GUIDANCE DOCUMENT: How to create, edit, clone or delete an event.

'Event' is the terminology used in LINE*BREAK* for training events - which can be **face-to-face workshops, webinar sessions or practical observations assessments**. This guidance document (GD) provides guidance on **how to create, edit, clone or delete these**.

To access online learning, you will login via the Rugby Xplorer platform. If you do not already have a Rugby Xplorer account, **watch this video** to see how to sign up: RX – How to sign up.

If you have not accessed the **LINE*BREAK*** learning management system before, follow these steps: www.nzrugby.co.nz/assets/1.0-Learner-GD_How-to-log-in.pdf

To access your admin or assessor account, follow these steps: How to switch your accounts

If you have any questions, problems, feedback or if you feel you should have one of the above accesses, please contact us on educationhelp@nzrugby.co.nz.

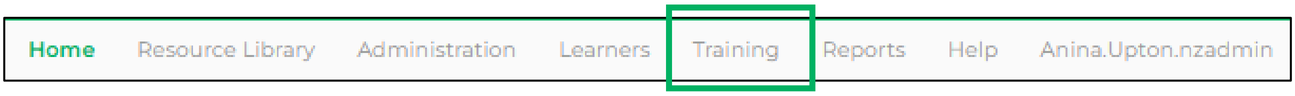
Steps covered in this GD include:

How to create an event

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

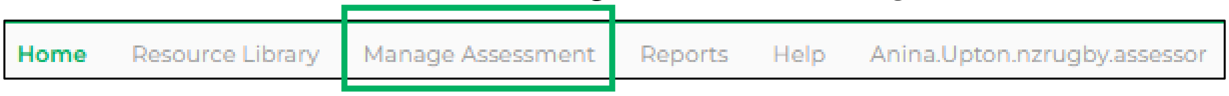
For administrator access:

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



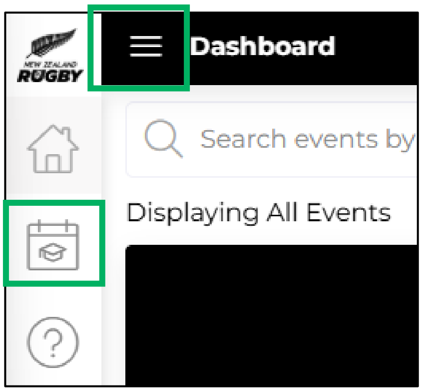
For assessor access:

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



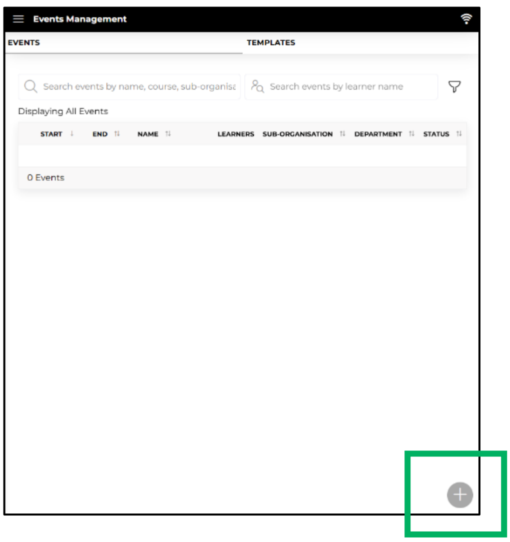
For administrators and assessors:

2. The event management dashboard will open in a new window. Click on:
   a. The **"Event Management"** icon on the left-hand side of the screen.
   <u>OR</u>
   b. The 3 line "menu icon" in the top left-hand corner and select "**Events Management**" from the menu options.



For the initial creation

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



2. You will be presented with the following page to create an event. Make changes as required.

<u>Note:</u> Fields with an asterisk* are compulsory to add.

Under EVENT DETAILS

3. Click into the "**Sub-organisation**" field, start typing and click on your **Provincial Union.**

Note: The **sub-organisation field MUST** be added first.

