

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 Pegasus Demo

Include Inactive

Ready to search

- ▶ 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:

Description:

Owner: Pegasus Demo

Location: Pegasus Demo

Auto Assign:

Active:

Assignment:

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

REQUIREMENTS

COMPETENCIES

0 found.

add

cancel

save

Search for the competencies

Add Competency to Role

Ready to search

cancel

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

<input checked="" type="checkbox"/>	YES ▾	Safety.Induction.General Safety Induction	Realm: Pegasus Demo	2 Years
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Scroll to the bottom of the page and click 'proceed'

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

Felicity Stevenson (contractor)

000 465 383

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
					AS AU AP	
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

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 Felicity Stevenson for Pegasus Demo

Demonstration Role

Owner: Pegasus Demo

Assign		Expiry Date	Current	Assign	Active	Status
Role:	Complete	Overall:				Working Towards
Assignment: Definition: Pegasus Demo, Assigned: Pegasus Demo						
Step	Req	On	Authoriser	Notes	User	
AS - Assess						
AU - Authorise						
AP - Appoint						
Active: <input checked="" type="checkbox"/>						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	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	Type	ID	Owner	Assignment		Expiry Date	Exp	Current	Assign	Active
				Definition	Assigned					
Administrator	ROLE	928939	Pegasus Demo	Pegasus Demo	Pegasus Demo					
Demonstration Role	ROLE	966525	Pegasus Demo	Pegasus Demo	Pegasus Demo					