User Manual - Condensed

1. INTRODUCTION

The Event Management module forms part of the Learning Management System (LMS) in the Signify HR Suite of Software. Its main purpose is the efficient management of events.

The module enables an event to be taken through its entire life cycle i.e. from setting it up, managing booking requests from prospective attendees, booking request approval by management, formal booking by a training academy, the printing of attendance registers, capturing of learner records, and the eventual closure of the event.

The Event Management module is strictly process and role-driven and in this manual, the different roles are dealt with according to their responsibilities at different stages of the event management process. In other words, understanding the event management process is of the utmost importance.

The focus of this manual is to enable an Event Administrator to quickly set up an event, without any bells and whistles. Additional features are dealt with later in the manual.

1.1. The main phases which will be covered are:

1. Create a training intervention (the name of the event)
2. Create a closed event
3. Load attendees
4. Print a paper-based attendance register for attendees to sign
5. Complete the electronic attendance register for the attendees

2. USER ROLES IN EVENT MANAGEMENT

The following roles play a part in managing an event. In the table that follows, a general definition is given for each as well as typical activities PER role.

For a user to be able to perform the activities in the following pages, the user must be assigned the role of Event Administrator. Kindly refer to the Event Management Advanced manual for the steps to assign roles to users.

Role	Definition	Typical Activities
General User	All employees having to book themselves on events	- Search for and view advertised events - Request event bookings - Search for and download learning guides
Manager	All employees having people reporting to them and who is expected to approve booking requests	All the normal user activities plus: - Receive event booking request notifications from employees - Approve/decline booking requests
Event Manager	All employees having people reporting to them and who is expected to book their own employees	All the normal user activities plus: The ability to book employees reporting to them on events
Event Coordinator	An employee explicitly assigned the role of coordinating events in the module	- Create new events - Act as the coordinator (with all the implied responsibilities) - Manage booking requests on behalf of managers and employees - Make event bookings - Manage the event - Print attendance register - Complete the system attendance register and update learner records - Answer event queries
Event Administrator	An employee explicitly assigned the role of system administrator on the Event Management module	Full administrative control over: - Master data - Employee management - Events

3. CREATE A TRAINING INTERVENTION IN THE LIBRARY

Before an event can be created, its name must exist in the Training Intervention library. See below the recommended minimum fields to be completed in this library to make the name available for an event's creation.

3.1. Getting There

From the main menu, click System Administration | Modules | Training Scheduling | Master Data | Training Interventions.

3.2. What do I do?

Provide information in the following fields. A detailed explanation of the remaining fields can be found in the Event Management Advanced manual.

1. Training Intervention Name (_Required)_

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

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

2. Pathway Step Type

This field determines where (in which module) an intervention is displayed. If an intervention's type is _Classroom_, it can only be used in Event Management.

3. Learning Type

An arbitrary categorization. Potentially affecting the categorization on reports. Examples of typical learning types are _1 Day Classroom, Awareness Training, Motivation,_ etc.

4. Nature of learning

An arbitrary classification of learning. Examples are _Internal, External, Formal_ etc.

5. Training Classification

An arbitrary classification of learning. Examples are _Local, Soft Skills_ etc.

6. 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.

7. Skills Priority

Typically linked to the SETA skills priorities e.g. Technology, Risk Management, and Compliance, etc.

See below an example of the full Training Intervention screen.

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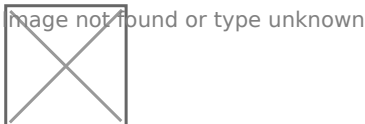
4. CREATE A CLOSED EVENT

A closed event is an event that is fully controlled by the event administrator. Some of its characteristics are:

- General users cannot request a booking on a closed event.
- Only the administrator can load, book and/or decline attendees.

A fuller explanation of event creation can be found in the Event Management Advanced manual.

4.1. Getting There

From the main menu, click System Administration | Modules | Training Scheduling | Administration | Manage Training.

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4.2. What will you see?

On reaching the Event List page, note the following.

1. Events scheduled to happen in the selected date range are listed.
2. Always use the SEARCH section to make sure your event has not been created yet.
3. Note the Event Reference Number, which is a unique number assigned to every event. You will primarily use this number when searching for or referring to an event.
4. Next to each event, find the ACTION button which gives you access to either edit the event or to jump directly to its attendance register.
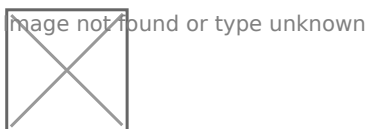

5. The tabs in the middle of the screen allow grouping of events according to their progress e.g. in planning, details confirmed, canceled, or finalised.


