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.

Signify SOFTWARE

Revision #3
Created 2026-04-23 08:27:05 UTC by Chanan Stenden
Updated 2026-05-14 14:48:34 UTC by Chanan Stenden