User Manual

Event Management: Create Master Data

As an example of working with Event Management master data we will populate a few **Venues,** add an **Event Coordinator** and also discuss adding **Training Interventions**. This will be used to demonstrate the importance of correctly registering your master data and also emphasise some of the the functionalities of the master data sections.

Venues

The diagram below shows in a simple way how much information could be captured against a venue. It must be added that **Venues** is probably the most comprehensive of the master data sections. Besides populating the venues, the additional information that will also be discussed is:

- Room
- Campus
- Venue-related settings in the Event Management Module

Venues
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Adding a Venue

1. Open the list of venues from the event management master data:

Modules | Event Management | Master Data | Venues | Venue

2. If a venue is to be deleted, tick its delete checkbox and click **Delete**.

3. To add a new venue, click **Add.** A blank venue page will open where you can provide the appropriate details.

Adding a Venue
Image not found or type unknown

4. Complete the venue detail page and click **Save**. After submitting the venue, the previously greyed-out tabs (Room, Communication, Address, Documents and Campus) become active.

5. Save Add New is used to to save the current venue and immediately create a next blank page for another new venue to be added. This is a handy feature when you have to add multiple venues one after the other.

6. After saving a **Delete** button is displayed so that a venue can be deleted while still on the venue screen.

The information on the venue's other tabs is optional but can be of great help in preventing event disasters e.g. overbooking a room, booking an event on the wrong campus etc. When an event is set up, the information provided on the other tabs will generate subtle warning messages e.g. when allowing more attendees than a room can accommodate.

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Adding A Room

7. Click to open the **ROOM** tab. On this screen, if it is an existing venue with existing rooms, a list of available rooms is shown. This list looks similar to the list of venues.

- NOTE: Be sure to ALWAYS add a room called TBA (To be announced) for cases when the specific room for the event cannot be determined up front. This room is shown on the screen below.

8. Click **Add** on the room tab to add a new room to this venue.

List of rooms
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9. Provide the room details and click **Save** to submit.

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Venues Not Showing on Event Detail Page?

There are two reasons why a venue that was registered under master data does not show up in the venue library on the event detail page:

- A **setting** is available in the Event Management module with which to select either of the following two alternatives for venues:

- **Allow events to be created by selecting ONLY the venue.** (*Therefore venues don't have to have rooms linked to them in order to be selected for an event*)
- **Force events to be created with a venue AND a room.** (*Therefore a venue without at least one room linked to it cannot be selected for an event*)

- The Event Management module is being operated on a **campus** basis and the venues in the library have not been linked to their respective campuses.

Enable cross-schema booking on rooms (optional)

1. From the System Administration Tools menu, click to open the configuration item: follow the navigation below and click **show all**.

System Administration | Tools | Configuration | Framework | Human Resources | Event Management

2. In the list of settings search for **Enable cross schema booking on rooms** and tick the setting value checkbox. Click **Update Settings**.

On the **Room Detail** tab you will now see a new setting available that will allow you to publish rooms to other schemas.

Image not found or type unknown
Enable cross-schema booking on rooms (optional)

3. Tick the checkbox of each schema you want to publish the room to, click **Save**.

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Linking a Room to a Campus

Linking a room to a campus is an optional step and will not be discussed here. It is not a requirement anywhere in the system and will not affect its working or the selections that can be made.

Linking a Venue to a Campus

Linking a venue to one or more campuses is an optional step unless you operate the event module on a campus basis. Refer to the *working with campuses* section for more information on setting up campuses.

If the event management module was configured to operate on a campus basis, the following should be considered when loading venues:

- Every venue must be linked to a campus to enable the venue to be used for an event.
- A venue can be linked to more than one campus, making the venue available for both.

In order to link a venue to a campus, follow these steps:

1. Open the list of venues from the event management master data:

Modules | Event Management | Master Data | Venues | Venue

2. To open click on the venue that must be linked to a campus. From the venue's tab strip, click campus to display a list of linked campuses.

3. Click **Add** to open the campus selection screen.

4. From the list tick the campus that should be linked to this venue and click **Select** to link it.

If there are no existing campuses to link, click **Add** then complete and save the campus detail.

Linking a Venue to a Campus
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Coordinator

As with the list of standard venues, a list of event coordinators can also be loaded. This library of coordinators is then available for use in events.

Adding a new Coordinator

1. Open the list of coordinators from the event management master data:

Modules | Event Management | Master Data | Coordinator

2. Click **Add** to add a new coordinator to the library by selecting an employee from list of employees.

Adding a new Coordinator
Image not found or type unknown

3. If a coordinator is to be deleted, tick its delete checkbox and click **Delete**.

Note: If the coordinator is currently linked to a future event, the message in the image below is displayed:

The message warns that the coordinator(s) are still linked to events and, if you want to proceed with the deletion of the coordinator(s), the earliest date on which the coordinator(s) can be deleted. This date is typically a date just after the last event for a coordinator has been completed.

Make your selection of coordinators to delete or to leave on the list and click **Delete** to accept the future dates on which the remaining coordinators will be ended in the system.

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Training Interventions

The training interventions master data section contains a library of courses that can be used in events. As such the information required seems relatively simple and only one field, the **Intervention Name**, is mandatory. These are found on the **Training Intervention Detail** tab.

Training Intervention Detail

However, a closer look at the role the screen on the next page and its information plays, reveals many important aspects that determine amongst other things:

- The name under which events etc., based on this intervention, will be saved to an employee’s learner history.
- Whether learner records using this intervention will be able to be used in official reports.
- An important consideration is that every record logged in the Learner Records must have a corresponding record in the training intervention library. An exception to this rule is historical learner records imported into Signify HR from external sources.

Below is a description of the purpose of some the fields as well as some general guidelines.

1. Code

A code a client uses to uniquely distinguish this course. The code is not an auto-generated field.

2. Training Intervention Name *(Required)*

A name serving as heading for an intervention. Attention should be given to this name since it is:

- The name users would see when booking on an event by this name.
- The name under which a record will be written to an employee’s learner records.

