

Online Learning: How to create, edit, clone or delete an event

If you have any questions, problems or feedback please contact your club administrator or member.education@surflifesaving.org.nz.

This guide will show you how to:

- Create an event
- Edit an event
- Clone an event
- Delete an event

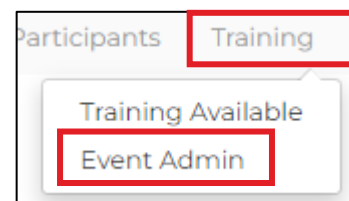
Before you start, make sure you have "switched" to your admin or assessor access. See our "**Switching between accounts**" guidance document.

How to create an event

To create events, look at the menu options on the top of the page:

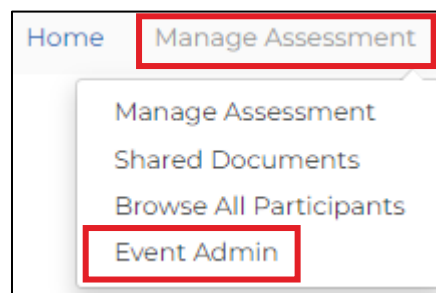
For administrator access:

1. Click on "**Event Admin**" under the "**Training**" heading.



For assessor access:

1. Click on "**Event Admin**" under the "**Manage Assessment**" heading.



For administrators and assessors:

2. Click on the "Event Management" icon on the left-hand side of the screen.



- a. Or click on the 3 line "menu icon" in the top left-hand corner and select "**Events Management**" from the menu options



To create an event:

1. Click the plus button in the bottom right corner of the page.




Dashboard Search events by name or club

Displaying **Incomplete Events** for My Clubs

START	END	NAME	MEMBERS	CLUB	STATUS
0 Events					

+

2. You will be presented with the following page to create an event. Make changes as required. **Note:** Fields with a blue asterisk  are compulsory to add.

Under EVENT DETAILS

- a. Click into the "CLUB" field and find your club (**Note:** The club MUST be added first).
- b. Click into the "COURSE(s)" field, search for and select the course your event relates to.
 - i. **Notes:**
 - You can add more than 1 course into 1 event, BUT you then must choose assessors (see below) that are allowed to assess all those courses.
 - We recommend creating an event for each course. This has less implications for the assessors/learners when closing an event.
- c. Type the maximum candidates in (if applicable), otherwise leave this blank.
- d. The "Limit External candidates" **not used at SLSNZ - leave this blank – do not tick.**

Event Details

CLUB* a

SLS NZ Demo > SLS NZ Demo X v

COURSE(S)* b

SLSNZ - Surf Lifeguard Award (SLA) Refresher X v

TOTAL NUMBER OF CANDIDATES c LIMIT EXTERNAL CANDIDATES d

Leave blank if there is no limits

Under EVENT CONTACT

- e. Type in the name of the person organising the event. This is the person people can contact for information.
- f. Add this person's emails.
- g. Add this person's phone number.

Event Contact

NAME* e

Anina Upton

EMAIL* f

anina.upton@surflifesaving.org.nz

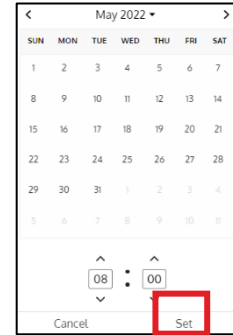
PHONE g

0274220322

Under SESSION

- h. Choose the start DATE and TIME.
- i. Choose the end DATE and TIME.

Note: If you click into (h) and (i)'s fields, you will get a calendar pop up – choose the **date**, change the **time** and click **"Set"**.

