



**D A M S T R A**

Schedule Training  
Course and  
Assign Attendees

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.

# Schedule Training Introduction

In Vault, Training Courses can be scheduled, and People assigned to attend, in a number of different ways:

## **Via the Training Course Record**

Involves finding the Training Course itself in the Course Register, and from there scheduling a session and optionally assigning Attendees

## **Via an individual Person's Record**

Allows us to add one specific Worker to the list of Attendees for an already-scheduled Training Course

## **Via the Course Scheduling Register**

This is the quickest method of scheduling an existing Training Course, and the method used in this guide.

Via Training Course Record

Via Worker Record

Via Course Scheduling Register



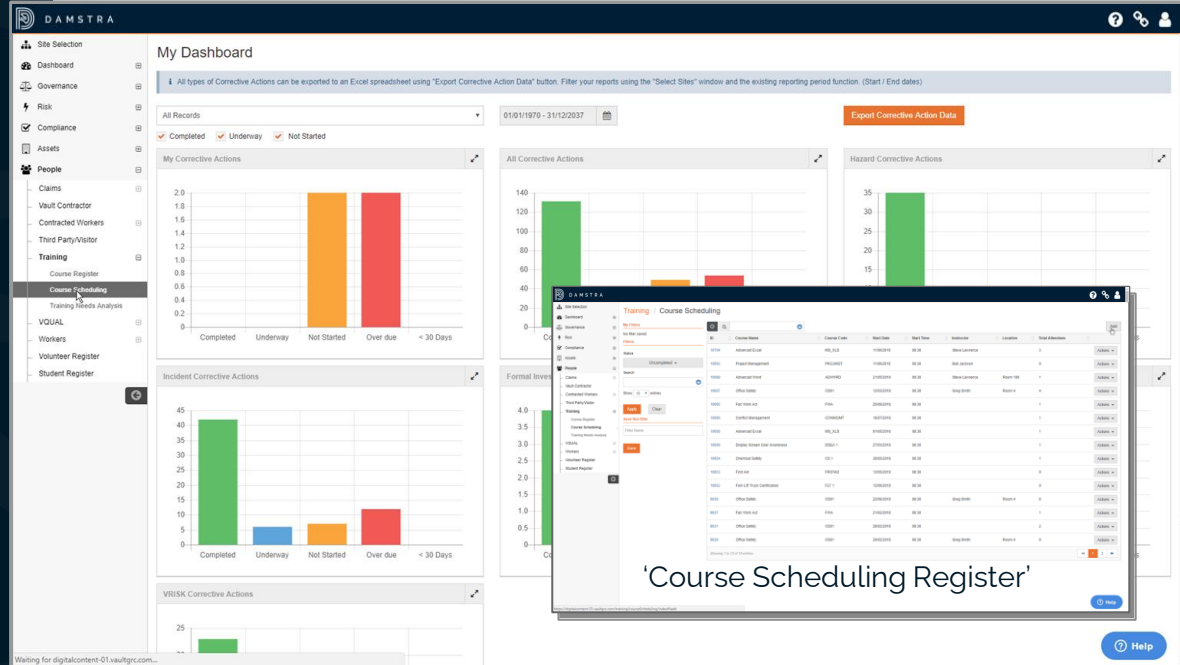
# Schedule Training

## Course Scheduling Register

The 'Course Scheduling Register' is found under 'People' in the 'Menu Bar'.

The 'Course Scheduling Register' displays all currently scheduled sessions of Training Courses.

To schedule a new session, **click 'Add'**.



# Schedule Training Course Details

The 'Add Course Schedule' form appears, which is split into two sections

The 'Course Details' section captures fundamental information about the training session including the Course involved, and the dates and times.

Work your way through the form, filling in all fields as you go.

Begin by **typing** the 'Course Name'.

Smart Search functionality will intelligently locate the correct course as you begin to type

The screenshot displays a web application interface for adding a course schedule. The breadcrumb trail at the top reads "Training / Course Scheduling / Add Course Schedule". The form is divided into two main sections: "Course Details" (indicated by a red dot) and "Add Person" (indicated by a green dot). The "Course Details" section contains the following fields:

- Course Name:** A text input field with a dropdown menu showing suggestions: "Advance", "Advanced Excel", "Advanced Word", and "ABC Group".
- Site:** A text input field.
- Course Start Date:** A date picker showing "24/05/2018".
- Course Start Time:** A time picker showing "08:30".
- Course End Date:** A date picker showing "24/05/2018".
- Course End Time:** A time picker showing "18:30".
- Trainer / Training Provider:** A text input field with a placeholder "Type Something...".
- Trainer Email Address:** A text input field.
- Location/Room:** A text input field.
- Email Trainer:** A checkbox.

