Events Guide

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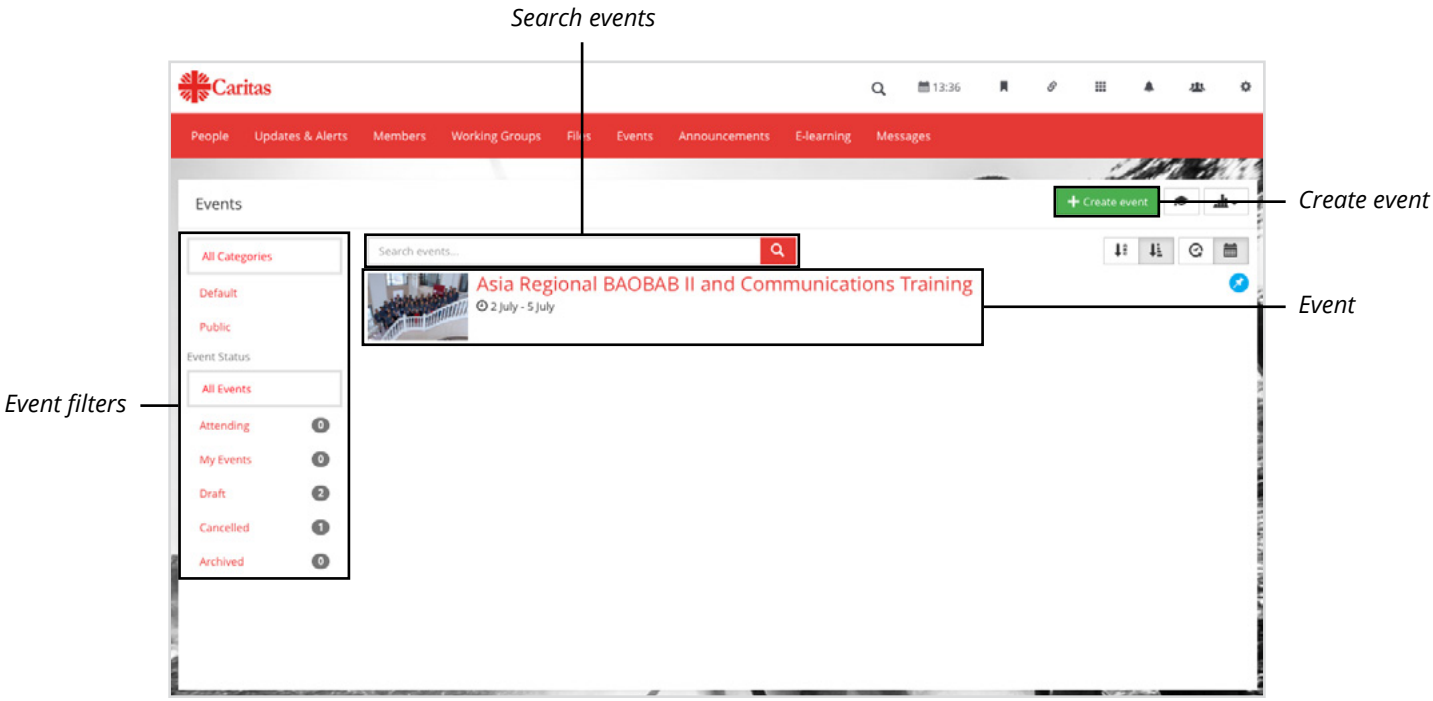
1 Events

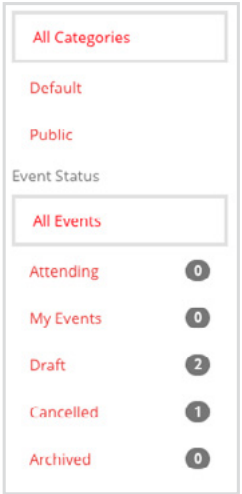
1.1 Events overview

When clicking **'Events'** in the main navigation bar along the top of the site, you will land on the events list page, which displays upcoming events. Filters can be found on the left hand side of the page and a search bar can be found above the events list.



