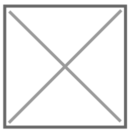
Event Management: Create a new Event

1. Open the event management module

Modules | Event Management | Administration | Manage training

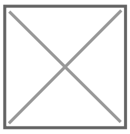
2. Click **Add New Event**.



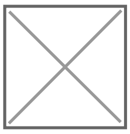
A blank Event Detail screen is opened where the event is planned. If any fields on the event detail screen are automatically filled in when it is opened, it is because a default event template exists which serves as the starting point for all new events. This default template is used to pre-populate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

On the blank event detail screen, note the following:

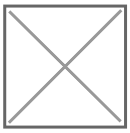
- There are a number of inactive tabs at the top of the page. These are used to more fully plan and describe the event and will become active once the event detail page is saved the first time.



- 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.

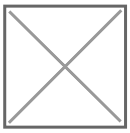


- The **Attendance Requirements** section is used to set the number of attendees allowed as well as to make provision for a waitlist on the event. It also enables you to determine the cut-off dates for bookings and cancellations.
- Normally events can only be booked on up to the day before the event.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



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.



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

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

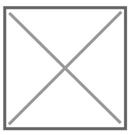
- On the **Event Detail** screen click the **hand** icon to open the venue/room library.

Cross-Schema venue booking

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**.



Copy Event

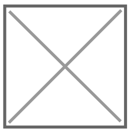
Properly populating an event with all the necessary information could take quite a while. Clicking the **Copy Event** button enables a user to re-use existing events to create new ones.

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.

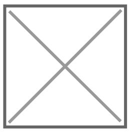
Copy Event

- 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.



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.



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

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.

Revision #2
Created 2021-03-28 00:30:31 UTC
Updated 2021-03-28 00:33:37 UTC