At the bottom of the form, there is a "Save Schedule" button (orange) and a "Cancel" button (grey).

# Schedule Training

## Course Details continued

If the Course being scheduled is a refresher, **type** the name of the original course, then **click** the 'Refresher for Course' check-box.

**Select** the 'Site' or 'Sites' that the scheduled session should be visible to in Vault, either by **scrolling** the 'Organisation Structure' or searching via the 'Site' name.

Multiple 'Sites' may be selected using the check-boxes.

Training / Course Scheduling / Add Course Schedule

Course Details

Course Name: Advanced Word

Site:

Course Start Date:

Course End Date:

Course Start Time:

Course End Time:

Trainer / Training Provider:

Trainer Email Address:

Location/Room:

☒ Refresher for Course

☐ ABC Group

☐ ABC Industries Australia

☐ New South Wales

☐ Rydalmere

☒ Finance

☐ New Forest

☒ Sydney Accounting

☒ Sydney Payroll

☐ Plant

☐ Sydney Warehouse

☐ Rydalmere Plant

☐ Dispatch

☒ Add Person

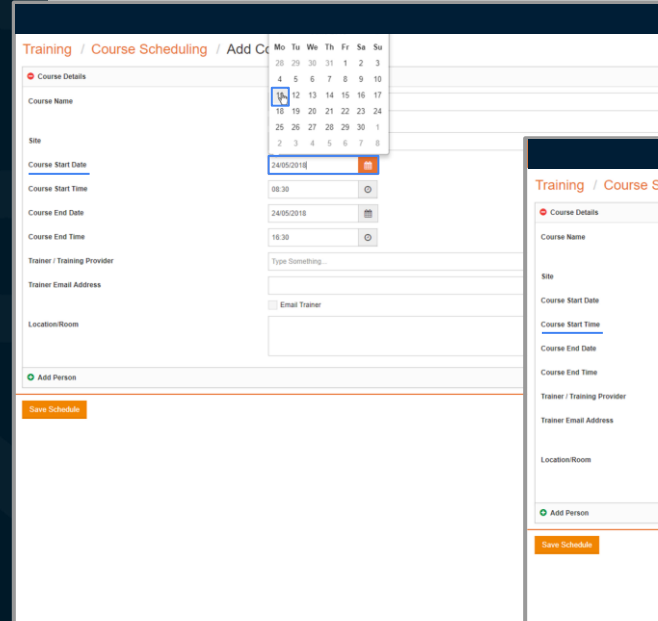
# Schedule Training

## Course Details continued

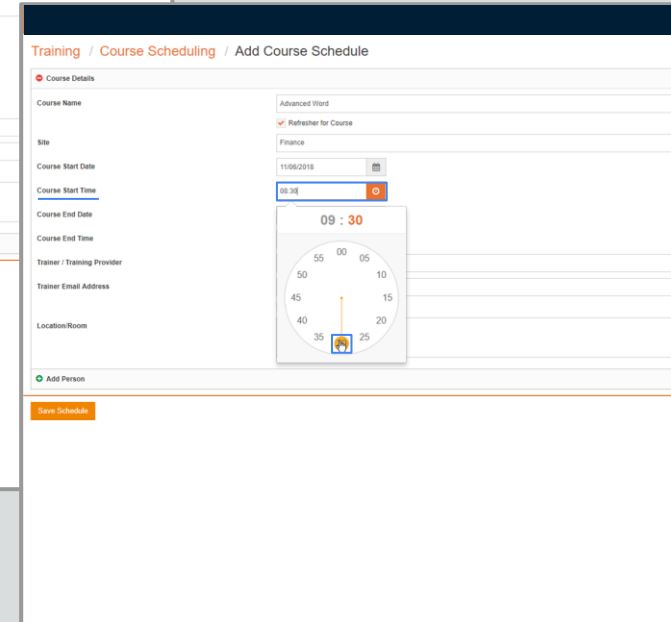
**Select** the 'Course Start Date', either by **typing** the date into the field or by **selecting** the date from the date picker.