Events main page

1.2 Finding events



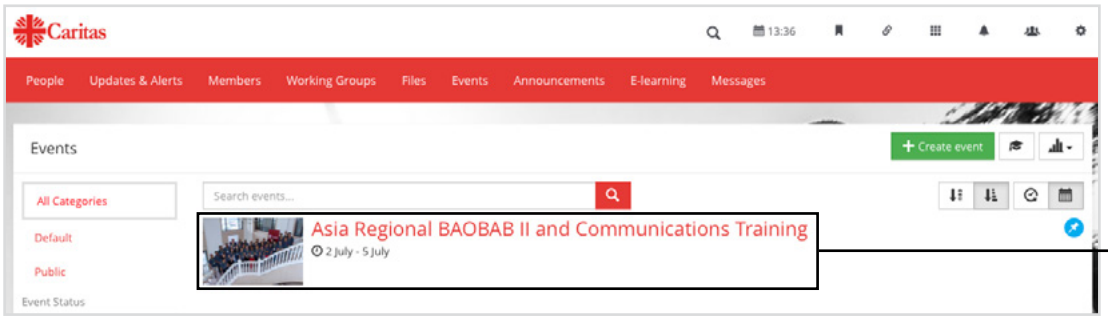
Events can be filtered by category. By default, 'All Categories' is selected. Events can also be filtered by status. By default, 'All Events' is selected. Other status types include: Attending, My Events, Draft, Cancelled and Archived.

