



# People Manager User Guide

Passport 360 manages the entire workforce in a single view via a digital 'passport' or profile that is utilised across reporting divisions, sites and projects, providing access to all information linked to their internal and external workforce.

# People Manager User Guide

## Notice

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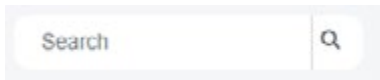
## Passport 360

Waterfront place,  
1 Eagle street,  
Brisbane City

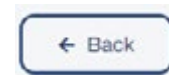
[info@passport360.com](mailto:info@passport360.com)

## Quick Tips

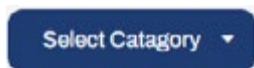
TIP 1: For easy searching of a specific individual, use the “Search” selection.



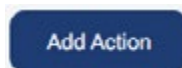
TIP 2: Use the back button to return to your previous screen.



TIP 3: Within the employees' profile, select the dropdown available to navigate between various demographics that you would like to view and manage on the individual.



TIP 4: Advise your employees of any important tasks that need to be completed, by using the “Add Action” option available. This will allow for quick communication between yourself and the individual.



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



Each tab will provide detailed information as per their headings. Employers can upload documents to their employees' profiles, such as Medicals, Competencies and Qualifications and various other documents which will run through the Passport 360 OCR (Optical Character Recognition) System whereby the documents will be validated or rejected.

*Note: If the document fails in OCR, it will need to be recaptured. An email notification will be sent to the relevant user(s) detailing the discrepancies.*

Add your own

# Employee

# 01

## Internet Browser settings

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

## 1. Add your own Employee

Select the “Add” button

 Add

Fill in the employee’s details.

Add Employee
×

First Name


Last Name

National ID Number

Email

 Save
 Cancel

Once complete – select the save button and your employee will populate in the grid that displays on the screen.

 Save

View an employee’s details by selecting the  button.

You will see a display of a quick overview of the employee’s General demographics, Safety glance, ID, KBC Training, CV and Emergency contact.

Safety Glance
✓

No Safety Indicators Selected

ID

Browse...
Or drop files here

Training

Browse...
Or drop files here

CV

Browse...
Or drop files here

Emergency contact
+

Add details to an i

# Individual's profile

# 02

## Internet Browser settings



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

## 2. Add details to an individual's profile

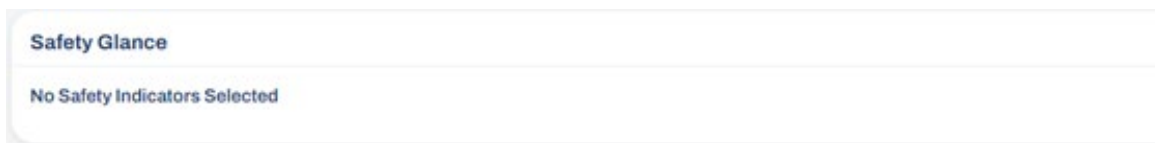
*Note: You can add a photo of the individual by selecting the "upload photo" button available.*




The image shows an employee profile card for 'DemoEmployee'. On the left is a placeholder for a profile picture with an 'Upload photo' button below it. To the right of the picture, the employee's email 'support@passport360.com' and 'Status:' are listed. Further right, fields for 'Id Number: 8811120000000', 'Phone:', and 'Supervisor:' are shown. On the far right, there are fields for 'Language:', 'Gender:', and 'Ethnic Group:'.

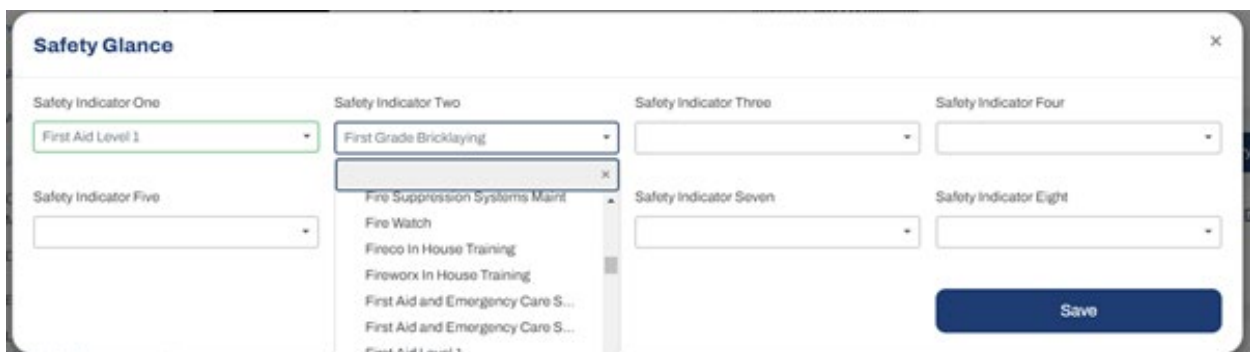
Select the edit icon on the persons "quick view" card,  update the information that you would like to edit and select save. 