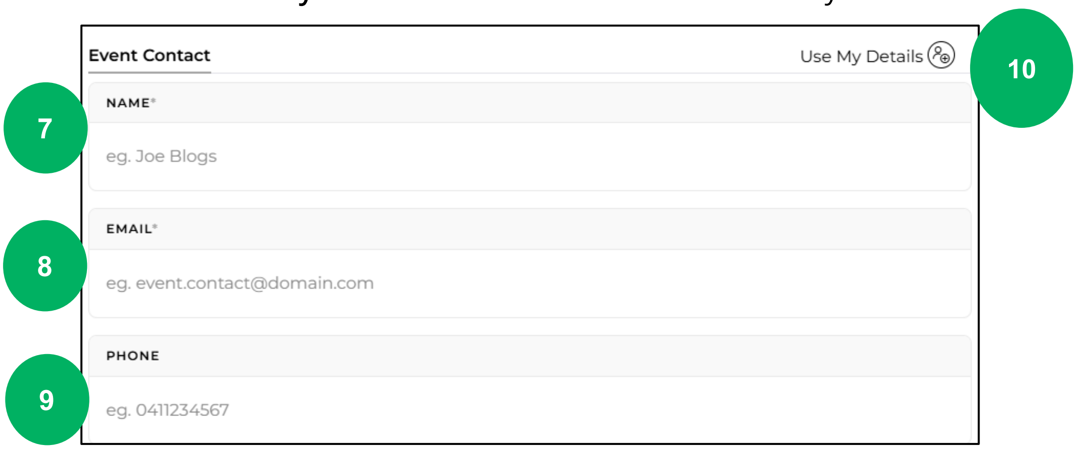
4. Click into the "**COURSE(s)**" field, start typing and select the course your event relates to.

Note: You can add more than 1 course into 1 event, BUT you then must choose assessors (see below) that are allowed to assess each of those courses. We recommend creating an event for each course. This has less implications for the assessors/learners when closing an event.

5. Type the maximum candidates in (if applicable), otherwise leave this blank.
6. The "**Limit External candidates**" – if ticked, any learners who is NOT from your PU, will not be able to enrol into the event. We suggest you leave this unticked.

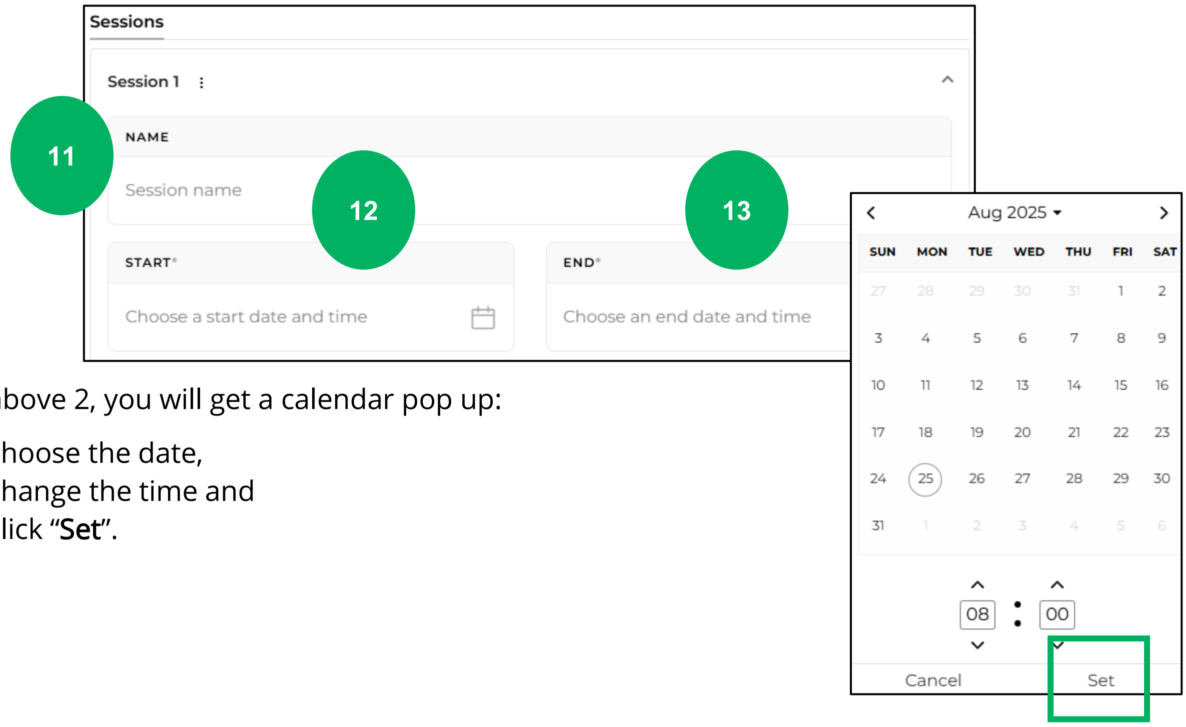
Under EVENT CONTACT

7. Type in the **name** of the person organising the event. This is the person learners can contact for information.
8. Add this person's **email**.
9. Add this person's **phone number**.
10. You can click the "**Use My Details**" button and it will add some of your details in.



