

Ko Awatea Learn Facilitator Guide

(Face-to-face courses – manager approval required)

Facilitator guide

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Face-to-face sessions

Facilitators have additional access in the Ko Awatea Learn courses they manage. This includes booking staff onto sessions, adding or editing session details, managing approvals, cancelling sessions, downloading sign-in sheets, and recording attendance. This guide explains how to complete each task for face-to-face courses that require manager approval.

Add attendees

- Find the **session date** you want to update
- Select the **three dots** on the far right of the session date
- Select **Attendees**

Upcoming events Add event

District	Event status	Booked	Session times	Rooms	Session status	Actions
Capital, Coast and Hutt Valley	Upcoming Booking open	0 / 20	7 July 2025, 8:00 AM - 4:30 PM	CTU Room 10	Upcoming	Go to event ...

Past events

District	Event status	Booked	Session times	Rooms	Session status	Actions
Capital, Coast and Hutt Valley	Over	0 / 20	6 May 2025, 8:00 AM - 4:30 PM	CTU Room 10	Session	...

Export attendance
Format
Export to file

Event details
Attendees
 Edit event
 Cancel event
 Copy event
 Delete event

- Select **Actions**, then choose **Add users**

[Event Details](#)
[Attendees](#)
[Wait-List](#)
[Cancellations](#)
[Take Attendance](#)
[Message Users](#)

Actions
 Actions
Add users
 Add users via file upload
 Add users via list of IDs
 Remove users
 Manage archived users

There are no records in this report

Export as CSV Export

- Enter the person's name in the search field
- Select **Search**
- Select the correct person from the results, checking their name, email address, and district
- Select **Add**

Note: Do not select **Allow scheduling conflicts**, as this may allow a person to be booked onto more than one course at the same time.

Select users to add (step 1 of 2)

Users to add

Search

1 potential users

Search results (1)

Belinda Test account, connectme@ccdhb.org.nz

belinda test

Search

Show all

☐ Show only users who declared interest in this activity

◀ Add

▶ Remove

☐ Allow scheduling conflicts

Continue Cancel

- Repeat the process to add any additional users to the session
- When all users have been added, select **Continue**

Select users to add (step 1 of 2)

Users to add

Belinda Test account, connectme@ccdhub.org.nz

Search

◀ Add

▶ Remove

1 potential users

Search results (1)

belinda test

Search

Show all

☐ Show only users who declared interest in this activity

☐ Allow scheduling conflicts

Continue

Cancel

- Select **Book users without requiring approval** to prevent an approval email being sent to the user's manager
- Enter any relevant facilitator information in **Additional information**
- Select **Confirm**

Add users (step 2 of 2)

Name	Work email address (lowercase letters)	ID number
Belinda Test account	connectme@ccdhb.org.nz	

Change selected users

▼ Collapse all

▼ Booking options

☒ Book users without requiring approval

▼ Sign-up fields

The values entered below will be populated for all selected users. To enter different values for each user use the [file import](#)

Additional information

Confirm Cancel

After the user is added, they will appear in the course **Attendees** tab.

Emails: When you add a staff member to a session, they automatically receive a confirmation email with the session name, date, time, and details. Their manager also receives an email confirming the booking.

Remove users

- Go to the session the user needs to be removed from
- Select **Actions**, then choose **Remove users**

The screenshot shows the 'Attendees' tab selected. The 'Actions' dropdown menu is open, and the 'Remove users' option is highlighted with a blue box. The main content area displays the message 'There are no records in this report' and an 'Export as' section with a 'CSV' dropdown and an 'Export' button.

- Select all the **user's names** that need to be removed and then select **Remove**

The screenshot shows the 'Select users to remove (step 1 of 2)' dialog. It features two columns: 'Users to remove' (empty) and 'Current attendees' (containing 'Belinda Test account, connectme@ccdhb.org.nz' which is highlighted with a blue box). Between the columns are 'Remove' and 'Undo' buttons, with the 'Remove' button highlighted by a blue box. At the bottom are 'Continue' and 'Cancel' buttons.