**2.1)** Your safety glance is an at-a-glance summary of Employee Training and Medical information. This can be customized to display your preferred items.



The image shows a 'Safety Glance' card. At the top, it says 'Safety Glance'. Below that, it states 'No Safety Indicators Selected'.

Add safety indicators to an individual's safety glance by selecting the  button. From the dropdown selection available, choose which safety indicators you would like to have immediate visibility on and when complete, select save.



The image shows the 'Safety Glance' configuration screen. It has a title bar 'Safety Glance' with a close button. Below the title bar, there are eight dropdown menus labeled 'Safety Indicator One' through 'Safety Indicator Eight'. 'Safety Indicator One' is set to 'First Aid Level 1'. 'Safety Indicator Two' is set to 'First Grade Bricklaying', and its dropdown menu is open, showing a list of training items including 'Fire Suppression Systems Maint', 'Fire Watch', 'Fireco In House Training', 'Firework In House Training', 'First Aid and Emergency Care S...', 'First Aid and Emergency Care S...', and 'First Aid Level 1'. 'Safety Indicator Three' and 'Safety Indicator Four' are empty. 'Safety Indicator Five' is empty. 'Safety Indicator Seven' and 'Safety Indicator Eight' are empty. At the bottom right, there is a blue 'Save' button.

If no training has been recorded or is not found, the safety indicator will display red. If the individual has valid, recorded training, the safety indicator will display green and if the recorded training is about to expire, the safety indicator will display yellow.



### Safety Glance

No Training	No Training	No Training	No Training
First Aid Level 1	First Grade Bricklaying	Gas Cutting	HIRA
No Training	No Training	No Training	No Training
Venomous Snake Handling	Job safety analysis	4x4 Advance and Defensive Driving	Accident and Incident Investigation

### ID

Or drop files here

### CV

Or drop files here

Add the individuals ID and CV documents.

Documents that have been incorrectly uploaded, will be rejected and will need to be captured again. When uploading document under the various tabs it is important to know the following:

- Select the correct expiry date
- Enter in / select the correct and corresponding information
- Any document uploaded to an Employees profile can be viewed by both his Employer and the Project Owner that he is linked to
- Documents must be in PDF format

*Note: To add documents to the employees' profile, select the browse button and choose your file from your personal file's database, or alternatively drag and drop the file into the screen and the document will upload accordingly.*

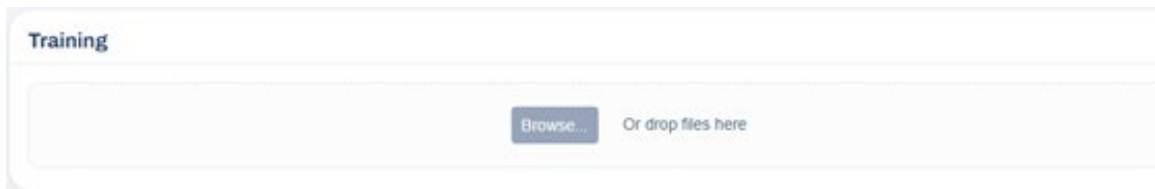
Or drop files here

To view the uploaded document, select the view button



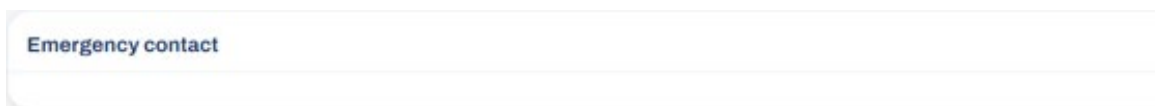
To delete the uploaded document, select the dustbin button

*Note: Once a document has been uploaded the status will automatically be “pending approval.” This will run through the Passport 360 OCR.*



