GUIDANCE DOCUMENT: How to manage events.

'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 **managing 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. To learn how to create, edit, delete or clone an event – see the steps here.

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.

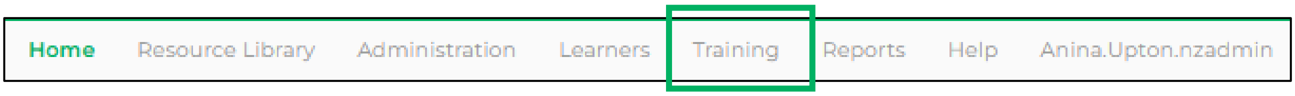
Steps covered in this GD include:

Access the event calendar

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

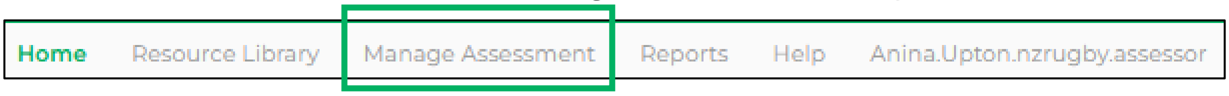
For administrator access:

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



For assessor access:

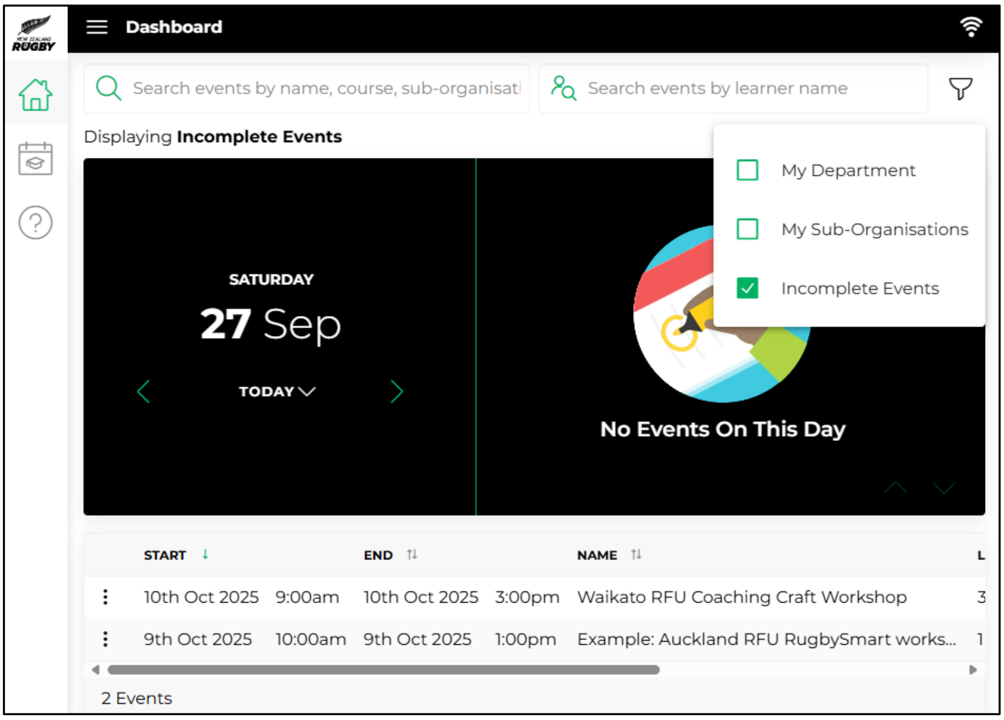
1. Click on **"Event Admin"** under the **"Manage Assessment"** heading.



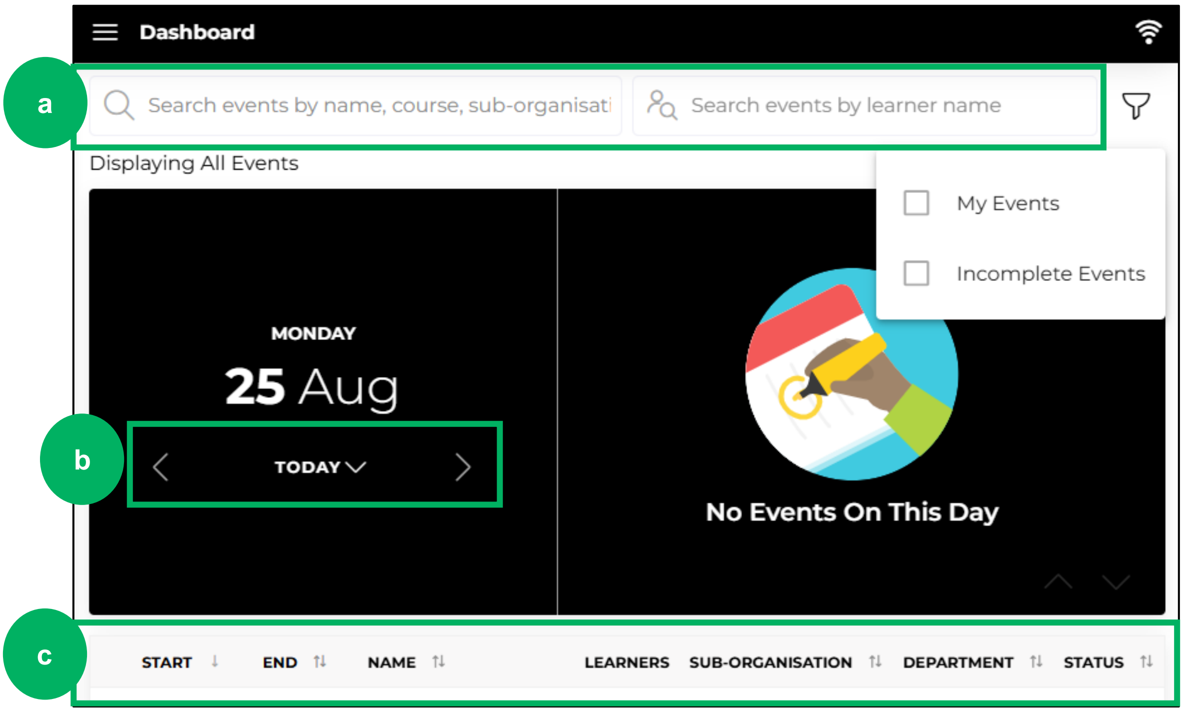
The dashboard/home page

For administrators and assessors:

