



D A M S T R A

Manage Person Types

Safety



## [DISCLAIMER]

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# Manage Person Types

## Introduction

In addition to 'Workers', 'Contracted Workers' and 'Third Party / Visitors', Damstra Safety also offers support for upto two additional person types.

These can be used to manage People in your Organisation who do not fit within the standard 'Worker' group, or who need to be treated separately for any reason.

Common examples include students or volunteers.

Workers

CONTRACTED WORKERS

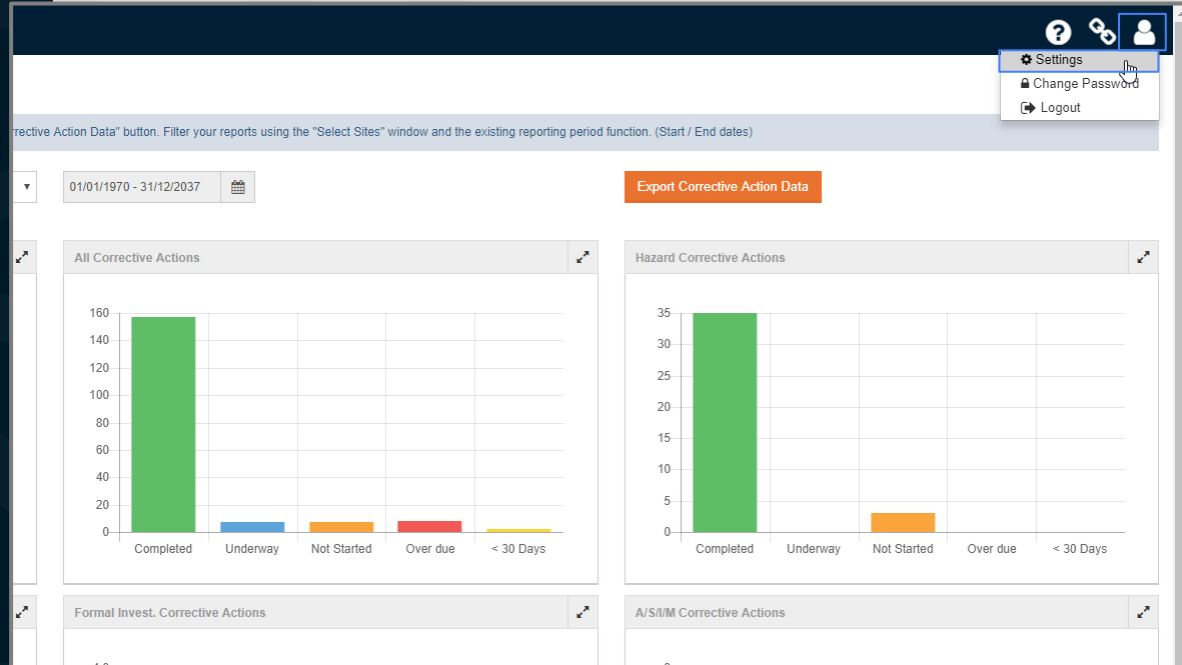