Under SESSION

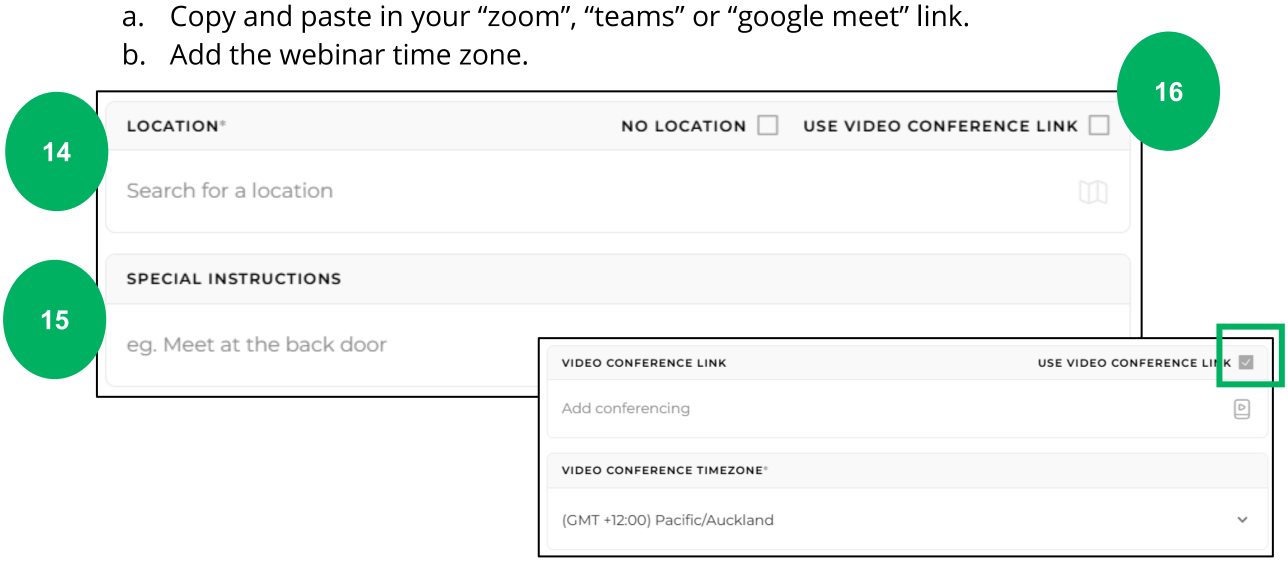
11. Give the session a **name** (i.e. Session 1; AM session; Coaches session).
12. Choose the **start** DATE and TIME.
13. Choose the **end** DATE and TIME.



For the above 2, you will get a calendar pop up:

- Choose the date,
- Change the time and
- Click "**Set**".

14. Add the **location** of the event – This is linked to Google Maps, so just start typing and it will find the location for you.
15. Type in any "**Special Instructions**" *(this can include where to meet, what to do on arrival etc.)*
16. If this event is for an online webinar, tick "**User video conference link**" and:
    a. Copy and paste in your "zoom", "teams" or "google meet" link.
    b. Add the webinar time zone.



17. For Assessors: Click into the field and start typing the assessor's name (s). Choose the **'Assessor'** that will be completing the ticking off in the system for this event.

Note: Only Assessors who hold the necessary credentials to assess the course you selected in #4 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.