2. You will land on the "**Dashboard**" page.
3. First, you can 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.
   a. The '**My Events**', **"My Sub Organisation"** and '**Incomplete events**' filters are selected upon login to be ticked by default.
   b. **To see all events** – make sure all of these are all **UNTICKED**:



4. To find events already created *(see below image):*
    a. You can search for events by their name or region, or;
    b. View the events by date, or;
    c. Scroll through the list of events *(You can sort these by name, region, date or status by clicking in the up and down arrows in the headings).*



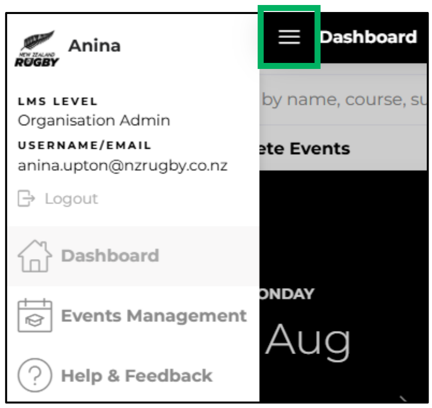
The menus

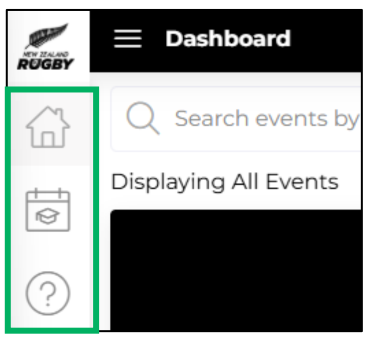
The primary menu can be accessed by:

1. Pressing the menu button beside the NZR logo at the top left of the app.
    a. From here, you can logout or access:
        i. The Home page (aka 'Dashboard' page),
        ii. Events Management page or,
        iii. The Help and Feedback page.

<u>OR</u>

2. Clicking the icons in the side menu.

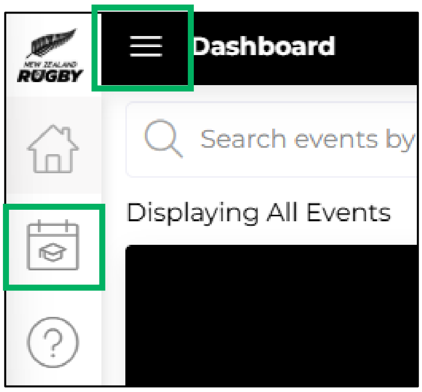




The event management page

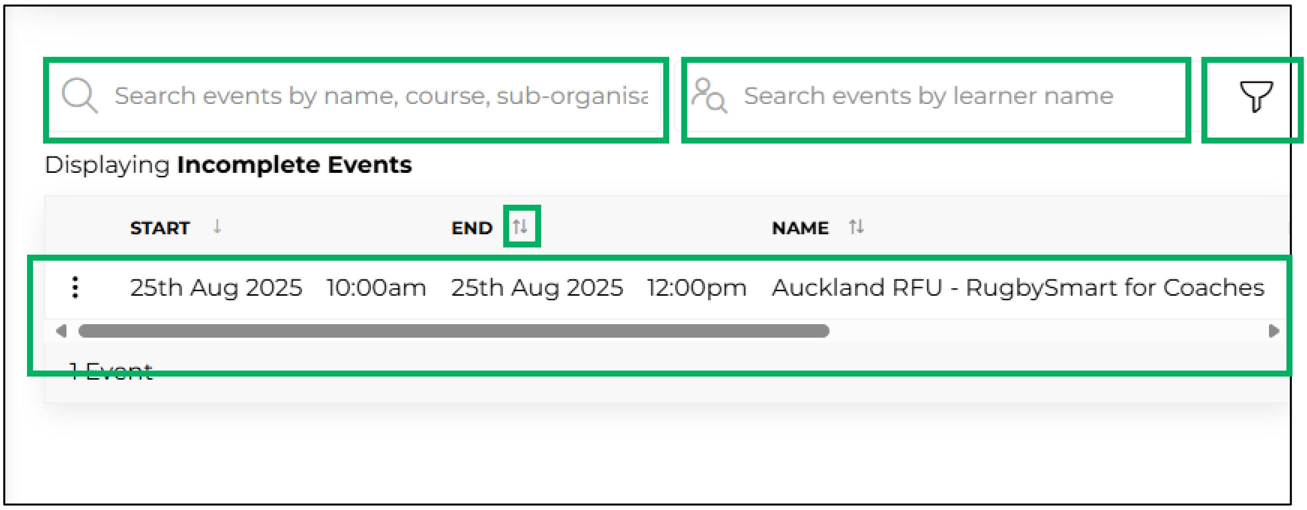
For administrators and assessors:

1. 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.



