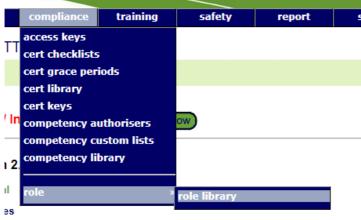
User Guide

Creating and Assigning Roles

STEP ONE | Creating a Role

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



etencies

up competency' may now contain a mixture of simple and verified competency members.

Roles sisting assignment of a role or prevent its future selection by suspending that role for a person

Click Add

Role Library for ETTT



Include Role from - - All Realms - -

Group by location Include Inactive

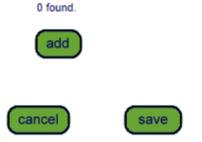
add



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

Add Role

Name:	Project testing R	ole	
Description:			
Owner:	CPB Contractors	ETTT	
Location:	ETTT V		
Auto Assign:			
Active:	\$		
Assignment	:		
	Set	by Site	
	Step	Required	Order
	AS - Assess		
	AU - Authorise		
	AP - Appoint		
			1
REQUIREME	NTS		



Search for the competencies



First aid

search

Ready to search



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.

..............................

				1	
		YES V	First Aid.Certificate.Apply First Aid	Realm: CPB Contractors	3 Years
I	_	·			

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

S V		Site.Induction.TFNSW - Detail
S V		Welder.Induction.Aurizon Auth



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 St 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	







STEP TWO | Assigning a Role

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

🄏 Benjamin Adlam (er	0	00 959 819				
general competencies	roles	keys	training	messages	site contact	locations
report						
Site: CPB Contractors ETTT		Include Pa	ast & Inactive igible	apply		add

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

Add Role to Benjamin Adlam

 Search for 	•
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Project test	search
Filletitest	search

Found 1 matches.

Name	ID	Owner	Site Location	Assignment Definition	Assignment Steps	Members
Project testing Role	9305	CPB Contractors ETTT	ETTT	CPB Contractors ETTT		2

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

Add Role to Benjamin Adlam

Role: Project testing Role

The below mandatory Competencies are required to satisfy this Role.

TYPE	Status	Status Name ID		Owner	Assignment Definition
COMPETENCY	Working Towards	First Aid.Certificate.Apply First Aid	26299	CPB Contractors	CPB Contractors
COMPETENCY	Complete	Inhouse.Induction.Project Induction	16759	CPB Contractors	CPB Contractors





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	Rol	е		Owner: CPB Contrac	tors ETTT	
Assign Role: Complete			Overall:	Expiry Date Current Assign Active	Status Working Towards	
Assignment: Definition: C	PB Co	ntractors ETTT, Assign	ed: CPB Contractors ETTT			
Step	Req	On	Authoriser	Notes	User	
AS - Assess						
AU - Authorise						
AP - Appoint						
Active: √ Added by: Felicitly Stevenson						

DEPENDENCIES		Status: All		Mandatory Only Latest Only		apply	apply						
	ТҮРЕ	Status	Mandatory	Name	ID	Owner	Assignment		Evoint	Current	Assian	Activo	Action
							Definition	Assigned	Expiry	Current	Assign	Active	ACUOI
	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

ſ	Name	Туре	ID	Owner	Assig	Expiry Date	Evo	Current	Assian	Active	
	Mallie				Definition	Assigned	Expiry Date	LVb	Current	Assign	Active
	Project testing Role	ROLE	930505	CPB Contractors ETTT	CPB Contractors ETTT	CPB Contractors ETTT					

