DAMSTRA

Manage Person Types

Safety

[DISCLAIMER]

This presentation document has been prepared by Damstra Technology Limited (“Damstra") and is intended for off line demonstration, presentation and educational purposes.

The information is not version controlled and as such is subject to change without notice.

Damstra does not accept any responsibility or obligation to inform users of this presentation of such changes.

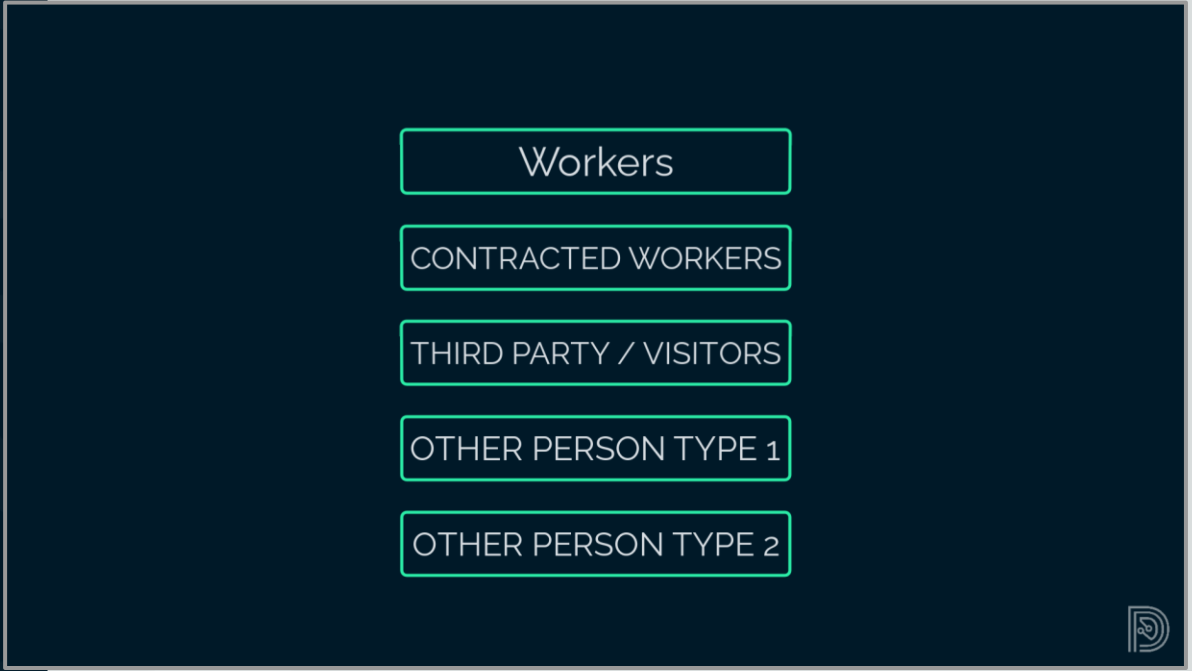
This includes any copies of this presentation taken and modified outside of the Damstra domain.

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.

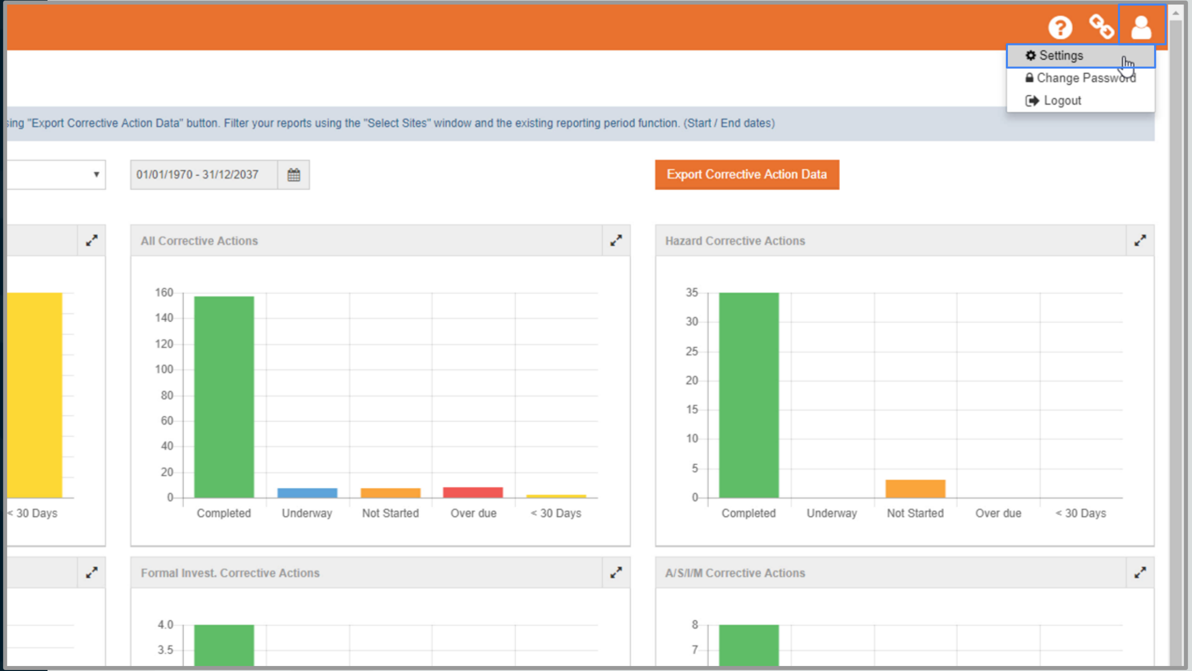
Common examples include students or volunteers.



