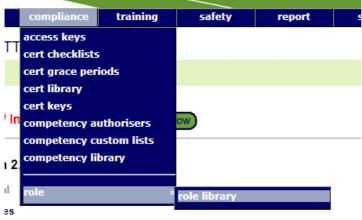
User Guide

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

Click Add

Role Library for Pegasus Demo



Include Inactive

add

Leave search box blank for all Roles in Pegasus Demo , or enter a text fragment to find matching Role names.

For a cardholder to satisfy a Role they must have have current assignments of all the Roles members.



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

.....

Add Role

Name:	Demonstration Role
Description:	
_	
Owner:	Pegasus Demo
Location:	Pegasus Demo
Location.	r cgusus Demo
Auto Assign:	
	_
Active:	
Autro.	•
Assignment	

Assignment:

Set by	y Realm	
Step	Required	Order
AS - Assess		
AU - Authorise		
AP - Appoint		

save

REQUIREMENTS



Search for the competencies

Add Competency to Role





Select the non-verified competencies that are required. Use the drop down to determine if the competency is to be Mandatory or Non-Mandatory.

1				
	YES V	Safety.Induction.General Safety Induction	Realm: Pegasus Demo	2 Years

Scroll to the bottom of the page and click '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

ТҮРЕ	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	

add





STEP TWO | Assigning a Role

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

Felicity Stevenson (contractor) 00							
general	competencies	groups	roles	keys	training	messages	report

Search for the role you are wanting to assign to the person and select the role Add Role to Felicity Stevenson

Search for						
Demonstration Role			search)		
Found 1 matches.						
Name	ID	Owner	Site Location	Assignment Definition	Assignment Steps	Members
Demonstration Role	10034	Pegasus Demo		Pegasus Demo		2

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

Add Role to Felicity Stevenson

Role: Demonstration Role

> The below mandatory Competencies are required to satisfy this Role.

TYPE	Status	Name	ID	Owner	Assignment Definition
COMPETENCY	Complete	Medical.Certificate.Industry Medical Certificate	76113	Pegasus Demo	Pegasus Demo
COMPETENCY	Working Towards	Safety.Induction.General Safety Induction	76118	Pegasus Demo	Pegasus Demo





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 Felicity Stevenson for Pegasus Demo

Assign				Expiry Date Current Assign Act	
Role: Complete			Overall:		Working Towards
ssignment: Definition	: Pegasus	Demo, Assigned: Peg	gasus Demo		
Step	Req	On	Authoriser	Notes	User
AS - Assess					
AU - Authorise					
AP - Appoint					

back	edit
------	------

DEPENDENCIES

Status: -- All -- T Mandatory Only Latest Only (apply)

TYPE	Status	Status	Statue	Statue	Statue	Statue	Statua	Status	Statue	Statue	Statue	Status	Status	Status	Status	Status	Status	Statue	Mandatory	Name ID	Owner	Assig	nment	Expine	Current	Assign	Active	Action
TIPE		manuatory	Name	10	Owner	Definition	Assigned	CADILY	Current	Assign	Active	Action																
COMPETENCY	Complete	YES	Medical.Certificate.Industry Medical Certificate	6401227	Pegasus Demo	Pegasus Demo	Pegasus Demo		Current	Complete	Active	Add New																
COMPETENCY	Working Towards	YES	Safety.Induction.General Safety Induction	76118	Pegasus Demo	Pegasus Demo						Assign																

WORKING TOWARDS

Name	Туре	ID	Owner	Assig	nment	Expiry Date	Evo	Current	Annian	Active
Name	Type	10	Owner	Definition	Assigned	Expiry Date	Exp	Current	Assign	Active
Administrator	ROLE	928939	Pegasus Demo	Pegasus Demo	Pegasus Demo					
Demonstration Role	ROLE	966525	Pegasus Demo	Pegasus Demo	Pegasus Demo					