- Once all the users who need to be removed are listed on the left-hand side, select **Continue**

Select users to remove (step 1 of 2)

Users to remove

Belinda Test account, connectme@ccdhb.org.nz

Search

Current attendees

Search

Remove

Undo

Continue

Cancel

- Enter a clear reason in the **Cancellation note**, such as 'needed on the ward'
- Select **Confirm**

Remove users (step 2 of 2)

Removing users from this session also deletes their sign up data.

Name	Work email address (lowercase letters)	ID number	Sign-up data
Belinda Test account	connectme@ccdhb.org.nz		Yes

Change selected users

▼ **Cancellation fields**

The values entered below will be populated for all selected users.

Cancellation note

Needed on the ward

Confirm

Cancel

After the user is removed, they will no longer appear in the **Attendees** list. They will appear in the **Cancellations** tab.

Bulk remove users success - Successfully removed 1 attendees. [View results](#)

Test course

Event Details
Attendees
Wait-List
Cancellations
Take Attendance
Message Users

Actions
Results - 0 records

There are no records in this report

Export as
CSV
Export

View all events

Cancellations tab: Shows when the user signed up, when they cancelled, and the cancellation reason.

Event Details
Attendees
Wait-List
Cancellations
Take Attendance
Message Users

1 record shown

Name	Time of sign-up	Time Cancelled	Cancellation type	Cancellation note	Actions
Belinda Test account	24 June 2025, 1:02 PM	25 June 2025, 12:13 PM	User Cancelled	Needed on the ward	

Export as
CSV
Export

View all events

Approve users

The **Approval Required** tab only appears when a person is awaiting approval. To update a request, select **Approve** or **Decline**, then select **Update requests**.

Name	Time Requested	Attendee's note	Manager's Name	Decide Later	Decline	Approve
Belinda Test account	27 June 2025, 2:07 PM		Site admin Belinda Colley	☐	☐	☒

Update requests

View all events

One-day sessions

Edit sessions

Use these steps to update a one-day session, including the date, time, room, facilitator, booking limits, and session details.

- Select the **three dots** on the right-hand side of the session you want to edit
- Select **Edit event**

Upcoming events

Add event

District	Event status	Booked	Session times	Rooms	Session status	Actions
Capital, Coast and Hutt Valley	Upcoming Booking open	0 / 20	7 July 2025, 8:00 AM - 4:30 PM	CTU Room 10	Upcoming	Go to event ...

Past events

District	Event status	Booked	Session times	Rooms	Session
Capital, Coast and Hutt Valley	Over	0 / 20	6 May 2025, 8:00 AM - 4:30 PM	CTU Room 10	Session

Event details

Attendees

Edit event

Cancel event

Copy event

Delete event

Export attendance

Format

Export to file

- To change the date, start time, or finish time, select the **cog next to the date field** and update the details in the pop-up window
- To change or select the room, select **Select rooms** and search for the correct room, use the x to remove a room
- Select **Select facilitators** and search for the session facilitator

Note: Use **Add a new session** for courses held over multiple days, as each day must be added within the same session. Refer to the [Multi-day sessions section](#) for instructions.

Editing event in Test course

▼ Collapse all

There are required fields in this form marked *.

▼ General

Specify sessions details

Date and time

7 July 2025 8:00 AM - 7 July 2025 4:30 PM Pacific/Auckland

Rooms

CTU Room 10 x Select rooms

Facilitators

Select facilitators

Assets

Select assets

Add a new session

Facilitator guide

11 of 22

August 2026

- **Sign-up opens** controls when staff can start booking. Select **Enable**, then choose the date and time bookings should open
- **Sign-up closes** controls when staff can no longer book. Select **Enable**, then choose the date and time bookings should close
- **Maximum bookings** limits how many people can book. Select **Use room capacity** or manually enter the maximum number