Manage Person Types

Settings

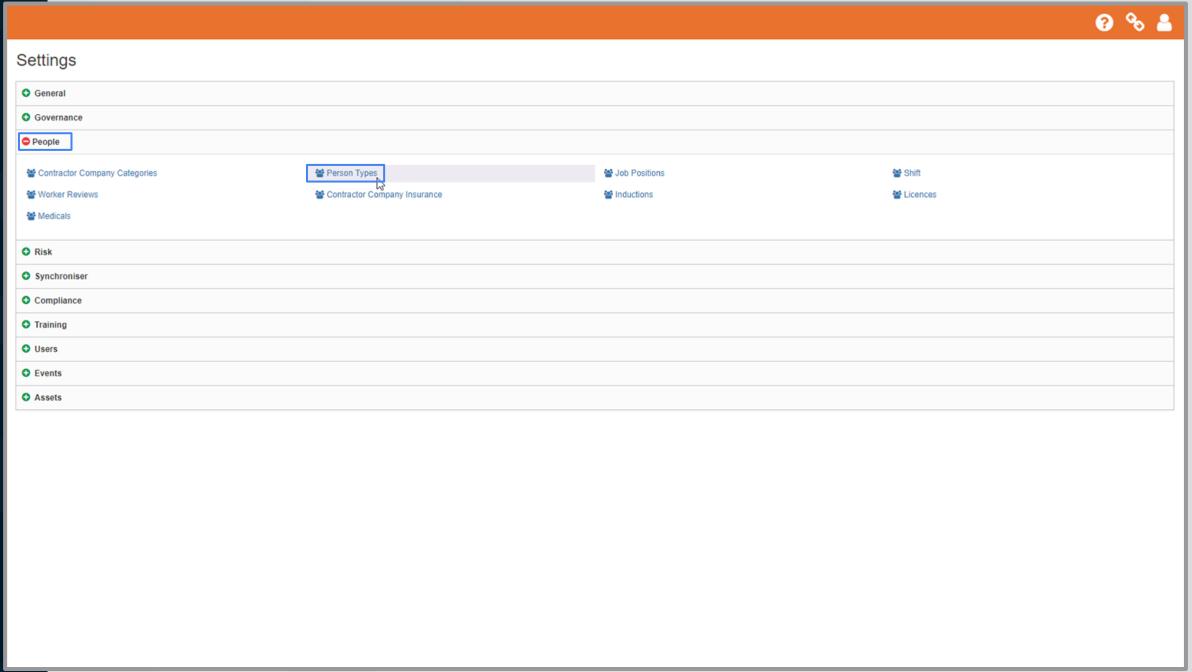
These additional ‘Person Types’ are added and managed in ‘Settings’, which is found under the ‘Profile’ icon at the top of the screen.