4.3. What do I do?

1. Click on **Add New Event** to open the screen below. Note the following when using the screen.
2. There are several 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.
3. Use the **Hand** icons next to some of the fields to open a list of library items to select from.
4. Specify dates by making use of the icons.
5. Fields with an * are compulsory.
6. The **Attendance Requirements** section is used to set the number of allowed attendees 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.
7. Normally events can only be booked 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.
8. Complete the blank event detail page by providing or selecting appropriate values and then clicking **Save**
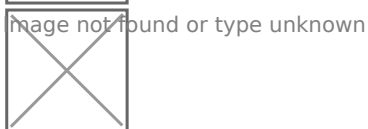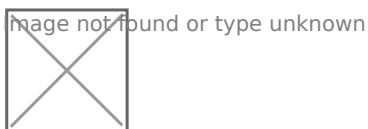
Once you have saved the page, note the following:

1. The event gets a unique reference number, assigned in the Smart Navigation field.
2. You can now **Copy the Event** for reuse if needed.
3. You can group or even cancel the event using (**Confirm Event, Cancel Event, Finalize Event**)
4. Assume the event will be sending a communication via email notifications to attendees and the email address FROM which they will be sent is shown around the top of the screen: **##########@company.com**
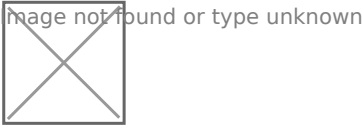

5. LOAD ATTENDEES ON A CLOSED EVENT

In the previous steps, a closed event was created, saved, and a unique reference number assigned. In the following steps, attendees will be added to the employee database. For a more detailed explanation of working with nominations and attendees, kindly refer to the Event Management Advanced manual.

5.1. Getting There

From the main menu, click System Administration | Modules | Training Scheduling | Administration | Manage Training, to open the Event List screen.

If you are still not on the newly created event's Event Detail tab, search for the event, then click **Action** | **Edit Event Details**.
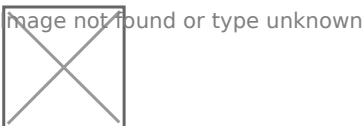
5.2. What do I do?

From the list of tabs now displayed at the top of the event, locate and click **Attendance**.
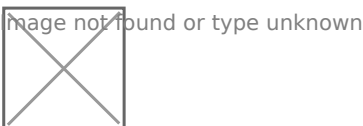
Before going to the ATTENDEES section, note the purpose of each section:

Request

Two types of booking requests are handled here:

- Booking requests from prospective or nominated attendees.

- All prospective attendees whose requests were approved by their managers.
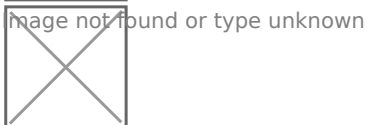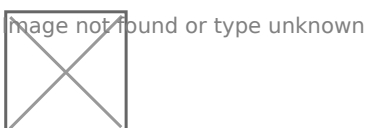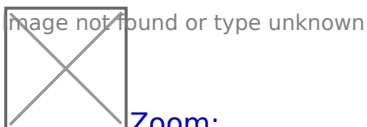
Attendees

All attendees for whom there is a booked reservation, are listed in this section.

Attendance Register

Several functionalities are contained in this section:

- All booked attendees from the ATTENDEES section are present.
- Attendees without bookings (gate-crashers) can be loaded.
- An attendance register can be printed.
- An electronic attendance register can be completed and saved against each attendee.
- Various reports

1. Locate and click to open the ***Attendees*** section.
2. Click ***Add Employee*** to search for and load attendees from the employee database. The moment an attendee is loaded, the system sends an email communication with the course details and optionally a calendar invite.
3. Alternatively, click ***Import Employees*** to import multiple attendees from an import sheet.
4. Note while searching for employees how the system warns of events on which the attendee is booked on in the vicinity of the current event.
5. The people loaded here are all seen as "booked", i.e. they have a reserved place and are expected to attend. This booking is therefore not just a nomination it is already confirmed.

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# 6. PRINT A PAPER-BASED ATTENDANCE REGISTER

After loading attendees in the ***Attendees*** section, preparations usually start for the event to take place. One of the actions is printing the attendance register.

For a more detailed explanation of all the functionalities on the **Attendance Register** section, kindly refer to the Event Management Advanced manual.

6.1. Getting There

From the main menu, click System Administration | Modules | Training Scheduling | Administration | Manage Training, to open the Event List screen.

Locate the event and click **Action** | **Edit Event Details**.

