

Ko Awatea Learn Facilitator Guide

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

Facilitator guide

Contents

Facilitator guide	2
Face-to-face sessions.....	2
Add attendees.....	3
Remove users	7
Approve users	9
Edit sessions	10
Copy sessions.....	13
Cancel sessions	14
Sign-in sheet.....	16
Take attendance	17

Face-to-face sessions

Facilitators have extra access within the Ko Awatea Learn courses that they manage. Booking staff on to a course on their behalf is part of that access. They can also add and edit sessions and take session attendance. This guide goes through instructions on how to do all of the above tasks.

Add attendees

- Find the **session date** you want to access
- Click on the **three dots** on the far right of the session date
- Click on **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
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

- Click on Actions – 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

- In the **box next to the Search button** enter the name of the person to be added
- Click **Search**
- Click on the **person's name** when they appear in the list on the right-hand side, e.g. Belinda Test account – check the name and email address are for the correct district
- Click **Add**

Note: Do not tick Allow scheduling conflicts, this would allow people to be booked on 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

◀ Add

▶ Remove

belinda test

Search

Show all

☐ Show only users who declared interest in this activity

☐ Allow scheduling conflicts

Continue

Cancel

- Once the person's name is on the left-hand side, repeat the process to add any other users to the session
- **Once all users have been added** on the left-hand side, click **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

- Tick **Book users without requiring approval** – this stops an approval email going to the user's manager. If you forget to tick this, the attendee will go to the Approval Required tab.
- In the **Additional information** box enter any details useful to the course facilitator to know about the user, e.g. user is on crutches so may need a chair for elevation
- Click **Confirm**

Add users (step 2 of 2)

Name	Work email address (lowercase letters)	ID number
Belinda Test account	connectme@ccdhub.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](#)

Once added to the session, the user will be listed in the course **Attendees** tab, see screenshot below.


 Bulk add attendees success - Successfully added/edited 1 attendees. [View results](#)

Test course

Event Details **Attendees** Wait-List Cancellations Take Attendance Message Users

Actions [▼](#)

1 record shown

Name	User's Email	Time of sign-up	Signup status	Manager Name(s)	Team	Profession	Additional information	Actions
Belinda Test account	connectme@ccdhub.org.nz	24 June 2025, 1:02 PM	Booked	- Site admin Belinda Colley			On crutches, may need extra seat	

Export as [CSV](#) [Export](#)

Emails: When you add a staff member to a session, they are automatically sent an email confirming they are booked on the course, including the session details, e.g. name, date, start and finish time, any details of the session. Their manager will also receive an email advising them their staff member is booked on the course and the same information about the session.

Remove users

- Go to the session that the user is being removed from
- Click on **Actions** – choose **Remove users**

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

- Click on the **name of the user** you want to remove and click **Remove**

The screenshot shows the 'Select users to remove (step 1 of 2)' dialog. It features two lists: 'Users to remove' (empty) and 'Current attendees' (containing 'Belinda Test account, connectme@ccdhb.org.nz'). A red box highlights the 'Remove' button between the lists. There are search bars and 'Continue'/'Cancel' buttons at the bottom.

- Once the name of the user you want to remove is on the **left-hand side of the screen**, follow the same process for anyone else you want to remove.
- Click **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

- Fill in a reason for the cancellation in the **Cancellation note**, e.g. 'Needed on the ward'
- Click **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

Once removed the user will no longer be in the **Attendees** list. They will be listed in the **Cancellations** tab, see below screenshot.

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 the details of when the user signed up, cancelled and their 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 click on **Approve** or **Decline** then click **Update requests**.

Event Details
Attendees
Wait-List
Cancellations
Take Attendance
Approval Required
Message Users

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	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Update requests
View all events

Edit sessions

If you need to change the details of a session, the date, time, room, facilitator, maximum or minimum numbers, details, follow the below instructions.

- Click on the **three dots** on the right-hand side of the session you want to edit
- Click **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	<div>Go to event</div> <div>...</div>

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	<div>Edit event</div> <div>Cancel event</div> <div>Copy event</div> <div>Delete event</div>

Export attendance

Format

Export to file

- To change the date, start time and finish time click on the **cog next to the date field** and edit the date or times in the pop-up box
- To change or select the room click on **Select rooms** and use the search function in the list that comes up to find the correct room. Use the **red x** to remove a room.
- Click **Select facilitators** to add in the session facilitator, use the search function

Note: The **Add a new session** button is used for courses that are held over multiple days in a row, e.g. a 2-day course for Health and Safety, both days must be added in the session. Edit the date and times in the pop-up screen that appears when 'Add a new session' is clicked.

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

🗑️ x

Add a new session

- The **Sign-up opens** field is for limiting when users can sign-up to a course. To prevent sign-up before a certain date, click **Enable** and then select the date and time from when you want staff to be able to book on the course.
- The **Sign-up closes** field is for limiting how long users can sign-up to a course. To prevent sign-up after a certain date, click **Enable** and then select the date and time from when you want to stop staff being able to book on the course.
- **Maximum bookings** is to limit how many people can sign-up to the course. You can click **Use room capacity** to auto-select the room capacity as the maximum number of people who can book on the session. Or you can manually enter the number of people.