The name under which an assessment is published.

3. Description

Describe the focus and contents of an event. The field allows text formatting.

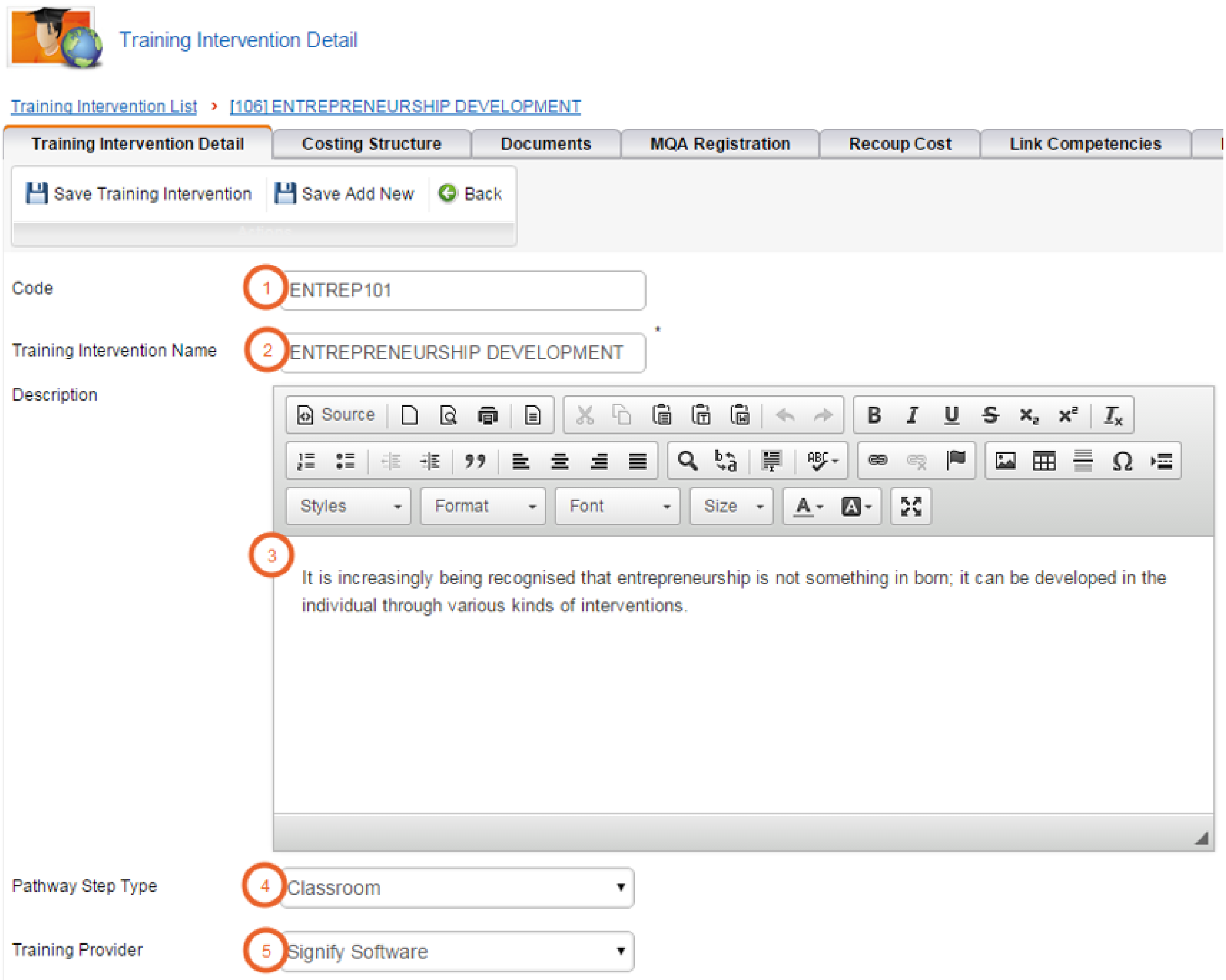
4. Type

This field determines where (in which module) an intervention is displayed. If an intervention’s type is:

- Classroom, it could only be used in Event Management.
- Assessment, it is visible as an activity when building assessments.
- Etc.

5. Training Provider

The training provider usually responsible for training on this intervention.



6. Learning Type

An arbitrary categorisation. Potentially affecting the categorisation on reports. Examples of typical learning types are *1 Day Classroom, Awareness Training, Motivation* etc.

7. Nature of learning

An arbitrary classification of learning. Examples are *Internal, External, Formal* etc.

FOR NQF-ALIGNED INTERVENTIONS ONLY

8. NQF Level

Use only if the course is NQF aligned.

9. NQF Band

1 - 4: General and further education and training qualifications sub-framework
5 - 7: College diplomas and technical qualifications
8 - 10: Degree and occupational qualifications