Sign-up opens ⓘ

27 May 2025 00:00 Pacific/Auckland

☒ **Enable**

Sign-up closes ⓘ

28 June 2025 00:00 Pacific/Auckland

☒ **Enable**

Maximum bookings* ⓘ

20 **Use room capacity**

- **Allow cancellations**: Leave this set to **At any time** so staff can cancel if needed
- **Minimum bookings**: Enter the minimum number required for the course to run, or leave this blank if it does not apply
- **Notify about minimum bookings**: Select this if you want to be notified when bookings are below the minimum before the session date

Allow cancellations ⓘ

☒ At any time

☐ Never

☐ Until specified period

0 hours before event starts

Minimum bookings ⓘ

5

Notify about minimum bookings ⓘ

☒ 5 days before event starts

- **Details** is where you add participant information, such as what to bring or any pre-reading reminders. This information appears in the confirmation and reminder emails
- **Context** can be used to describe who the course is for, such as staff from a specific ward or service
- **Facilitator** does not need to be completed if the facilitator was already entered in the date section
- **District** should be pre-populated, change if the district is incorrect
- Select **Save changes** after all details have been updated

Details ⓘ

↵

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A ▼

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Bring a plate of food to share.

Wear comfy clothes as there will be moving around required.

▼ Custom fields

Context

Facilitator

District

Capital, Coast and Hutt Valley ▼

Save changes

Cancel

Changes to the session appear in the course list immediately. Check the session details and edit anything that does not look correct.

Multi-day sessions

For multi-day courses, add each required date within the same session. Dates may be consecutive or non-consecutive, such as a two-day course held on 22 and 23 September, or on 22 September and 22 October. This is different from separate one-day sessions held on different dates; refer to [One-day sessions](#) for those courses.

- Select the **three dots** on the right-hand side of the session you want to edit
- Select **Edit event**

Test course

Event
All
Booking
All
Room
All
Advanced
All

Upcoming events

Last reservations are 1000 days before the event starts. Unallocated reservations will be deleted 999 days before the event starts.

District	Event status	Booked	Session times	Session status	Actions
Capital, Coast	Upcoming Booking open	0 / 20	22 September 2026, 8:30 AM – 4:30 PM	Upcoming	Go to event ...

Past events

Context	District	Event status	Booked	Session times	Rooms	Facilitators
	Capital, Coast	Over Attendance	3 / 20			

- To change the date, start time, or finish time for the first session, select the **cog next to the date field** and update the details in the pop-up window
- Select **Add a new session** or select the **copy symbol** to add the next session date

Editing event in Test course

There are required fields in this form marked *.

General

Specify sessions details
Date and time
22 September 2026 8:30 AM – 22 September 2026 4:30 PM Pacific/Auckland
Rooms
Select rooms
Facilitators
Select facilitators
Add a new session

- After copying a date, the same date will appear twice
- Select the **cog next to the date field** to update the date and time for the copied session
- If you do not change the copied date, a conflict warning will appear when you save

Specify sessions details	Date and time	Rooms	Facilitators
	22 September 2026 8:30 AM - 22 September 2026 4:30 PM Pacific/Auckland	 Select rooms	Select facilitators  x
	22 September 2026 8:30 AM - 22 September 2026 4:30 PM Pacific/Auckland	 Select rooms	Select facilitators  x

- To add more dates, select the **copy button** or **Add a new session**. After all dates have been added, refer to [Edit sessions](#) to update the remaining fields

Specify sessions details	Date and time	Rooms	Facilitators
	22 September 2026 8:30 AM - 22 September 2026 4:30 PM Pacific/Auckland	 Select rooms	Select facilitators  x
	23 September 2026 8:30 AM - 23 September 2026 4:30 PM	 Select rooms	Select facilitators  x

[Add a new session](#)

Copy sessions

Copying sessions is the easiest way to add additional sessions for a course.

- Select the **three dots** next to an existing session
- Choose **Copy event**

Upcoming events

District	Event status	Booked	Session times	Rooms	Session status	Actions
Capital, Coast and Hutt Valley	Upcoming Booking open	0 / 20	7 July 2025, 8:00 AM – 4:30 PM	CTU Room 10	Upcoming	Go to event ...