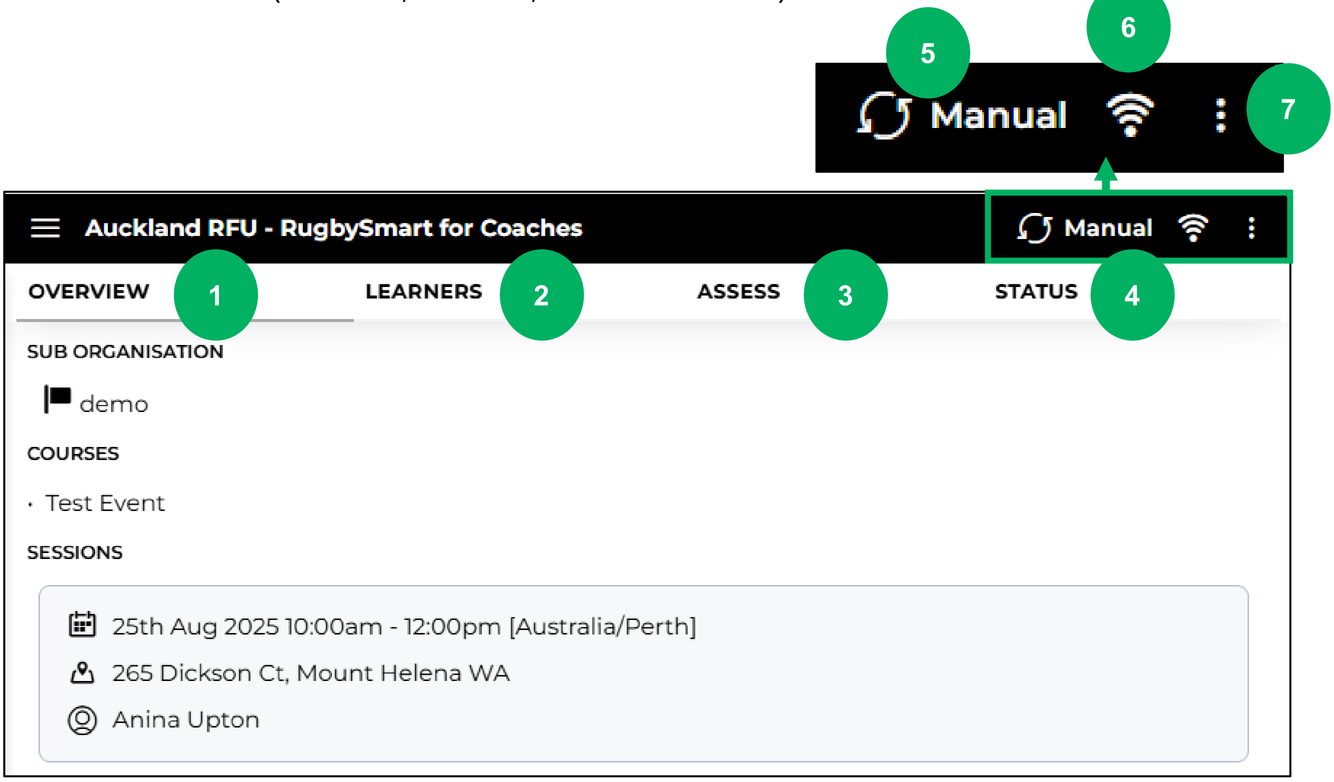
2. You can filter events displayed by adding or removing the filters pressing the filter "funnel" button at the far right of the search bar and adjusting the filter options.
    a. The '**My Events**' and '**Incomplete events**' filters are <u>selected</u> upon login to be ticked <u>by default</u>.
    b. **To see all events** – make sure all of these are all **UNTICKED**.

3. To find events already created (see below image):
    a. You can search for events by their name, course, sub organisation or by learners.
    b. Scroll through the list of events *(You can sort these by name, region, date or status by clicking in the up and down arrows in the headings).*
    c. You can sort the list by date, name, club or status.



A specific event's page

1. To view event details, double-click on the row of the event you'd like to open (see above).
2. You will navigate to the page for the selected event (see below). The event page has four tabs within it (Overview, Learners, Assess and Status).



1. **Overview**: This displays information about the event (Name, Course/s, Date/s, Location, Assessor/s and a description of the event).
2. **Learners**: A list of learners already enrolled in the event.
3. **Assess**: This is where the assessor/facilitator/instructor/educator will sign off practical assessments and/or face to face training.
4. **Status**: An overview of the learners that are complete or incomplete.
5. **Refresh:** Select the frequency of the app refreshing (every 1min; 5min; 30 seconds or manual). Click the number/word, not the symbol; Click the symbol to force a refresh.
6. **Wi-Fi:** Turn the Wi-Fi connection on/off. Data will update when you turn this back on and when you are connected to the Wi-Fi again. This is useful for assessing on the field with no Wi-Fi and when you get back to the club/office, for example, you turn on the Wi-Fi and it syncs your assessment data. *If you do not use your device for 40 minutes, you will be logged out. To log back in via RX, you do require internet access.*
7. **Dot menu:** It provides options to edit, delete and clone the event.

Learner’s tab

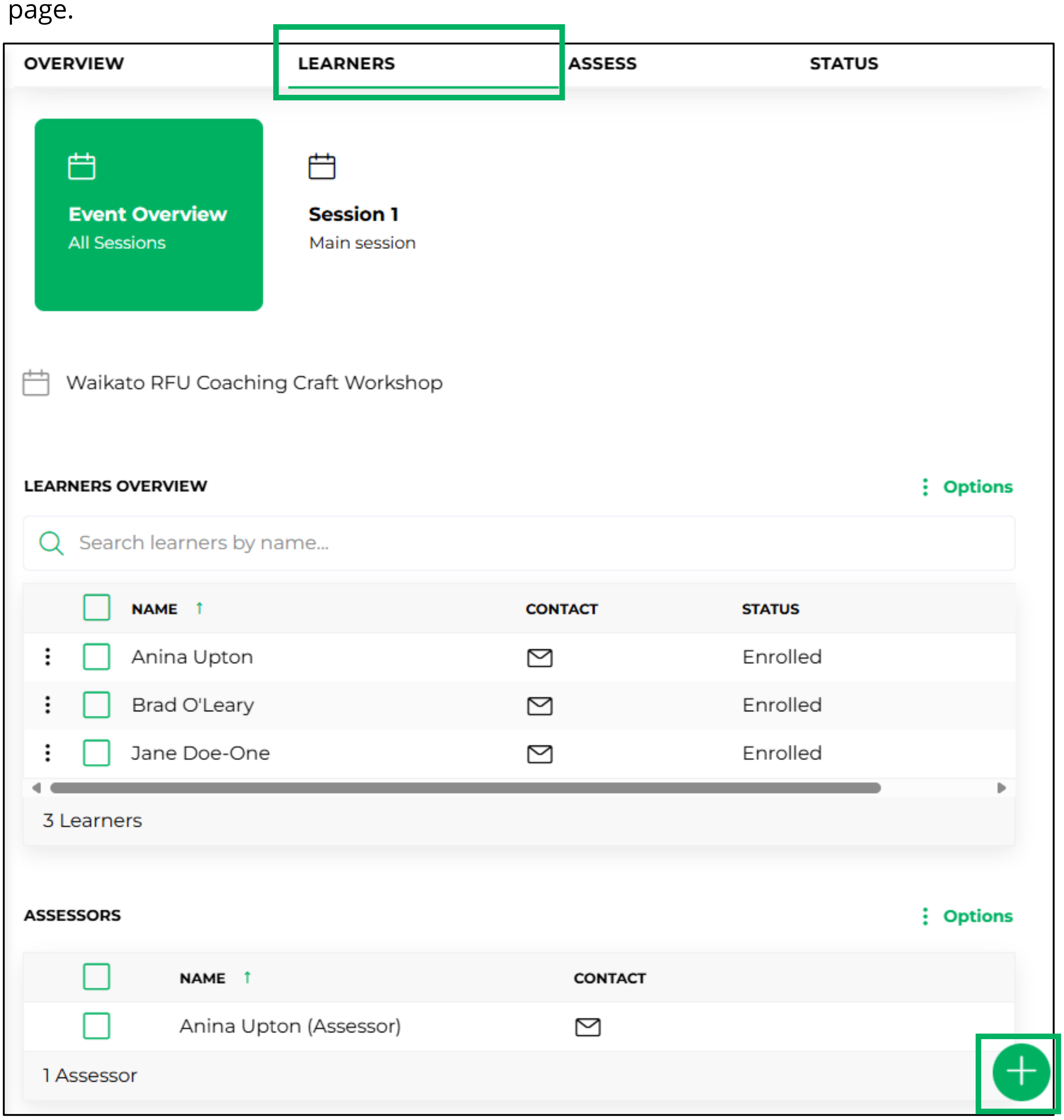
The Learner’s tab allows you to do the following:

- View all learners who have already enrolled into the event.
- Enrol or sign-in learners for the event.
- Contact learners via email.
- Review a learners’ status for the event.
- Delete a learner from an event.