10. Credits

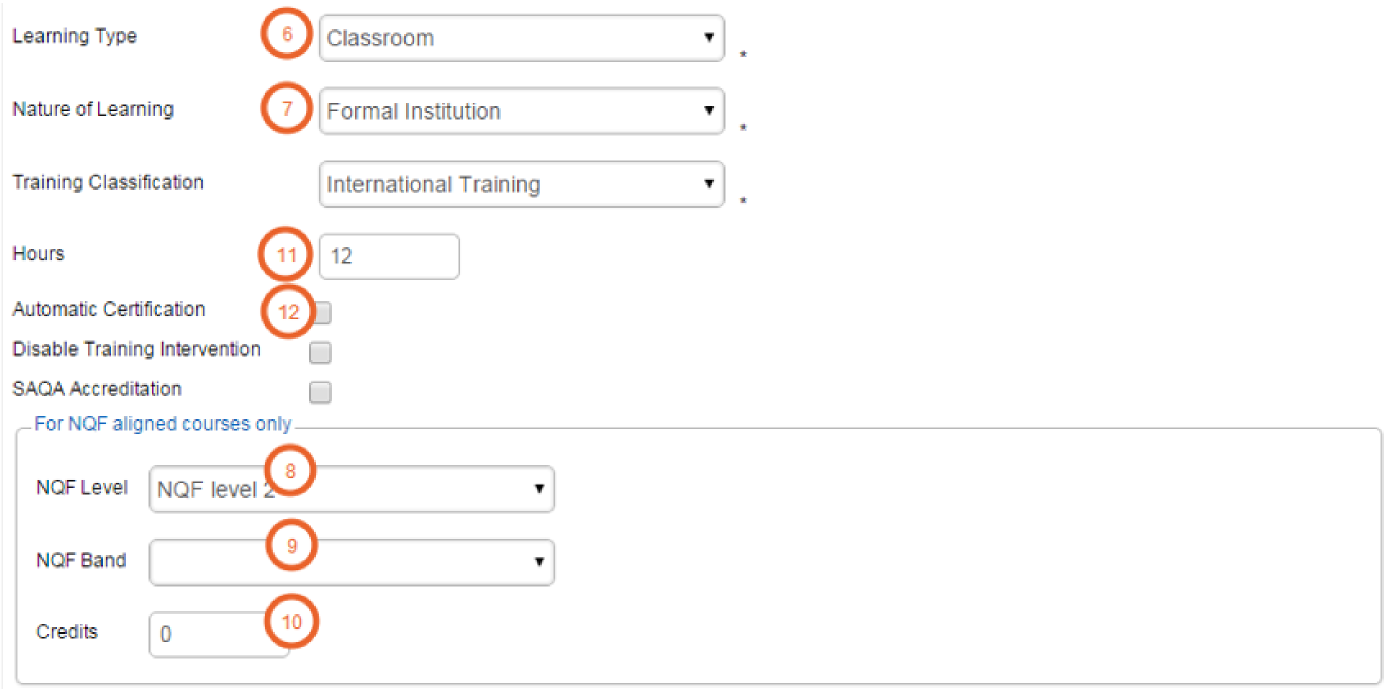
Use only if course is NQF aligned.

11. Hours

Number of hours the average person would need to complete this course.

12. Automatic certification

Can be used to automatically issue a person with a unique certificate number on successful completion of a course. The rules for this are process-specific and must be configured by Signify Software. To activate and use this option, please contact Signify for assistance.



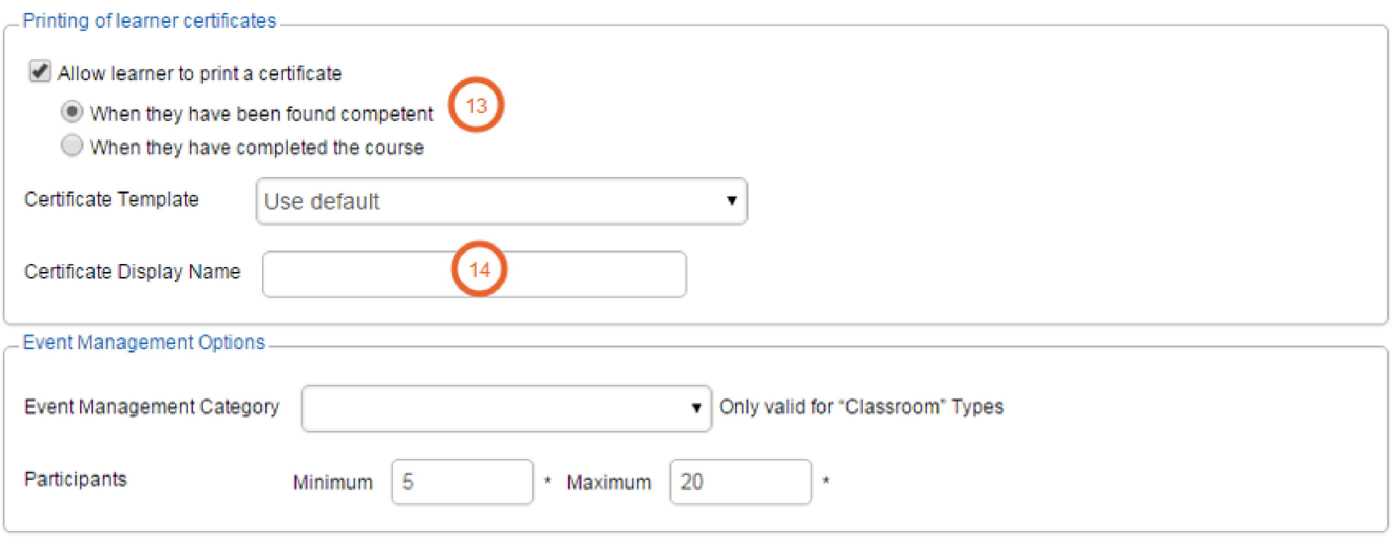
PRINTING OF LEARNER CERTIFICATES

13. Learner can print certificate when competent

If a person was marked competent on a course and this check box is switched on for the particular intervention, the learner record would be available on the Employee Self Service Portal and the employee could then print an official certificate for himself.