Past events

District	Event status	Booked	Session times	Rooms	Session status	Actions
Capital, Coast and Hutt Valley	Over	0 / 20	6 May 2025, 8:00 AM – 4:30 PM	CTU Room 10	Session	Event details Attendees Edit event Cancel event Copy event Delete event

[Export attendance](#)

Format

[Export to file](#)

- Edit the copied session details, including the date, time, room, and facilitator
- Check all remaining details, update anything that has changed, then save

Copying as a new event in Test course

There are required fields in this form marked *.

▼ Collapse all

General

Specify sessions details

Date and time	Rooms	Facilitators	Assets
7 July 2025 8:00 AM – 7 July 2025 4:30 PM Pacific/Auckland	CTU Room 10 × Select rooms	Select facilitators	Select assets ×

The 7 August session has been copied from the 7 July session.

Upcoming events

District	Event status	Booked	Session times	Rooms	Session status	Actions
Capital, Coast and Hutt Valley	Upcoming Booking open	0 / 20	7 July 2025, 8:00 AM – 4:30 PM	CTU Room 10	Upcoming	Go to event ...
Capital, Coast and Hutt Valley	Upcoming Booking open	0 / 20	7 August 2025, 8:00 AM – 4:30 PM	CTU Room 10	Upcoming	Go to event ...

Continue copying sessions until all session dates are listed. Use the sign-up opens and sign-up closes fields if bookings should open later or close before the session date.

Cancel sessions

If a session must be cancelled, follow these steps so booked attendees are notified.

- Go to the session
- Select the **three dots**
- Select **Cancel event**

Upcoming events							Add event	
District	Event status	Booked	Session times	Rooms	Session status	Actions		
Capital, Coast and Hutt Valley	Upcoming Booking open	0 / 20	7 July 2025, 8:00 AM - 4:30 PM	CTU Room 10	Upcoming	Go to event ...		
Capital, Coast and Hutt Valley	Upcoming Booking open	0 / 20	7 August 2025, 8:00 AM - 4:30 PM	CTU Room 10	Upcoming	Event details Attendees Edit event Cancel event Copy event Delete event		
Past events								
District	Event status	Booked	Session times	Rooms	Session status	Actions		
Capital, Coast and Hutt Valley	Over	0 / 20	6 May 2025, 8:00 AM - 4:30 PM	CTU Room 10	Session over	...		

A warning will state: **“Cancelling this event will remove all of its booking, attendance and grade records. All attendees will be notified.”** Check that you are cancelling the correct session date, then select **Yes**.

Cancelling event in Test course

▼ Event

District
Capital, Coast and Hutt Valley

Booked/Capacity
0 / 20

Event booking
Booking open

Approval required by:
Manager Approval

Details
Bring a plate of food to share.
Wear comfy clothes as there will be moving around required.

▼ Sessions

Status	Times	Rooms
Upcoming	7 July 2025, 8:00 AM - 4:30 PM	CTU Room 10

Cancelling this event will remove all of its booking, attendance and grade records. All attendees will be notified.

Yes

No

The session date will remain on the course page, but the session status will show as **Cancelled**. A cancellation email is automatically sent to all booked attendees and their managers.

 Event cancelled

Test course


Event All **Booking** All **Advanced** All

Upcoming events

Add event

District	Event status	Booked	Session times	Rooms	Session status	Actions
Capital, Coast and Hutt Valley	Upcoming Booking open	0 / 20	7 August 2025, 8:00 AM - 4:30 PM	CTU Room 10	Upcoming	Go to event 