**Select** the 'Course Start Time', either by **typing** the time into the field, or by **selecting** the hour from the time picker, then the minute.

**Select** the 'End Date' and 'Time' for the Course.



This screenshot shows the 'Add Course' form in the 'Training / Course Scheduling' section. The 'Course Start Date' field is highlighted, and a date picker is open, showing a calendar for May 2018. The date '24/05/2018' is selected. Other fields include 'Course Name', 'Site', 'Course Start Time' (08:30), 'Course End Date' (24/05/2018), 'Course End Time' (16:30), 'Trainer / Training Provider', 'Trainer Email Address', and 'Location/Room'. A 'Save Schedule' button is at the bottom.



This screenshot shows the 'Add Course Schedule' form in the 'Training / Course Scheduling' section. The 'Course Start Time' field is highlighted, and a time picker is open, showing a clock face with the time '09:30' selected. Other fields include 'Course Name', 'Site', 'Course Start Date' (11/06/2018), 'Course End Date', 'Course End Time', 'Trainer / Training Provider', 'Trainer Email Address', and 'Location/Room'. A 'Save Schedule' button is at the bottom.

# Schedule Training

## Course Details continued

**Type** the name of the 'Trainer / Training Provider'. Smart Search functionality will find the name of any person already added to the 'Training Course' record as a capable Assessor / Trainer as you begin to type. Free-text entry is available where a third party or external company has been engaged.

The Trainer's 'Email Address' and 'Location' will automatically appear if this information is available in Vault. The information in these fields can be manually **entered** if need be.

**Tick** the 'Email Trainer' check-box to automatically generate an email to the Trainer when the form is **saved**.

The screenshot shows a web application interface for 'Add Course Schedule'. The breadcrumb trail is 'Training / Course Scheduling / Add Course Schedule'. The form is titled 'Course Details' and contains several input fields and checkboxes. The 'Course Name' field is pre-filled with 'Advanced Word'. The 'Site' field is pre-filled with 'Finance'. The 'Course Start Date' is '11/05/2018' and the 'Course End Date' is '12/05/2018'. The 'Course Start Time' is '09:30' and the 'Course End Time' is '18:30'. The 'Trainer / Training Provider' field is pre-filled with 'Carolyn Smith'. The 'Trainer Email Address' field is pre-filled with 'csmith@abcind.au'. The 'Location/Room' field is pre-filled with 'Level 4, Conference Room'. There are checkboxes for 'Refresher for Course' (checked), 'Email Trainer' (checked), and 'Add Person' (unchecked). At the bottom, there are 'Save Schedule' and 'Cancel' buttons.

Training / Course Scheduling / Add Course Schedule

Course Details

Course Name: Advanced Word

Site: Finance

Course Start Date: 11/05/2018

Course Start Time: 09:30

Course End Date: 12/05/2018

Course End Time: 18:30

Trainer / Training Provider: Carolyn Smith

Trainer Email Address: csmith@abcind.au

Location/Room: Level 4, Conference Room

☒ Refresher for Course

☒ Email Trainer

☐ Add Person

Save Schedule Cancel

# Schedule Training

## Adding People

The 'Add Person' section is where we can select People to attend the Training.

To begin assigning People, **click 'Add'**.

Training / Course Scheduling / Add Course Schedule

**Course Details**

Course Name: Advanced Word

Site: Finance

Course Start Date: 11/06/2018

Course Start Time: 09:30

Course End Date: 12/06/2018

Course End Time: 16:30

Trainer / Training Provider: Carolyn Smith

Trainer Email Address: csmith@abcind.au

Location/Room: Level 4, Conference Room

**Add Person**

Search: [ ]

Buttons: Email Attendees, Add, Pass All Attendees, Print Attendance register

| ID                         | Type | Name | Passed | Mark |
|----------------------------|------|------|--------|------|
| No data available in table |      |      |        |      |

Show 10 entries | Showing 0 to 0 of 0 entries

Save Schedule Cancel

# Schedule Training

## Adding People Continued

**Select** the 'Person Type' you'd like to pick from. The choices here will include 'Workers', 'Contracted Workers', and any other 'Person types' your Organisation has added.