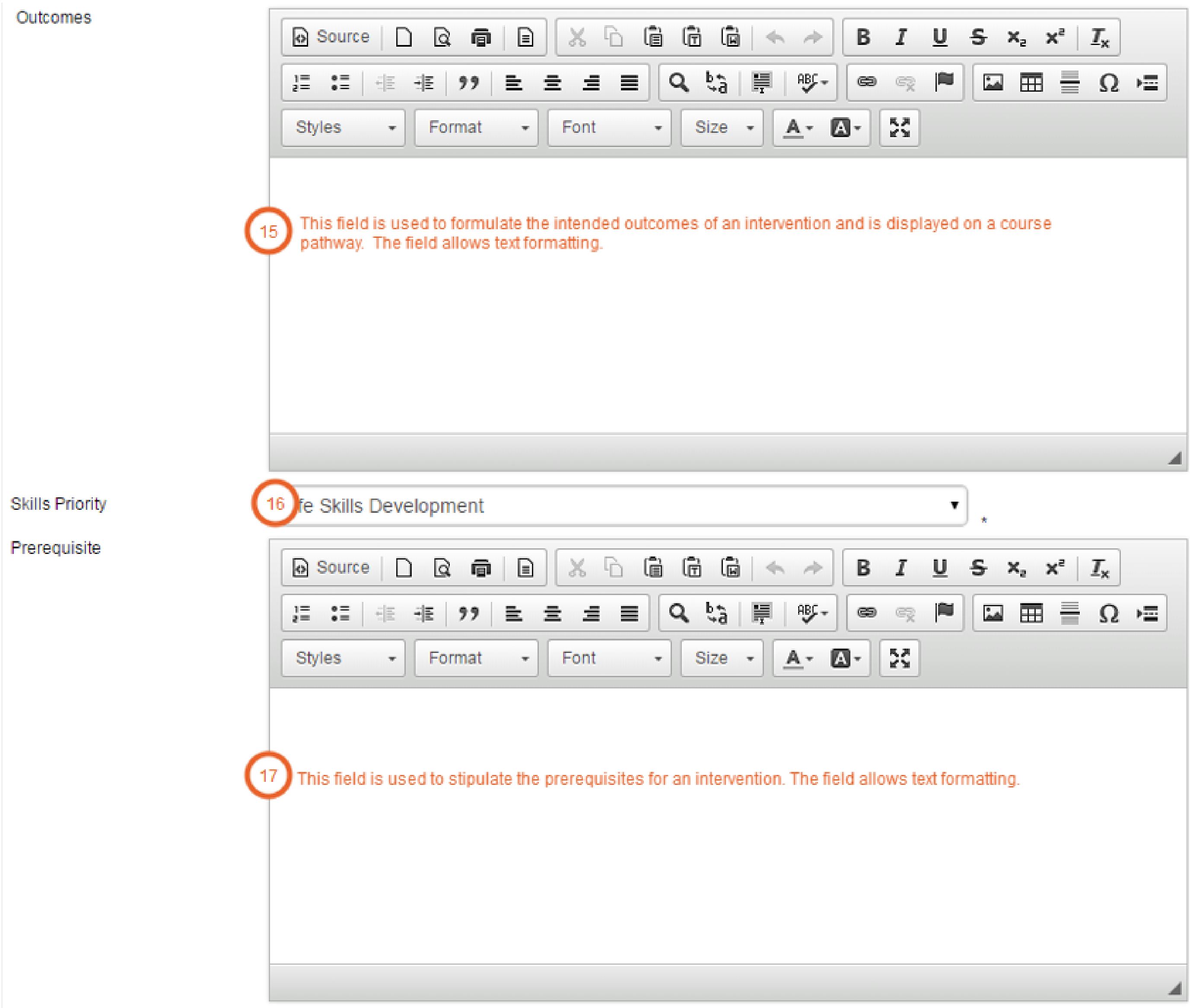
14. Certificate Display

If used, will override the intervention's name with a specific certificate-friendly name.



16. Skills Priority

Used in SETA reporting.



18. Learner record expiry options

Only used for reporting purposes.

19. Training category

A list of the DTI training categories. Find below a short definition for each category.

- **A** - Formal Qualification.
- **B** - Formal Qualification with mentorship.
- **C** - Structured Learning in the workplace with mentorship or coaching e.g. Apprenticeship where practical involvement is required and formally accessed by an accredited body.
- **D** - Institutional instruction together with structured, supervised experiential learning in the workplace (Learnership).
- **E** - Structured, supervised experiential learning in the workplace which may include some institutional instruction - such training typically has an assessment linked to it.
- **F** - Structured information sharing or direct instruction involving workshops, seminars or conferences and short courses with no assessment link to it.

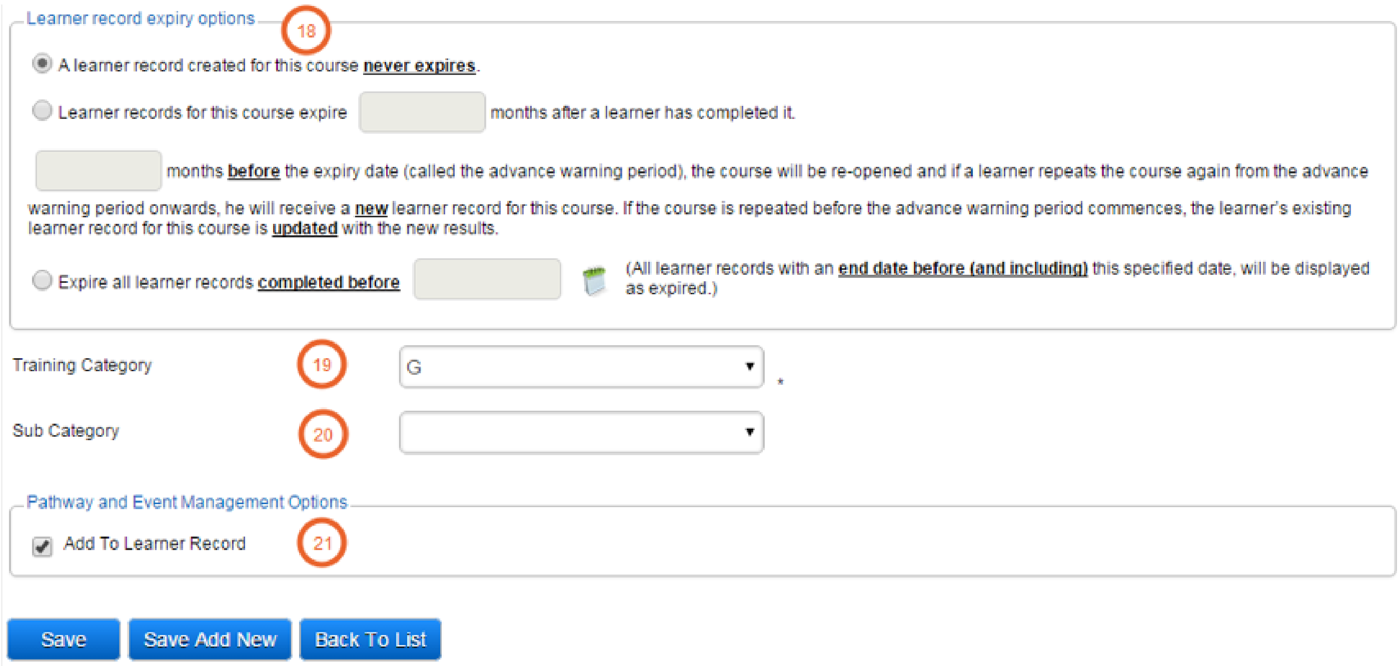
- **G** - Informal and on the job training.