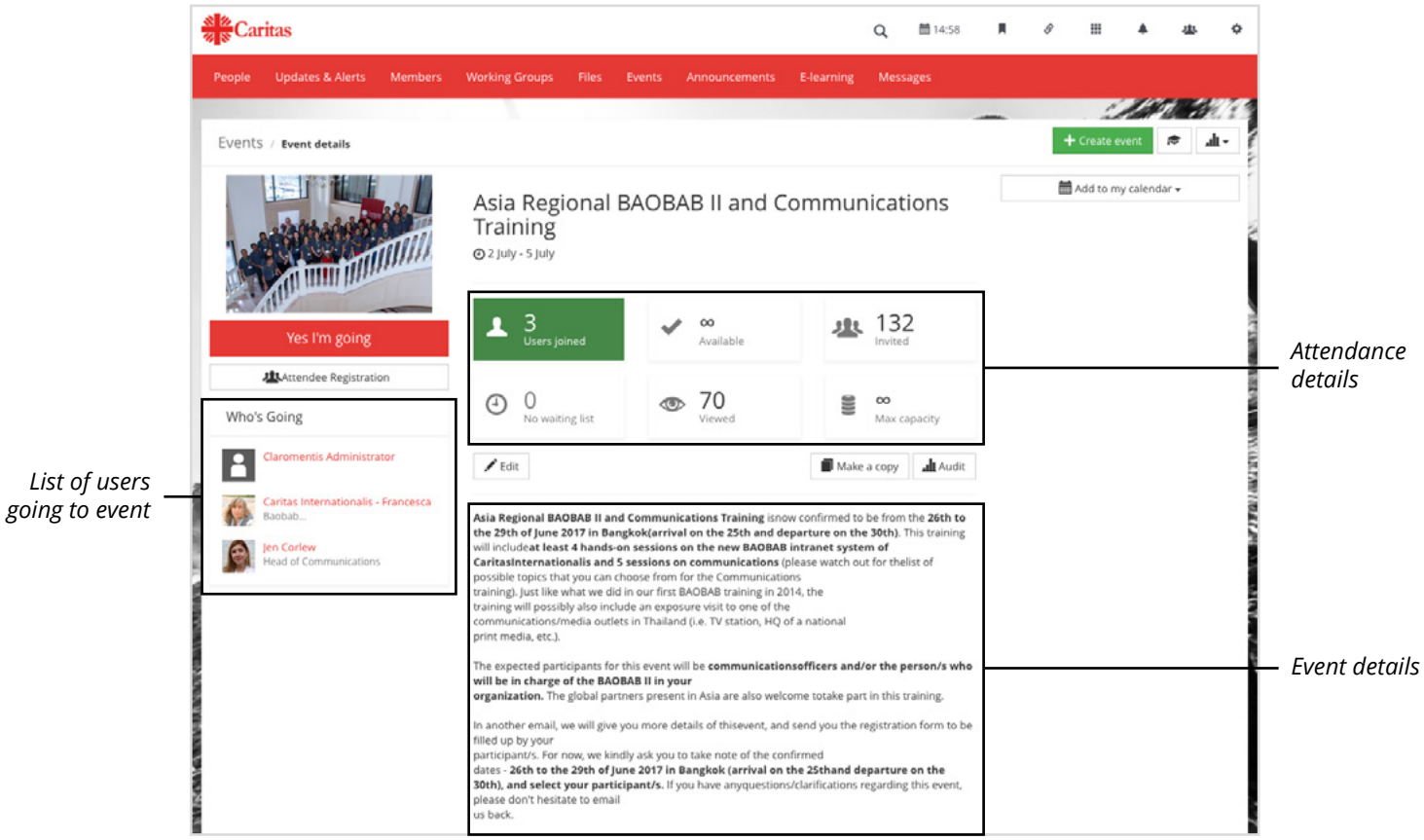
By default, upcoming events are displayed. It is possible to modify the display to show the most recently added events or past events. Use the toggles located above the events list to the right. By default, events are sorted by creation date. It is possible to sort events alphabetically by clicking **'A to Z'**.