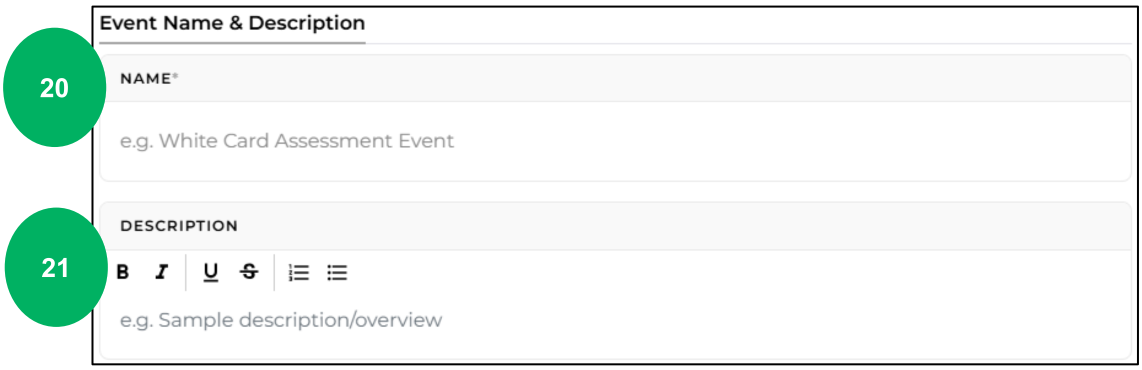
18. You can add multiple sessions to 1 event. *For example, if you were going to run a RugbySmart session in the morning and another session in the afternoon, you could create 2 sessions in this one event.*
19. Click the **PLUS** icon and complete the details as above again.

Under NAME & DESCRIPTION

20. Type in the name of your event.

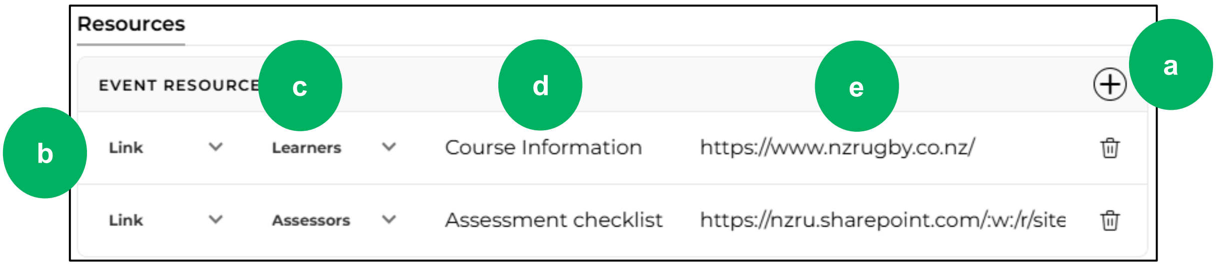
Note: Naming Convention Suggestion: Start with your PU name, then the event name, i.e. '*Bay of Plenty RFU: RugbySmart*'. Make sure the learner can identify your event by the name, so they know which PU is offering the event and what course they are attending.

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



Under RESOURCES & NOTIFICATIONS

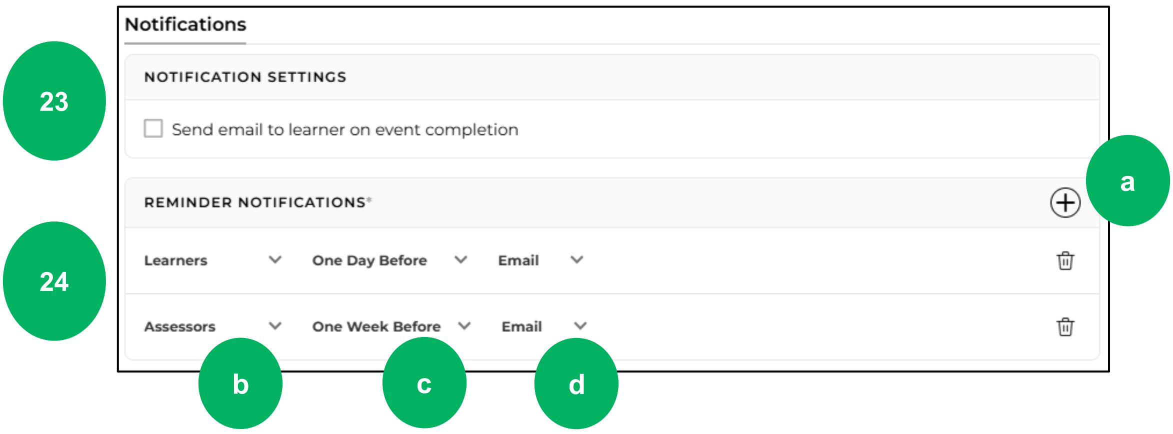
22. You can add relevant resources to the event (i.e. the Safety Plan, pre-reading etc.) by:
    a. Click the **PLUS** icon.
    b. Select "**Link**".
    c. Select "**Assessor"; "Learner" or "All"** *(this will make the attached document visible only to those you select).*
    d. Type in a name for the resources.
    e. 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).*
    f. If you'd like to add more than 1 resource, click the blue PLUS symbol and repeat the above.



