

How Event Scheduling Works

Based on the guide and the role definitions we have already established, **Event Scheduling** operates as a controlled lifecycle that progresses from setup to booking to delivery to attendance capture and finally to completion reporting. The exact flow depends on whether the event requires administrator approval, manager approval, or no approval at all.

Let us take a look at each of the following scenarios you may encounter when using the **Event Scheduling** module, and the roles played by the administrator, coordinator, facilitator, manager, and employee:

- An event that requires an **administrator's approval**.
- An event that requires the **manager's approval**.
- An event where **no approval** is required.

Administrator approval is required

Scenario: A company creates an internal development session, but only an Event Scheduling Administrator may approve attendance requests.

The administrator prepares the module and event.

The administrator activates the module if needed, ensures the right permissions are in place, configures the master data, and creates the event in Event Scheduling. They set the event status to confirmed, add the relevant sessions, link the training intervention if required, and make the event visible on the calendar so employees can book it. They also set the requirement for administrator approval.

The coordinator prepares the event operationally.

The coordinator ensures the practical arrangements are in place, including the venue, room, timing, session setup, and any logistical details to be managed before the event.

The facilitator prepares to deliver the session.

The facilitator is assigned to the session and focuses on delivery, ensuring the content, discussion, and participant engagement are ready for the session date.

The employee submits a booking request.

The employee sees the event in the calendar, clicks to book, and submits a booking request with the required motivation. Because approval is required, the booking does not go through immediately and remains pending.

The administrator reviews the request.

The Event Scheduling Administrator checks the request and either approves or declines it. If approved, the employee is added to the attendee list. If declined, the employee is not booked onto the event.

The event takes place.

The coordinator supports logistics on the day, while the facilitator runs the session. If the event uses QR codes, a booked attendee can scan the code to log their attendance.

The administrator records attendance and completion.

After the session, the administrator updates per-session attendance, records the overall completion status, and captures competency information where applicable. If there are costs, they can also be recorded against attendees.

Responsibilities in this story

- **Administrator:** creates the event, configures approval, approves or declines bookings, records attendance and completion, and maintains the event record.
- **Coordinator:** manages the practical setup and logistics.
- **Facilitator:** delivers the event.
- **Employee:** submits a booking request and attends once approved.
- **Manager:** not involved in the approval path in this scenario.

Manager approval is required

Scenario: A compliance or development event must be approved by the employee's training manager before the employee may attend.

The administrator configures the event and workflow.

The administrator sets up the event in Event Scheduling, ensures the relevant training intervention and master data are in place, and links the booking process to an HR workflow that requires manager approval. The guide notes that the training manager reporting line must be populated for each person for this to work correctly.

The coordinator prepares the logistics.

The coordinator ensures the venue, room, sessions, and event details are ready. If the event runs over more than one day, multiple sessions can be created.

The facilitator is assigned to lead the event.

The facilitator is linked to the session and prepares to host and guide the event flow.

The employee submits a booking request.

The employee books themselves onto the event from the calendar view and selects a motivation from the master data list. Because manager approval is required, the request's status is Awaiting Approval.

The manager receives the request and decides.

The manager finds the request in the HR Processes approval queue and either approves or declines it. If approved, the employee becomes a confirmed attendee. If declined, the booking does not proceed.

The event is delivered.

The coordinator handles the operational side, the facilitator runs the session, and the employee attends once approved. QR codes may be used to help record attendance once the person is booked.

The administrator completes the administrative follow-up.

The administrator updates attendance records per session, captures overall completion status, and can view historical attendance or export the attendance register.

Responsibilities in this story

- **Administrator:** sets up the event, configures manager approval, monitors the event record, and updates attendance and completion data.
- **Coordinator:** ensures the logistics are ready.
- **Facilitator:** delivers the event and guides participant interaction.
- **Manager:** reviews booking requests and approves or declines them.
- **Employee:** submits the request, waits for approval, and attends after approval.

No approval is required

Scenario: A workshop is open to the relevant audience and does not require approval before booking.

The administrator creates the event and opens it for booking.

The administrator sets up the event, selects the sessions, adds the relevant master data, and enables the option that makes the event visible on the end-user calendar. No approval workflow is assigned.

The coordinator organises the event logistics.

The coordinator ensures the venue, room, timing, and arrangements are ready.

The facilitator prepares for delivery.

The facilitator is assigned to the event and gets ready to run the session on the scheduled date.

The employee books immediately.

The employee sees the event in the calendar, clicks to book, selects a motivation if required, and submits the booking. Because no approval is required, the booking is confirmed straight away.

The employee receives the normal event communications.

Once booked, the employee may receive the QR code email and any other notifications configured for the event.

The event is delivered, and attendance is captured.

The coordinator manages the operational side, the facilitator leads the event, and the administrator captures attendance and completion afterwards. Attendance can be recorded session by session, and the system can show historical attendance and completion status.

Responsibilities in this story

- **Administrator:** creates the event, makes it available for direct booking, and records attendance and completion afterwards.
- **Coordinator:** handles practical event setup.
- **Facilitator:** delivers the event.
- **Employee:** books directly and attends.
- **Manager:** not involved unless the organisation later chooses to add approval requirements.



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