Use the search bar to search for events by keyword. Insert a keyword into the search bar and click the **'Search'** icon.

1.3 Viewing events

To view the details of an event, simply click on the image or title of the event you wish to view.





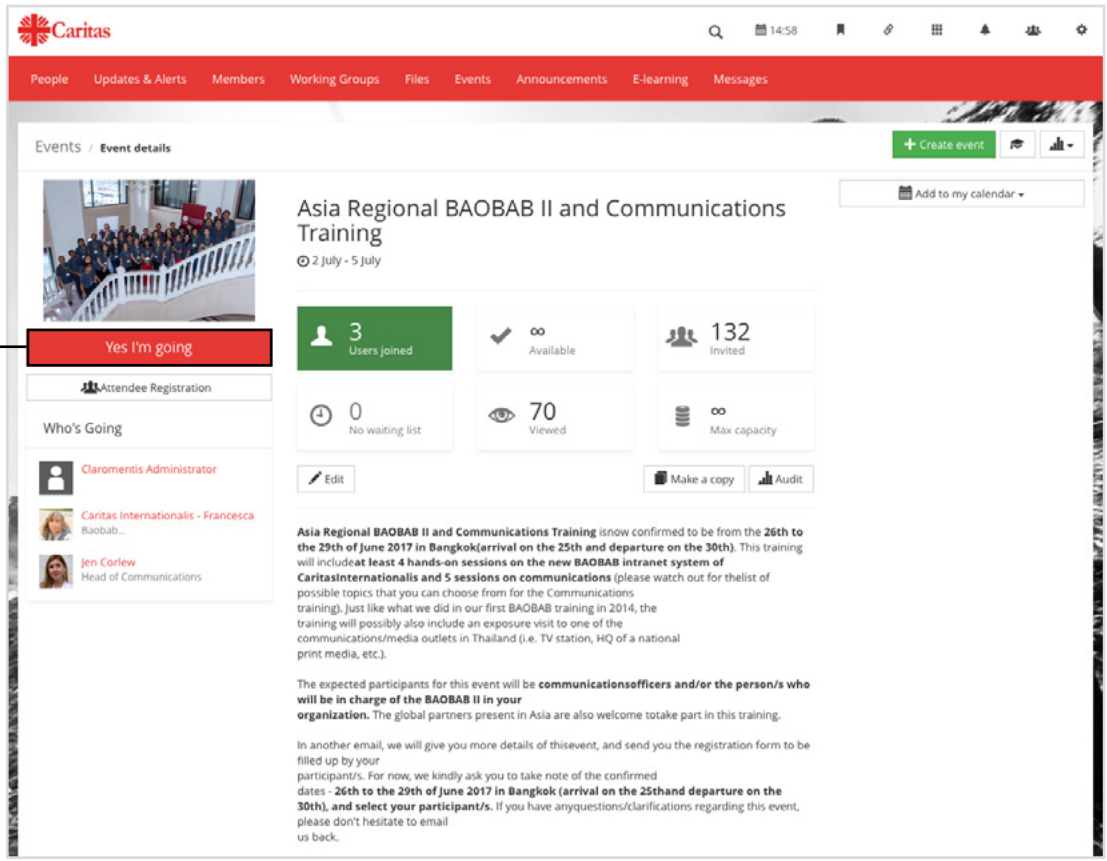
An event page

2 Joining events

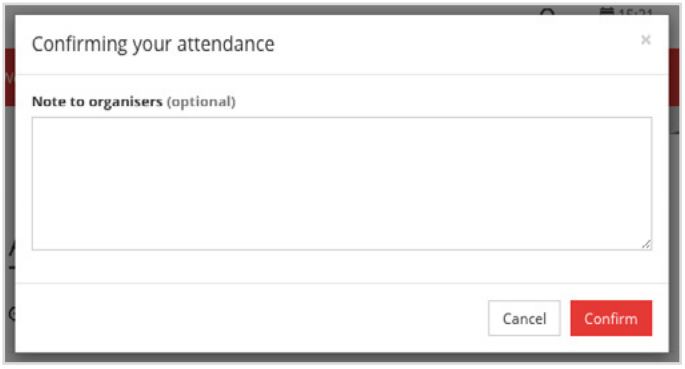
2.1 Join an event

To join an event, click **Yes I'm going** from the event details page.

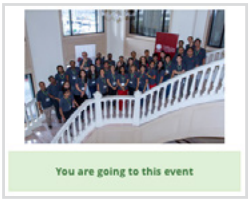
Yes I'm going button



Some events may allow you to bring a certain number of guests (friends and family). If this is allowed, select the number of guests you will be bringing from the drop down list. You will only be able to select up to the maximum defined by the event organiser. If guests are not allowed, this field will not appear.

