



Positions and Requirements User Guide

The learning module offers corporate clients the ability to facilitate e-learning programmes to both their service providers and employees, as required. Manage learning programmes and physical classroom environments for on-site facilitated courses.

Positions and quirements User Guide

Notice

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Table of Contents

Create and Manage Requirements	05
Create and Manage Positions	10
Add Positions to Requirements	12
Create OREPS	14

Passport 360

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Quick Tips

TIP 1: For easy searching of a specific position, use the “Search” selection.



TIP 2: To edit a position, use the edit option available.



TIP 3: To view the positions and their requirements, use the view option available.



TIP 4: To delete a position, select the



position and delete.

TIP 5: Use the search function for quick referral to specific data required.



TIP 6: Use the filter option available for each item for easy searching.



Create and

Manage Requirements

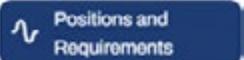
01

Internet Browser settings

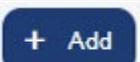
Although Google Chrome is the recommended browser for optimal site performance, Passport 360 is supported by all popular browsers.

1. Create and Manage Requirements

Note: It is advised to set up your position requirements before you create your positions, however if you choose to create your positions first, it will not affect the functionality in any way.

Navigate to the  module on your dashboard.

Select 

Select the  button to add a requirement.

Fill in the requirement name and description first.

Requirement Name	Description	Requirement Type	Requirement Element
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Select your requirement type from the dropdown selection available. Each type requires different actions. (Explained below)

- Legal Appointment
- Authorisations
- Competency
- Demographics
- GroupCompetency
- GroupQualification
- KBCTrain
- Medical
- OperatingLicenses
- Online
- OREP
- Position
- PPE
- PTO
- Qualification
- Upload

Legal Appointment:

Select a Legal Appointment you have already created from the secondary drop-down menu. The Employee will be required to upload the Appointment Requirements.

Authorizations:

Selection based on authorizations created, the secondary drop-down menu will populate from the authorizations tab in the Employee's safety profile.

Competency:

Select a pre-existing competency from the secondary drop-down menu. This will be populated from the relevant competencies uploaded against the Employee's safety profile.

Demographics:

Select the document required from the Employee's Demographics tab. This will be populated from the relevant ID document uploaded against the Employee's safety profile.

Group Competency:

Select a pre-existing grouped competency from the secondary drop-down menu. This will be populated from the relevant competencies uploaded against the Employee's safety profile.

Group Qualification:

Select a pre-existing grouped qualification from the secondary drop-down menu. This will be populated from the relevant qualifications uploaded against the Employee's safety profile.

KBC Training:

Populated from the resellers training records.

Medical:

This requirement will be populated from the most recent medical uploaded against the Employees safety profile, based on the Clinic selected from the secondary drop down menu.

Operating Licenses:

Select a pre-existing operating license from the secondary drop-down menu. This will be populated from the relevant licenses uploaded against the Employee's safety profile.

Online:

A secondary menu will appear to allow you to select a program you have already created. The Employee will be required to complete this Online Program from their Individual profile.

OREP:

Select a pre-existing OREPS from the secondary drop-down menu. This will be populated from the relevant OREPS uploaded against the Employee's safety profile.

Position:

Link an existing position to another one for and employee to adhere to both requirements. E.g: A receptionist may be the office first aider as well for a set period so that position will need to be assigned to that individual too.

PPE:

Select pre-existing PPE from the secondary drop-down menu. This will be populated from the required PPE items associated to the position.

PTO:

Select pre-existing PTO's from the secondary drop-down menu. This will be populated from the Employees PTO safety profile.

Qualification:

Select a pre-existing qualification from the secondary drop-down menu. This will be populated from the relevant qualifications uploaded against the Employee's safety profile.

Upload:

The Employee will be required to upload a PDF format document.

Once you have completed all of the requirement fields as displayed below

Requirement Name	Description	Requirement Type	Requirement Element
Fire Fighting	Fire Fighting Level 1	Competency	Fire Fighting

You will now select the  button and your requirement will now be added to your list of requirements available.

Manage Positions		Manage Requirements			
Requirement Name	Description	Requirement Type	Requirement Element		
 First Aid L1		Competency		2867	
 First Aid L1		Competency		507	
 Fire Fighting	Fire Fighting Level 1	Medical		1	
 Fire Fighting	Test	Position		2	

If you need to edit the requirement, highlight the item that you would like to edit by clicking on the requirement name and select .

Once you have edited the details, select .

If you need to delete the requirement, highlight the item that you would like to delete by clicking on the requirement name and select .

Note: To tell if the item is correctly selected, the line item will display in a light grey color so that you can be assured that you are selecting the correct item.

Create and

Manage Positions

02

Internet Browser settings

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2. Create and Manage Positions

Select **Manage Positions**

Select **+ Add** to create your position.
Fill in the applicable fields.

Position Name	Position Description	Client Code	Client Job Code	Abbreviation
<input type="text"/>				

Once you have completed the applicable fields, select **Update**

Your position will now be added to your list of positions available.