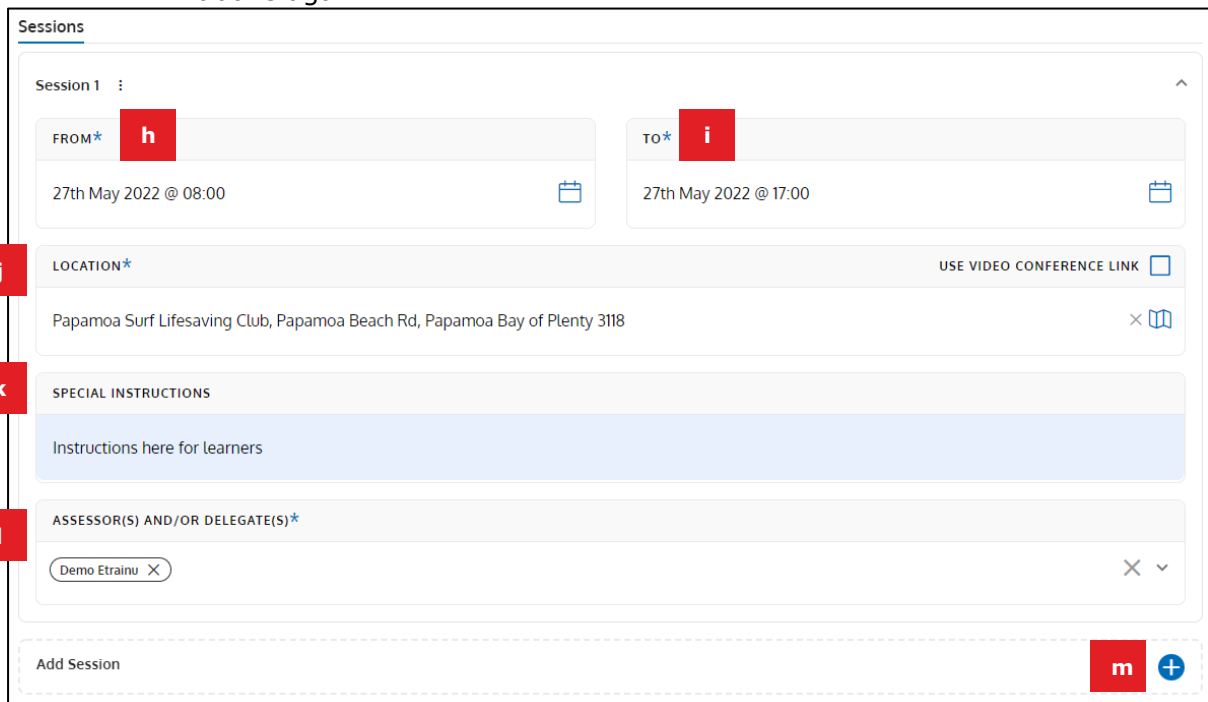


- j. Add the location of the event – This is linked to Google Maps, so just start typing and it will find the location for you.
- k. Type in any "Special Instructions" (this can include where to meet, what to do on arrival etc.)
- l. Click into the field and start typing your assessor's name (s). Choose the **'Assessor'** that will be completing the ticking off in the system for the event.

Note: Only Assessors who hold the necessary credentials to assess the course you selected in 2b above, will show for selection. Also, if you have more than once course being assessed (in one event), you may need to select an assessor for each. For example:

- If you have an event for Surf Lifeguard and Patrol Support Refreshers, the assessors are the same, so you can select "Mr Assessor – All"; but,
- If you have an event for 2 separate courses with 2 different assessors, i.e. the Surf Lifeguard Refresher and IRB Drivers Refreshers (which we do not recommend), you will can (and will need to) choose "Mr Assessor – Surf Lifeguard" for the SLA Refresher and "Ms Assessor – IRB Driver" for the IRB Driver Refresher.

- m. You can add multiple sessions to 1 event. For example, if you were going to run a refresher session in the morning and a session in the afternoon, you could create 2 events. Click the PLUS icon and complete the details as above again.



Under NAME & DESCRIPTION

n. Type in the **name** of your event.

Note: Naming Convention Suggestion:

Start with your club name, then the event name, i.e. '**Papamoa SLSC Surf Lifeguard Refresher Day**'. Make sure the learner can identify your event by name so they know which club is offering the event and what they are attending.

o. Add a **description**. This can include what you will be completing and information about the day.

n

o

Name & Description

NAME*

Papamoa SLSC - Surf Lifeguard Refresher Day

DESCRIPTION

B I U [List Icons]

At this event, we will be refreshing all members for their Surf Lifeguard Award. Please make sure you complete your theory test online before the date of this assessment.

Under RESOURCES and NOTIFICATIONS

p. You can add relevant resources to the event (i.e. the Safety Plan, pre-reading etc.) by:

- i. Select "Link".
- ii. Select "Assessor"; "Learner" or "All (this will make the attached document visible only to those you select).
- iii. Type in a name for the resources.
- iv. Add the URL where the resource is saved (no resources can be added as a PDF, word or in any other format other than a URL link).
- v. If you'd like to add more than 1 resource, click the blue PLUS symbol and repeat the above.

p

Resources

EVENT RESOURCES

Link	Assessor	CPR video	https://www.surflifesaving.org.nz/lifesaving/lifesaving-resources	+
				x



- q. You can customise the email notifications that will be sent for your event. Note this defaults to one reminder, so if you'd like to send no notification, make sure you delete the one that is there. To add a different/second notification:
 - i. Click on the blue PLUS button first.
 - ii. Select if you'd like to send a notification/reminder one day or week before the event date.
 - iii. Choose "email" as the method of delivery.