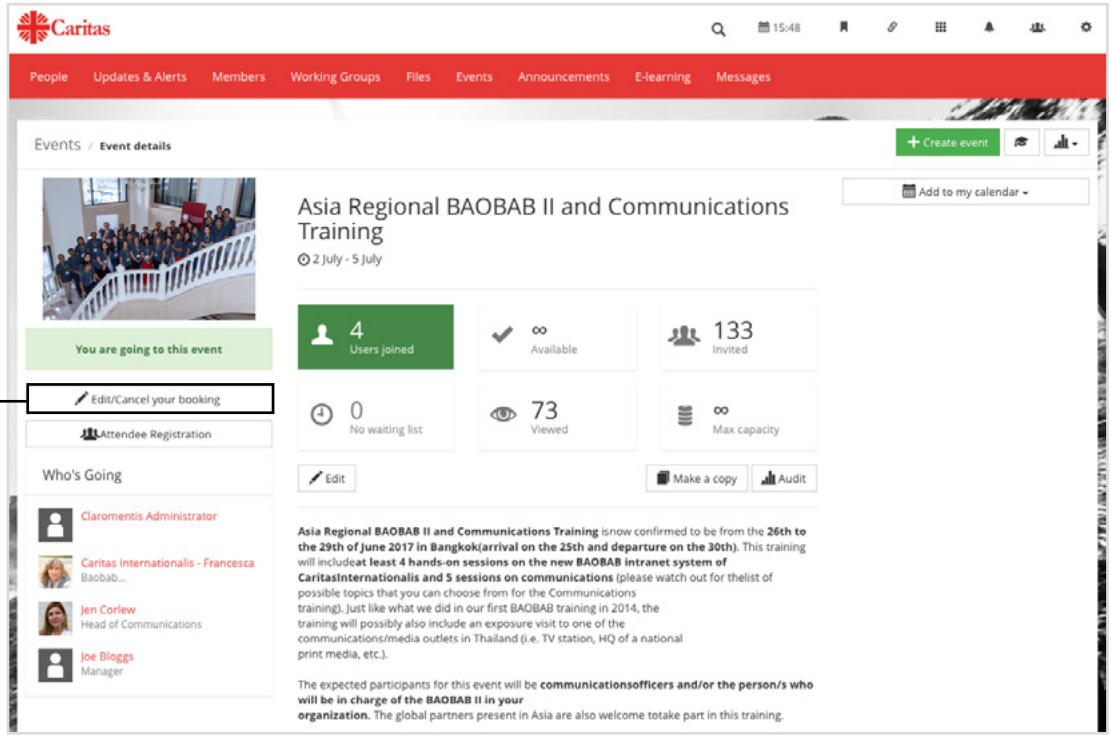


Submit a note to the organisers (optional) and click **Confirm**. Your name will then be displayed under the 'Who's Going' list.



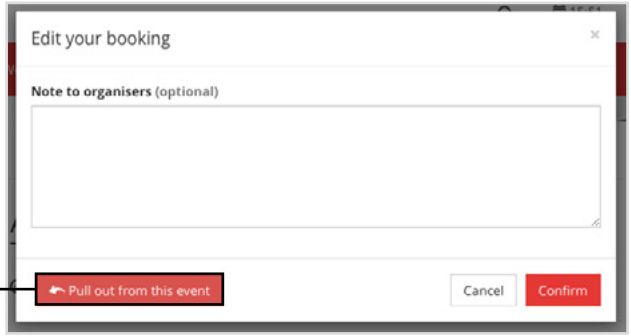
2.2 Editing or cancelling a booking

To edit or cancel a booking, click **Edit/Cancel your booking** from the event details page.



Edit/cancel button

Modify your booking details as needed. Alternatively, click **'Pull out from this event'** to cancel your booking.

