

# Working with Events

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**Please note**

This document is intended to support staff who have attended the Mosaic training course relevant to their role. If you have not attended a relevant course, please contact the [Mosaic Children's Training Team](#). Every effort has been made to ensure that screen shots included are current; there may be some minor differences in look and feel within the system. All data-examples included in this document are fictitious. Any resemblance to real persons, living or dead, is purely coincidental.

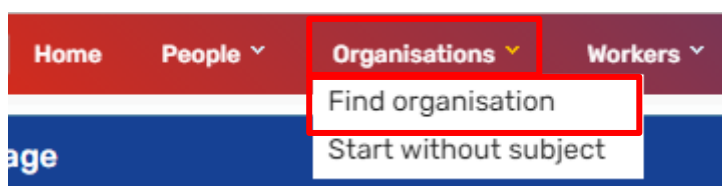
## Introduction

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Events are used to record sessions and activities that take place for a service such as training sessions for Foster Carers and Adopters. Events allow the recording of the type of session, who led the session and who attended.


To create a new event, you must be in the record for the Organisation where the event is being held, or of the Organisation taking responsibility for organising the training. For example, the Organisation would be Lincolnshire County Council as they would be responsible for arranging training for Foster Carers and Adopters.


Select **Organisations > Find organisation** from the menu at the top of the screen.



Enter search criteria in the **Name** field and click the **Find** button to display your team or organisation.

It is advisable to always use the **wildcard %** first when searching for an organisation as naming conventions have been used.

Before creating a New Event, please check to establish whether or not it already exists by selecting **Events > Planned events** so that you do not create a duplicate. A list of Events will display, those that are still active will have a status of Current and have an  edit icon displaying.

If the Event already exists, click on the  edit icon to open it. Once open, attendees at Sessions can be updated and new Sessions can be added as required. Please - go straight to the section titled **Sessions** on page 6. This section of the guide gives details on how to create new Sessions within an Event and how to edit existing ones.

**If you need to record a New Event please start from the next section.**

## Recording an Event

If the event has not been created or is not currently active, click on the **New event** button.

The **New Event** screen display

The screenshot shows the 'New Event' interface. At the top, there are four tabs: 'Event details', 'Documents', 'Invitees', and 'Sessions'. The 'Event details' tab is selected. Below the tabs, there is a header 'Event details' and a note: 'Fields marked with a \* are required'. The form contains the following fields:

- Event title\* (text input)
- Event type\* (dropdown menu with '-- Please select --')
- Start date\* (calendar icon)
- End date (calendar icon)

Below these fields is a rich text editor for the 'Event plan'. The editor has a toolbar with various icons for text formatting (bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, undo, redo) and a 'Format' dropdown menu. At the bottom right of the screen, there are 'Save' and 'Close' buttons.

The New Event screen has the following tabs:

- **Event Details** – Allows you to record the specific details for the event, e.g. First Aid, Parenting Programmes and e-learning courses. Leave the **End Date** blank until the last session has taken place. When the last session has been recorded, the **End Date** will be the date of the last session within a given year
- **Documents** – ignore not currently used
- **Invitees** – Allows you to record a list of individuals to invite to each session and record if they have been invited etc.  
**Please note:** this should only be used if the participants are expected to attend every session of this Event such as a Parenting Programme. Do not add participants here if you are using this Event to record all the training of this type that has taken place over a given year such as mandatory First Aid training or e-learning as participants will only attend one session.
- **Sessions** – Allows you to record the details of each session that make up the Event or specific training dates for training of this type that has taken place across a given year

Once you have input all of the details about the Event, click the **Save** to save the changes that you have made. This will allow you to edit in the future.

**Please note:** Clicking the **Finish** button will close and lock down the Event. You should only do this when there are no further sessions to record or update and you have recorded an **End Date**.

## Invitees

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On the **Invitees** tab you can add people that are expected to attend every session e.g. a Parenting Programme. Any invitees added here will pre-populate into every session recorded within this Event.

Do not use the **Invitees** tab if you are using this Event to record sessions, e.g. e-learning or mandatory First Aid training. In this instance the participants would be added to the individual sessions recorded within the sessions tab.