All People in the selected 'Person Type' will now be shown in the 'Register'.

**Use** the controls at the bottom of the screen to change the number of entries shown per page, and use the page controls to **browse** the list.

Trainer / Training Provider

Trainer Email Address

Location/Room

Carolyn Smith

csmith@abond.au

☒ Email Trainer

Level 4, Conference Room

+

Add Person

Select Person Type

Worker

Contracted Worker

Student

Volunteer

Other

Select Site

Site

Department

Q

| No                            | Name             | Site              | Department         | Position                |
|-------------------------------|------------------|-------------------|--------------------|-------------------------|
| <input type="checkbox"/> AU01 | Josh Vergeer     | Sydney Accounting |                    | Chief Executive Officer |
| <input type="checkbox"/> 91   | Phillipa Drappin | Ballarat          | Warehousing        | A.M. Picker / Packer    |
| <input type="checkbox"/> 908  | Michael Farley   | Sydney Accounting | Account Executives | Accountant              |
| <input type="checkbox"/> 853  | Steve Lawrence   | Sydney Accounting |                    | Accountant              |
| <input type="checkbox"/> 71   | Robyn O'Grady    | Melbourne         | Laboratory         | Laboratory Manager      |
| <input type="checkbox"/> 647  | Robert Beggs     | Melbourne         | Logistics          | General All Rounder     |
| <input type="checkbox"/> 555  | John Reitze      | Melbourne         | Logistics          | P.M. Picker / Packer    |
| <input type="checkbox"/> 547  | Gary Thompson    | Sydney Accounting |                    | Accountant              |
| <input type="checkbox"/> 457  | Robbie Duggan    | Melbourne         | Sales              | Sales Manager           |
| <input type="checkbox"/> 424  | Kiri Hodge       | Sydney Warehouse  | Engineering        | Maintenance Supervisor  |

Show 10 entries | Showing 1 to 10 of 73 entries

Select

Cancel

# Schedule Training

## Adding People Continued

Optionally, **use** the controls to filter-down the 'People' in the list.

'All' will apply no filtering.

'Planned Only' will filter the list to only those people for whom the Training Course is Required based on Position or individual selection, but who do not hold current or expired certification.

'Expiring' will filter the list to only those people whose certification is nearing expiry or has already expired. When chosen, additional options allow control over just how close to expiry the filter should extend.

Course End Date: 12/05/2018  
Course End Time: 18:30  
Trainer / Training Provider: Carolyn Smith  
Trainer Email Address: csmith@abcind.au  
☒ Email Trainer  
Location/Room: Level 4, Conference Room

**Add Person**

Select Person Type: Worker  
☐ All ☐ Planned Only ☒ Expiring

Expiring filter options:  
Expired  
Expired 7 Days  
Expired 14 Days  
**1 Month**  
2 Months  
3 Months  
4 Months  
6 Months

| No  | Name           | Site              | Department         | Position                 |
|-----|----------------|-------------------|--------------------|--------------------------|
| 908 | Michael Farley | Sydney Accounting | Account Executives | Accountant               |
| 547 | Gary Thompson  | Sydney Accounting |                    | Accountant               |
| 348 | Judy Flinders  | Sydney Accounting |                    | GM - Finance             |
| 347 | Greg Smith     | Melbourne         | Head Office        | GM - Logistics           |
| 219 | Jack Brazier   | Sydney Accounting |                    | Accountant               |
| 164 | James Morpher  | Melbourne         | Sales              | Area Manager             |
| 159 | Tania Tourenne | Melbourne         | Head Office        | Personal Assistant - CEO |