To add a learner to the event

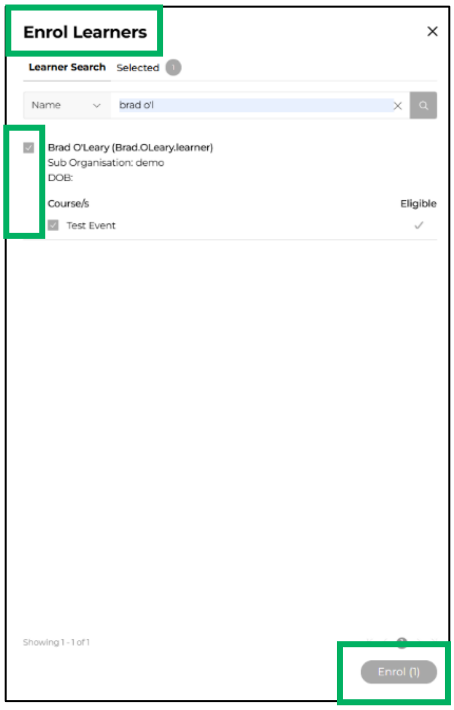
If you have a learner who hasn’t enrolled themselves prior to the event, you can add them by:

1. On the **“Learners”** tab, click on the round **‘+’** button in the bottom right-hand corner of the page.



2. Here, if you are enrolling a learner, you will get an **"Enrol Learner"** pop up.

3. Enter the following details about the participant to complete the registration:
    a. Add the learner's name: Type the learner's first and last name. TYPE IN THE **FULL FIRST NAME** AND **at least 2 letters of their LAST NAME** (i.e. Anina Up) to ensure they come up for selection. *(You can technically search with 3 letters of their first name and 3 letters of their last name, i.e. Ani Upt, but this will make the search take longer).*
    b. If the learner is presented in the list, select them in the list. If you cannot locate the learners, then they have never logged into the system before (i.e. if they are new to rugby, they may have an RX account but have not accessed LINE*BREAK* at least one time) and will need to do so first.
    c. Click **"Enrol".**



<u>**Notes:**</u> Enrolments can be completed **before, on the day of, or after** the event date. If an event is for more than one course (i.e. RugbySmart and Small Blacks running on the same day together as a master class), you must tick and untick the appropriate courses.

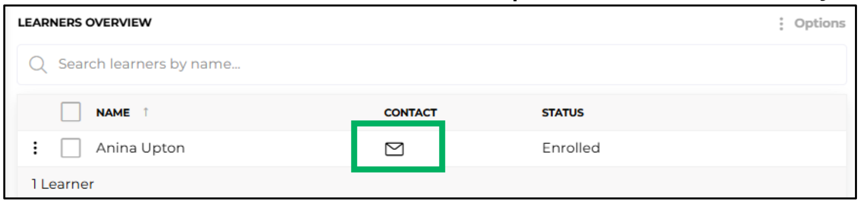
Only **assessors** (not learners) can add people "after the event date".

Learners cannot enrol into a course the day after the event date, they cannot enrol into past events. Even if the event has not been closed, the day after the session, they cannot book in.

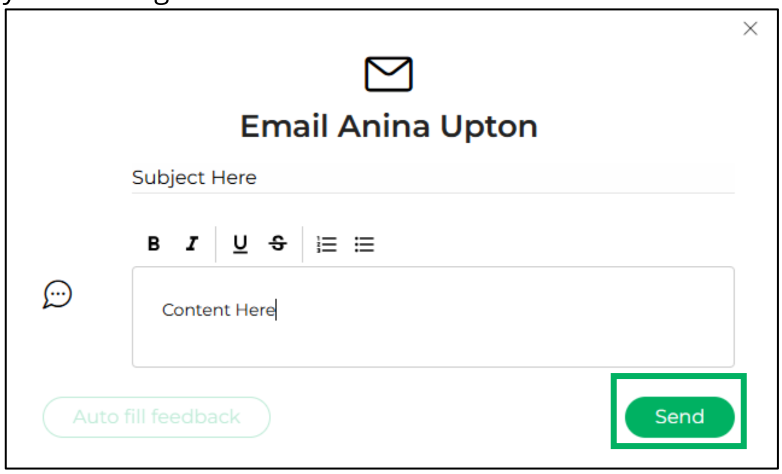
To contact learners via email

To email an individual learner:

1. On the **"Learners"** Tab, click the **"envelope" icon** for the learner you wish to email.

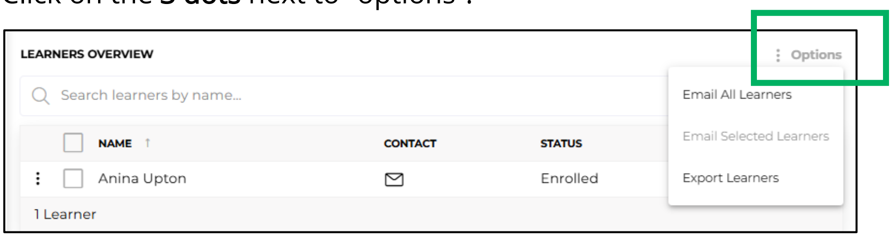


2. The email window will pop up and you can add a subject and content to the email. Add your message and click "**Send**".



