



## How to create an event

### Introduction

This guide shows you how to create social events in the Events application.

With the correct permissions that have been configured from the admin side of the Events application, you will see an option to create a new event at the top-right menu bar.

### Creating an event

1. Head to **Application > Events**.
2. Use the **+ Create event** option to add an event.

A screenshot of the 'Events' application interface. At the top right, a red arrow points to a green '+ Create event' button. The interface includes a search bar, a list of event categories (Social, Training Events), and a list of event status filters (All Events, Attending, My Events, Draft, Cancelled, Archived). Three event cards are visible: 'Summer Event' (Primrose Hill, London, UK, 20:00 Monday, 30 August - 05:30 Tuesday, 31 August), 'Team introductions' (23:00 Saturday, 31 July - 00:00 Sunday, 1 August), and 'CPR + AED Training' (Wednesday, 29 September, 20:00 - 21:00).

**Reminder:** If you do not see the option to create a new event, please check with your administrator that you have the permission needed to do so.

### Setting up an event

Follow the 8 steps below to set up a social event.

1. Name the event and choose its category.

The screenshot shows a form for creating an event. The fields are: Title \* (text input with 'Summer Event'), Category \* (dropdown menu with 'Social'), Tags (text input with 'social, holiday planner, BBQ' and a list of popular tags below: claromentis, intranet, microsoft, excel, team, social, powerpoint, word, holiday planner, BBQ), and Organiser \* (dropdown menu with 'Claromentis Administrator' and a 'Browse' button).

- **Title:** The name of the event.
- **Category:** The category in which you wish to place this event.
- **Tags:** Relevant tags to the event to help with searching.
- **Organiser:** The user who will organise the event. This will default to the creator of the event but you can edit this if it is being created on behalf of another user.

2. Add an image for your event.

The screenshot shows the 'Edit Single Event' page. The form fields are identical to the previous one. Below the form, there is an 'Image' field with an 'Upload image' button. The page header includes the 'claromentis' logo, a search bar, and navigation links like 'HOME', 'COMPANY', 'DEPARTMENT', 'FORMS', 'LEARNING', 'PROJECTS', 'BUG TRACKER', 'SUMMER EVENT', 'BOOK A PERSONALISED DEMO', and 'LEARN MORE'. The breadcrumb trail is 'Events / Summer Event / Edit Single Event'.

- **Image:** A thumbnail image to represent the event. You can either use our drag-and-drop feature to upload an existing file or choose an image from the Document application.

3. Set the Date & Time of the event (and timezone if needed):

The screenshot shows the 'Date & Time' and 'Timezone' fields. The 'Date & Time' field has two date pickers (both set to '29-08-2021'), a time input (set to '12:30'), a separator '-', and another time input (set to '17:00'). Below this are two checkboxes: 'Full day' and 'Repeat', both of which are unchecked. The 'Timezone' field is a dropdown menu set to 'Default - Europe/London'.

- **Date & Time:** Specify the date and time of the event. There are also two checkboxes that enable you to define whether (1) the event is for the whole day or (2) to create this as a repeatable event allowing the event to run every day, week, month, or year up until a specified amount of time.
- **Timezone:** Specify which time zone the date and time are representing.

4. Provide the event details.

This is a Webinar/Online event

**Location**

**Event details \*** B I U T X<sub>2</sub> X<sup>2</sup> EMAIL ↻ [SOURCE]

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**Training Event**  This event will be marked as Training Event and recorded in user's training record

**Approval**  Approval required to attend  
 Attendee's line manager/supervisor can also approve

- **Webinar/Online event:** Specify the event as a Webinar/Online event or an in-person event by checking the box. If the event is a Webinar/Online event, you will have the option to add in some Joining Details alongside the Event Details. This can be either the URL link for the event or any supporting information users will need to join the online event.

This is a Webinar/Online event

**Location**

**Event details \*** B I U T X<sub>2</sub> X<sup>2</sup> EMAIL ↻

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**Training Event**  This event will be marked as Training Event and recorded in user's training record

- **Location:** Specify the event location. If the event is an in-person event, you can add in the Location of the event generated from Google Maps. For more information on how to set up Google Maps API, please click [here](#).

**Please note:** If the event is a training event, you will need to check the following box. A training event can be connected to a learning path in LMS and it will create a training record upon attending the event.

**Training Event**  This event will be marked as Training Event and recorded in user's training record

For more information, check out our guide [Training Events](#).

5. Decide the event approval and acceptance.

**Approval**  Approval required to attend  
 Attendee's line manager/supervisor can also approve

- **Approval:** Define if approval is required for the event. Approval can be given by your manager/supervisor or by any user who has the 'Manage Booking' permission which we will see below.
- **Attachments:** Add documentation to the event (training agenda or a questionnaire for example)

6. Manage the number of participants allowed at the event.

**Participants**  Limited  Unlimited

**Total capacity**  people

Allow each user to bring up to  friends or family

Allow waiting list up to  people

Private (Participants will not be displayed)

- **Participants:** State how many people can attend the event. By default, this is set to Unlimited. You can change this to Limited which will allow you to (1) specify the number of attendants, (2) whether friends and family can be invited, and (3) a waiting list for people to join if the total capacity has been reached. You can also specify if the event will be private meaning that the 'Who's Going' list will not appear in the front-end for users to see.

7. Define the event permissions.

You will see the following permission options that can be set for individual users and/or Roles and Groups:

**Permissions**

**All registered**  
User: Claromentis Administrator

View only

Can join

Can Manage Booking And Attendees

Edit this event

Delete

[View effective permissions...](#)

- **View only:** User(s) can view the event details from the front-end of the application, but will not be allowed to interact with it.
- **Can join:** User(s) can join the event (or request to join).
- **Can Manage Booking And Attendees:** User(s) will be able to accept/decline approval required to attend. Users can also view the full list of attendees as well as confirm their attendance on their behalf via Event > Attendee Registration.
- **Edit this event:** User(s) will be able to edit permissions and details of the event.
- **Delete:** User(s) will be able to delete the event.

**Reminder:** Deleted events cannot be restored.

8. Make the event live.

With all the information added to the event and permissions set, you can now create the event by moving it to the 'Live' status:

**Status**  ▼

Display this Event at the top of the Upcoming Events list

Send an email invitation/cancellation/updates to users who can sign-up

**Reminder:** Be sure to specify email notifications to users as well as pin the event to the top of the events pages as needed.

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Tags: [events](#), [user guide](#), [create](#)