Show 10 entries | Showing 1 to 7 of 7 entries

Select Cancel

# Schedule Training

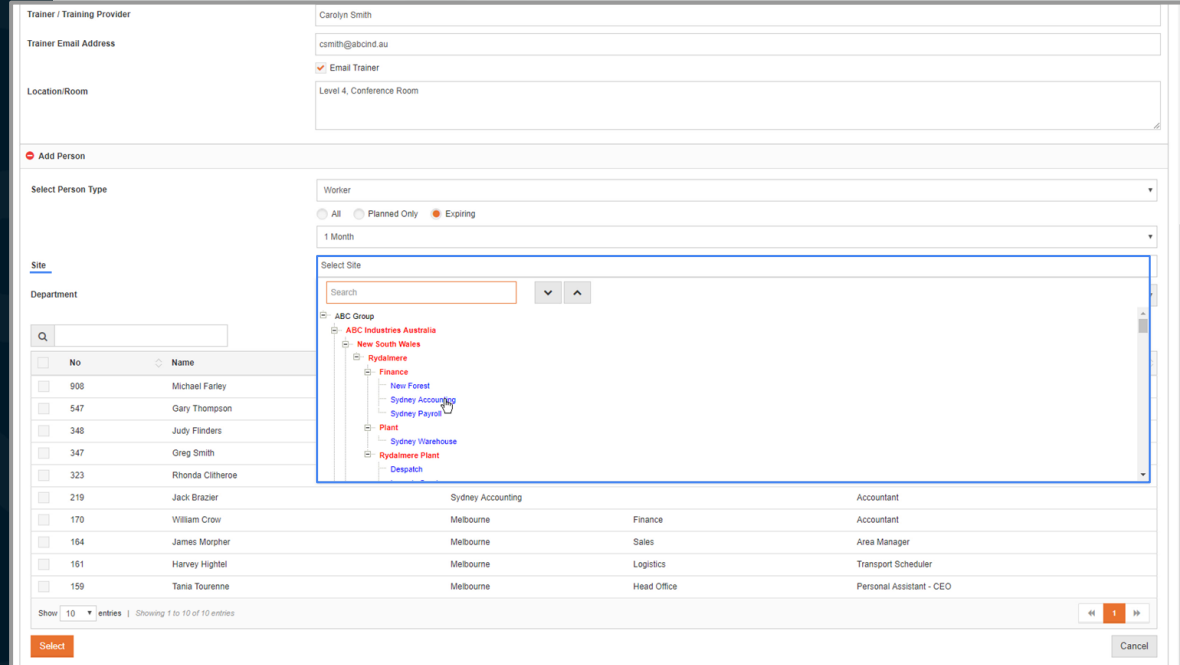
## Adding People Continued

**Click** the 'Site' field to filter to People from a specific site or sites.

**Search** by Scrolling the 'Organisation Structure', or by using site search.

If your Organisation has enabled 'Departments', you may **select** one at this stage.

People that match all selected criteria are now displayed in the table.



Trainer / Training Provider: Carolyn Smith

Trainer Email Address: csmith@abond.au

Location/Room: Level 4, Conference Room

**Add Person**

Select Person Type: Worker

☐ All ☐ Planned Only ☒ Expiring

1 Month

**Select Site**

Search: [Search Bar]

ABC Group

- ABC Industries Australia
  - New South Wales
    - Rydalmere
      - Finance
        - New Forest
        - Sydney Accounting
        - Sydney Payroll
      - Plant
        - Sydney Warehouse
      - Rydalmere Plant
        - Despatch

| No                       | Name                 | Department        | Role        |
|--------------------------|----------------------|-------------------|-------------|
| <input type="checkbox"/> | 908 Michael Farley   |                   |             |
| <input type="checkbox"/> | 547 Gary Thompson    |                   |             |
| <input type="checkbox"/> | 348 Judy Flinders    |                   |             |
| <input type="checkbox"/> | 347 Greg Smith       |                   |             |
| <input type="checkbox"/> | 323 Rhonda Clitheroe |                   |             |
| <input type="checkbox"/> | 219 Jack Brazier     | Sydney Accounting | Accountant  |
| <input type="checkbox"/> | 170 William Crow     | Melbourne         | Accountant  |
| <input type="checkbox"/> | 164 James Morpher    | Melbourne         | Sales       |
| <input type="checkbox"/> | 161 Harvey Hightel   | Melbourne         | Logistics   |
| <input type="checkbox"/> | 159 Tania Tourenne   | Melbourne         | Head Office |

Show 10 entries | Showing 1 to 10 of 10 entries

Select

Cancel

# Schedule Training

## Removing People

The Attendees are now shown in a register.

If you need to **remove** an Attendee for any reason, **select** 'Actions', then 'Remove Person'.