To email all learners:

1. Click on the **3 dots** next to "options".



2. Select "***email all learners***" and complete the email pop up window as above. *You can also first tick >1 learners and then click the 3 dots and you will then be able to select "**email selected learners**".*

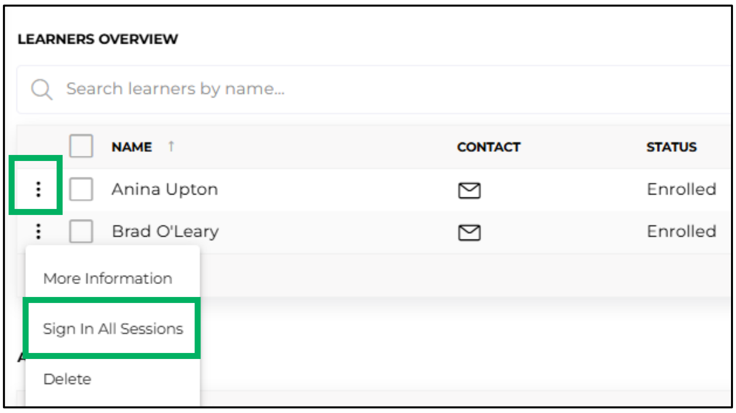
Note: Both the learner(s) and the assessor(s) will receive this email. Emails are not saved once they have been sent.

To sign in learners

To register a learner's attendance at the event, so their assessment can be ticked off, they **must** be signed in. Only once the learner has been signed in, will they be available for assessment:

<u>One by one:</u>

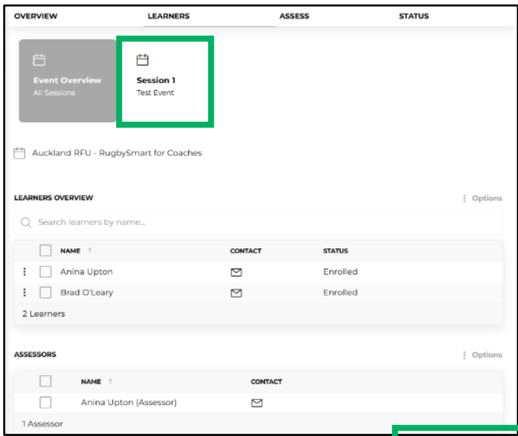
1. On the **"Learners"** Tab, click the 3 dots next to the learner's name and select **"Sign In"**.

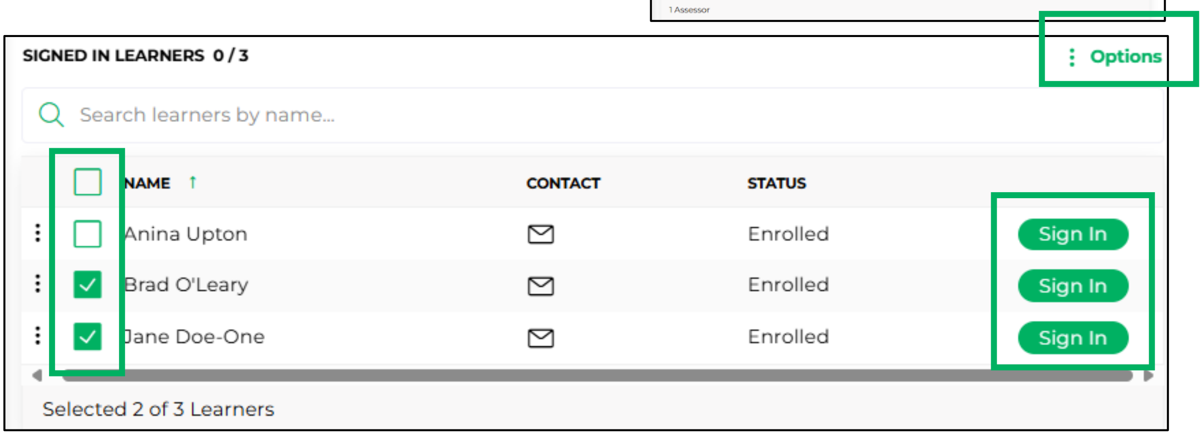


<u>Multiple or all:</u>

1. Make sure you switch to the **Session** first.

2. Here you can:
   a. Individually click the "**Sign in**" button, <u>OR,</u>
   b. **Tick the learners** you want to sign in and click on the "**Options**" next to the 3 dots. Here you can "**Sign in Selected Learners**".



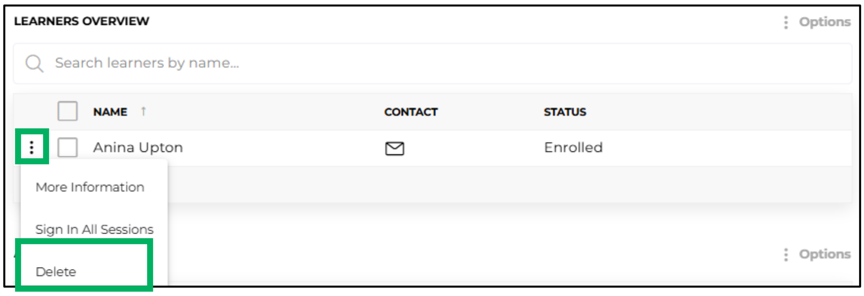


<u>Note:</u> Signing in learners can be completed **on the day of, or after** the event date, but it can <u>NOT</u> be done <u>before</u> the event date.

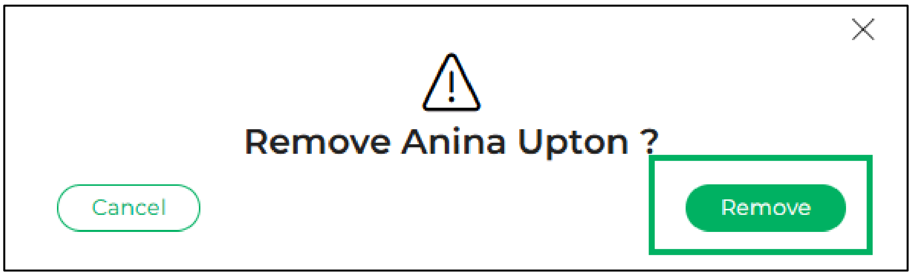
To delete a learner from an event

A learner may need to be deleted from an event because they did not turn up for the practical assessment/training. You can leave them in the event *(i.e. if you wanted a record of who was invited but did not turn up and maybe email them a reminder to book into another session)* and just not assess them ***(this has no system consequences)***, but if you like the event to look tidy, you can:

1. On the **"Learners"** Tab, click the 3 dots to the left of the learner's name.
2. Select **"Delete".**



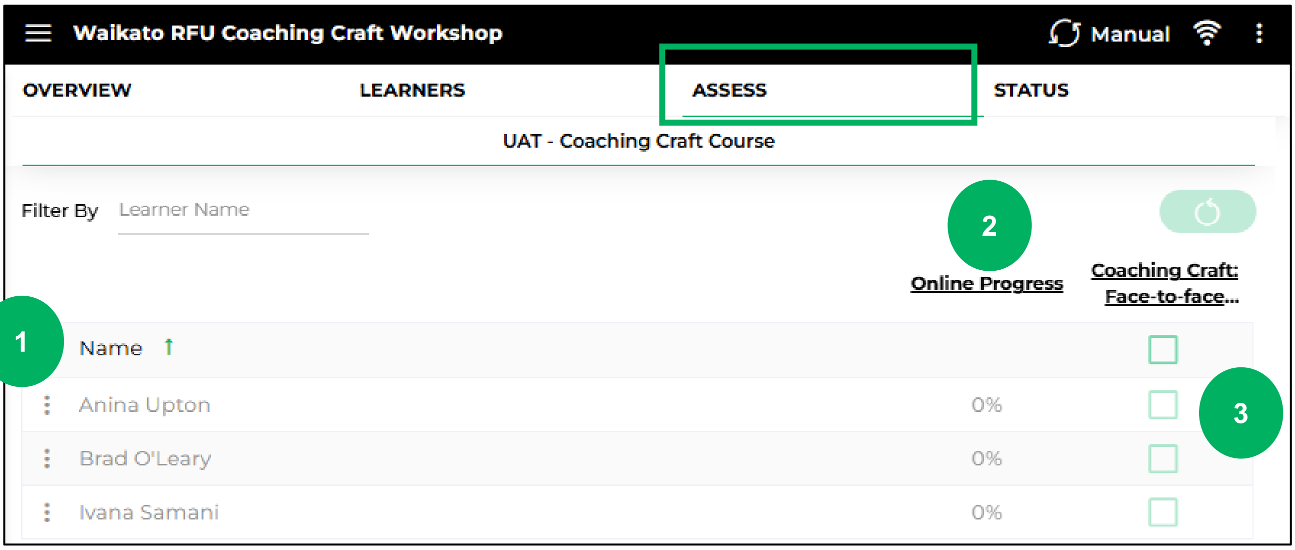
3. Confirm the deletion by clicking **"Remove"** on the pop-up window.



Assessor tab

Note: Only Assessors with "Assessor" access and who have been added to the event as one of the assessors, will be able to complete the following.

The assessments tab allows you to view all courses, and the assessment items covered within the event. Here you will see:



1. The learners who have been enrolled and signed in.
2. Any theory modules completed/ not completed yet, these are "greyed out" and is not editable.
3. The practical aspects (either a face-to-face training session attendance or practical assessment components) available for assessment.

Note: Practical assessments that were signed off (as passed) in a previous event (i.e. if a learner completes part 1 of 3 assessments over 2 event dates), will still show as **"ticked".**

The assess tab allows you to assess learners.

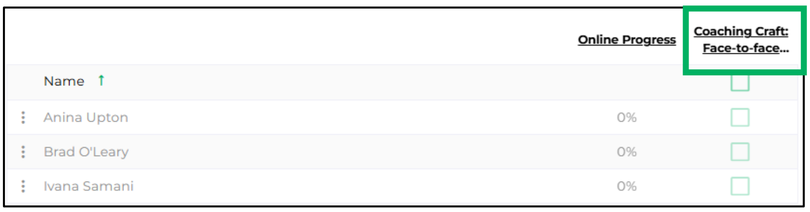
To assess/ sign off attendance for a learner

Ensure that all learners have been signed into the event first before assessing them. On the **"Assess"** Tab, you can sign off/assess in two ways:

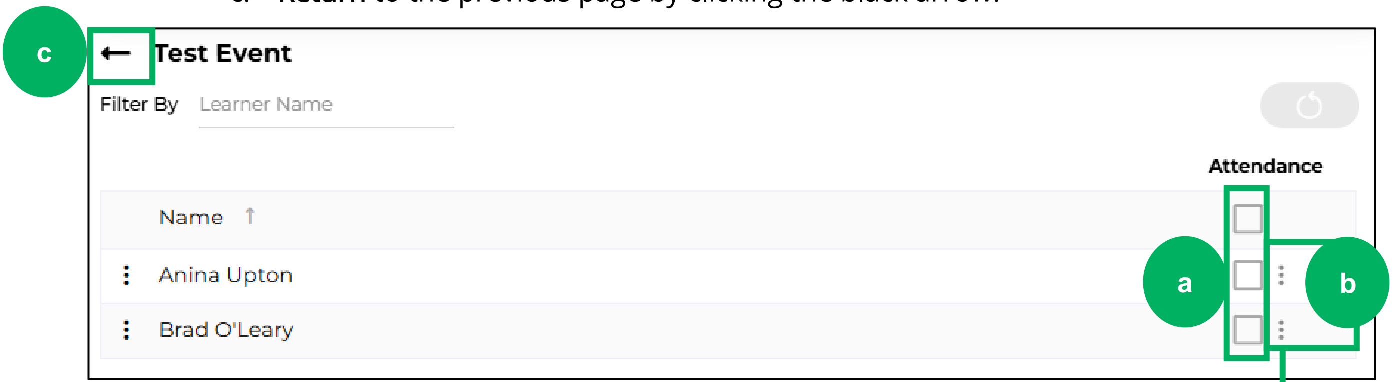
OPTION 1:

You can sign off all learners for a particular task (i.e. tick off all task ABC first) by:

1. Click on each PRACTICAL TASK **HEADING** (i.e. Click on the heading "Coaching Craft Face to face").

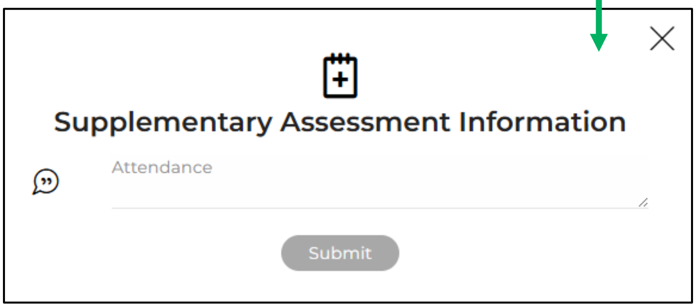


2. Here you can then:
    a. **Tick off** all learners for that specific assessment task.
    b. **Add a note** to the person's record by clicking the 3 dots.
    c. **Return** to the previous page by clicking the black arrow.



