

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 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](#) Image not found or type unknown

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.

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List of rooms

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

Image not found or type unknown



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**.

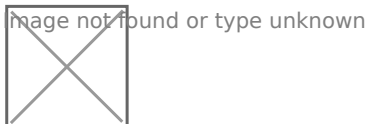
System Administration | Tools | Configuration | Framework | Human Resources | Event Management

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.

Enable cross-schema booking on rooms (optional)

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



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](#)

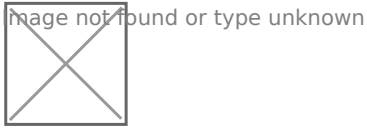
Image not found or type unknown

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.



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.

[illegible]

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.

Learning Type 6 Classroom ▼ *

Nature of Learning 7 Formal Institution ▼ *

Training Classification International Training ▼ *

Hours 11 12

Automatic Certification 12 ☐

Disable Training Intervention ☐

SAQA Accreditation ☐

For NQF aligned courses only

NQF Level 8 NQF level 2 ▼

NQF Band 9 ▼

Credits 10 0

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.

Printing of learner certificates

☒ Allow learner to print a certificate 13

☒ When they have been found competent

☐ When they have completed the course

Certificate Template Use default ▼

Certificate Display Name 14

Event Management Options

Event Management Category ▼ Only valid for "Classroom" Types

Participants Minimum 5 * Maximum 20 *

16. Skills Priority

Used in SETA reporting.

Outcomes

15 This field is used to formulate the intended outcomes of an intervention and is displayed on a course pathway. The field allows text formatting.

Skills Priority

16 Life Skills Development

Prerequisite

17 This field is used to stipulate the prerequisites for an intervention. The field allows text formatting.

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.

Learner record expiry options
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☒ A learner record created for this course never expires.

☐ Learner records for this course expire months after a learner has completed it.

months before the expiry date (called the advance warning period), the course will be re-opened and if a learner repeats the course again from the advance warning period onwards, he will receive a new learner record for this course. If the course is repeated before the advance warning period commences, the learner's existing learner record for this course is updated with the new results.

☐ Expire all learner records completed before (All learner records with an end date before (and including) this specified date, will be displayed as expired.)

Training Category
19
G

Sub Category
20

Pathway and Event Management Options

☒ Add To Learner Record
21

Save Save Add New Back To List

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

Project Structure type unknown

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