20. Sub category

For reporting purposes.

21. Log to Learner record

Tick this box if an intervention should cause the **Log to Learner Record** checkboxes to be ticked by default on step 3 of the Attendance register of an event.



Costing Structure

The **Costing Structure** tab allows a user to specify the cost elements for an intervention. This structure is then available on employee learner records, on training event attendance registers etc.

Note the following when specifying the cost elements:

1. Click **Add** to add new cost elements from the cost elements library.

- For every cost element you can specify:
  - The proposed amount to be billed per course attendee.
  - Whether the amount is *Editable* for a specific event. (Meaning if changed it would be changed for all attendees on the event as well)
  - Whether the amount can be *Changed per Attendee*. (If this is ticked in addition to *Editable*, the implication is that the amount for a cost element can be changed not only on an event level but also on an attendee level.

Costing Structure
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Event Management: Create a new Event

1. Open the event management module

Modules | *Event Management* | *Administration* | *Manage training*

2. Click **Add New Event**.

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A blank Event Detail screen is opened where the event is planned. If any fields on the event detail screen are automatically filled in when it is opened, it is because a default event template exists which serves as the starting point for all new events. This default template is used to pre-populate every new event with selected information e.g. prices, requirements etc.

On the blank event detail screen, note the following:

- There are a number of inactive tabs at the top of the page. These are used to more fully plan and describe the event and will become active once the event detail page is saved the first time.

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- Use the hand icons next to some of the fields to open a standard list of items to select from.
- Specify dates by making use of the calendar icons.
- Fields with an * are compulsory.

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- The **Attendance Requirements** section is used to set the number of attendees allowed as well as to make provision for a waitlist on the event. It also enables you to determine the cut-off dates for bookings and cancellations.
- Normally events can only be booked on up to the day before the event. If it is required to keep the event open for bookings to the day of the event, set the booking cut-off days to -

1. This should however only be used for special cases.

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3. Complete the event detail page by selecting appropriate values and then clicking **Save**. If a warning message appears acquaint yourself with the contents because in many cases it could warn you of possible conflicts e.g. number of seats available etc.

Note how the STATUS and EVENT STATUS fields of the event change when the event is saved.

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Notes on Using the Libraries

Some of the libraries used to select items from are either interdependent or dependent on other events. A few examples are:

- The Provider field is populated from the Training Intervention library.
- Only venues that are available for the selected dates are shown. On the library search screen, tick the *Show venue/room that will be double booked* checkbox if all venues must be shown.
- If a coordinator is linked to one or more campuses, only these campuses will be available in the campus library. In some cases the coordinator and his/her campus are automatically set.
- Only facilitators that are available for the selected dates are shown. On the library search screen, tick the *Show Facilitators that will be double booked* checkbox if all facilitators must be shown.

At the top of the page a ribbon of new functionalities has now appeared besides the previously inactive tabs that have now also become active.

Notes on Using the Libraries

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Save Event

Saves the event details and displays a **Saved Successfully** message as confirmation.

Copy Event

Use the current event as a template to create another event from. All details will be copied over but you will be expected to provide a new event date and time.

Settings

Specify event-specific characteristics e.g. if the event can be booked from a training pathway etc.

Confirm Event

Once it is certain that an event will go ahead as planned it can be confirmed by clicking this button.

Cancel Event

An event can be cancelled at any stage by clicking this button. The event will not be deleted but will be moved to the Cancelled Events status where it could still be viewed or even reused.

Finalize Event

The event has taken place, the attendance register has been completed and all invoices paid etc. Click this button to finalise and “archive” the event.

Publish Event

An event is not visible to the general users unless it is published. Even a planned event can be published and will allow bookings as an indication of interest.

Additional tabs on the event page will become available once the user clicks the **Advanced Options** tab. The working of these is discussed in the **Advanced Options** section.

A very useful functionality on the ribbon can be accessed via the Copy Event button.

Cross-Schema venue booking

- On the **Event Detail** screen click the **hand** icon to open the venue/room library.

Cross-Schema venue booking
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1. Select the **Show Venue/Room published to all schemas** radio button, click **Search**.

2. Click **View venue schedule** to see available dates before you select a venue.

3. From the Venue/Room list select the radio button of the chosen venue, click **Select**.

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Copy Event

Properly populating an event with all the necessary information could take quite a while. Clicking the **Copy Event** button enables a user to re-use existing events to create new ones.

1. From the Manage Events page, locate the event that is to be re-used or copied.

2. On the functionality ribbon, click to open the **Copy Event** screen shown below.

Copy Event
Image not found or type unknown

- The entire event can be copied to a new event but in the process changes are allowed to the new event's schedule. How much this is changed can be indicated by using the **Copy Type** radio buttons. (Radio button ***Copy event using existing schedule*** selected)
- If the radio button ***Copy event and create a new schedule*** is selected, the screen changes as follows.

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3. Make the required schedule changes and click **Copy**.

- The event is copied to a new event and a confirmation is displayed containing the new event's reference number.

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Cancel an Event

An event can be cancelled at any stage in its lifecycle even when attendees are already booked on it.

1. To cancel an event, locate and click the **Cancel Event** button on the Event ribbon.

2. The following confirmation is required, allowing a user to indicate if cancellation notifications are to be sent to attendees already booked on the event.