- r. You can also add instructions of what you would like your learners to do after enrolment, but before the event. You can include aspects such as a pre-learning completion reminder, what to bring with them etc.

Notifications

q REMINDER NOTIFICATIONS +

One Week Before Email x

One Day Before Email x

r POST ENROLMENT INSTRUCTIONS

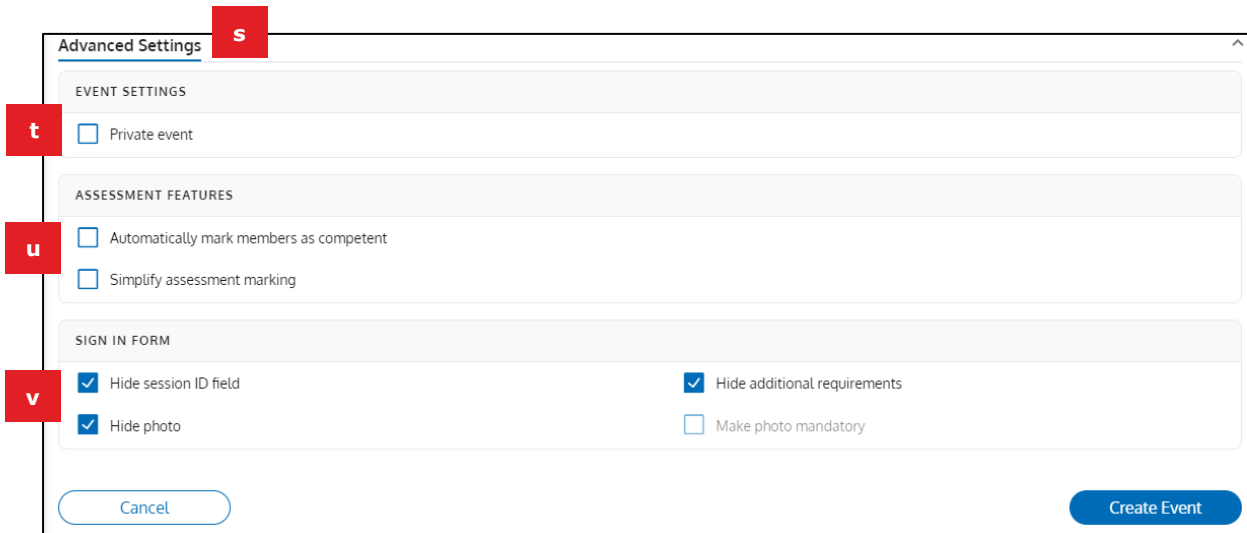
B I U

Please make sure you complete your theory test online before the date of this assessment.


And finally, there are some **ADVANCED SETTINGS**

For almost all events created, advanced settings will be irrelevant, but just FYI:

- s. You must click on the “**Advanced Settings**” heading for these to expand.
- t. By clicking and making an event “**Private**” it means it will not appear in the training calendar. Assessors and Admins can see it from the Assessor App area only, but learners cannot. Once the event is saved, a URL will appear in the description of the event, in the Assessor App. This URL can then be emailed to individuals should you want them to enrol. This URL is used as a secret way to access the course.
- u. For the 2 assessment features:
 - i. “Automatically mark learners as competent” – this means all learners “pass boxes” are ticked by default and you need to UNTICK those that are not competent yet.
 - ii. “Simplify assessment marking” – this is an obsolete function that will be removed in the future. Ticking it makes no difference.
- v. For the 4 “sign in form” settings:
 - i. Hide session ID field – ignore this, not an SLSNZ function. Leave as default setting.
 - ii. Hide photo – when an assessor is signing in the learners on the day, this is an option to take a photo of the person on sign in. By hiding this, it will be turned off. Leave as default setting.
 - iii. Hide additional requirements – ignore this, not an SLSNZ function. Leave as default setting.
 - iv. Make photo mandatory – when an assessor is signing in learners on the day, this will make their photo mandatory.



3. Click “Create Event” once you are happy with all your information.



The event will now be available in the “Training Event” calendar for learners to enrol into.

Once the event is created, the Assessors selected in the event session will be notified of the event via email and will be emailed a calendar attachment to add the event to their personal calendars.

Events can be edited, deleted or cloned by pressing the menu button on the left of each event in the Events Management page as per the steps below.