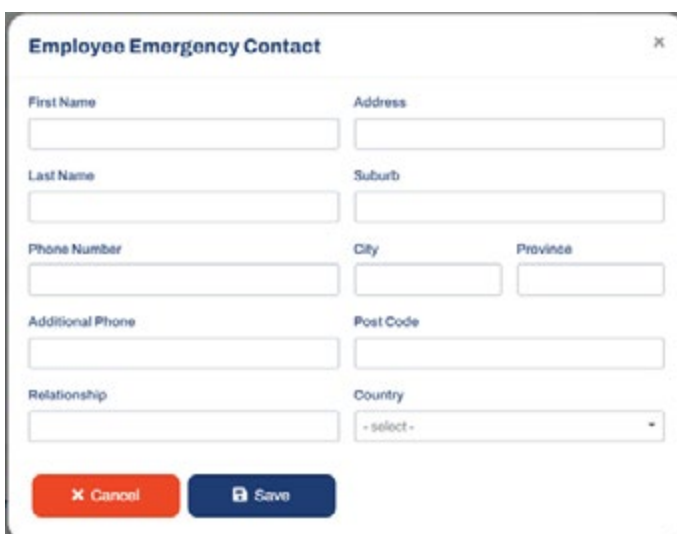
The image shows a 'Training' section with a file upload area. It includes a 'Browse...' button and the text 'Or drop files here'.

The Reseller specific delivered training history of the Employee, where applicable, is displayed here. Access the relevant Training Certificates / Documents where applicable, by selecting the document that you wish to print. Provided that the correct and relevant information is on the Employee’s profile, a new window will open with the requested document. For any queries regarding this process please contact your Reseller or [support@passport360.com](mailto:support@passport360.com)



The image shows an 'Emergency contact' section with a text input field.

Add an Emergency contact by selecting the button  
Fill in the requested fields and “save”

The image shows a form titled 'Employee Emergency Contact'. It contains the following fields:

- First Name
- Last Name
- Phone Number
- Additional Phone
- Relationship
- Address
- Suburb
- City
- Province
- Post Code
- Country (dropdown menu with '- select -')

At the bottom, there are two buttons: 'Cancel' (red) and 'Save' (blue).

# Add a Medical

# 03

## Internet Browser settings

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

### 3. Add a Medical

Upload and maintain Employees certificates of Fitness.

*Note: No sensitive Medical information will be accepted. ONLY a Certificate of Fitness*

Navigate to the  button and select "Medical"



Select the  button

Fill in the necessary data applicable to the employees medical and once complete, select "save".

**Employee Medical**

Upload

 Or drop files here

Medical Type

Medical Date

Expiry Date



Clinic

Health Issues

The employees medical details will appear in the Medical records display which will go through OCR for validation.

**Medical**

	Type	Medical Date	Expiry	Days Left	ClinicName
 	Entrance	11 Feb 2021	30 Dec 2021	322	HSP Group

# Add a Qualification or Competency

# 04

## Internet Browser settings

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

## 4. Add a Qualification or Competency

This tab houses all qualifications and competencies.

Should your required competency or qualification not be available for selection, please refer to general settings whereby you can add your required skill certificate or email [support@passport360.com](mailto:support@passport360.com) for assistance.

Select the “Skills” column via the Select Category ▾ button.

Select the + Add button by the “qualifications” grid or the “competencies” grid.

### Employee Qualification

Upload Document

Browse...

Or drop files here

Fill in the necessary data applicable to the employee's skill and when complete, select “save”.

Qualification Date

Qualification Name

Institution

NQF Level

Save

Cancel

The employee's skill details will appear in the records display which will be validated through OCR.

### Qualifications

	Date	Name	Institution	Level	Status
 	10 Feb 2021	COMSOC 1	Test	3	Awaiting valid

Add an

# Operating License

# 05

## Internet Browser settings

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

## 5. Add an Operating License

Select the “Operating License” column via the  button.

Select the “Add” button 

**Employee Operating Licence**

---

Upload Document

Or drop files here

Expiry Date

Assessment Centre



Assessor

Category

Fill in the necessary data applicable to the employee's skill and when complete, select “save”.

The employees operating licences will appear in the records grid display which will be validated through OCR.

### Operating Licences

	Category	Expiry	Assessor	Status
 	General	05 Mar 2021	ABC	Awaiting valid...



Add

PTO's

06

**Internet Browser settings**

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## 5. Add PTO's

Upload Planned Task Observations per Employee. These may also be uploaded by your project owner.

Select the "PTO" column via the  button.

Select  the button

Fill in the necessary data applicable to the employee's PTO and when complete, select "save".

