

User Guide

Creating and Assigning Roles

STEP ONE | Creating a Role

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



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

Group by location

Include Inactive

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

Add Role

Name:

Description:

Owner: CPB Contractors ETTT

Location:

Auto Assign:

Active:

Assignment:

Set by Site		
Step	Required	Order
AS - Assess	<input type="checkbox"/>	
AU - Authorise	<input type="checkbox"/>	
AP - Appoint	<input type="checkbox"/>	

REQUIREMENTS

0 found.

[add](#)

[cancel](#)

[save](#)

Search for the competencies

Add Competency to Role

[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.

<input checked="" type="checkbox"/>	YES ▼	First Aid.Certificate.Apply First Aid	Realm: CPB Contractors	3 Years
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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	<input type="checkbox"/>	
AU - Authorise	<input type="checkbox"/>	
AP - Appoint	<input type="checkbox"/>	

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

✓ Benjamin Adlam (employee, contractor) 000 959 819

general competencies **roles** keys training messages site contact locations

report

Site: CPB Contractors ETTT Include Past & Inactive Include Eligible 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

Project test search

Found 1 matches.

Name	ID	Owner	Site Location	Assignment Definition	Assignment Steps	Members
					AS AU AP	
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	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

cancel

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: <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Working Towards
Assignment: Definition: CPB Contractors ETTT, Assigned: CPB Contractors ETTT						
Step	Req	On	Authoriser	Notes	User	
AS - Assess						
AU - Authorise						
AP - Appoint						
Active: <input checked="" type="checkbox"/>						Added by: Felicity Stevenson

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DEPENDENCIES Status: 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					