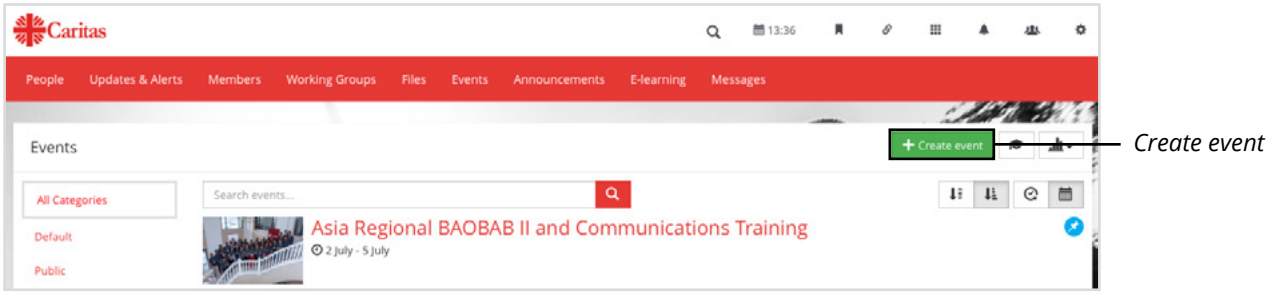


Pull out from this event

3 Creating events

3.1 Create event

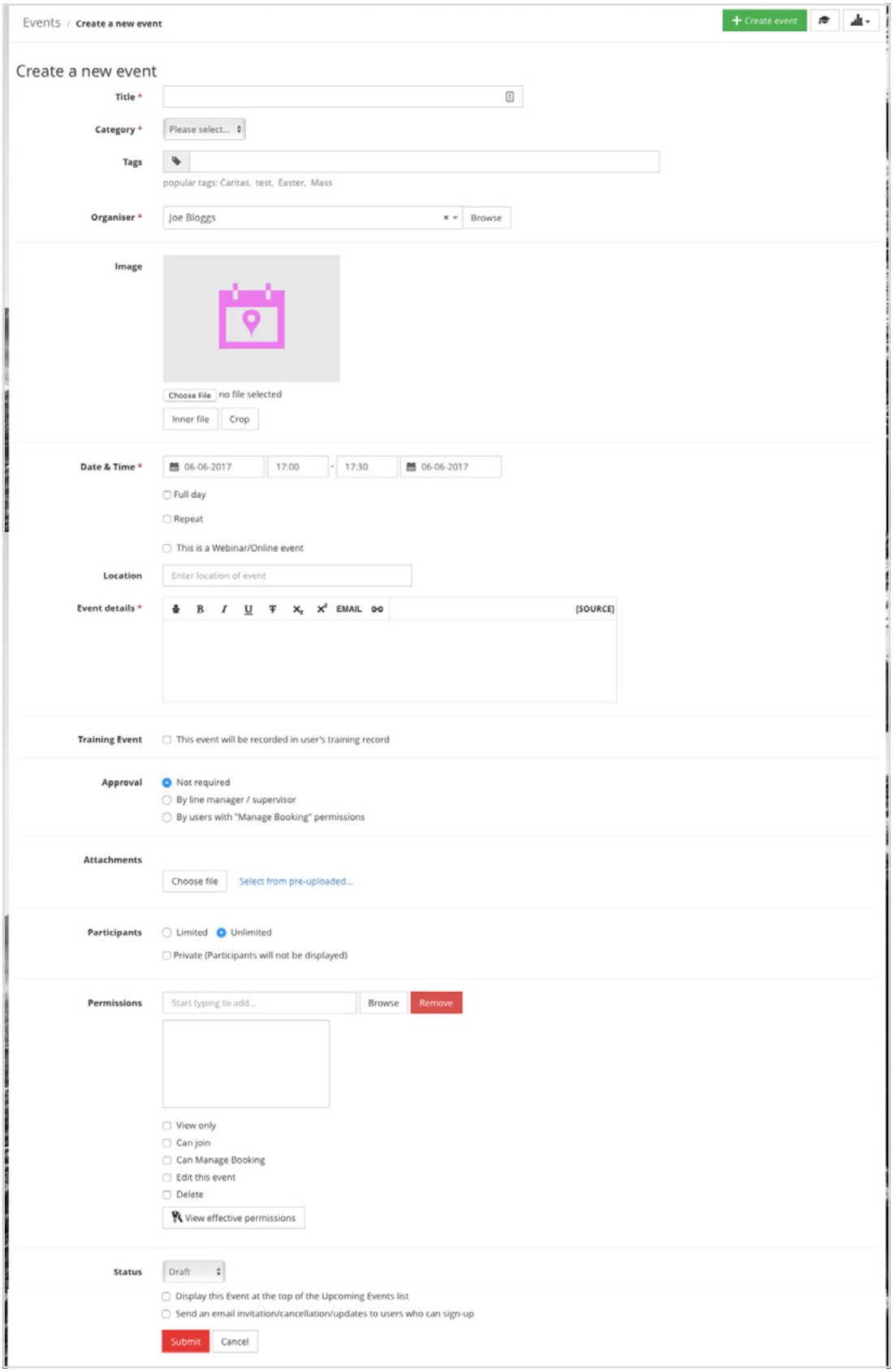
To create a new event, click the '**Create event'** button to the top right of the events main page.



Events main page

Complete the details as required.