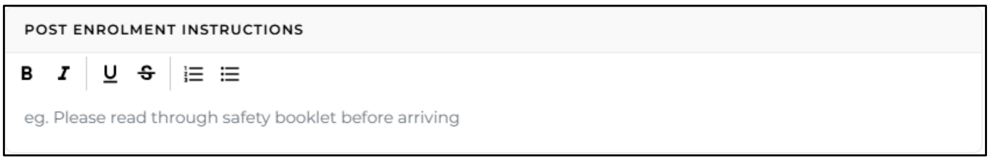
You can customise the email notifications that will be sent for your event.

This **defaults** to two reminders, so if you'd like to send no notification, make sure you delete the ones that are there.

23. To add a notification, which will send an email to the learner, once you have completed assessment of the event, tick "Send email to learner on event completion".
24. To add a different notification:
    a. Click on the blue **PLUS** button first.
    b. Select "**who**" the notification will go to: "**Learners**", "**Admins**", "**Assessors**" or "**All**".
    c. Select if you'd like to send a notification/reminder one day or one/two week(s) before the event date.
    d. Choose **"email"** as the method of delivery.



25. 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.



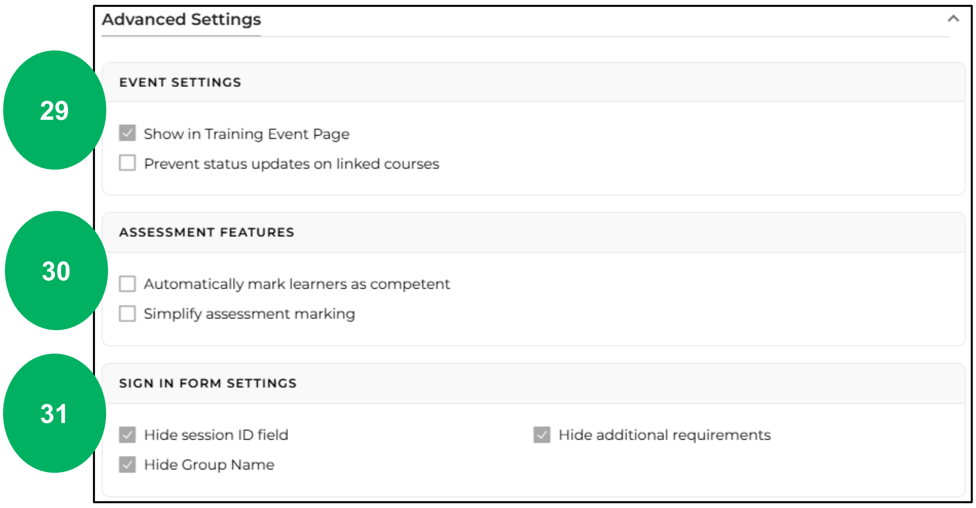
Under EVENT FEEDBACK & EXPECTED DOCUMENTS

26. You can copy and paste in a feedback form link into the "**Feedback Survey URL**" field. This survey link will be emailed to the learner as soon as the event has been marked as **completed**.
27. Add any "**Expected Document**". These can be anything you need them to bring with them (i.e. a workbook, ID). To add these:
    a. Click on the **PLUS** icon.
    b. Add the document **name**.
    c. Tick if this is "**Mandatory**" to supply. We suggest you DO NOT tick this as it can stop the event from progressing if a learner does not bring it on the day.

Under ADVANCED SETTINGS

For almost all events created, advanced settings will be irrelevant, but just <u>FYI</u>:

28. You must click on the "**Advanced Settings**" heading for these to expand.



29. For <u>event settings</u>:
    a. If you UNTICK "**Show in Training Event Page**" it means your event will not show in the training event calendar (but a link can still be shared by the assessor). DO NOT untick this.
    b. "Prevent status updates on linked courses". DO NOT untick this.
30. For <u>assessment features</u>:
    a. "**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 or who did not attend.
    b. "**Simplify assessment marking**" – This will create a button, so you can assess all learners with one click instead of individually. TICK this.
31. For <u>sign in form settings</u>:
    a. Hide session ID field – ignore this, not an NZR function. Leave as default setting.
    b. Hide additional requirements – ignore this, not an NZR function. Leave as default setting.
    c. Hide group name – ignore this, not an NZR function. Leave as default setting.
32. For <u>enable enrolment questions</u>:
    a. These need to be built in the system, so please ignore and leave unticked.

