



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

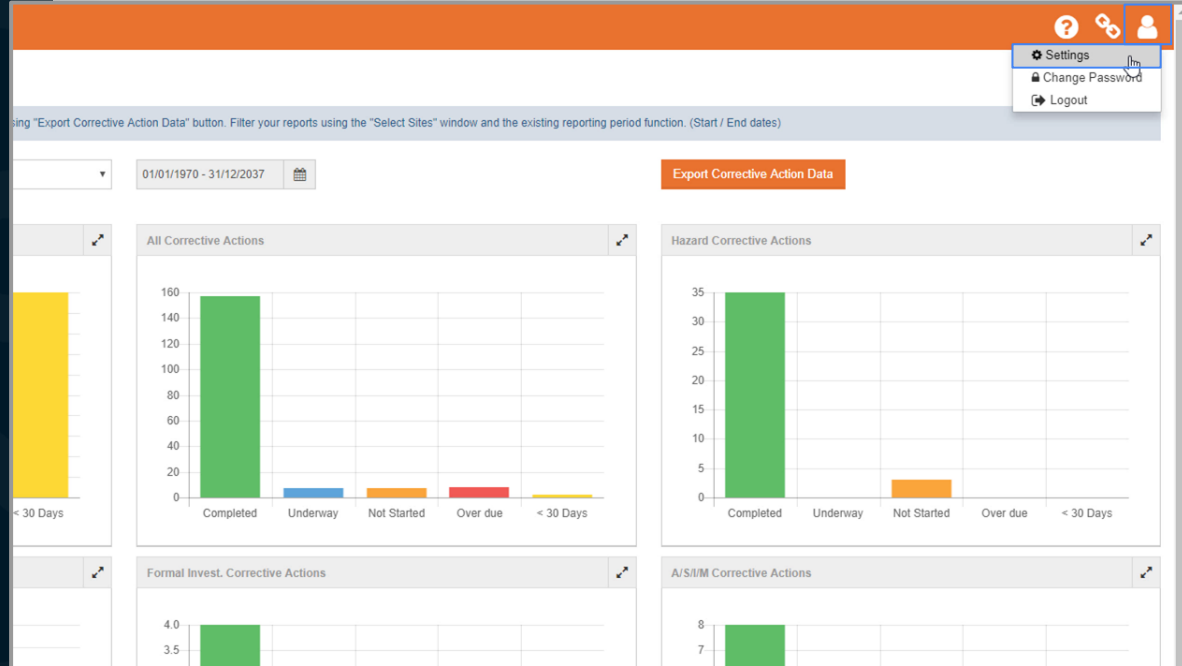
THIRD PARTY / VISITORS

OTHER PERSON TYPE 1

OTHER PERSON TYPE 2

Manage Person Types Settings

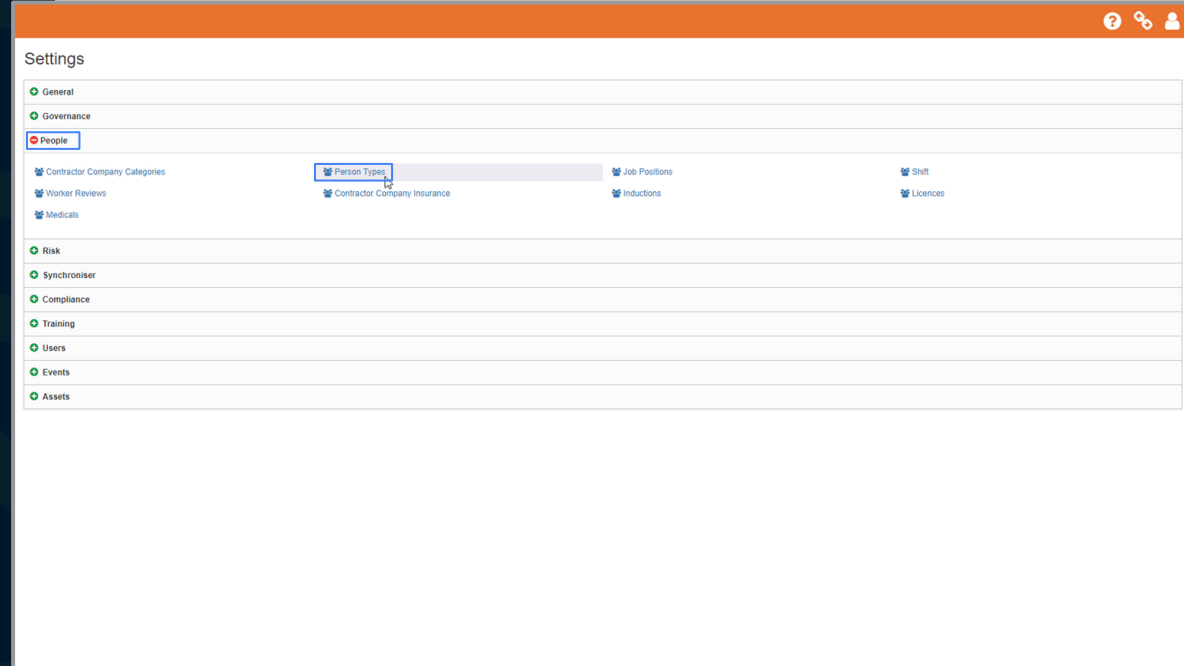
These additional 'Person Types' are added and managed in 'Settings', which is found under the 'Profile' icon at the top of the screen.



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 shows a web application interface for managing person types. The breadcrumb is 'Settings / Person Types'. There are utility icons (help, refresh, user) in the top right. An 'Add' button is in the top right corner. Below the breadcrumb is a table with columns for 'Person Type Name', 'Include in KPIs', and 'Show KPI hours'. The table contains one row for 'Volunteer', with green checkmarks in the 'Include in KPIs' and 'Show KPI hours' columns. An 'Actions' dropdown menu is visible at the end of the row. Below the table, it says 'Showing 1 to 1 of 1 entries'. A 'Back' button is in the bottom right corner.

