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Manage Assessors/Trainers

Safety

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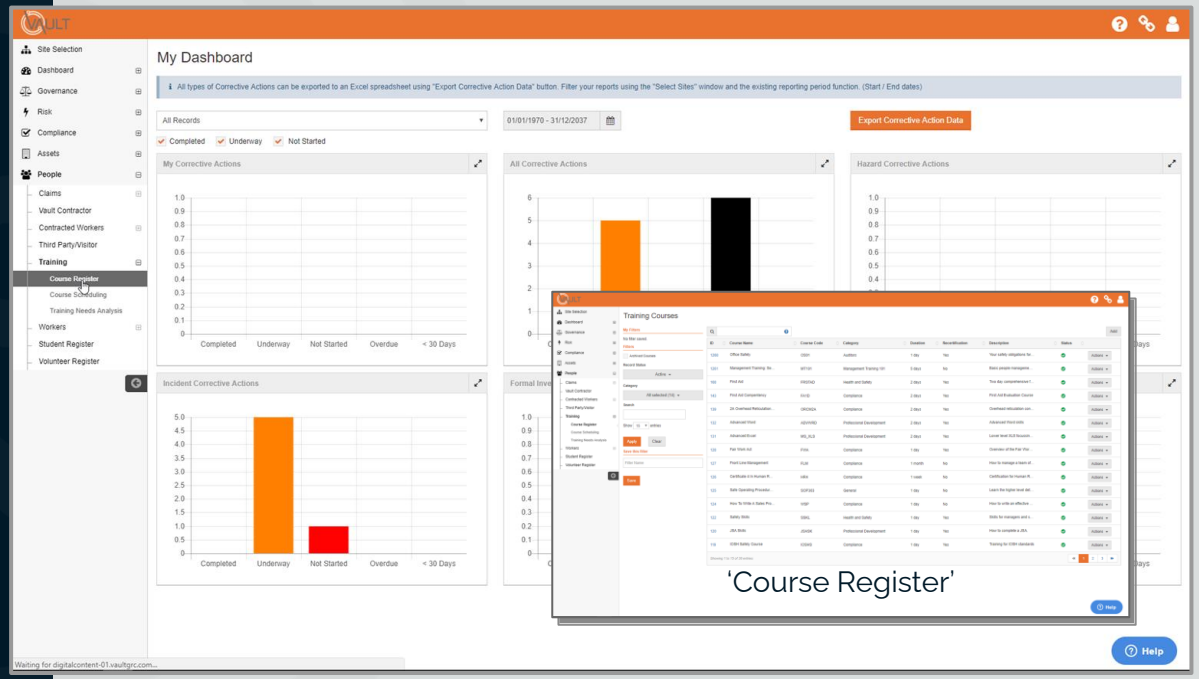
Manage Assessors/Trainers
Course Register

Once a Training Course has been **added** to the 'Courses Register' in Vault, assigning Assessors and Trainers to it is easily managed by editing the Training Course.

This can be found under 'People' in the 'Menu bar'.