Cancel an Event
Image not found or type unknown

Event cancellation notifications **ARE NOT AUTOMATICALLY SENT OUT** to attendees when an event is cancelled. The checkbox shown above must be explicitly ticked to enable this functionality.

Event Management: Book a Course

From the moment that an event is published it is visible to users who then can request a booking on it or in the case of a manager book his/her employees.

The Manager's View

When a manager logs into the Signify HR system he has the same navigation options as a normal user. Remember that a manager is firstly a general system user and secondly a manager of employees. A user who logs into the Signify HR Suite has two options by which to access events and related information.

Standard functionalities

Advertised Events, My Requests, My Notification, My Events, Help Contact Information, Reports

These are the standard functionalities available to a manager. They are exactly the same as the functionalities available to a general system user since a manager must be able to manage his own training events and courses as well.

From the portal

- Navigate to the book a course portal

Option 1: My Quick Start | **Book a Course**

From the portal
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Option 2: Quick Links | **Book a Course**

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- You should now be able to see a list of available courses.
- Using the view by tool displayed below you can choose how you want the events to be displayed.

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- When viewing by Category click the **plus** sign next to a node to expand the category and display the individual events.
- When the category grouping is expanded the individual events are shown as indicated below.

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The manager books himself on an event (as a user)

- Click the **View/Book** hyperlink next to an event to request a booking.
- On the **Event Detail** screen read through the event details, click the **Book Event** button.
- Read through the event booking, and click confirm booking.

The manager books himself on an event (as a user)
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Email Template - Event Request

ET1 - Booking request mail sent to the user (manager) once the manager booked himself on an event.

Email Template - Event Request
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The manager loads his employees onto an event

In addition to the general user functionalities a manager must also be able to manage the training requirements of his employees. This menu item enables the manager to view and approve all his employees’ booking requests as well as their requests for new training events to be scheduled. Although the manager stays primarily responsible for these duties, the system coordinator can also perform them when necessary.

Rules when a manager books his employees on an event:

- Book my Employees button is visible on the screen where all the learning providers (schemas) are listed.
- A manager can only book his employees on courses IN HIS OWN SCHEMA. No cross-schema booking seems to be available yet.
- On a daily basis, if a person is detected to be a manager, the Event Manager role will be assigned (or revoked if he is no longer a manager).
- Employee bookings made by the manager will go straight to the Pending Confirmation status which will allow the academy to book the person. No further approval is required.
- A manager will be able to only book employees reporting to him as their TRAINING MANAGER (or line manager depending on the current setting determining this)

A manager can book his/her employees by following these steps:

1. Navigate to training calendar (book a course).
2. Click the **View/Book** hyperlink next to the desired event / training to be done.
3. On the **Event Detail** screen read through the event details, a **Book my employees** tab is available where you can select the employees reporting to you in the capacity of Training Manager (this reporting line can be modified but more on that later).
4. Click **Add Employee,** a list of employees reporting to you is displayed.

Image not found or type unknown
The manager loads his employees onto an event

- From the list of employees mark the checkbox (see below) of each employee you want to book on the selected course, click **Select**.

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Note below that after clicking the select button the letter '***R***' appears next to the checkbox to indicate that a booking request has been send.

- Click **Close.**

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- All requests will now be displayed under the Book my employees tab.

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Reporting line as training manager

The event management training manager reporting can be modified:

System Administration | Tools | Configuration | Framework | Global Settings | Learner Record / Event Management

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Reporting line as training manager

Link Evaluation to an Event

Navigate to: System Administration | Modules | Training Scheduling | Administration | Manage Training

The steps required to link an Event Evaluation to an Event, is the focus of this article.

1. Find your Event

Search for and select the event you want employees to evaluate.

2. Navigate to the Evaluation Tab on the Event

1. Click on Advanced Options for more options related to the Event.

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2. Click on the Evaluation tab to open the Evaluation List screen for the Event.

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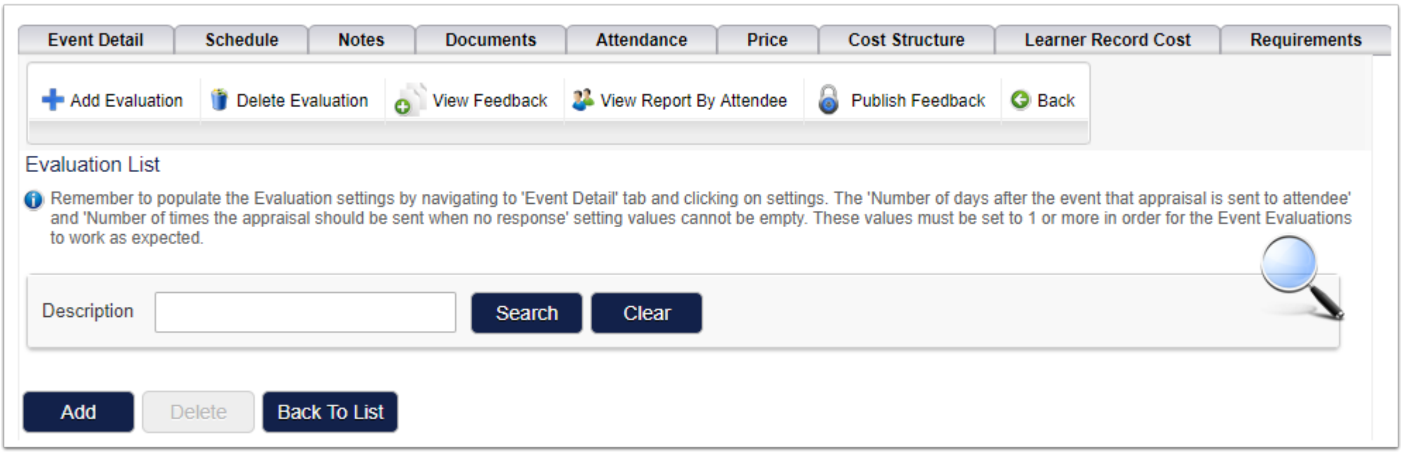
3. View the Evaluation List screen details