Manage Person Types

Settings, People Section

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

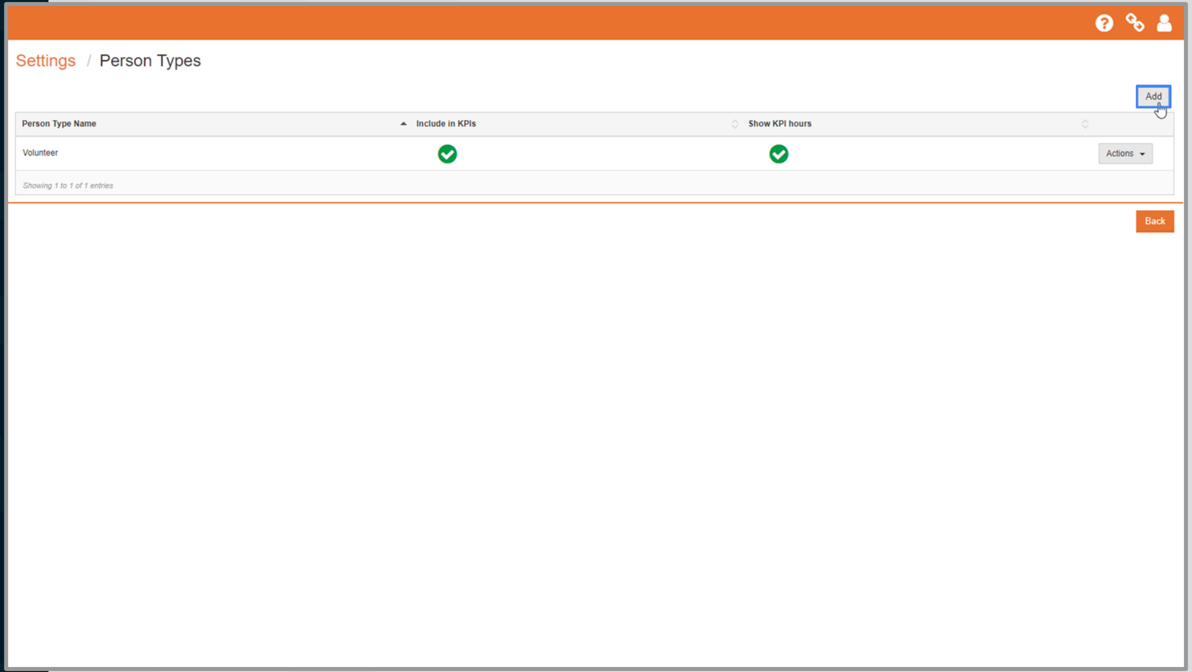


DAMSTRA

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'.



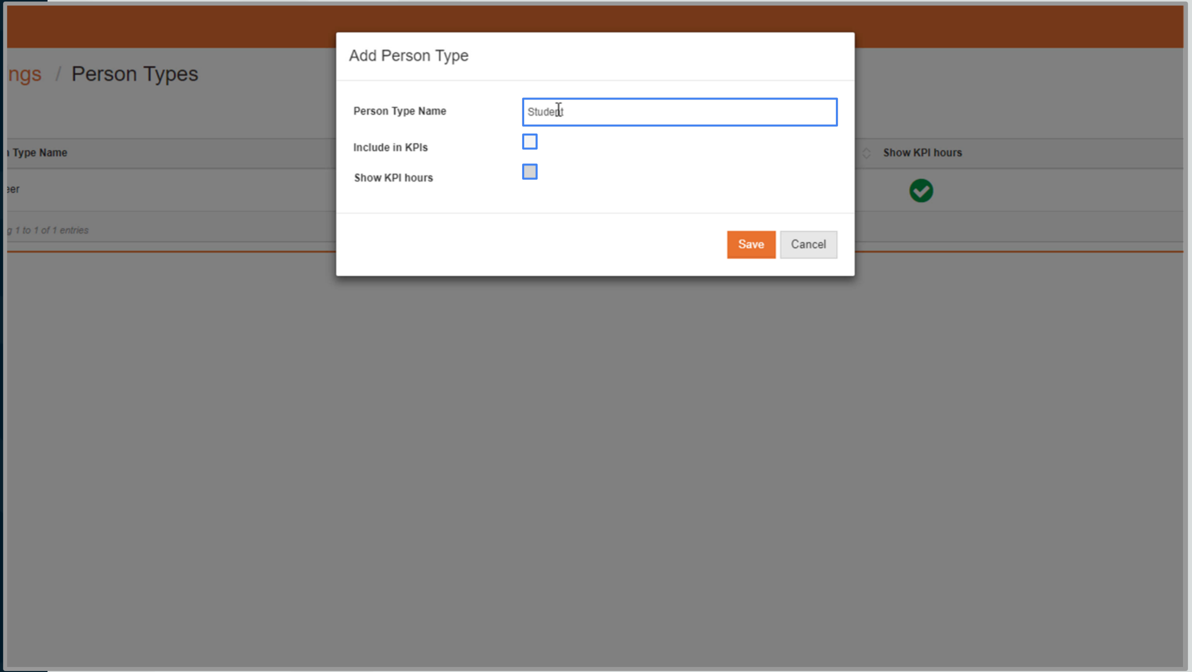
DAMSTRA

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'.