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

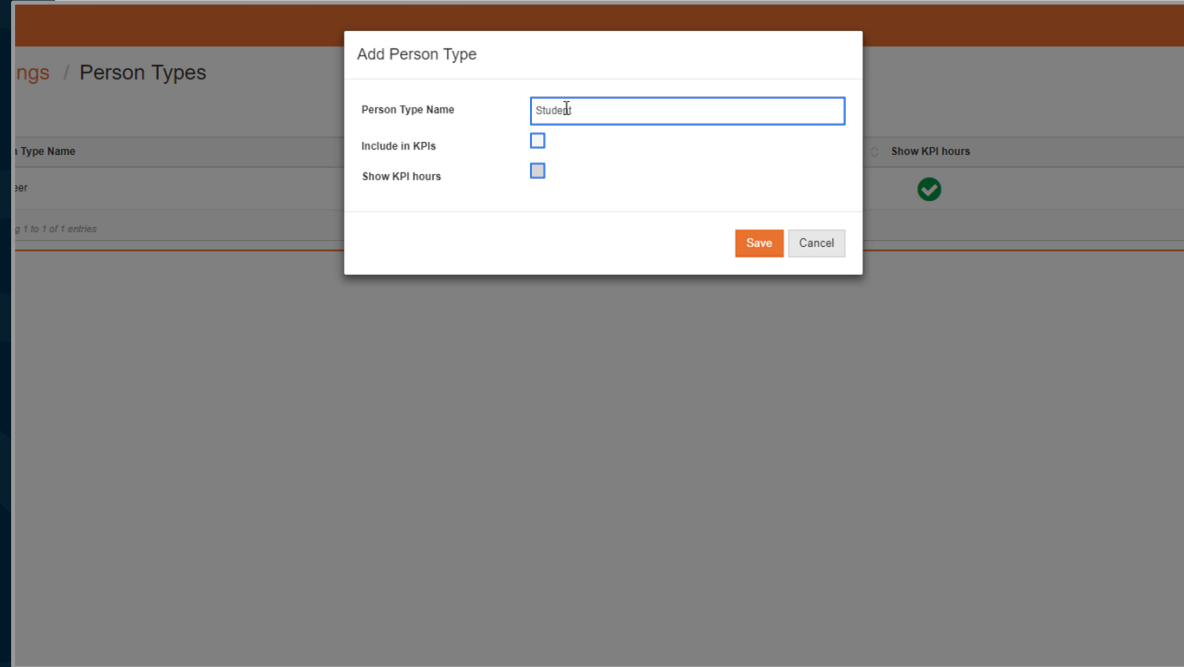
Manage Person Types

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 blurred view of the "Person Types" management page. The dialog box contains the following elements:

- Person Type Name:** A text input field containing the text "Student".
- Include in KPIs:** A checkbox that is currently unchecked.
- Show KPI hours:** A checkbox that is currently unchecked.
- Buttons:** "Save" (orange) and "Cancel" (grey) buttons at the bottom right.

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

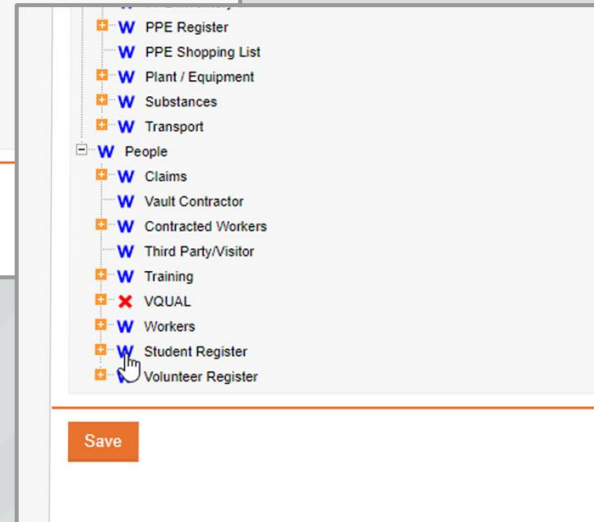
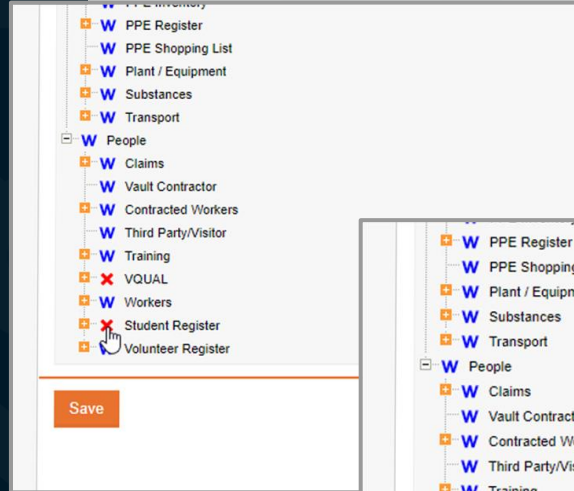
Manage Person Types

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 displays the 'Settings / Person Types' page. It features a table with the following data:

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

Below the table, it indicates 'Showing 1 to 2 of 2 entries'. An orange 'Add' button is located in the top right corner of the table area. A 'Back' button is visible in the bottom right corner of the main content area.

An overlay menu titled 'VAULT' is shown on the right side. The menu items are:

- Site Selection
- Dashboard
- Governance
- Risk
- Compliance
- Assets
- People
 - Claims
 - Vault Contractor
 - Contracted Workers
 - Third Party/Visitor
 - Training
 - Workers
 - Student Register** (highlighted)
 - Volunteer Register