THIRD PARTY / VISITORS

OTHER PERSON TYPE 1

OTHER PERSON TYPE 2

# Manage Person Types Settings

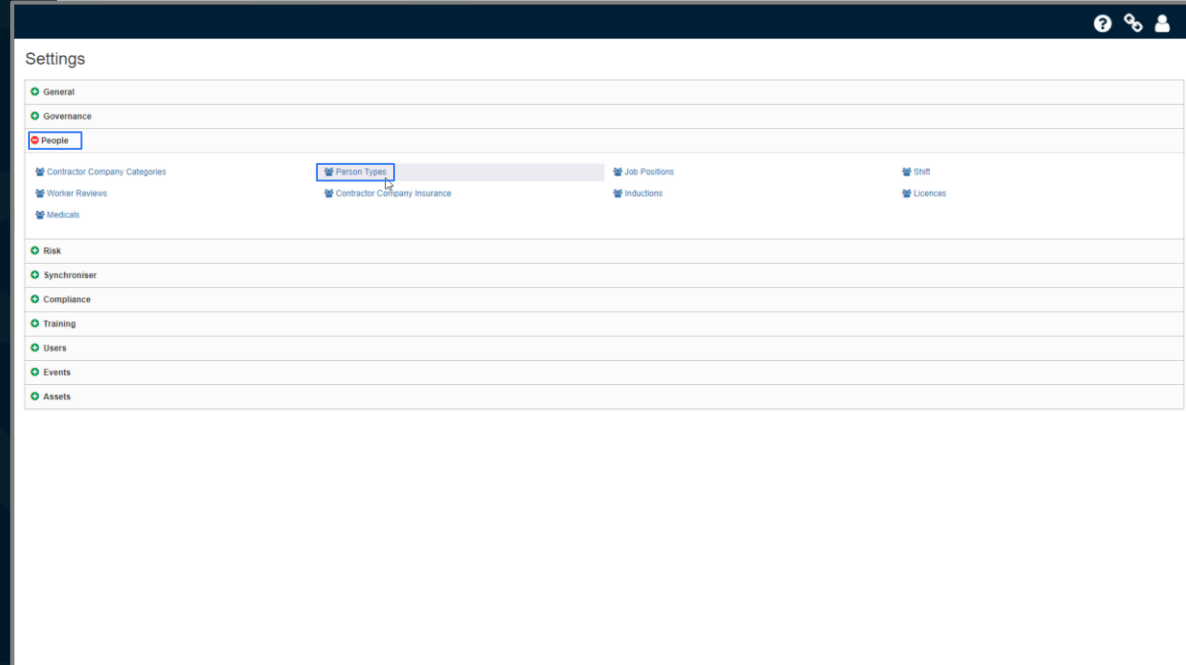
These additional 'Person Types' are added and managed in 'Settings', which is found under the 'Profile' icon at the top of the screen.



# Manage Person Types

## Settings, People Section

**Click** to expand the 'People' section, then **click** 'Person Types'.

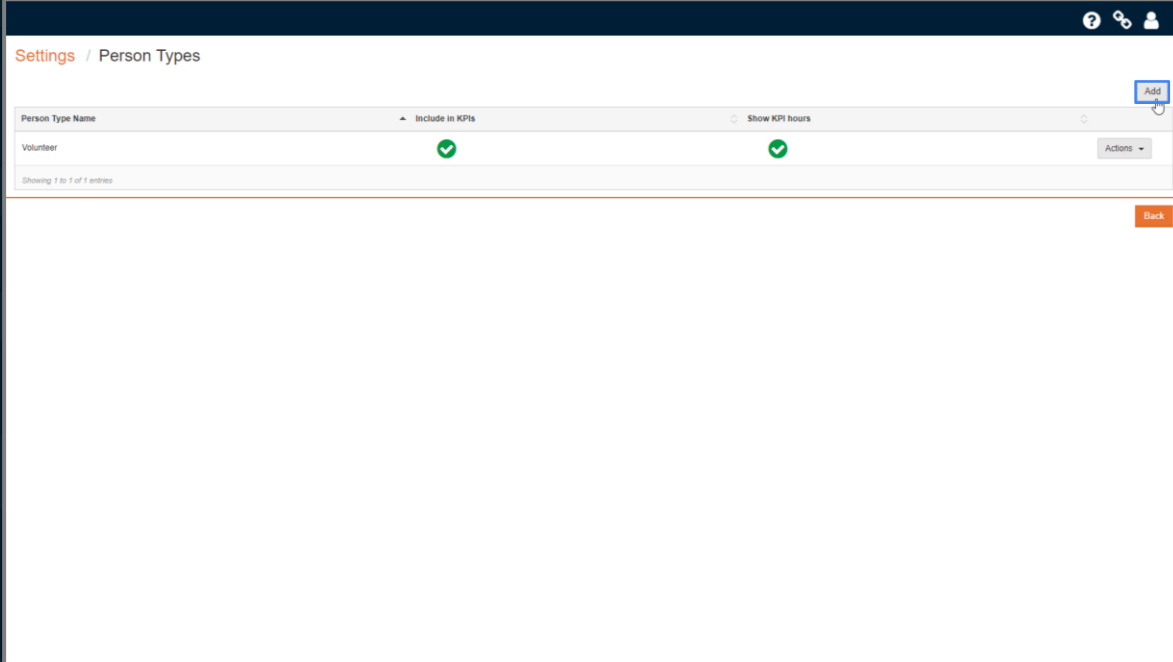


# Manage Person Types

## Add Person Type

Any existing additional 'Person Types' will now be shown. To add a new 'Person Type', **click** 'Add'.