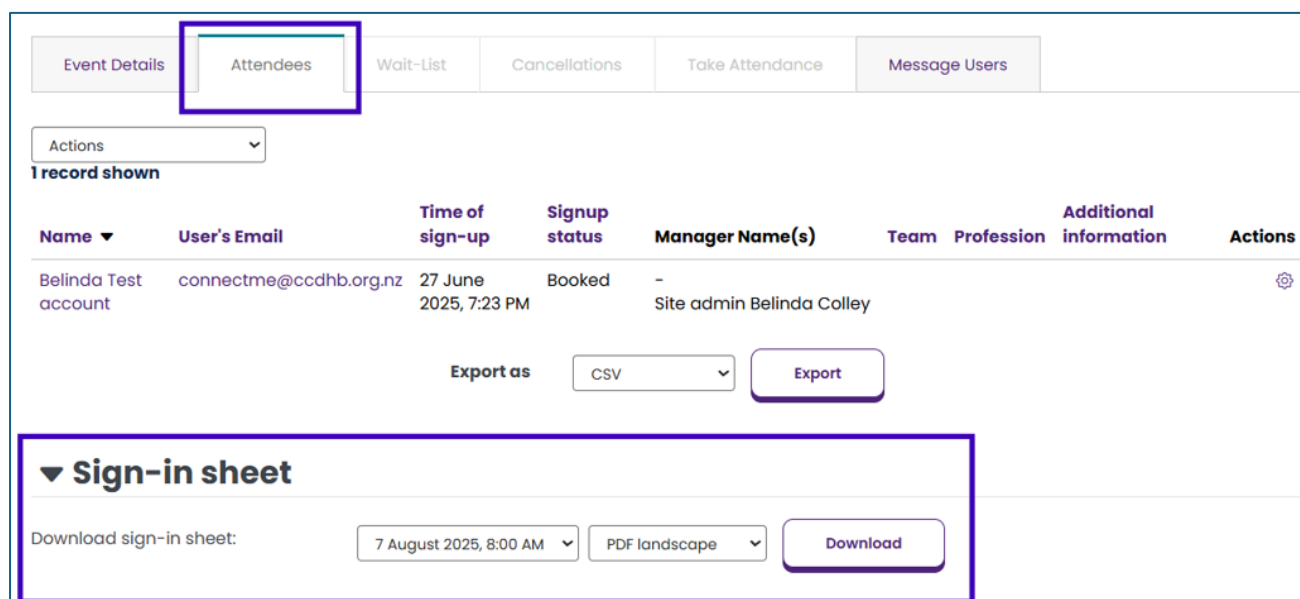
Past events

District	Event status	Booked	Session times	Rooms	Session status	Actions
Capital, Coast and Hutt Valley	Over	0 / 20	6 May 2025, 8:00 AM - 4:30 PM	CTU Room 10	Session over	
Capital, Coast and Hutt Valley	Cancelled	0 / 20	7 July 2025, 8:00 AM - 4:30 PM	CTU Room 10	Cancelled	

Sign-in sheet

Use the **Attendees** tab to create and download a printable sign-in sheet for the session.

- Go to the **Attendees** tab for the correct session
- Go to the **Sign-in sheet** section at the bottom of the page
- Select **Select session**, then choose the applicable date
- Select the **File format**. Recommended options are **PDF landscape** or **PDF portrait**
- Select **Download**. The file will download in your browser and can be printed



The screenshot shows the 'Attendees' tab selected in a navigation bar. Below the navigation bar, there is a table of attendees. The table has columns for Name, User's Email, Time of sign-up, Signup status, Manager Name(s), Team, Profession, Additional information, and Actions. One record is shown for Belinda Test account, with a signup time of 27 June 2025, 7:23 PM and status 'Booked'. Below the table, there is an 'Export as' section with a dropdown menu set to 'CSV' and an 'Export' button. At the bottom, there is a 'Sign-in sheet' section with a dropdown menu for the date (7 August 2025, 8:00 AM), a dropdown menu for the file format (PDF landscape), and a 'Download' button.

Name ▼	User's Email	Time of sign-up	Signup status	Manager Name(s)	Team	Profession	Additional information	Actions
Belinda Test account	connectme@ccdhb.org.nz	27 June 2025, 7:23 PM	Booked	- Site admin Belinda Colley				

Export as: CSV Export

▼ Sign-in sheet

Download sign-in sheet: 7 August 2025, 8:00 AM PDF landscape Download

Take attendance

After the session has finished, update attendance for everyone who was booked on the course. This ensures each attendee's learning record is accurate.

