

# Glossary



## Attendance record

An attendance record is used to document whether each attendee was present at an event session, absent, or absent with an excuse. Administrators use this record to accurately track participation, add notes as necessary, and finalise attendance for reporting and historical reference. The guide also indicates that attendance can be updated for each session, which is crucial for events with multiple sessions.

## Attendees

Attendees are individuals who have been added to an event and are expected to participate. They can be added one by one or as part of a group. Their attendance, completion status, and cost information can be tracked within the event record. Additionally, if self-service booking is enabled, attendees can book themselves onto events.

## Booking request

A booking request is a submission made by an individual who wishes to attend an event, particularly when prior approval is necessary. Depending on the established workflow, this request may need to be approved by an Event Scheduling Administrator or the person's manager. Once the request is approved, the individual is officially booked for the event.

## Calendar view

The calendar view displays scheduled events in a calendar format, making it easy to see what is happening on specific dates. In this view, events are organised by their names, allowing users to see the upcoming events they are attending. Additionally, employees can use this view to book themselves for events.

## Categories

Categories serve as labels for organising events into relevant subjects or business areas, such as Management, Soft Skills, or ICT Development. They assist administrators in classifying and filtering events more efficiently. Categories can be selected when setting up the event's detailed information.

## Classification

A classification is a master data value that describes the broader category or type of an event, such as "Local" or "International." It helps standardise event records, making reporting and filtering more consistent. Classifications are chosen during the event setup process under the extended details section.

## Completion status

Completion status indicates the final outcome for an attendee after an event has occurred. Statuses such as Completed, Not Completed, Rescheduled, and Cancelled can be included. This information helps organisations monitor whether attendees finished the event and whether any follow-up is necessary.

## Confirmed event

A confirmed event is one that has been approved and is ready for users to view in the calendar. It's important to note that only confirmed events will appear in the calendar view. This status is crucial because it distinguishes confirmed events from draft or pending ones, ensuring that only events ready for booking and attendance are displayed.

## Coordinator

A coordinator is responsible for organising the practical arrangements for an event and ensuring it runs smoothly. They manage the logistical aspects of the event setup, including confirming the event details, venue, and schedule. The coordinator plays a key role in the event planning process.

## Course type

A course type is a master data value that describes the format or origin of a course, such as "Internal" or "External." It helps differentiate between various types of learning or event interventions. Course types can be selected in the extended details section when creating or editing an event.

## Custom people group

A custom people group is a user-defined group created for a specific purpose, typically to simplify attendee selection. Administrators can add individuals to these groups either one by one or by applying certain conditions, such as job titles or organisational nodes. These groups are particularly helpful when the same set of people needs to be invited to events on a recurring basis.

## Facilitator

A facilitator is responsible for leading the event session and guiding participants through the activities or learning experiences. They help keep the session focused, support discussions, and ensure that the event meets its objectives. Additionally, the system allows for multiple facilitators to be assigned to an event if necessary.

## Free text

Free text allows users to enter their own values rather than choosing from a predefined list. This option is available for items such as training interventions and training providers. It is particularly useful when the specific item has not yet been stored in the Master Data Library or when flexibility is required.

## HR process

An HR process is a configured approval workflow that is used when event bookings need to be reviewed by a manager or administrator. HR processes are established separately and linked to the booking approval flow. This linkage determines who needs to approve a request before the attendee is confirmed.

## Learning record

A learning record is created when an event is associated with a training intervention. It's important to note that if a course is not linked to any training intervention, no learning record will be generated. This means that while the event can still be scheduled, it won't be documented as part of the employee's formal learning history.

## List view

The list view is the area where administrators can see all scheduled events in a list. It supports searching, filtering, and expanding each event to view or edit details. The list view is the main workspace for creating, managing, and maintaining events.

## Master data

Master data is the core reference information used throughout the module, including classifications, course types, categories, regions, venues, rooms, and booking motivations. It is stored in the Master Data Library, creating consistency in the system and helping avoid duplicate or incorrect entries. Setting up master data correctly is essential before events can be managed properly.

## Motivation for booking

A motivation for booking is the reason a person gives when requesting to attend an event. These reasons are stored in the Master Data Library and selected from a dropdown during booking. This helps organisations understand why the booking was made, especially where approval is required.

## Notifications

Notifications are the email templates and messages used to communicate event-related information to users. These messages can support booking confirmations, approvals, reminders, and other event communication needs.

## People group

A target audience, or a people group, is a defined collection of people used to organise coordinators, facilitators, or attendees. It can be built from selected individuals or from group conditions such as job titles or organisational nodes. People groups make it easier to manage large groups of people without adding them one by one every time.

## QR code

A QR code is a unique code sent to a person after they have been successfully booked onto an event. The code can be scanned in the system to match the attendee to the event reference and record attendance more quickly. This speeds up attendance capture and reduces manual errors.

## Reporting line

A reporting line defines the relationship between employees in terms of hierarchy, indicating who reports to whom. It is used in **People Management** to establish organisational structure, manage permissions, and support workflow processes such as approvals and performance tracking.

## Room

A room is the specific space within a venue where an event takes place. Rooms help organisations specify exactly where a physical event will be held.

## Session

A session is one scheduled occurrence of an event, usually with its own date, time, and facilitator. Events can have more than one session, especially when they run over multiple days. Attendance is tracked per session, making sessions important for accurate event administration.

## System menu

The system menu is the navigation area where the **Event Scheduling** module can be added, making it easy for users to access. The administrators must activate the menu item during the module's setup and configuration. This ensures **Event Scheduling** is visible and available to users who need it.

## Training intervention

A training intervention is the learning item or course that an event is built around. It appears in dropdowns throughout the module and can be linked to an event, allowing the system to create a learning record.

## Training provider

A training provider is the organisation or person delivering the event. When creating an event, administrators can select a provider from a dropdown or enter one using free text. It is also linked to the training intervention so that event delivery details are recorded consistently.

## Venue

A venue is the location where a physical event will take place, such as a head office or training facility. Venues are created in master data and can then be linked to rooms. They form part of the event's location setup and help users know where the event will be held.

## Waitlist

A waitlist is the group of people who want to attend an event after the maximum number of attendees has been reached. The event setup includes minimum, maximum, and waitlist values. This helps organisations control attendance numbers while still keeping a queue of interested participants.



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