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Manage Assessors/Trainers

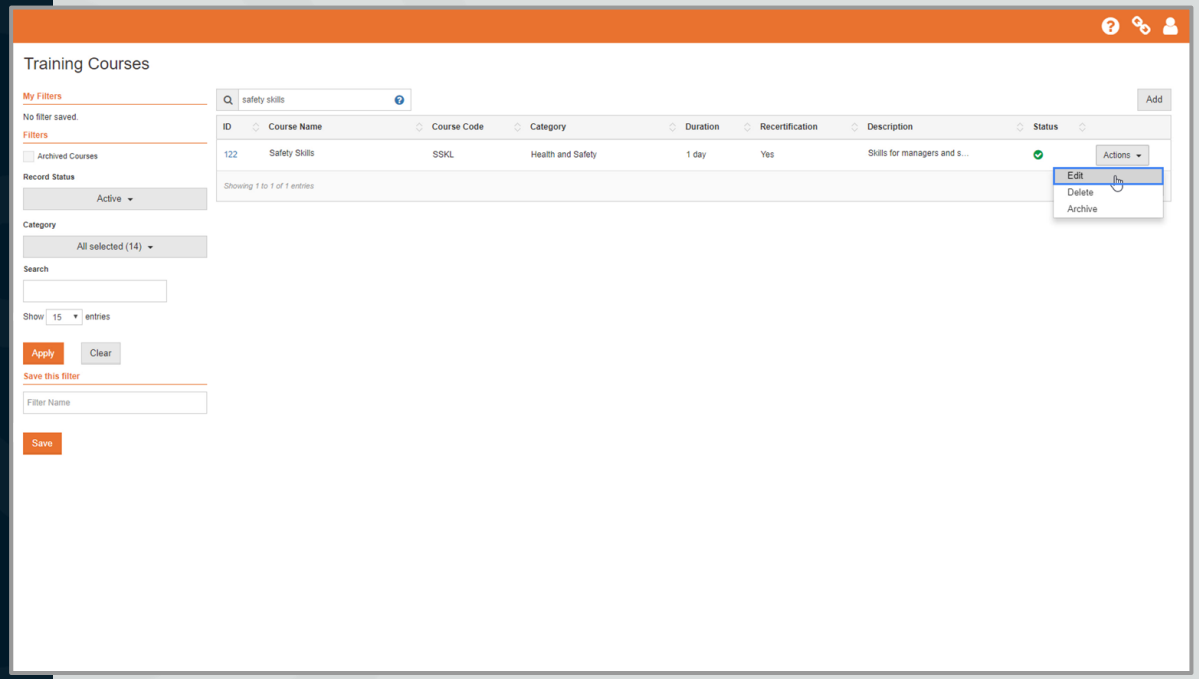
Edit Course

Locate the Training Course involved in the 'Course Register'.

Once found, there are two ways to **edit** a Course in Vault. Either:

Click 'Actions', then 'Edit'.

or: **Click** the 'Course ID' to view the course, then **click '**Edit'.



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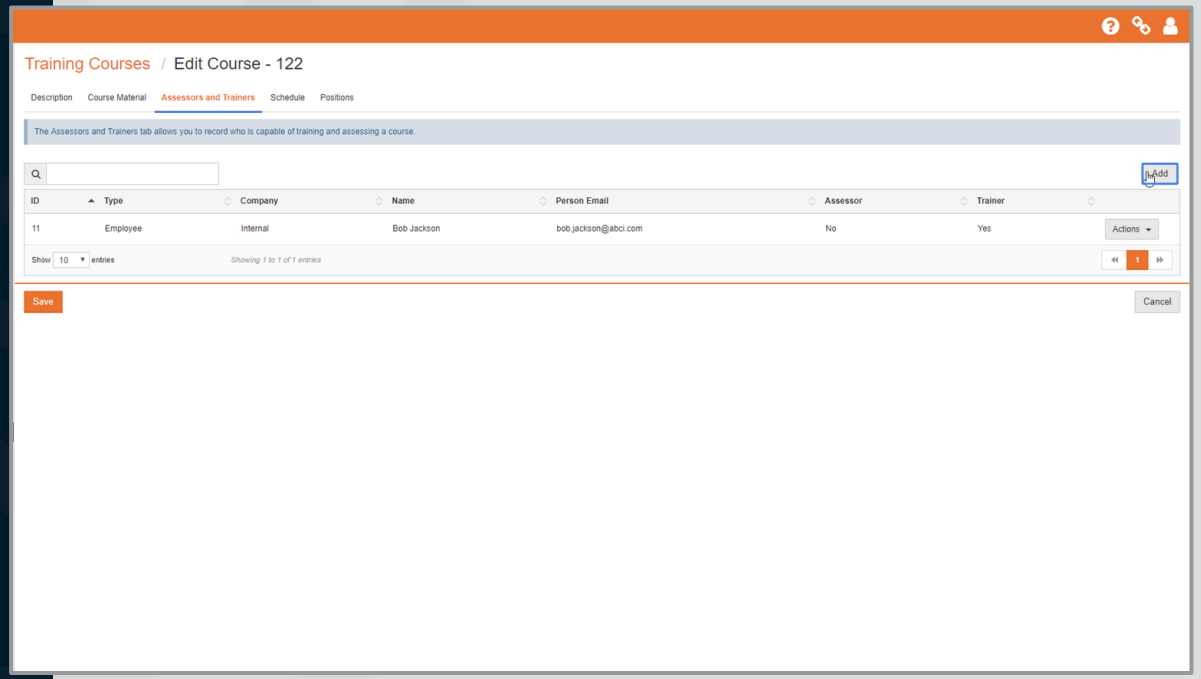
Manage Assessors/Trainers

Add Person

Click the 'Assessors and Trainers' tab.