The person is now removed from the course

**Tick** the 'Email Attendees' button to automatically email the selected Attendees the details of the Training Course.

Once all required Attendees are added, **click** 'Save Schedule'.

The screenshot displays the 'Schedule Training' interface. The top section contains form fields for course details: Course Name, Site, Course Start Date, Course Start Time, Course End Date, Course End Time, Trainer / Training Provider, Trainer Email Address, and Location/Room. Below this is the 'Add Person' section with a search bar and buttons for 'Email Attendees', 'Add', 'Pass All Attendees', and 'Print Attendance register'. A table lists attendees with columns for ID, Type, Name, Passed, and Mark. The 'Actions' column for each row contains a dropdown menu. The dropdown for the first attendee (ID 9850) is open, showing options: 'Remove Person' (highlighted with a red box), 'Edit Mark', and 'Actions'. At the bottom, there is a 'Save Schedule' button and a 'Help' button.

| ID   | Type   | Name             | Passed | Mark | Actions                               |
|------|--------|------------------|--------|------|---------------------------------------|
| 9850 | Worker | Gary Thompson    |        |      | Actions                               |
| 9849 | Worker | Michael Farley   |        |      | Actions                               |
| 9843 | Worker | Jack Brazier     |        |      | Actions                               |
| 9842 | Worker | Rhonda Clitheroe |        |      | Remove Person<br>Edit Mark<br>Actions |
| 9841 | Worker | Judy Flinders    |        |      | Actions                               |

Save Schedule

Help

# Schedule Training

## Email to Trainer

The notification email to the Trainer is now shown.

The Recipient and Subject will be automatically populated by Vault, though this can be manually altered if required, and additional Recipients or CC Recipients can be added.

Optionally, **attach** any related files.

The email automatically includes comprehensive details about the training course including the name, dates and times of the course, the Attendees list, any additional comments or notes and the details of who scheduled the course.

**Click 'Send Mail'** to send it on its way.

Training / Course Scheduling / Add Course Schedule

Email Trainer

To: csmith@abcind.au

CC: financemanager@abcind.au

Subject: People on Advanced Word on 11/06/2018 at 09:30

Attach File: [Choose file](#) Advanced Word - Facilitator Guide.docx

Header Text

DO NOT REPLY to this automated message. Please use the email address at the bottom to contact the sender directly.

You have been added to the Advanced Word Course Details:

Course Name: Advanced Word  
Refresher for Course: Yes  
Site: Finance  
Start Date: 11/06/2018  
Start Time: 09:30  
End Date: 12/06/2018  
End Time: 16:30  
Instructor: Carolyn Smith  
Trainer Email Address: csmith@abcind.au  
Location: Level 4, Conference Room  
The following people will be on the Advanced Word course  
Gary Thompson; Judy Flinders; Rhonda Clitheroe; Jack Brazier; Michael Farley

Comments/Message

Thanks for agreeing to do this at short notice.

I

Footer Text

This email has been sent by:  
User Name: steve.lawrence  
Type: Employee  
Name: Steve Lawrence  
Email Address: steve.lawrence@vaultintel.com  
Vault URL: https://digitalcontent-01.vaulttr.com

[Send Mail](#)

[Help](#)

# Schedule Training

## Email to Attendees

Next, the notification email to Attendees appears. This works very similarly to the Trainer email.

Attendees are provided with the names, dates and times of the course, the name and email address of the Trainer and the location of the Training.

**Note** that if this is an online course delivered via 'Bracken', the URL link will be shown in the 'Header Text' section.

Again, **click** 'Send Mail' to send the email to the recipients.

The screenshot shows a web application interface for sending an email to attendees. The form is titled "Email Attendees" and includes the following sections:

- To:** A text field containing a list of email addresses: gary.thomp@abci.com, judy.finders@abci.com, rhonda\_c1th@abci.com, jack.brazier@abci.com, mfarley@abci.com, and mfarley@abci.com.
- CC:** An empty text field.
- Subject:** A text field containing "Training Scheduled for Advanced Word Course on 11/06/2018".
- Attach File:** A button labeled "Choose file" and a text field indicating "No file chosen".
- Header Text:** A large text area containing the following content:

DO NOT REPLY to this automated message. Please use the email address at the bottom to contact the sender directly.