On the Evaluation List screen you can:

- Add a new Evaluation
- Delete an Evaluation

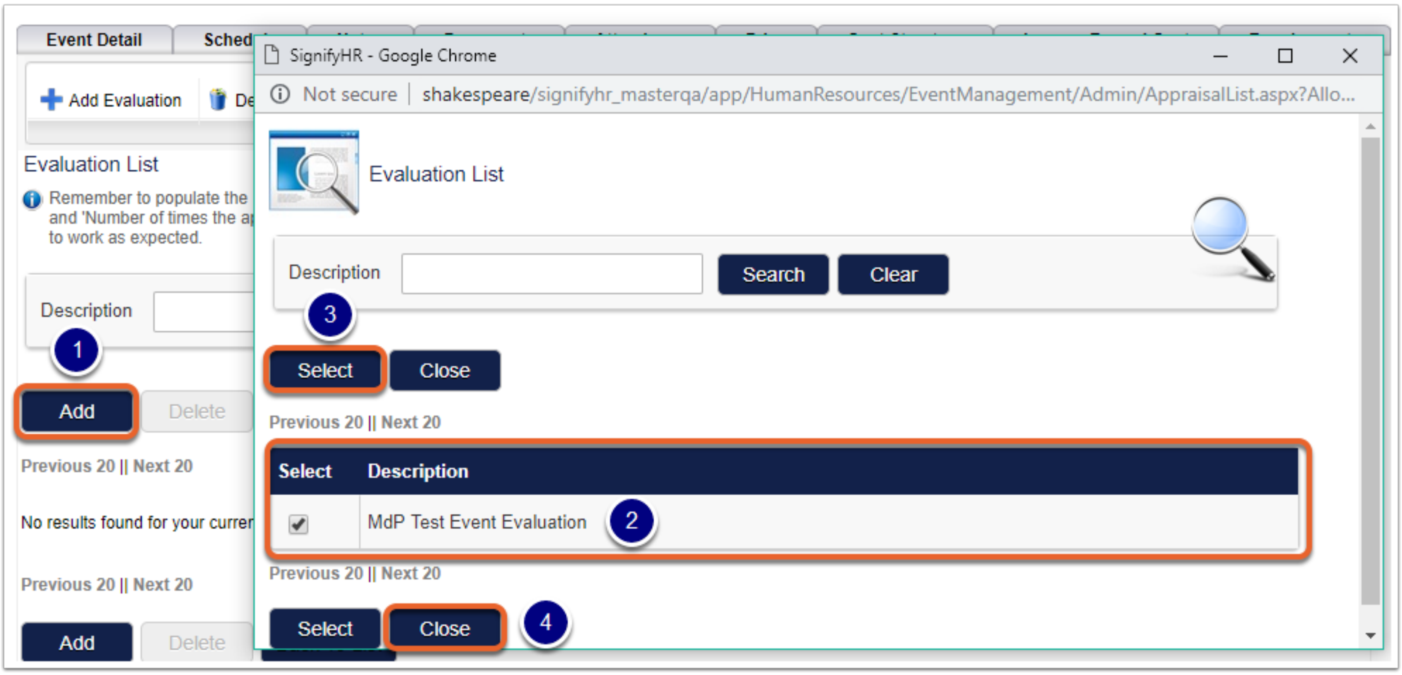
- View feedback received from an Evaluation
- View the report by Attendee
- Publish the feedback to the LMS portal
- Search for Evaluations.



The screen message on the Evaluation list contains important information. Remember to read it to ensure you complete all required actions for your evaluation to be sent to end users.

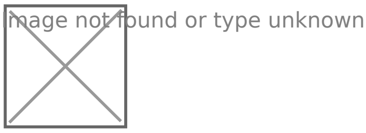
4. Add the Evaluation to the Event

1. Click on the Add button on the Evaluation List screen to select an Evaluation for this Event.
2. Select the Evaluation you want to use from the list.
3. Click the Select button to link the Evaluation to the Event.
4. Click on the Close button to Return to the Evaluation List screen



5. Setup the Event Setting for the Evaluation

1. Select the Event Detail Tab.
2. Select Settings to view the Event Settings.



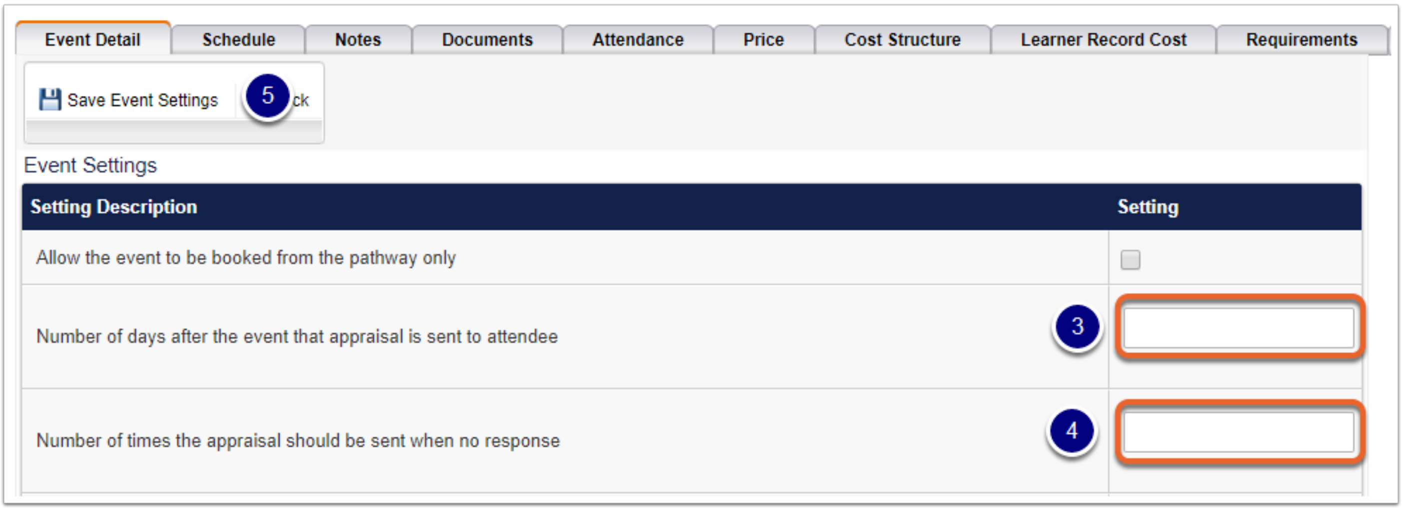
3. Update the value of the Number of days after the event that appraisal is sent to attendee.