The Assessors and Trainers tab will display any currently assigned resources

To **add** a new Assessor or Trainer, **click** 'Add'.



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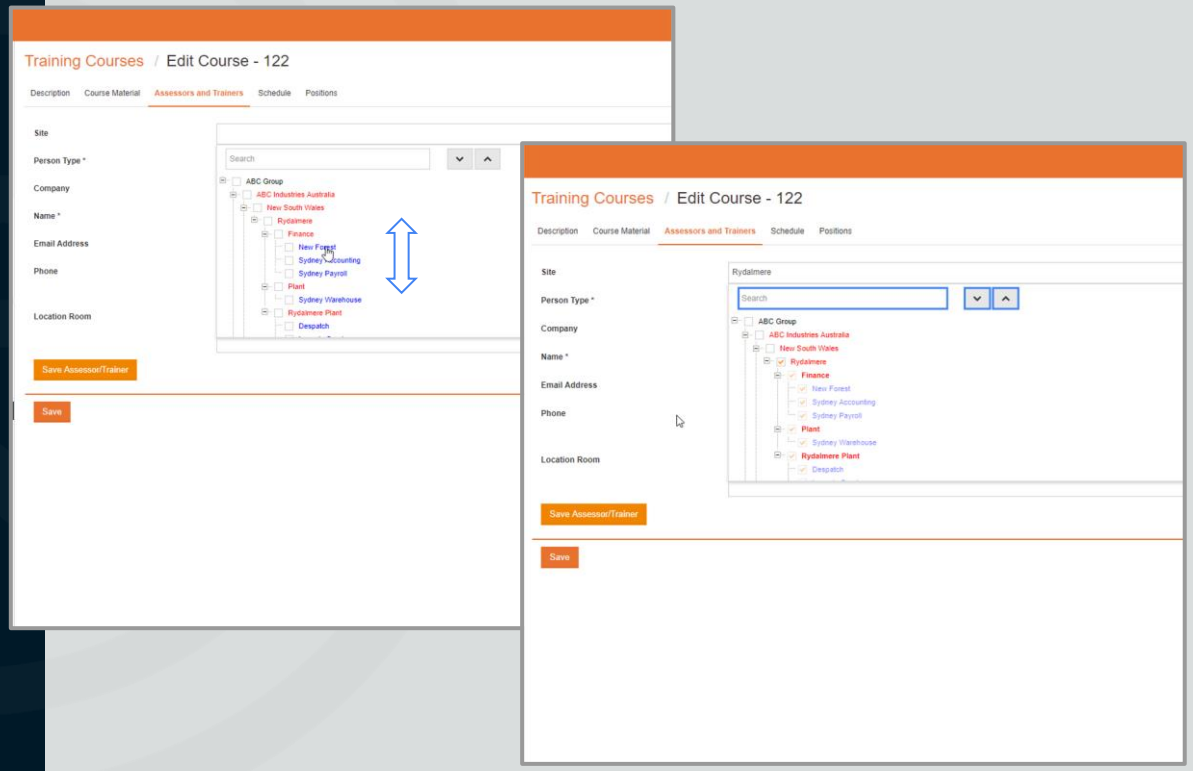
Manage Assessors/Trainers
Add Person continued

Fill in the form, completing all mandatory and relevant fields as you go

Select the 'site' that the Assessor or Trainer being added is assigned to

If the Person being added delivers this training for the entire Organisation, **select** the Organisation itself. Otherwise, **select** a particular 'site' or 'sites' by scrolling the 'Organisation structure', or by using 'site name search'.