- Go to the course session list
- Take event attendance** appears under Event status when attendance needs to be updated
- Select **Take event attendance** to mark attendance

Upcoming events Add event

District	Event status	Booked	Session times	Rooms	Session status	Actions
Capital, Coast and Hutt Valley	Upcoming Booking open	1 / 20	7 August 2025, 8:00 AM - 4:30 PM	CTU Room 10	Upcoming	Go to event ...

Past events

District	Event status	Booked	Session times	Rooms	Session status	Actions
Capital, Coast and Hutt Valley	Over Take event attendance	3 / 20	6 May 2025, 8:00 AM - 4:30 PM	CTU Room 10	Session over	...
Capital, Coast and Hutt Valley	Cancelled	0 / 20	7 July 2025, 8:00 AM - 4:30 PM	CTU Room 10	Cancelled	...

Export attendance Format Export to file

- In the **Take Attendance** tab, choose **All** from the **Select learners** dropdown menu to select all learners
- In the **and mark as** dropdown menu, choose **Fully attended**
- Do not select Save attendance unless everyone listed has had attendance correctly marked**

Event Details Attendees Wait-List Cancellations Take Attendance Message Users

Bulk actions Select learners All and mark as Fully attended Save attendance

Learner	Event Attendance
☒ Belinda Test account	Fully attended
☒ Carolines tester	Fully attended
☒ LD Test Eric Yee	Fully attended

Save attendance Cancel

- Use the dropdown beside each person to manually change the attendance status for anyone who did not attend, such as **No show** or **Unable to attend**.

Note: If you use **Partially attended**, the attendee will need to complete an additional session to complete the face-to-face component of the course.

- After everyone has the correct attendance status, select either **Save attendance** button.

The screenshot shows the 'Take Attendance' tab in the interface. At the top, there are tabs for 'Event Details', 'Attendees', 'Wait-List', 'Cancellations', 'Take Attendance', and 'Message Users'. Below the tabs, there is a 'Bulk actions' section with 'Select learners' set to 'All' and 'and mark as' set to 'Fully attended'. A 'Save attendance' button is highlighted with a red box. Below this is a table with two columns: 'Learner' and 'Event Attendance'.

Learner	Event Attendance
☒ Belinda Test account	Fully attended
☒ Carolines tester	No show
☒ LD Test Eric Yee	Fully attended

At the bottom of the table, there are two buttons: 'Save attendance' (highlighted with a red box) and 'Cancel'.

A confirmation message will appear at the top of the screen when attendance has been marked.

The screenshot shows the 'Test course' interface. At the top, there is a green confirmation message: 'Successfully updated attendance'. Below this is the 'Take Attendance' tab, which is highlighted. The interface is similar to the previous screenshot, but the 'Save attendance' button is no longer highlighted. The table shows the same learners and their attendance status.

Learner	Event Attendance
☐ Belinda Test account	Fully attended
☐ Carolines tester	No show
☐ LD Test Eric Yee	Fully attended

At the bottom of the table, there are two buttons: 'Save attendance' and 'Cancel'.

After attendance has been saved, the Sign-up status in the Attendees list will show each person's attendance status, such as Fully attended or No show.

Event Details Attendees Wait-List Cancellations Take Attendance Message Users									
Actions									
Results - 3 records									
Name	User's Email	Time of sign-up	Signup status	Manager Name(s)	Team	Profession	Additional information	Actions	
Belinda Test account	connectme@ccdhb.org.nz	29 June 2025, 11:25 AM	Fully attended	- Site admin Belinda Colley					
Carolines tester	test.caroline@middlemore.co.nz	29 June 2025, 11:25 AM	No show	- Site admin Belinda Colley					
LD Test Eric Yee	eric.yee+test@tewhatuora.govt.nz	29 June 2025, 11:25 AM	Fully attended	-					