Event Type User Guide

Event Type Actions

Add Event Type

To start this action, click the   Add Event Type   button above the Event Type listing.

Creates a new Event Type.

When this action starts a form is displayed to enter the details of the Event Type.

Each field customises or controls some aspect of the Event Type display or behaviour.

Some fields are required and must be entered before the Event Type can be added, the required fields are .

Although some fields are not required, it is best practice to populate these, including .

Most fields are optional, and are often prefilled with a good default so these may not need to be changed. These optional fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.

View

To start this action, select the Event Type you need to work on, and click the   View   button in the ⋮ More Menu on that row.

Display the selected Event Type.

This action displays the Event Type similarly as for an Edit Action, except none of the fields are editable.

Useful for reviewing records without making any changes.

Edit

To start this action, select the Event Type you need to work on, and click the ✏ button on that row.

Edits an existing Event Type.

When this action starts a form is displayed with the existing Event Type and any previous information entered.

Each field customises or controls some aspect of the Event Type display or behaviour.

When editing it is advisable to only change what is needed and most fields may not need to be changed. These other fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.

Copy

To start this action, select the Event Type you need to work on, and click the   Copy   button in the ⋮ More Menu on that row.

Copies an existing Event Type.

The selected Event Type is copied and the word (Copy) will be added to the name of the new Copy

Delete

To start this action, either select the Event Type to work on and click the 🗑 button on that row. Or CTRL+click to select multiple Event Types and click the 🗑 button above the Event Type listing.

Deletes an existing Event Type.

When this action starts a screen is displayed to check for Confirmation before the Action continues.

On this screen a list of warnings may be provided to show the impact of deleting this Event Type.

Search

To start this action, click the 🔍 button above the Event Type listing.

Allows a Search of Event Types.

This allows a simple text search across all Event Types.

To search a specific field select the field from the drop down list

Adv. Search

To start this action, click the 🔍 Adv. Search button above the Event Type listing in the ⋮ More Menu.

Allows an Advanced Search of Event Types.

The Advanced Search opens a new section at the bottom of the Event Types and allows several distinct features:

- Multiple Search Lines : allows Event Type matches to be identified where more than one search criteria is required

- Nested Searches : allows a combination of AND and OR logic to find results

- Saved Filters : allows a search to be saved as a Filter

- Export : allows the results of the search to be exported and worked on separately

Refresh

To start this action, click the ↻ Refresh button above the Event Type listing in the ⋮ More Menu.

Refresh the list of Event Types.

Allows the list of records to be refreshed.

Although the records in the system will automatically update if a another Admin is using the system at the same time, the Refresh button allows the list to be manually updated.

Export to List

To start this action, click the ☁ Export to List button above the Event Type listing in the ⋮ More Menu.

Export the Event Type results shown to a List.

An Export List can be downloaded as a CSV file, or through any number of customised Export Templates.

Export to List will begin the process of Exporting the Event Types shown.

Once the data is exported it is available to download as a CSV file with all columns.

A list of Export Templates for Event Types will be shown, select the Export Template to Print, Export to Document, Export to CSV or Email.

Before using a template an opportunity to amend the template is provided.

See Export Templates for more information on Managing Export Templates.

Export All

To start this action, click the ⤓ Export All button above the Event Type listing in the ⋮ More Menu.

Export all the Event Types to a List.

Exactly as for "Export to List" except rather than just Exporting the Event Type results shown, all Event Types will be expored.

Export Item

To start this action, select the Event Type you need to work on, and click the ☁ Export Item button in the ⋮ More Menu on that row.

Export only the selected Event Type to a List.

Exactly as for "Export to List" except rather than just Exporting the Event Type results shown, only the selected Event Type is exported.

Choose Columns

To start this action, click the ⚙ Choose Columns button above the Event Type listing in the ⋮ More Menu.

Changes the Columns shown in the Event Type Listing.

The Choose Columns screen shows the Selected Columns on the left, and the Event Type Columns available on the right.

Drag and Drop column names between the two columns.

Alternatively double click on a column name to move it from one list to the other.

On the left the Selected Columns can be dragged up and down to change the ordering in the Event Type Listing.

Manage Filters

To start this action, click the ⚨ Manage Filters button above the Event Type listing in the ⋮ More Menu.

Creates custom Filters for Event Types.

A Filter is a saved Advanced Search. Multiple Filters can be created for Event Types.

These Filters appear at the top of the Event Type listing.

When the Filter is selected the results are restricted to only include those which match the Filter.

The Manage Filters action shows a list of existing Filters for Event Types where these can be managed.

Event Type Field Reference

Colour

The colour used to annotate events within the calendar