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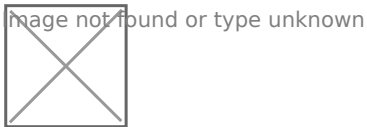
6.2. What do I do?

1. Ensure the **Attendance Register** section is selected.
2. When opening the section, all the employees loaded as attendees in the **Attendees** section will also be listed on the **Attendance Register** screen.
3. Look for the screen section **Attendance Register Printing Options.**
4. Select the appropriate report format (e.g. All information on same page) and click **Preview** to generate a printable attendance register from the attendee information.
5. Take the attendance register to class and have all attendees sign it.
6. Bring the signed register back to the office for the next phase of the process.
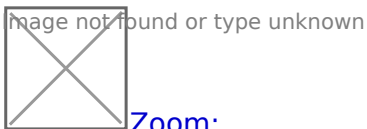
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7. COMPLETE THE ELECTRONIC ATTENDANCE REGISTER

On completion of a training event, one of the activities taking place afterward is updating the attendance register on the event. This has the following benefits:

- Completing the electronic attendance register enables you to create a learner record for each attendee.
- An attendee can print a course certificate from the learner record if this is allowed for the course.
- If the event is linked to a pathway, the event will show as attended on the pathway.
- If the event is linked to an employee's PDP record, the PDP record will show as completed.
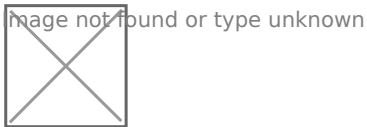
For a more detailed explanation of all the functionalities on the **Attendance Register** section, kindly refer to the Event Management Advanced manual.

7.1. Getting There

From the main menu, click System Administration | Modules | Training Scheduling | Administration | Manage Training, to open the Event List screen.

Locate the event and click **Action** | **Edit Event Details**.

7.2. What do I do?

1. Ensure the **Attendance Register** section is selected.
2. When opening the section, all the employees loaded as attendees in the **Attendees** section will also be listed on the screen.
3. Keep the signed attendance register handy. On it you will have 2 types of entries:
    - People who were booked.
    - People who were not booked but nevertheless attended the event.
4. Use the paper-based attendance register and transfer all needed information to the employee's electronic record as follows.
5. Tick the following 2 checkboxes, or just the **Select** box if needed. Ticking **Log to Learner Record** will create a learner record for each attendee.
6. Pay attention to the following fields:
    - Attendance Type e.g. *Attended*
    - Competent e.g. *Not Yet Competent*
    - The Comment field, if needed.
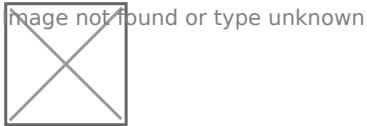7. **Save** the entire page when done.
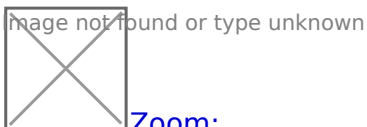
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8. ADDITIONAL FUNCTIONALITIES ON AN EVENT

The following are convenient functionalities to be aware of when working with events.

8.1. Event Email Communications

See below a diagram of the most important emails that can be triggered from the events module or click on the PDF link.

Mind_Map_-_Event_Management_Emails_15-09-2016.pdf

8.2. The Event List Screen

1. Always consider the date range when searching for events.
2. If an event cannot be seen on the screen in front of you, look whether it is not present on one of the grouping folders e.g. **Confirmed Event, Finalized Event** etc.
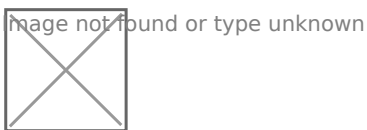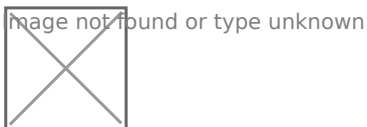

8.3. The Event Detail Tab

Many fields draw their information from data libraries e.g.

- Training Interventions
- Providers
- Venues
- Coordinators
- Facilitators.

These are indicated by a **Hand Symbol** If the required information is not present on the list, refer to the Event Management Advanced manual for information on populating the libraries.

8.4. The Event Schedule Tab

1. If an event's dates (called the schedule) must be changed, access the schedule from the event's internal tabs.
2. Click the **Advanced Options** tab to reveal additional functionalities
3. Use the **Documents** tab to upload documents (e.g. brochure, training material etc.) to an event. If flagged, some documents will be automatically included on emails to attendees.
4. Use the **Cancel Event** button to cancel an event and send a cancellation email to all booked attendees.

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