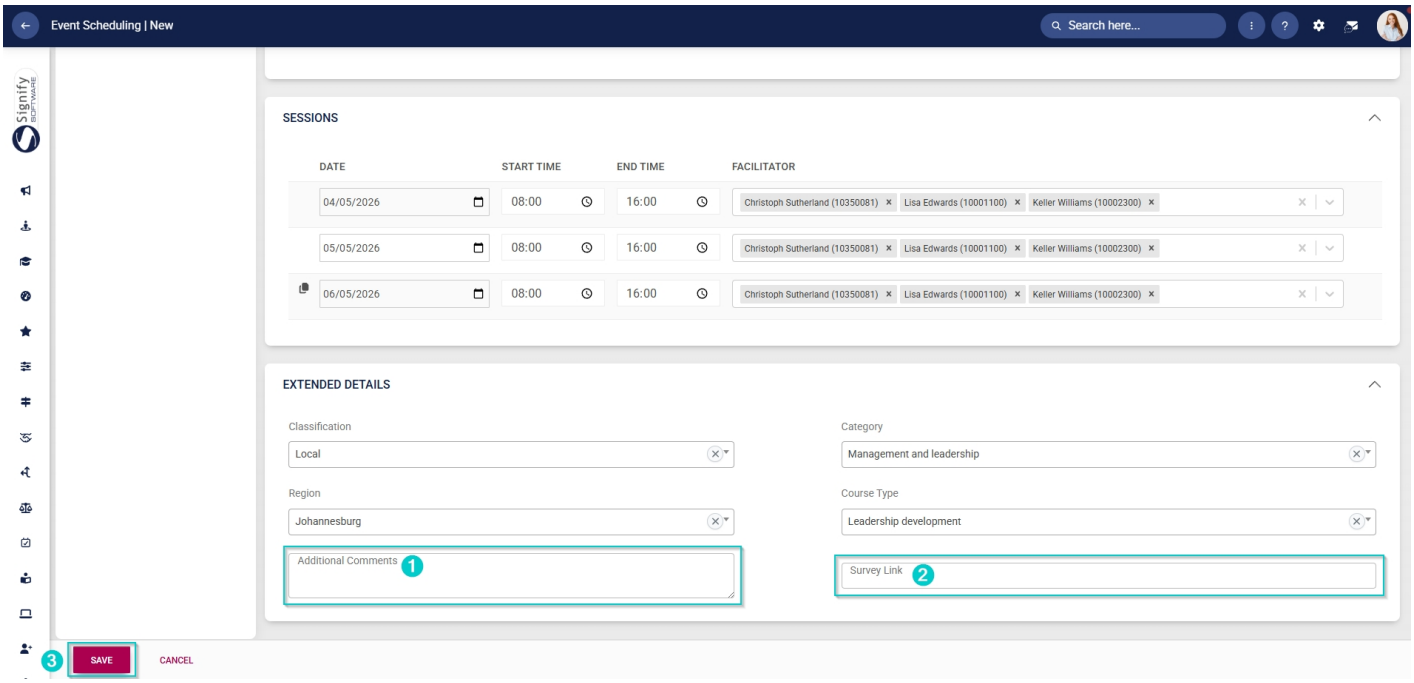
- To delete a session, click the **dustbin icon**.



- Additional details about the event can be captured in the **Extended Details** section. From the **drop-down menus**, select Classification, Category, Region, and Course Type (which administrators previously configured as master data).



- Additional **comments** about the event can be entered in the text box.
- An external URL can be provided for attendees to complete a **survey**.
- Click **SAVE** when you are finished or click **CANCEL** to discard your edits.



Revision #4
Created 2026-05-07 13:27:50 UTC by Chanan Stenden
Updated 2026-06-24 14:03:55 UTC by Carla Botha