- **Title:** Insert the event title/name.
- **Category:** Select the appropriate category from the list.
- **Tags:** Enter the tag names required, separated by a comma. Popular tags are displayed under the tag field. For more information on tags, please see the Tags Guide.
- **Organiser:** By default, the organiser of the event is the person creating it.
- **Cover image:** Click Choose file to upload an appropriate cover image for the event. Alternatively, use the Crop tool to resize the image.
- **Date & Time:** Specify the date and time of the event.
  o Full day: Tick the checkbox if the event is all day. The time fields above will disappear.
  o Repeat: Tick the checkbox to schedule the event at a set interval until a specified date.
- **Webinar/Online event:** Tick the checkbox if the event is scheduled to take place online, i.e. the event is not in a physical location. If ticked, the location field below will disappear.
  o Joining Details: If 'Webinar/Online event' is ticked, an additional field will appear labelled 'Joining Details'. Anyone signed up to the Event will receive an email containing these joining instructions. The joining instructions will also be displayed on the event details page.
- **Location:** Specify the location of the event. This field integrates with Google Maps and a map of the location will be displayed. Remember, this field will not be displayed if 'Webinar/Online event' was ticked.
- **Event details:** Insert the event details.


Events / Create a new event
+ Create event
Create a new event
Title *
Category *
Please select...
Tags
popular tags: Caritas, test, Easter, Mass
Organiser *
Joe Bloggs
Browse
Image
Choose File
no file selected
Inner file
Crop
Date & Time *
06-06-2017
17:00
17:30
06-06-2017
Full day
Repeat
This is a Webinar/Online event
Location
Enter location of event
Event details *
EMAIL
[SOURCE]
Training Event
This event will be recorded in user's training record
Approval
Not required
By line manager / supervisor
By users with "Manage Booking" permissions
Attachments
Choose file
Select from pre-uploaded...
Participants
Limited
Unlimited
Private (Participants will not be displayed)
Permissions
Start typing to add...
Browse
Remove
View only
Can join
Can Manage Booking
Edit this event
Delete
View effective permissions
Status
Draft
Display this Event at the top of the Upcoming Events list
Send an email invitation/cancellation/updates to users who can sign-up
Submit
Cancel

- **Approval:** Here you can select whether interested attendees will need approval to join the event. You can choose to have no approval needed, approval by line manager/supervisor or approval by users with manage booking permissions.
- **Attachments:** Click **'Choose file'** to upload relevant attachments.
- **Participants:** Select 'Limited' or 'No Limit' (default).
  - ***Total capacity:*** Insert the maximum number of people who may attend the event.
  - ***Friends or family:*** Tick the checkbox to allow people to bring friends and family and insert the maximum each person may bring.
  - ***Waiting list:*** Tick the checkbox to allow a waiting list and insert the maximum number of people who may be added to the waiting list.
  - ***Private:*** Tick the checkbox to make the guest list private so other attendees cannot see who else is attending.

- **Permissions:** Select the appropriate users or groups of users and then select their level of rights by ticking the relevant checkboxes: View only, Can join, Can Manage Booking, Edit this event, Delete
- **Status:** Select the appropriate status of the event: Draft (default), Live, Cancelled, Archived

Once all event details have been completed, click **Submit**.

3.2 Edit event

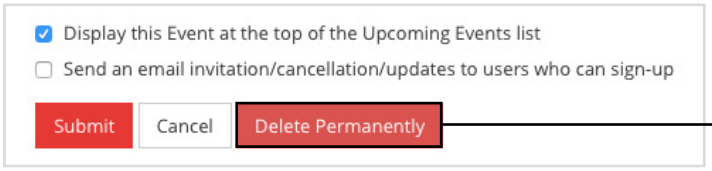
To modify an existing event, click **'Edit'** from the event details page.

If the event you are modifying is a repeatable event, you will have the option to edit the single event or the whole sequence.

Edit the event details as required, following the steps in section '3.1 Create event'.

3.3 Delete event

To delete an event, click **'Delete Permanently'** from edit mode and then click **'OK'** to confirm.