If you need to edit the position, highlight the item that you would like to edit by clicking on the position name and select **Edit**

Once you have edited the details, select **Update**

If you need to delete the position, highlight the item that you would like to delete by clicking on the position name and select **Delete**

Add Positions to

Requirements

03

Internet Browser settings

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3. Add Positions to Requirements

Once you have finished with your Position requirements and have completed creating your Positions, you can now add your position to the requirements.

Navigate back to [Manage Requirements](#)

Select the  icon next to the requirement type.

The list of created positions will display in the grid on the left and to move a position into the requirement, simply highlight the position and select the  button so that it can be added to the position requirement.

Available Positions	Position with Requirement
Position 2 replacement	 No records found

All the positions that are added to that requirement type will display in the grid on the right.

Available Positions	Position with Requirement
No records found	 Position 2 replacement  Position 1 Replacement

When you are complete, select  and you will be returned to the previous page.

Create OREPS

04

Internet Browser settings

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4. Create OREPS

Create and manage your Occupation Risk Exposure profiles. They can be assigned to a position via the requirement type selection. This will make it available to your Service Provider to take with them for their medical review.

Select the  button to create your OREPS.

Select  and fill in all of the required fields.

Department	Job Title
<input type="text"/>	<input type="text"/>
Driving Primary	
<input type="text"/>	
Description	
<input type="text"/>	

Work Environments

Plant	Restricted Space	Office Work
<input type="text"/>	<input type="text"/>	<input type="text"/>
Workshop or Store	Elevated Platform	Working at Heights
<input type="text"/>	<input type="text"/>	<input type="text"/>

Requirements to Perform the Job

Physical Ability

Use a Safety Harness	Physical Fitness	Stamina
<input type="text"/>	<input type="text"/>	<input type="text"/>
Mobility or Agility	Physical Strength	Standing for Long Periods
<input type="text"/>	<input type="text"/>	<input type="text"/>
Long Sitting Periods	Eye, Hand, Foot Coordination	Fine Motor Skills
<input type="text"/>	<input type="text"/>	<input type="text"/>
Need for Balance	Use of Both Hands	Use of Both Feet
<input type="text"/>	<input type="text"/>	<input type="text"/>
Climbing Stairs or Ladders		
<input type="text"/>		

Communication

Hearing Ability

Clear Speech

Visual Ability

Acuity Near

Acuity Far

Colour Vision

Depth Perception

Physiological

Stress Coping Mechanism

Shift Work

Physical Attributes

BMI Restriction

Height Restriction

Hip Width Restriction

Requirements to Perform the Job* 1 - 5

Walking on Even Surfaces

Walking on Uneven or Slippery Terrain

Walking Up and Down Inclines

Climbing Stairs or Ladders less than 45 degrees

Climbing Vertical Ladders

Squatting

Kneeling

Task Analysis

Lifting to Waist Height

Lifting to Shoulder or Above Head

Maximum Weight Lifted

Pushing or Pulling in a Horizontal Plane

Pushing or Pulling in Vertical Plane

Spade Work in Restricted Area

Spade Work in Unrestricted Area

Impact or Hammer Work

Ergonomics Hazards* 1 - 5

Sustained Postured <input type="text"/>	Repetitive Movements <input type="text"/>	Awkward Positions <input type="text"/>
Forward Bending <input type="text"/>	Twisting Back <input type="text"/>	Repetitive Lifting <input type="text"/>
Lifting in Restricted Work Area <input type="text"/>	Working at Extremes of Reach <input type="text"/>	

Dexterity

In Kneeling <input type="text"/>	At Table Top Height <input type="text"/>	Above Head <input type="text"/>
On a Ladder or Scaffolding <input type="text"/>	In Supine <input type="text"/>	

Additional Risks

Driving Secondary <input type="text"/>	Wet Conditions <input type="text"/>	Poor Lighting <input type="text"/>
Vibration - Whole Body <input type="text"/>	Vibration - Hand or Arm <input type="text"/>	

RFA Classification

Sedentary <input type="text"/>	Roaming <input type="text"/>	Light <input type="text"/>
Moderate <input type="text"/>	Heavy <input type="text"/>	

Hygiene Info

Exposure Data

Ergonomics <input type="text"/>	Heat Stress <input type="text"/>	Cold Stress <input type="text"/>
VOCs <input type="text"/>	Biological <input type="text"/>	TID (10) <input type="text"/>
Silica <input type="text"/>	Resp. Dust <input type="text"/>	Noise <input type="text"/>
Welding <input type="text"/>	Manganese <input type="text"/>	Iron Oxide <input type="text"/>
Aluminium <input type="text"/>	Chromium <input type="text"/>	Vibration <input type="text"/>

DMR Details

DMR Code

✖ Cancel
Save

If you need to edit the OREP, highlight the item that you would like to edit by clicking on the OREP name and select Save

Once you have edited the details, select Update

If you need to delete the OREP, highlight the item that you would like to delete by clicking on the OREP name and select Delete

To view the OREP you have just created, select View PDF whereby the pdf document will show on your screen. You can print the document from that screen display if you require a copy.



Note: All OREPS created will pull in for selection when you add it as a Position requirement type.

Learn more: www.passport360.com

Find us on the Microsoft Appsource and the Azure Marketplace