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 as **At any time** so staff can cancel if they are sick
- **Minimum bookings** – put in the minimum number of people the course will be run for, this can be left empty
- **Notify about minimum bookings** – Tick to add and enter how long before the session date you want to be notified if the number of bookings are below your minimum number

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

- The **Details** section is a place where you can put information about the course for the participants, e.g. things to bring on the day, pre-reading reminders. This information is in the confirmation email and the reminder email sent to participants.
- **Context** field can be used to fill in who this course could be for, e.g. only for nurses in a certain ward or service
- The **Facilitator** field doesn't need to be completed if it was completed in the date section
- **District** should be pre-populated, select the correct one if not
- Click **Save changes** once all the above details have been updated

Details

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

Any changes made to the session will update into the list of courses immediately. Check the session on the list of sessions and edit anything that doesn't look correct.

Copy sessions

Copying sessions is the easiest way to add in additional sessions for a course. Click on the **three dots** next to an existing session and then choose **Copy 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	<div>Go to event</div> <div>...</div>

Past events

District	Event status	Booked	Session times	Rooms	Session status
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

Edit the details on the copy page that appears, e.g. date, time, room, facilitator. Check all the other details, edit anything else that needs to be changed. Save changes.

Copying as a new event in Test course

▼ Collapse all

There are required fields in this form marked *.

▼ 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

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	<div>Go to event</div> <div>...</div>
Capital, Coast and Hutt Valley	Upcoming Booking open	0 / 20	7 August 2025, 8:00 AM – 4:30 PM	CTU Room 10	Upcoming	<div>Go to event</div> <div>...</div>

Continue copying sessions until all session dates for your course are listed. Remember to use the sign-up opens and closes fields if you don't want staff to be able to book on straight away or to close the session bookings before the session is held.

Cancel sessions

Sometimes a session must be cancelled, follow the steps below to ensure the booked attendees are advised of the cancellation. Click the **three dots** then **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	<div><div>Go to event</div><div>...</div></div>
Capital, Coast and Hutt Valley	Upcoming Booking open	0 / 20	7 August 2025, 8:00 AM - 4:30 PM	CTU Room 10	Upcoming	<div><div>Event details</div><div>Attendees</div><div>Edit event</div><div>Cancel event</div><div>Copy event</div><div>Delete event</div></div>

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	<div>...</div>

A warning at the bottom of the page will warn, 'Cancelling this event will remove all of its booking, attendance and grade records. All attendees will be notified.' Before cancelling check you're in the right session date. Then click **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 still be listed on the course page, but the session status will be **Cancelled**. A cancellation email will automatically be 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

At the bottom of the Attendees tab and list of attendees there is the option to create and download a Sign-in sheet which can be printed to take to the session.

- Go to the **Attendees** tab in the correct session
- Under the heading **Sign-in sheet** at the bottom of the page
- Click on **Select session** and choose the **applicable date**
- Select the **File format**, recommended: **PDF landscape or PDF portrait**
- Click **Download**, this will download in your browser and be **available to print**

The screenshot shows the 'Attendees' tab selected in a navigation bar. Below the tabs, there is a table of attendees. At the bottom of the page, there is a section titled 'Sign-in sheet' with a dropdown menu for 'Download sign-in sheet:' showing '7 August 2025, 8:00 AM', a dropdown for 'File format' showing '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

▼ Sign-in sheet

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

Take attendance

After the session is over, you will need to update the attendance of all the people who were booked on the course. It is important to update attendance as it affects the learning records for the course attendees.

- Go to the list of sessions for the course
- Take event attendance** appears in Event status under courses where the attendance needs to be updated
- Click **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 from the **Select learners** dropdown menu choose **All**. This will put a **tick** on the left-hand side of all the Learners.
- Then in the '**and mark as**' dropdown menu choose **Fully attended**. This will mark everyone as Fully attended. **DO NOT CLICK** Save attendance unless everyone listed did fully attend.

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
<input checked="" type="checkbox"/> Belinda Test account	Fully attended
<input checked="" type="checkbox"/> Carolines tester	Fully attended
<input checked="" type="checkbox"/> LD Test Eric Yee	Fully attended

Save attendance
Cancel

- By using the dropdown list next to each person, **manually change the attendance** of anyone who didn't attend to either No show or Unable to attend.

Note: There is also a Partially attended option, if this is used the person who partially attended will need to complete an additional session to complete the face-to-face part of the course.

- Once everyone has the correct attendance marked, click either of the **Save attendance** buttons

The screenshot shows the 'Take Attendance' tab in the system. At the top, there are tabs for 'Event Details', 'Attendees', 'Wait-List', 'Cancellations', 'Take Attendance', and 'Message Users'. Below these 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
<input checked="" type="checkbox"/> Belinda Test account	Fully attended
<input checked="" type="checkbox"/> Carolines tester	No show
<input checked="" type="checkbox"/> 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 message at the top of the screen will confirm that attendance has been marked.

The screenshot shows the 'Test course' page. At the top, there is a green success message: 'Successfully updated attendance'. Below this is the 'Test course' header and the same tabs as in the previous screenshot. The 'Take Attendance' tab is active. The 'Bulk actions' section shows 'Select learners' set to 'None' and 'and mark as' set to 'Select one ...'. 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
<input type="checkbox"/> Belinda Test account	Fully attended
<input type="checkbox"/> Carolines tester	No show
<input type="checkbox"/> 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'.

Once attendance has been marked, the Sign-up status in the Attendees list will be updated to show each person's attendance, e.g. Fully attended, 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	-					