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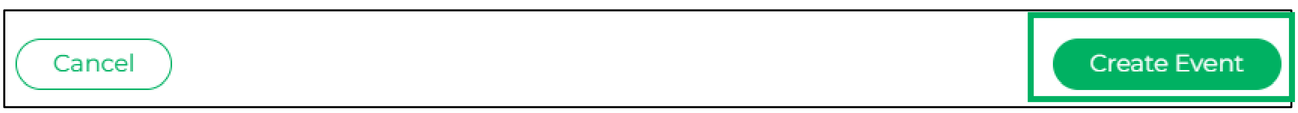
33. Click "**Create Event**" once you are happy with all your information.



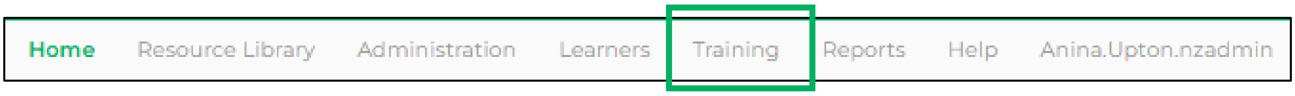
The event will now be available in the "**Training Event**" calendar for learners to enrol into. Once the event is created, the assessors selected in the event session will be notified of the event via email and will be emailed a calendar attachment to add the event to their personal calendars.

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!

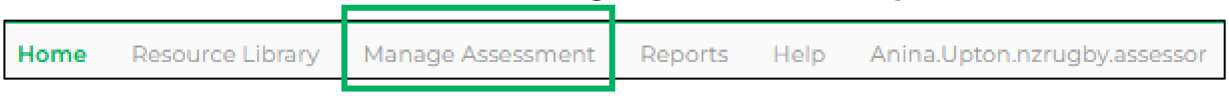
For administrator access:

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



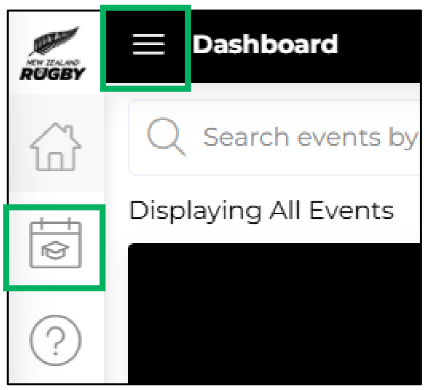
For assessor access:

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



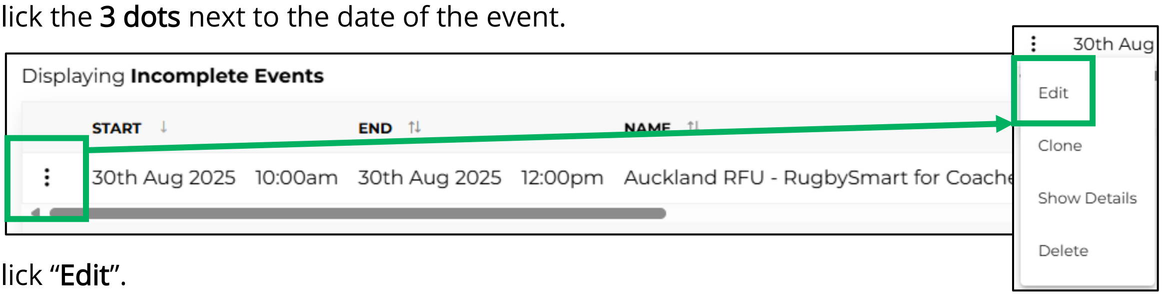
For administrators and assessors:

2. Click on:
   a. The **"Event Management"** icon on the left-hand side of the screen.
   <u>OR</u>
   b. The 3 line "menu icon" in the top left-hand corner and select "**Events Management**" from the menu options.