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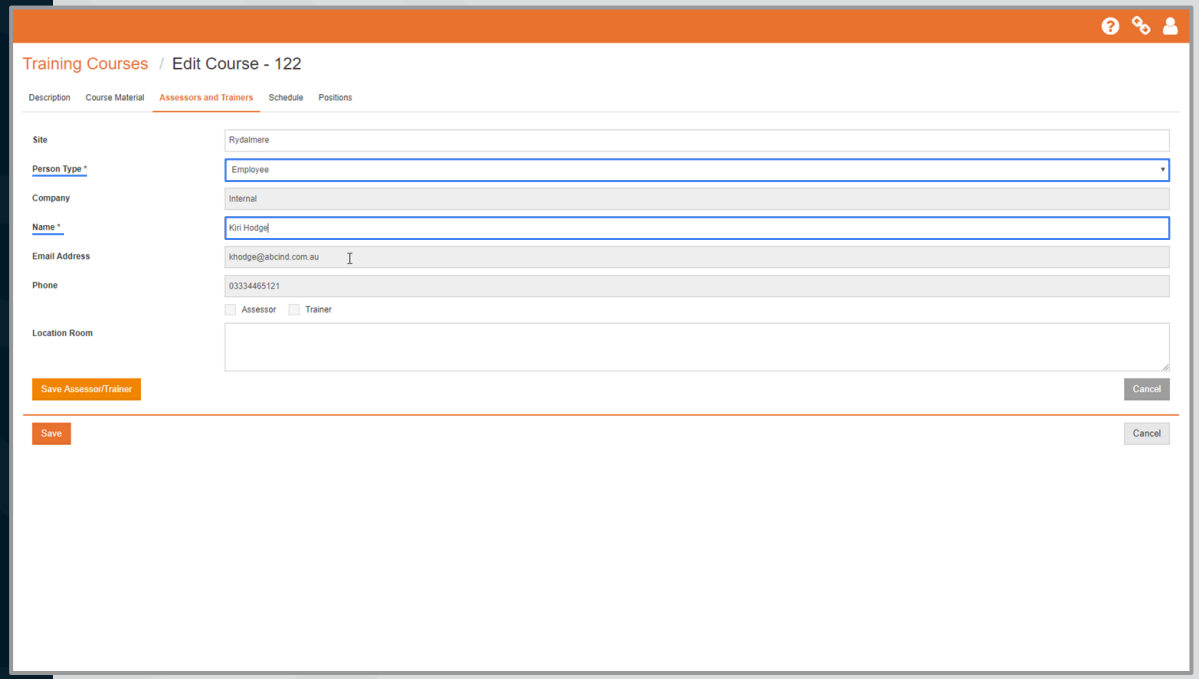
Manage Assessors/Trainers
Add Person continued

Select a 'Person Type' from the drop-down box.

Note that depending on the 'Person Type' selected, other fields in the form may be greyed-out and will be automatically populated from information already held in Vault.

Supply the Person's 'Name'. For all 'People Types' other than 'External', 'Smart Search' will help find the person as you begin to type. Once found, **click** the person.

Note that their 'Email Address' and 'Phone Number' will automatically appear.



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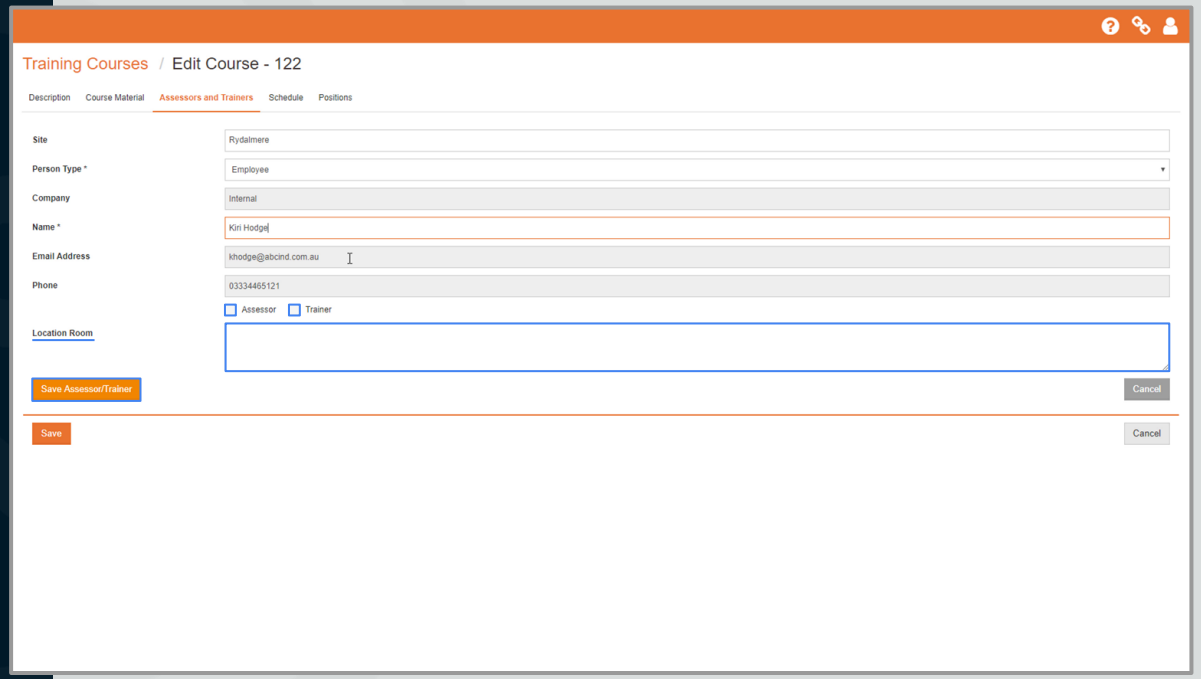
Manage Assessors/Trainers
Add Person continued