Or, to edit the settings for an existing 'Person Type', **click** 'Actions' then 'Edit'.



The screenshot displays the 'Settings / Person Types' page. At the top right, there are icons for help, refresh, and user profile. Below the breadcrumb 'Settings / Person Types', there is an 'Add' button. A table lists person types with columns for 'Person Type Name', 'Include in KPIs', and 'Show KPI hours'. The 'Volunteer' entry is shown with green checkmarks in the latter two columns and an 'Actions' dropdown menu. A 'Back' button is located at the bottom right of the table area.

Person Type Name	Include in KPIs	Show KPI hours	Actions
Volunteer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Actions

Showing 1 to 1 of 1 entries

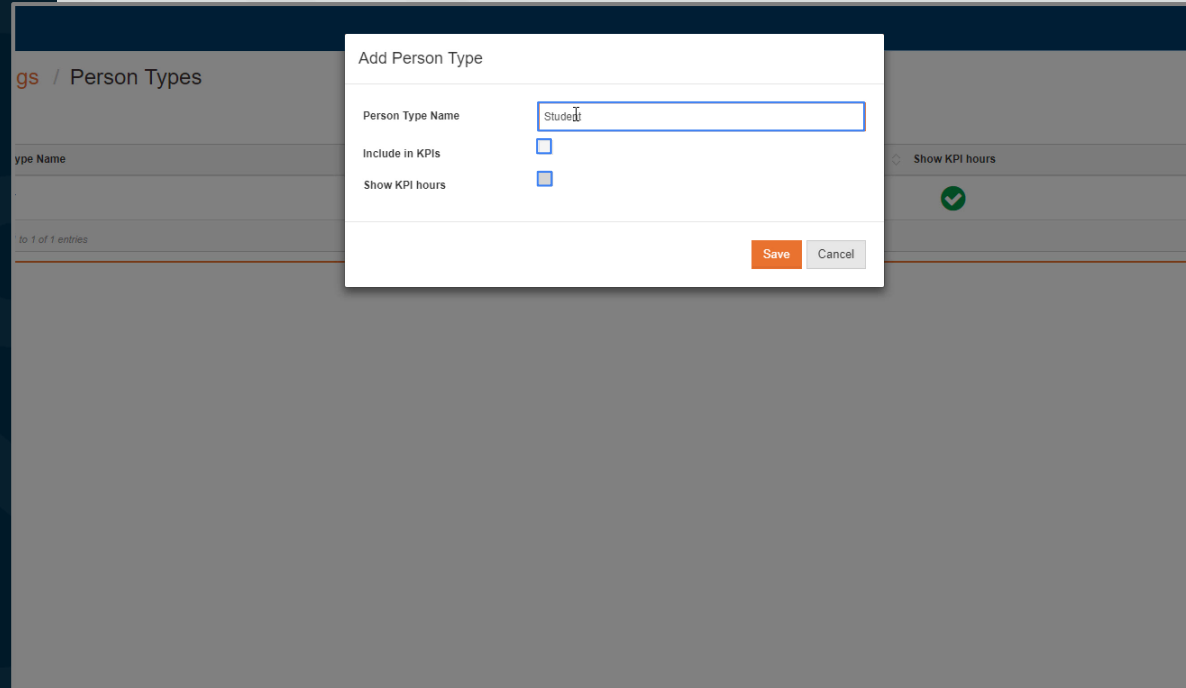
# Manage Person Types

## Add Person Type

**Name** your 'Person Type', then make the following selections:

**Tick** the 'Include in KPIs' checkbox if you would like to be able to set the Key Performance Indicator hours for this Person Type in the 'Set KPI Hours' section of 'Settings'.

**Tick** 'Show KPI hours' if you'd like to be able to select and display data for this 'Person Type' in the 'Performance Indicators' sections of 'Dashboard'.