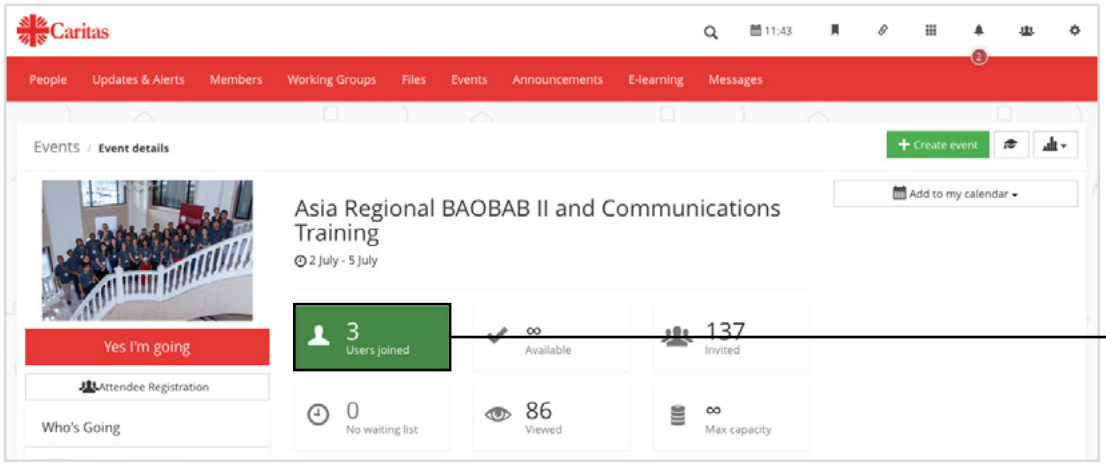
Delete Permanently button

TIP: If you are deleting a repeatable event, clicking Delete Permanently from edit mode, either when editing the single event or the whole sequence, will delete the entire event.

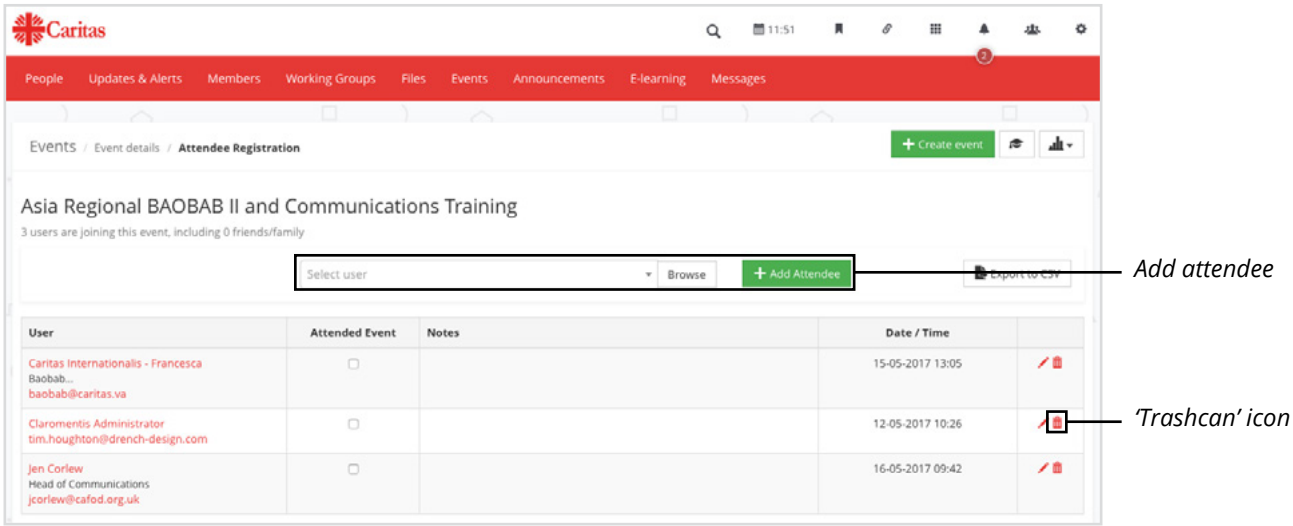
4 Managing bookings

4.1 Add users

To manage the attendee list, click on the green users joined button from the event details page.



Users who have joined the event will appear in the list. It is possible to register users for the event on their behalf, by selecting the required user and clicking **'Add Attendee'**.



4.2 Delete users

To delete a booking, click the 'trashcan' icon to the right of the user you wish to remove from the event and click **'OK'** to confirm.