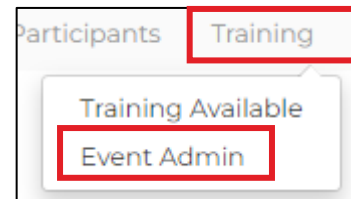
How to edit an event

All admins and assessors can edit, clone or delete each other's events, so **DO NOT MAKE CHANGES TO ANOTHER PERSON'S EVENT BEFORE CHECKING WITH THEM FIRST!**

To get to the event calendar, look at the menu options on the top of the page:

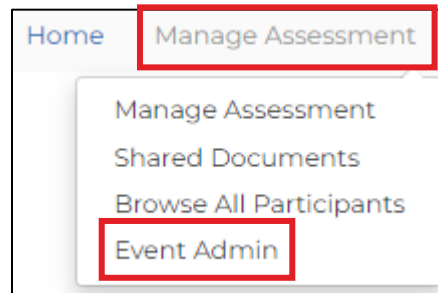
For administrator access:

1. Click on "**Event Admin**" under the "**Training**" heading.



For assessor access:


1. Click on "Event Admin" under the "Manage Assessment" heading.



For assessors and administrators:


2. From the dashboard page, click on the "Event Management" **icon** on the left-hand side of the screen.



Or click on the 3 line "menu icon"  in the top left-hand corner and select "**Events Management**".

First, you can also filter events displayed by adding or removing the filters pressing the filter “funnel” button at the far right of the search bar and adjusting the filter options.



- **Note:** The ‘My Clubs’ and ‘Incomplete Events’ filters are selected upon login to be ticked **by default**.
- To see all events – **make sure all of these are all UNTICKED:** 

My Clubs
 My Events
 Incomplete Events

It is possible to update any details of the event via the **Edit Event page**.

- To edit the event:
 - Click the **3 dots** next to the date of the event.
 - Click “**Edit**”.

	START ↓	END ↑
⋮	19th Jan 2022	19th Jan 2022
	2	4th Jan 2022
Edit	21	21st Dec 2021
Clone	21	7th Oct 2021
Delete	021	23rd Jun 2021

- Make any changes you would like.
- Click the ‘**Edit Event**’ button at the bottom of the page.


Advanced Settings

⌵

Cancel

Edit Event

- A pop-up will appear to confirm you wish to update the event.
 - You will also be asked if the system should send a notification to the learners and Assessors regarding the event modification. If this is TICKED, email notifications will be sent.
 - You can also include an additional message for notification recipients that will be included in the email notification.
 - Click “**Edit Event**” to confirm.



Edit Event?

a Notify enrolled candidates and assessors?

b

Cancel

c **Edit Event**

How to delete an event

An event might need to be deleted if it is being cancelled (i.e. due to weather, Covid etc.) and a new date has not been chosen yet.

All admins and assessors can edit, clone or delete each other's events, so **DO NOT DELETE ANOTHER PERSON'S EVENT BEFORE CHECKING WITH THEM FIRST!**

1. To delete the event:
 - a. Click the **3 dots** next to the date of the event.
 - b. Click "**Delete**".

Displaying All Events


START ↑↓	END ↑↓	NAME ↑
8th Apr 2022	8th Apr 2022	Papamoa SLSC - Surf Lifeguard Refresher Day
⋮	29th Mar 2022	29th Mar 2022
		SLA Refresher
	22	16th Jul 2022
		Surf Official L2 Face to Face Training

Edit

Clone

Delete

2. A pop-up will appear to confirm you wish to delete the event.
 - a. You will also be asked if the system should send a notification to the learners and Assessors regarding the event deletion. If this is TICKED, email notifications will be sent.
 - b. Choose a reason for the cancellation.
 - c. You can also include an additional message for notification recipients that will be included in the email notification.
 - d. Click "**Delete Event**" to confirm.



Delete Event?

a Notify enrolled candidates and assessors?

Other ✕ ✓ **b**

c

Cancel
d Delete Event

How to clone an event

If you are creating the same type of event more than once, cloning an event is great option and a time saver.

1. To clone an event already created:
 - a. Click the **3 dots** next to the date of the event.
 - b. Click "**Clone**".

Displaying All Events

START	END	NAME
8th Apr 2022	8th Apr 2022	Papamoa SLSC - Surf Lifeguard Refresher Day
29th Mar 2022	29th Mar 2022	SLA Refresher
22	16th Jul 2022	Surf Official L2 Face to Face Training

Edit

Clone

Delete

- c. Make any changes you would like (i.e. change the name; dates and times; instructions, assessors etc.)
- d. Click the '**Create Event**' button at the bottom of the page.

Advanced Settings

Cancel

Create Event