The screenshot shows a web application interface with a modal dialog box titled "Add Person Type". The background is a dimmed view of a "Person Types" management page. The dialog box contains the following elements:

- Title:** Add Person Type
- Person Type Name:** A text input field containing the word "Student".
- Include in KPIs:** A checkbox that is currently unchecked.
- Show KPI hours:** A checkbox that is currently unchecked.
- Buttons:** An orange "Save" button and a grey "Cancel" button.

The background page shows a breadcrumb "gs / Person Types", a table with a header "Person Name", and a "Show KPI hours" toggle switch which is currently turned on (indicated by a green checkmark).

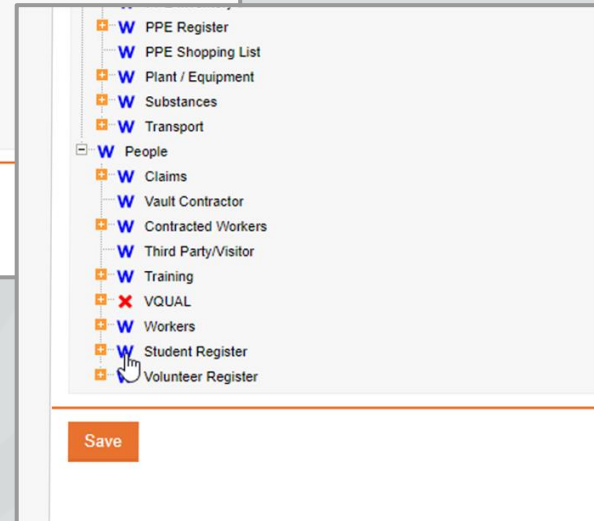
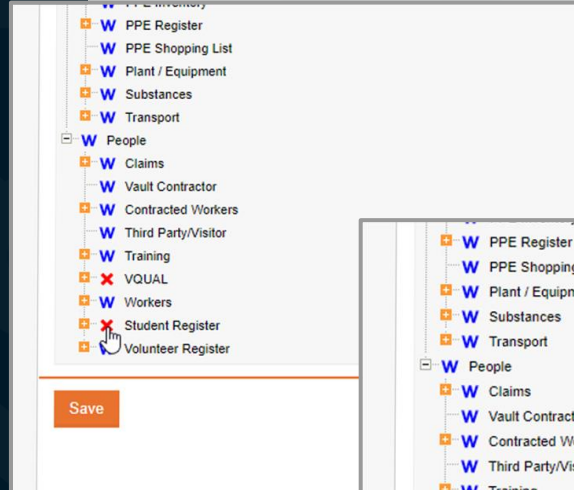
# Manage Person Types

## Add Person type

An additional, important step in adding a new 'Person Type' is to adjust your 'User Group Profiles'. By default, all 'User Groups' will have no access to this new 'Person Type'.

**Set** read or write access for your groups to suit your requirements.

Further help with managing User Group Profiles can be found in the 'Support Portal'.





# Manage Person Types

## Person Register

Once the new 'Person Type' has been added and 'User Group Profiles' **adjusted** to allow access, a Register for the 'Person Type' will be visible under 'People' in the 'Menu Bar'.

People may now be **added** to the register and information added to their records in the same way as 'Workers'.

The screenshot shows the 'Settings / Person Types' page in the DAMSTRA system. It features a table with two entries: 'Student' and 'Volunteer'. Both entries have green checkmarks in the 'Include in KPIs' and 'Show KPI hours' columns. An 'Add' button is visible in the top right corner of the table. Below the table, it says 'Showing 1 to 2 of 2 entries'. A blue arrow points from the 'Student' entry in the table to the 'Student Register' option in the 'People' menu. The 'People' menu is open, showing options like 'Claims', 'Vault Contractor', 'Contracted Workers', 'Third Party/Visitor', 'Training', 'Workers', 'Student Register', and 'Volunteer Register'. The 'Student Register' option is highlighted with a blue box and a mouse cursor.

Person Type Name	Include in KPIs	Show KPI hours	Actions
Student	✓	✓	Actions ▾
Volunteer	✓	✓	Actions ▾