If you'd like to add a note via the 3 dots:

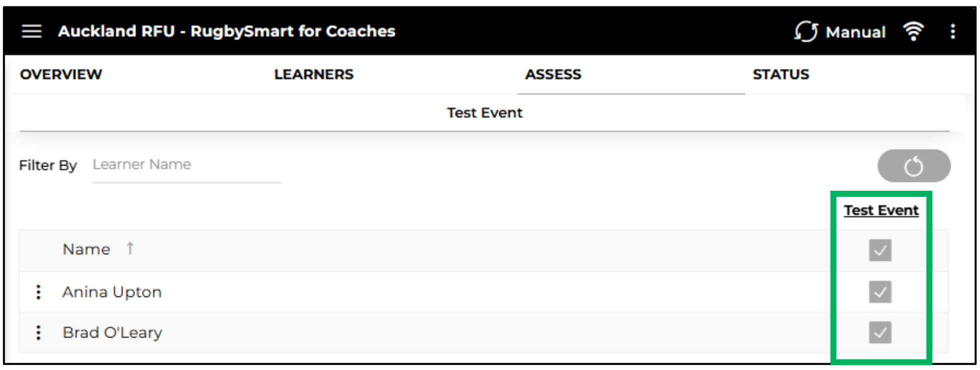
i. Click on the 3 dots icon (see #b in image above).
ii. Type in your note.
iii. Click "**Submit**".



<u>Note:</u> **These notes can be read by all system administrators,** so be aware of this when you add notes. This includes: (1) Do not include personal details. (2) Use only appropriate language. (3) Only include what is appropriate for public view and related to the assessment. These notes can NOT be edited or deleted (once the submit button is clicked).

OPTION 2:

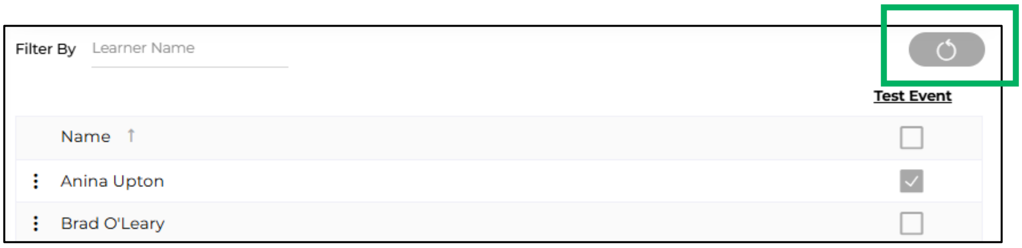
You can sign off a learner for all practical tasks (on the main page) by ticking off all the tasks listed for each learner.



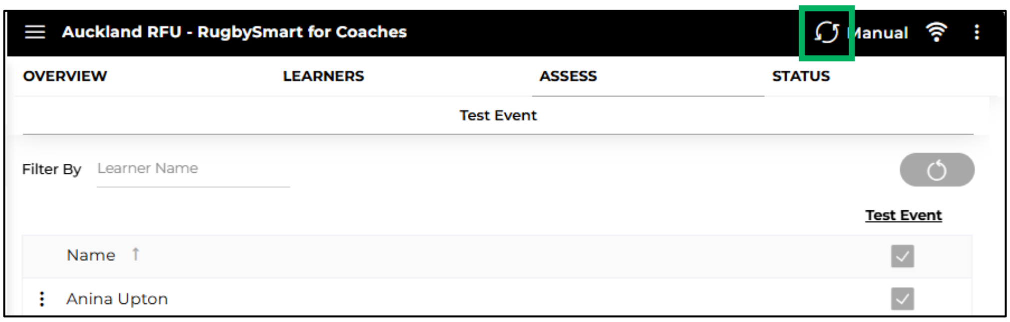
<u>Note:</u> You can <u>NOT</u> add "**notes**" if you are using Option 2 to sign off.

For Option 1 and 2:

- If you have marked an assessment in error, you can revert the assessments (to a maximum of 5 previous versions). To do this click the **circle icon** in the top right corner of the assessing page; or you can just TICK/UNTICK what you did in error.



- Multiple Assessors can assess learners at the same time. To see the latest assessment data, press the **Refresh** button to refresh the data presented within the assessment pages.