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

3. Click the **3 dots** next to the date of the event.



4. Click "**Edit**".
5. Make any changes you would like.

6. Click the '**Update Event**' button at the bottom of the page.

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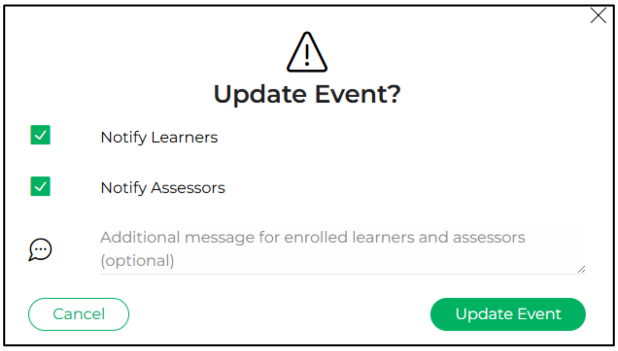
7. A pop-up will appear to confirm you wish to update the event.
    a. You will be asked if the system should send a notification to the learners and assessors regarding the event modification. If this is TICKED, email notifications will be sent.
    b. You can also include an additional message for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

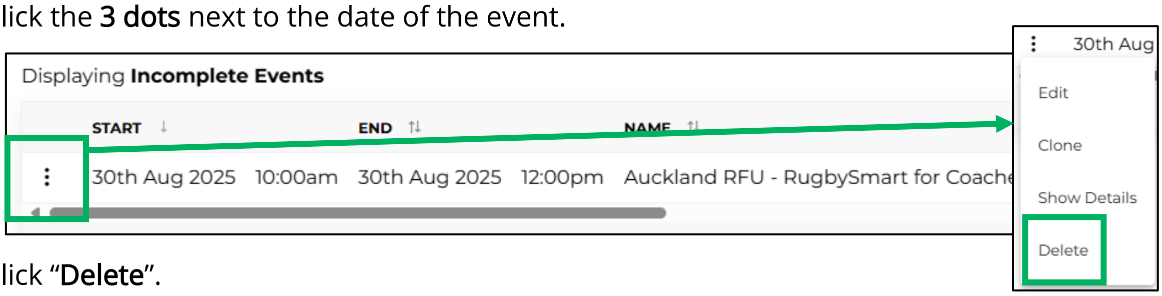


How to delete an event

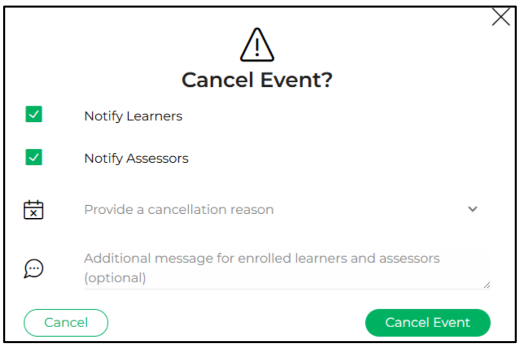
An event might need to be deleted if it is being cancelled (i.e. due to weather, Covid etc.) and a new date has not been chosen yet.

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. Click the **3 dots** next to the date of the event.



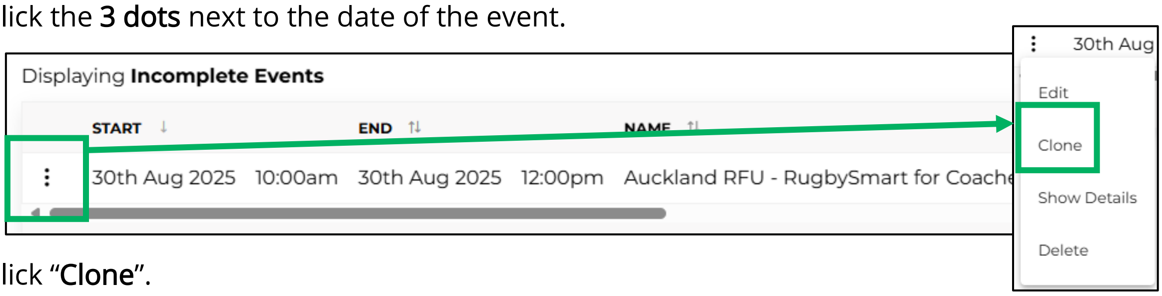
2. Click "**Delete**".
3. A pop-up will appear to confirm you wish to delete the event.
    a. You will be asked if the system should send a notification to the learners and Assessors regarding the event deletion. If this is TICKED, email notifications will be sent.
    b. Choose **a reason** for the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



How to clone an event

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

1. Click the **3 dots** next to the date of the event.



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