### Employee PTO

Upload Document

Or drop files here

PTO Type

PTO Date

Client


Work area

Supervisor

Other

Projects

 Cancel

 Save

Add

# Delegations

# 07

## Internet Browser settings

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

## 5. Add Delegations

This tab is used to manage your Legal Appointment delegation, so if your 2.6.1 is on leave and you require an individual to step in for that time period, you will delegate the current 2.6.1 Legal Appointment to the required individual through this tab. This is like a Legal Appointment letter but only for a selected time period.


Select the “Delegations” column via the  button.

Select the  button.

Fill in the necessary data applicable to the employee's delegation and when

### Employee Delegation

Upload Document



Or drop files here

Use Legal Appointment

- select -

Project

- select -

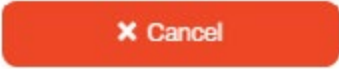
Delegate to


select

From

To

Reason





# Add Legal Appointments

# 08

## Internet Browser settings

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## 5. Add Delegations

Select the “Legal Appointments” column via the **Select Category** button.  
Select the **+ Add** button.

Fill in the necessary data applicable to the employees Legal Appointment and when complete, select “save”.

### Legal Appointment

Upload

Or drop files here

Legal Appointment Type

- select -

Appointment

- select -

Expiry Date

Projects

The employees Legal Appointments will appear in the records grid display.

### Legal Appointments

	Type	Act	Name	Expiry
 	OHSA	S16 3	Health and Safety...	30 Dec 2021

# Assign Positions to an Employee



## Internet Browser settings

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

## 9. Assign Positions to an Employee

Position requirements automatically populate according to what has been loaded on the Employee's Profile, with the exception of any requirement where an "Upload" type is stipulated, or an "Online Course / Assessment" type.

A Service Provider may complete Position requirements on behalf of the Employee, except when an "Online Course / Assessment" type has been stipulated – this must be completed by the Employee through his individual profile.

Select the "Positions" column via the  button.



# Assign PPE

# 10

## Internet Browser settings

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

## 11. Assign PPE

Any PPE items that have been assigned to the linked Employee will be displayed here. PPE can only be assigned by the current Employer, provided that the Company has a Corporate Client Package.

Select the “PPE” column via the  button.

View which projects the  
**Employee**  
is linked to

**11**

**Internet Browser settings**

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

## 10. View which projects the employee is linked to

All of the listed projects that the employee is linked to will populate in the grid display. This will include the Project Name, Pack Name, Owner Company and the date that the Employee was linked to the project.

Select the “Projects” column via the  button.

Project Name	Linked Date
Project2	2/11/2021 6:12:16 AM
Project1	2/11/2021 6:12:16 AM
Project1	2/11/2021 6:12:16 AM

# Notes

# 12

## Internet Browser settings

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

## 12. Notes

Only the current Employer can add Notes to a Linked Employee. The detailed Notes are only visible to the Users of the Company who created the note. Corporate Clients will only be able to view a note that has been made against an Employee, but not the details therein.

Select the “Notes” column via the  button.

Select the  button.

Add your note in the field provided, upload any supporting documentation if its necessary and select save.

### Employee Notes

Notes

Add Your Note Here.....

Upload Document (Optional)

Browse... Or drop files here

X Cancel

Save

All of the listed notes against the individual will be displayed in the grid.

To view a note, select the  button.

To delete a note, select the  button

# Authorisations

# 13

## Internet Browser settings

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

## 13. Authorisations

Legal Authorisations required and / or issued by Project Owners will be housed here. Corporate Cleints may upload Authorisations against their linked Service Provider Employees.

Select the "Authorizations" column via the  button.

Select the  button

Fill in the nesessary data applicable to the employee's authorization and when complete, select save.

### Employee Authorisation

Upload Document

Or drop files here

Department

Section

Responsible Engineer

Type

Category

✕ Cancel

Save

The employees authorisations will appear in the records grid display which will be validated through OCR.

### Authorisations

	Type	Category	Status
 	Authorisation of a ...	Other	Awaiting validation



# Other

# 14

## Internet Browser settings

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

## 14. Other

This tab is used to upload your employee declarations. These pull in the BU specific requirements which are acknowledged by the individual and displayed here. These can also pull into your SHE file if it is marked as a custom document.

Select the “Other” column via the  button.

Select the  button.

Fill in the necessary data applicable to the employee's declaration and when complete, select save.

Learn more: [www.passport360.com](http://www.passport360.com)

*Find us on the Microsoft Appsource and the Azure Marketplace*