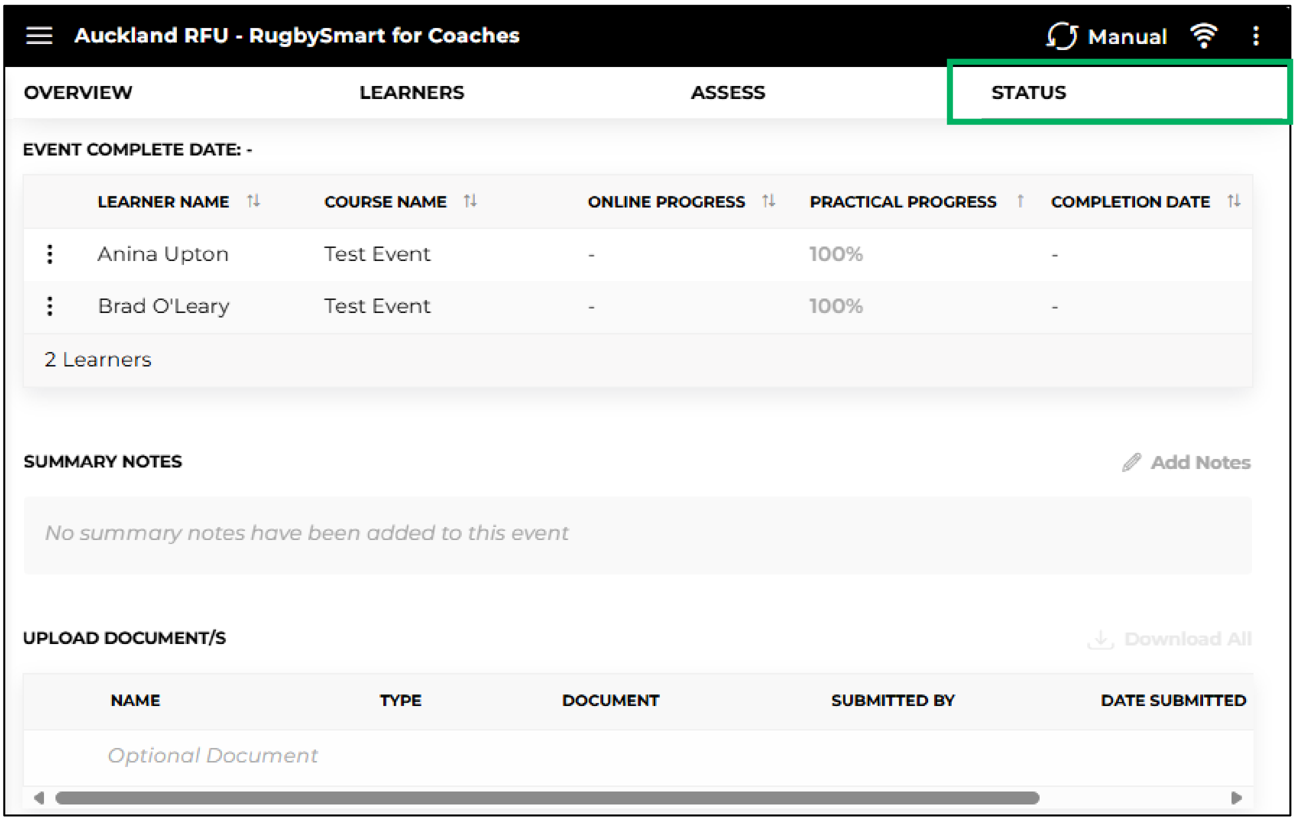


Terms of Use:

- By logging in, you are attesting that you are logging in with YOUR password and login and no one else's.
- By ticking off assessments for a learner, as the educator, facilitator or trainer, you are attesting to the learner meeting the required assessment criteria.
- Please read this document for more roles and responsibilities information: [NZR and PU Roles and Responsibilities.]()

Status tab

The Status tab provides an overview of the learners' progress for the courses covered in the event.



To process assessment data, **you must close the event**. An event can be closed while learners are still in the **"incomplete"** box.

FAQ: Any system consequence of this? Can the learner complete this assessment later, or will they need to be enrolled in a new event?

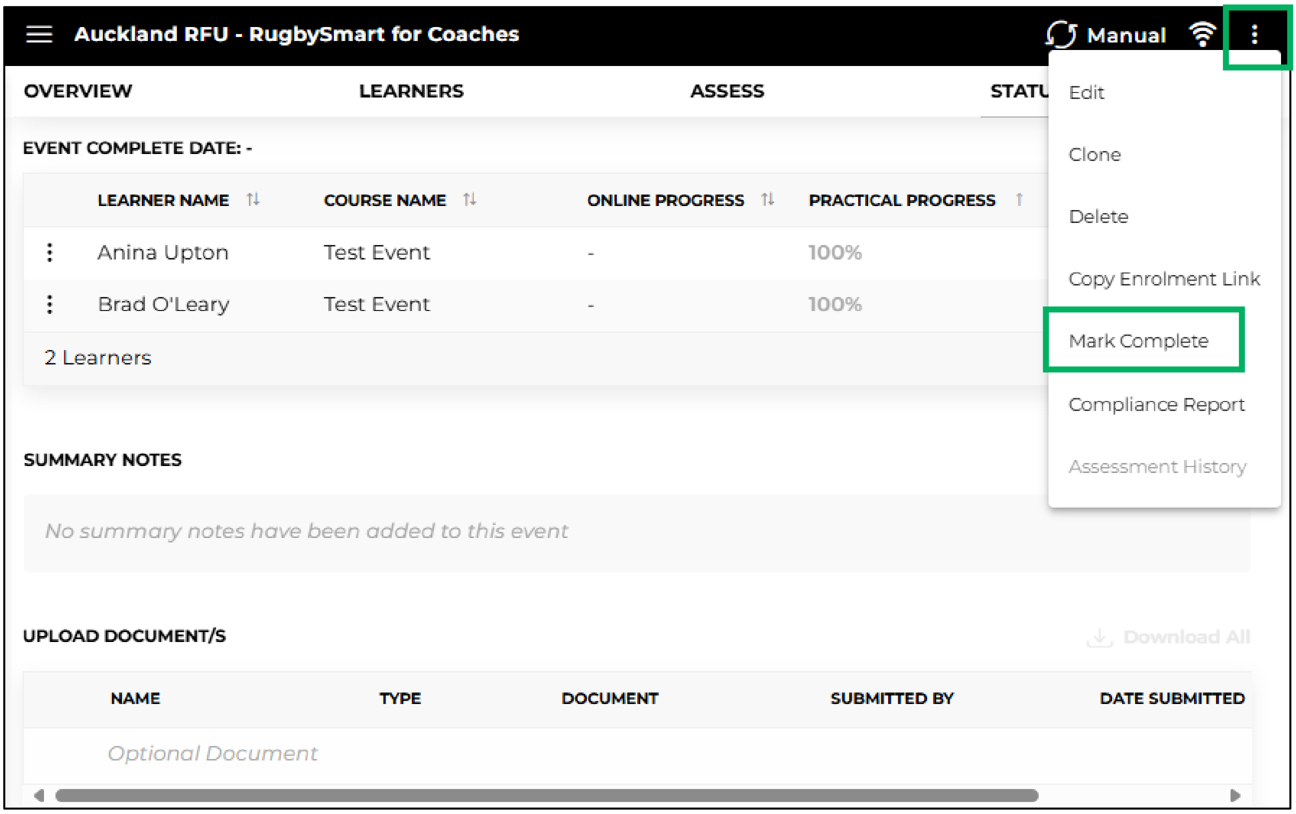
If incomplete because they have not completed the ***online learning module*** *component, there are no consequence, they can still complete the online module, but the event does not update once it has been closed – but "passed data" will* ***push through passed to SalesForce once all aspects (of the course) have been completed.***

If they are still to complete the practical "sign off" assessment aspect later, they need to be added to a new event (if the event is closed).

To close an event

While in the "**Status tab**", once all assessment activities have been completed for an event, go to the top right of the page:

1. Click on the three dots to get a drop-down menu.
2. Click on '**Mark Complete**'.



This MUST be done, so the "completed" data can be pushed back to the Linebreak LMS and learner's SalesForce record can be updated.

This will put the event in a **read-only state** and will then push data to the relevant systems.

NO CHANGES CAN BE MADE AFTER AN EVENT IS CLOSED & IT CAN NOT BE UNDONE!

Note: As mentioned before: Practical assessments that were signed off (as passed) in a previous event are retained and will still show as "ticked" in future events, so "completed" aspects are not lost when an event is closed.