The screenshot shows the 'New Event' interface with the 'Invitees' tab selected. At the top, there are four tabs: 'Event details', 'Documents', 'Invitees', and 'Sessions'. Below the tabs, the 'Invitees' section is displayed. It features a search bar with the text 'Search:' and a dropdown menu set to '15' entries. Below the search bar is a table with the following columns: 'Name', 'Address', 'Status', 'Note', and 'Actions'. The table currently contains the text 'No records to display'. At the bottom of the table, there are navigation buttons: 'First', 'Previous', 'Next', and 'Last'. Below the table is an 'Add Invitee' button. At the bottom of the interface, there are 'Save' and 'Close' buttons.

To invite someone, click the **Add Invitee** button. The Find Party screen displays with tabs allowing you to search for a Person.



Search for and select the Invitee and their name will appear on the list on Invitees.

New Event

Event details Documents **Invitees** Sessions

**Invitees**


Show 15 entries Search:

Name	Address	Status	Note	Actions
Felicity Foster	10 Sixfield Close, Lincoln, LN6 0EJ	Selected		 

Showing 1 to 1 of 1 entries First Previous 1 Next Last

Add Invitee

Save Close

You can remove an invitee by clicking the **X** delete icon. To amend an invitee's status from **Selected** to **Invited**, **Accepted** or **Declined** or add notes you need to edit their details by clicking on the  edit icon. Clicking this icon displays the **Edit invitee** window.

**Edit invitee**

Name

Address

Status 

- Selected
- Invited
- Accepted
- Declined

Note

OK Cancel

Click **OK** to save the change or **Cancel** to close the window without making any changes.

**Please note:** You can also view Events attended by a person on their Person Summary page. Navigate to the section titled **Viewing Events**, which will show you how to do this.

## Sessions

The Sessions are either a one-off course that a Carer has attended or a series of classes that form part of a course e.g. a Parenting Programme. These make up the Event.

If this is the first Session recorded against this Event, select **Add Session**.

New Event

Event details Documents Invitees **Sessions**

Sessions

Show 15 entries Search:

Title	Date and start time	End time	Location	Actions
No records to display				

Showing 0 to 0 of 0 entries First Previous Next Last

Note: Any addition of sessions will save all other changes to the event **Add session**

Save Close

A **New Session** window opens displaying the four tabs listed below for completion.

New Session

Session details Documents Performers Participants

Session details

Fields marked with a \* are required

Session title\*

Location


Date\*

Start time  End time

Session plan

Save & add another Save & close Close

**Session Details** – Allows you to add specific details about the session such as the name and the date it took place

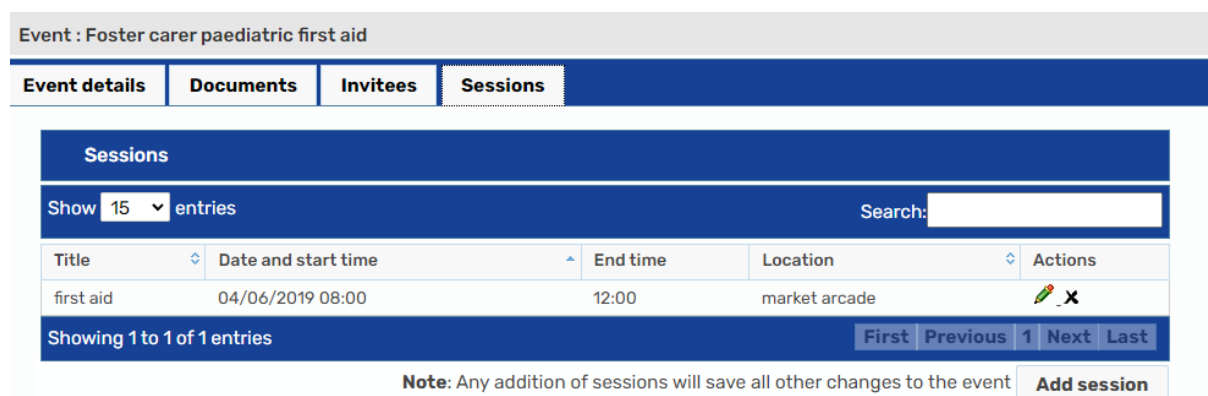
- **Documents** – Ignore this is not currently used
- **Performers** – Ignore this is not currently used
- **Participants** – Allows you to record the individuals or groups of people who have completed the training by completing a Person Search. If a list of people were added in the **Invitees** tab when adding the **Event** their details will automatically pre-populate into this tab. Once the attendee has been added, click on the  edit icon to record their attendance and add any optional notes

Once all attendees have been added, **Save and Close** to return to the **Event** screen.