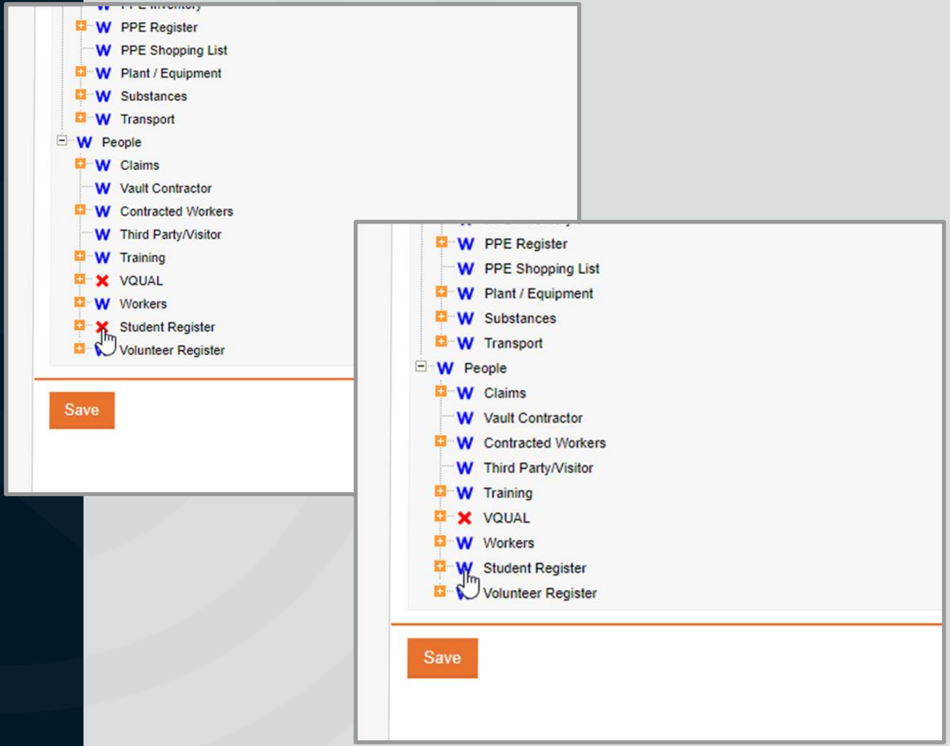
DAMSTRA

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’.

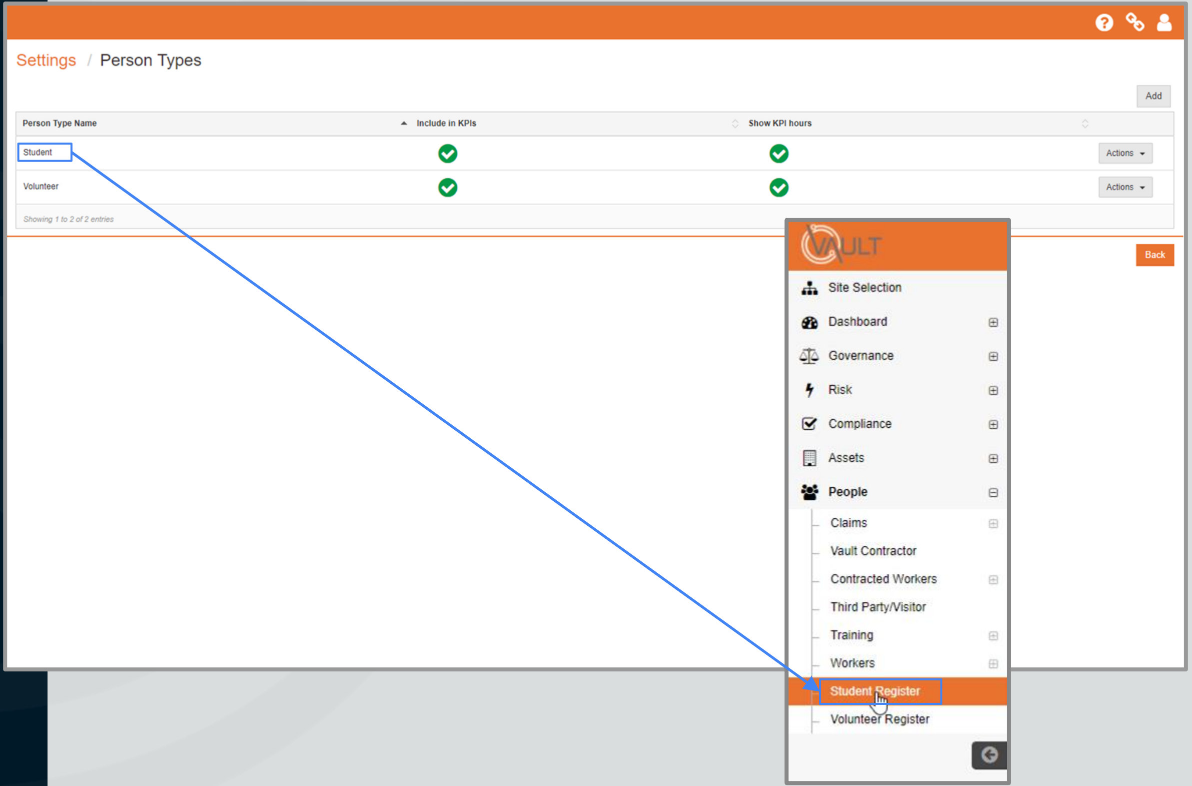


DAMSTRA

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'.



DAMSTRA