User Guide
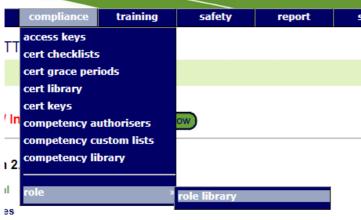
Creating and Assigning| Roles

STEP ONE | Creating a Role

Click the 'compliance' tab, role and then role library

Click Add

Name your role and click add to begin selecting competencies to attached to the role.

Add Role

Name:	Project testing Role
Description:	
Owner:	CPB Contractors ETTT
Location:	ETTT ▼
Auto Assign:	☐
Active:	☑

Assignment:

Set by Site		
Step	**Required**	**Order**
AS - Assess	☐	
AU - Authorise	☐	
AP - Appoint	☐	

REQUIREMENTS

0 found.

add

cancel   **save**

Search for the competencies

Add Competency to Role

First aid   **search**

Ready to search

Pegasus ™
Powered by Onsite

Select the non-verified competencies that are 'owned' by the CPB realm or your site. Use the drop down to determine if the competency is to be Mandatory or Non-Mandatory.

☑	YES ▼		First Aid.Certificate.Apply First Aid	Realm: CPB Contractors	3 Years

Scroll to the bottom of the page and click 'proceed'

ES ▼		Site.Induction.TFNSW - Detail
ES ▼		Welder.Induction.Aurizon Auth

proceed

Continue searching and adding competencies until the role is complete. Click 'save'

Assignment:

Set by Site		
Step	**Required**	**Order**
AS - Assess	☐	
AU - Authorise	☐	
AP - Appoint	☐	

REQUIREMENTS

TYPE	GROUP	Name	ID	Owner	Assignment Definition	Assignment S...
						PT TR AS AU
COMPETENCY		First Aid.Certificate.Apply First Aid	26299	CPB Contractors	CPB Contractors	
COMPETENCY		Inhouse.Induction.Project Induction	16759	CPB Contractors	CPB Contractors	

add

cancel   **save**

STEP TWO | Assigning a Role

In the persons profile, click the 'roles' tab and click add

Search for the role you are wanting to assign to the person and select the role

You will be shown the competencies in that role and if the person has any of them. Click 'proceed'

You will be taken to a screen where you can assign any competencies the person may have but not recorded in Onsite or leave as working towards.

The status of the role will be shown as working towards until all mandatory requirements are fulfilled.

View Role of Benjamin Adlam for CPB Contractors ETTT

Project testing Role   Owner: CPB Contractors ETTT

	Assign				Expiry Date		Current	Assign	Active	Status
Role:	Complete			Overall:						Working Towards

Assignment: Definition: CPB Contractors ETTT, Assigned: CPB Contractors ETTT

Step	Req	On	Authoriser	Notes	User
AS - Assess					
AU - Authorise					
AP - Appoint					

Active: ✓   Added by: Felicity Stevenson

[back]   [edit]

DEPENDENCIES   Status: - - All - - ▼   ☐ Mandatory Only   ☐ Latest Only   (apply)

TYPE	Status	Mandatory	Name	ID	Owner	Assignment		Expiry	Current	Assign	Active	Action
						Definition	Assigned					
COMPETENCY	Complete	YES	Inhouse.Induction.Project Induction	6415837	CPB Contractors	CPB Contractors	CPB Contractors		Current	Complete	Active	Add New
COMPETENCY	Working Towards	YES	First Aid.Certificate.Apply First Aid	26299	CPB Contractors	CPB Contractors						Assign

WORKING TOWARDS

Name	Type	ID	Owner	Assignment		Expiry Date	Exp	Current	Assign	Active
				Definition	Assigned					
Project testing Role	ROLE	930505	CPB Contractors ETTT	CPB Contractors ETTT	CPB Contractors ETTT					