- The value must be 1 or more

4. Update the value of the Number of times the appraisal should be sent when no response.

- The value must be 1 or more

5. Click on Save Event Settings, to apply the changes you have made.



What happens next?

Based on the settings, the Evaluation will be sent to the employee or made available on the LMS portal.

For example, if the setting values are set as indicated below:

- **Number of days** after the event that appraisal is sent to attendee = **7**
- **Number of times** the appraisal should be sent when no response = **3**
- Event ended **Tues 2018/10/02**

And the following is true:

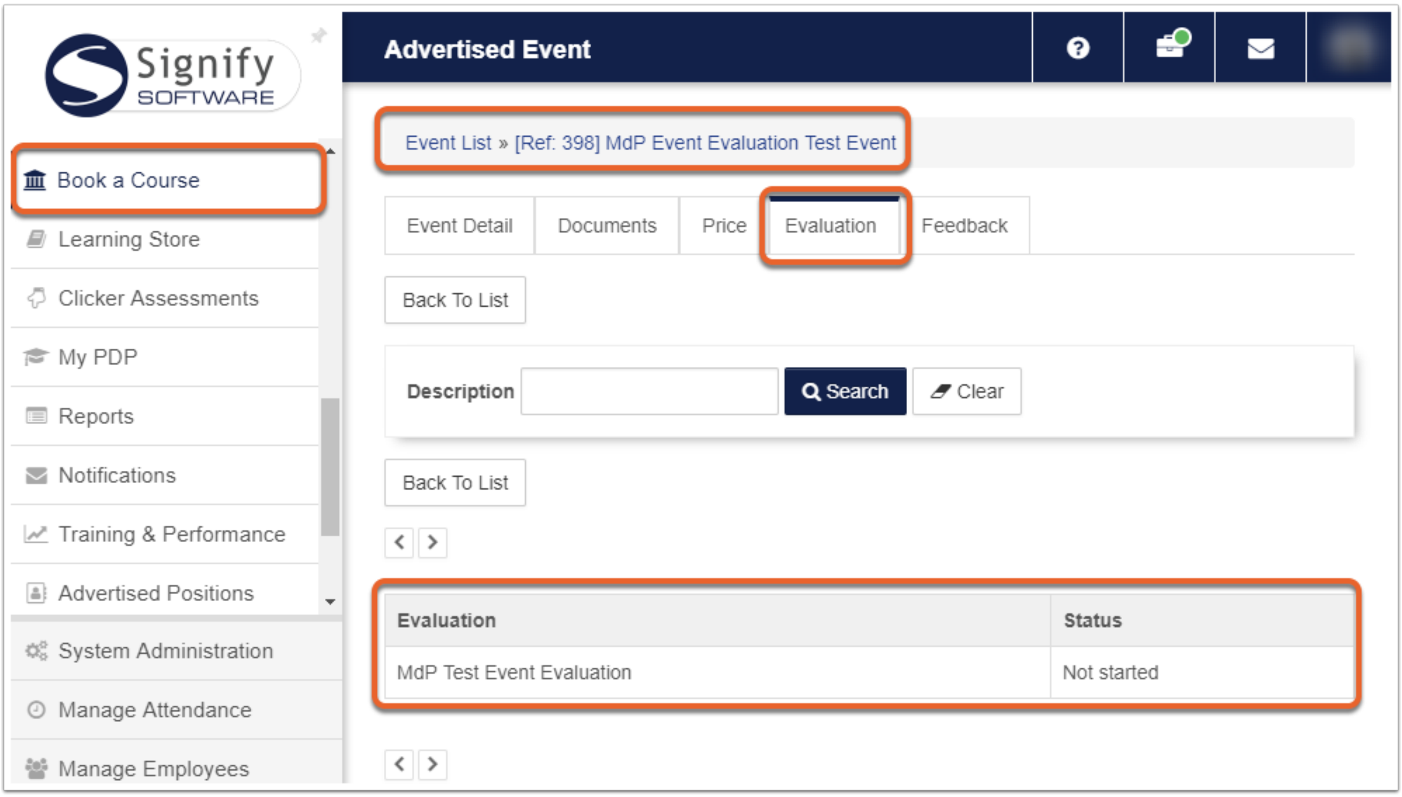
- Event Status is "Planned" or "Confirmed".
- Employee Booking Type is "Confirmed Booking".
- Employee Attendance Type is "Attended".

The following will happen:

- The email will be sent on **Tues 2018/10/09**, **Wed 2018/10/10** and **Thu 2018/10/11**
- The employee will receive the Evaluation email 7 days after the event end date, for 3 days.
- The Evaluation email will be sent up to 3 times if no response is received.
- The Attendee can access the Evaluation from the end date of the Event until the last day of the last email reminder on **Thu 2018/10/11**

Where can the Attendee access the Evaluation?

- By clicking on the URL in the Email they receive
- From within the LMS on the Evaluation Tab for the specific Course



How does the End User see the Evaluation?

The Evaluation displayed to the End User can contain:

- An Overall Rating
- Questions as linked to the Evaluation

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Configure Microsoft Teams and Zoom to use as a Online Event Platform

Please se attached PDF and Word document that explains the process to Configure Microsoft Teams and Zoom to use as a Online Event Platform in the Training and Scheduling Module (Event Management).