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
Option 2: Quick Links | **Book a Course**



- 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.



- 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.



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)

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

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.

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**.



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.**



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



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

Reporting line as training manager

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