You have been added to the Advanced Word Course Details:

Course Name: Advanced Word  
Refresher for Course: Yes  
Site Finance  
Start Date: 11/06/2018  
Start Time: 09:30  
End Date: 12/06/2018  
End Time: 16:30  
Instructor: Carolyn Smith  
Trainer Email Address: csmith@abci.com  
Location: Level 4, Conference Room
- Comments/Message:** A large text area with a rich text editor toolbar (bold, italic, underline, link, unlink, list, indent, outdent, undo, redo, source code, help).
- Footer Text:** A text field containing the following content:

This email has been sent by:  
User Name: steve.lawrence  
Type: Employee  
Name: Steve Lawrence  
Email Address: steve.lawrence@vaultintel.com  
Vault URL: https://digitalcontent-01.vaultgrc.com

At the bottom left of the form is a blue "Send Mail" button. At the bottom right is a blue "Help" button.

# Schedule Training

## Course Scheduled

The course is now scheduled, and both the Trainer and the Attendees have been notified.

The screenshot displays the DAMSTRA Training / Course Scheduling interface. The left sidebar contains navigation links: Site Selection, Dashboard, Governance, Risk, Compliance, Assets, People, Claims, Vault Contractor, Contracted Workers, Third Party/Visitor, Training (selected), Course Register, Course Scheduling (active), Training Needs Analysis, VQUAL, Workers, Volunteer Register, and Student Register. The main content area is titled 'Training / Course Scheduling' and features a search bar, a filter section with 'My Filters' (No filter saved), a status dropdown set to 'Uncompleted', and a search bar. Below these are buttons for 'Apply', 'Clear', 'Save this filter', and 'Filter Name'. The main table lists scheduled courses with columns: ID, Course Name, Course Code, Start Date, Start Time, Instructor, Location, Total Attendees, and Actions. The table shows 15 entries, with the first row highlighted. A pagination bar at the bottom indicates 'Showing 1 to 15 of 30 entries' and includes a '2' button.

| ID    | Course Name                   | Course Code | Start Date | Start Time | Instructor     | Location                 | Total Attendees | Actions |
|-------|-------------------------------|-------------|------------|------------|----------------|--------------------------|-----------------|---------|
| 10706 | Advanced Word Refresher       | ADVWRDR     | 11/06/2018 | 09:30      | Carolyn Smith  | Level 4, Conference Room | 5               | Actions |
| 10704 | Advanced Excel                | MS_XLS      | 11/06/2018 | 08:30      | Steve Lawrence |                          | 3               | Actions |
| 10693 | Project Management            | PROJMG      | 11/06/2018 | 08:30      | Bob Jackson    |                          | 0               | Actions |
| 10689 | Advanced Word                 | ADVWRD      | 21/05/2018 | 08:30      | Steve Lawrence | Room 100                 | 1               | Actions |
| 10667 | Office Safety                 | OS01        | 12/03/2019 | 08:30      | Greg Smith     | Room 4                   | 4               | Actions |
| 10665 | Fair Work Act                 | FWA         | 25/06/2018 | 08:30      |                |                          | 1               | Actions |
| 10660 | Conflict Management           | CONMGMT     | 16/07/2018 | 08:30      |                |                          | 1               | Actions |
| 10658 | Advanced Excel                | MS_XLS      | 01/05/2018 | 08:30      |                |                          | 1               | Actions |
| 10656 | Display Screen User Awareness | DSEA 1      | 27/03/2018 | 08:30      |                |                          | 1               | Actions |
| 10654 | Chemical Safety               | CS 1        | 30/05/2018 | 08:30      |                |                          | 1               | Actions |
| 10653 | First Aid                     | FRSTAD      | 12/05/2018 | 08:30      |                |                          | 0               | Actions |
| 10652 | Fork Lift Truck Certification | FLT 1       | 12/06/2018 | 08:30      |                |                          | 0               | Actions |
| 9638  | Office Safety                 | OS01        | 22/06/2018 | 08:30      | Greg Smith     | Room 4                   | 8               | Actions |
| 9637  | Fair Work Act                 | FWA         | 21/02/2018 | 08:30      |                |                          | 1               | Actions |
| 9631  | Office Safety                 | OS01        | 28/02/2018 | 08:30      |                |                          | 2               | Actions |