Indicate whether the Person being added is an Assessor or Trainer, or both, by **ticking** the appropriate 'check-boxes'.

Optionally **add** details about this person's location in the 'Location Room' free-text box. This information will be sent to attendees as the location for the Training.

When all required and relevant details are added, **click** 'Save Assessor/Trainer'.



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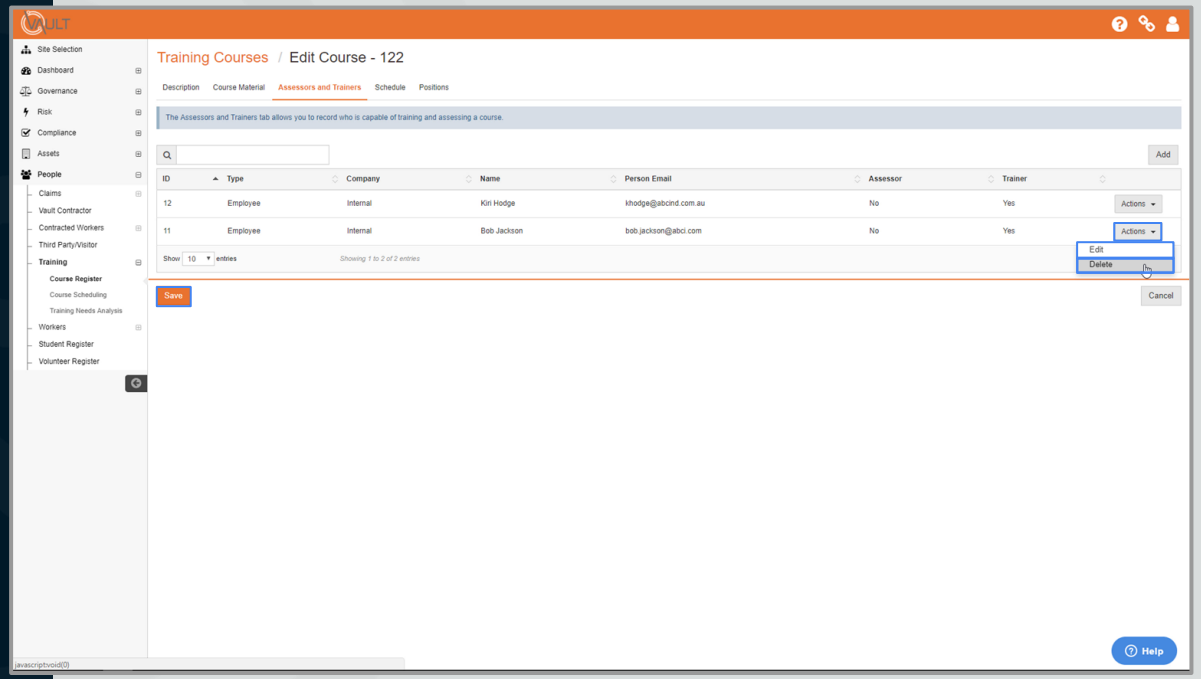
Manage Assessors/Trainers
Edit Person

The details are now **saved** and appear in the 'Register'.

Additional Assessors and/or Trainers may be added by repeating this process.

To **edit** the details of an existing Assessor or Trainer, simply **click** 'Actions', then 'Edit' or, to delete, **select '**Delete'.

Click 'Save' to return to the 'Course Register'.



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