For planned courses that have a fixed number of sessions, such as a Parenting Programme, after clicking on **Add session**, select **Current event**. This will copy forward all the Invitees that were originally added into the new Session. If the attendance has changed during the course, you can select a **Session**. This will copy forward the attendees at that Session only.

If this Session records attendance or completion of training that is being recorded within a given year, e.g. e-learning or mandatory First Aid training, then select **Current Event** to start with a blank Participants tab. Selecting Session will copy forward all those that have previously been recorded as having completed the training which will duplicate recording.

Once an option has been selected a New Session window will display with four tabs to be updated as outlined previously.





Event : Foster carer paediatric first aid

Event details Documents Invitees Sessions

### Sessions

Show 15 entries Search:

Title	Date and start time	End time	Location	Actions
first aid	04/06/2019 08:00	12:00	market arcade	 

Showing 1 to 1 of 1 entries [First](#) [Previous](#) [1](#) [Next](#) [Last](#)

**Note:** Any addition of sessions will save all other changes to the event [Add session](#)


## Viewing Events

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There are two ways you can view an event, either through the **Organisation summary** or through the **Person summary** of an invitee.

The **Events** option on the Person summary page allows you to view a list of events to which the person has been invited or has attended. Select **Events** from the left-hand menu of the **Person summary** screen for the child or young person in question.

The screenshot shows a user interface for viewing events. At the top, it says "Events - Ms Felicity Foster (3501785) born 12 Jun 1976 (45 years old)". Below this is a blue header "Participated events". There is a search bar and a dropdown menu set to "15 entries". A table lists events with columns for "Event title", "Event type", "Session title", "Session date", and "Attended". One entry is visible: "First Aid Training" under "Approved Foster Carer Training", with a session date of "10/01/2022" and a green checkmark in the "Attended" column. A "view details" icon is next to the entry. At the bottom, it says "Showing 1 to 1 of 1 entries" and has navigation buttons: "First", "Previous", "1", "Next", "Last".

In the above example, we can see that Felicity was invited to attend a First Aid Training course. The tick symbol indicates that she did attend. To view details of the event, click the  view details icon.


The screenshot shows a "Details" page for the event. It contains several fields: "Event title" (First Aid Training), "Event invite status" (Invited), "Event invitee note" (empty text area), "Session title" (First Aid Training), "Session location" (St John's Ambulance Cer), "Session date" (10/01/2022), "Session start time - end time" (9:00 AM - 4:00 PM), "Session participant attended (Y/N)" (Y), and "Session participant note" (empty text area). A "Cancel" button is located at the bottom right.











Click **Cancel** to close the details page. Click **Close** to close the list of events.



## Ending an Event

An Event must be left Open until all Sessions have been recorded. Once the final Session has been recorded the Event can be Finished.

From within the **Planned Events** screen click on the  edit icon next to the Event you wish to Finish.

Planned events						
Show 15 entries						
Search:						
Event title	Type	Status	Start date	End date	Created by	
First Aid Training	Approved Foster Carer Training	Current	27/09/2021		Amy Brooke acting for CSH The Beacon - Duty Worker	
First Aid	Fostering Preparation Course	Current	05/04/2021		Kinga Bardocz	
First Aid	Approved Foster Carer Training	Current	06/01/2020	07/12/2020	Ronald Rum	
Parenting Programme 2	Parenting Program	Current	02/09/2019		Kinga Bardocz acting for Steve Skywalker	
Parenting Programme 1	Parenting Program	Finished	02/09/2019	02/09/2019	Joan Meiklem	
Parenting Program	Parenting Program	Current	20/08/2019		Kinga Bardocz	
Foster carer paediatric first aid	Approved Foster Carer Training	Current	03/06/2019		Kinga Bardocz	
Prep Course 1	Approved Foster Carer Training	Current	01/01/2019		Joan Meiklem	
Prep Course 2	Approved Foster Carer Training	Current	01/01/2019		Valerie Vader	
First Aid 1	Approved Foster Carer	Current	01/06/2018		Keith Kenobi	

The Event window opens.

Event : First Aid

Event details Documents Invitees Sessions

Event details

Fields marked with a \* are required

Event title\* First Aid

Event type\* Fostering Preparation Course

Start date\* 05/04/2021 End date

Event plan

Finish Save Close

Within the Session tab check that all the sessions that have taken place for this Event have been recorded.

In the **End Date** field enter the date the last session took place. If you are recording training that has taken place within a given year, this would be the end date for that period.

Then click on **Finish**.

**Please note:** Once Finish has been selected no further recording can be added to this Event.