

ST guide – Worker and competency register

Version 1.4

This document provides guidance on how to add workers and their competencies onto Fortysouth SiteTracker system to allow Delivery Partners and Clients to create Site Access Requests.

Workers are defined as either employees or subcontractors of the Delivery Partner or Client who need access to go onto Fortysouth sites.

The worker and competency information in SiteTracker system is linked to an approved Delivery Partner or Client and is loaded via a CSV file onto Fortysouth SharePoint.

For guidance on how to create Site Access Request or adding Portal users onto Fortysouth system, please refer to relevant guides. For further information or access, please contact: sar@fortysouth.co.nz.

1. Pre-requisites

For this process, Fortysouth has provided the following prerequisites to the Delivery Partner or Client:

1. A company “Account Code” and “Account Name”,
2. [A worker and competency register Excel template](#),
3. [Fortysouth Site access and Competency Framework](#),
4. [Fortysouth SharePoint folder access to upload their worker and competency register](#).

2. Worker and competency register in Excel/CSV file

We believe the competency of our workers is central to our shared Health & Safety (H&S) success. Having workers with the appropriate competencies for both the site and the specific tasks is a key expectation of our site access process.

Accordingly, Delivery Partners and Clients are expected to provide and maintain up to date in Fortysouth SharePoint a worker and competency register for the workers they are willing to access and work on Fortysouth sites. All registered competencies have to be aligned with the minimum expectations set out in Fortysouth H&S competency framework.

The Fortysouth SiteTracker system will ensure that only workers in the register with the appropriate competencies can be added to site access requests.

3. Completing the worker and competency register

1. The [worker and competency register Excel file](#) is provided with the following structure. Please do-not change the columns names or add or remove any columns.

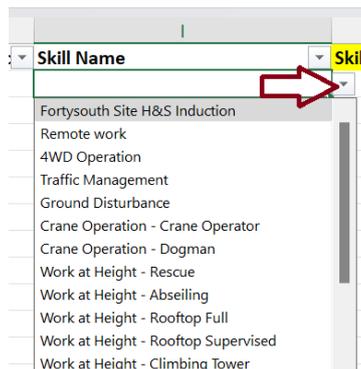
COLUMN	CONTENT
A	Resource ID
B	Account Code
C	Account Name
D	Employer
E	First Name
F	Last Name
G	Email Address
H	Phone Contact
I	Skill
J	Skill Code
K	Valid From
L	Valid To
M	Status

2. The competency types (i.e. skills) are defined in [Fortysouth Site access and competency Framework](#). The framework specifies the minimum required skills for various activities, how these competencies can be acquired, and how continued competency can be demonstrated. Please do-not change the field names or add any extra records in the list on CSV file.

SKILL	SKILL CODE
Fortysouth Site H&S Induction	SKL0
Ground Disturbance	SKL4
Crane Operation - Crane Operator	SKL5A
Crane Operation - Dogman	SKL5B
Work at Height - Rescue	SKL6A
Work at Height - Abseiling	SKL6B
Work at Height - Rooftop Full	SKL6C
Work at Height - Rooftop Supervised	SKL6D
Work at Height - Climbing Tower	SKL6E
Electrical Work	SKL7
Asbestos Related Work - Class A	SKL8A
Asbestos Related Work - Class B	SKL8B
Asbestos Awareness	SKL8C
First-Aid	SKL9

3. Each row in the worker and competency register Excel file represents a specific competency for a worker. If a worker has multiple competencies, each should be recorded on a separate row.
4. Enter data in the standardised worker and competency register Excel file provided by Fortysouth as follows:
- a. Column A: Resource ID
 - Enter Employee Number (if available), of the resource you are adding
 - If no employee Number exists, input in format - AccountID-NNNN where NNNN is numeric
 - The subcontractor resource can have their own ID or as per (ii) above
 - Do not re-use previous Resource ID for new employees
 - The field is alpha/numeric and **mandatory**
 - b. Column B: Account Code
 - Input the Account Code as provided by Fortysouth. It is the same for all your workers
 - The field is alpha/numeric and **mandatory**
 - c. Column C: Account Name
 - Input the Account Name as provided by Fortysouth. It is the same for all your workers
 - The field is alpha/numeric and **mandatory**
 - d. Column D: Employer
 - Input the subcontractors company name if the worker is employed by a subcontractor
 - Note: The Subcontractor Resource is linked to your Account Code. A company can only select resources in Site Access Request that are linked to its own Account Code.
 - e. Column E: First Name
 - Input the workers First Name
 - Name could include Middle Name, as preferred

- f. Column F: Last Name
 - Input the workers Last Name
 - The field is **mandatory**
- g. Column G: Email Address
 - Input the worker's email address
 - The email address is used to send to the worker the approved Site Access Request, including site access information, site contacts and site hazards
 - The field is **mandatory**
- h. Column H: Phone Contact
 - Input the worker's mobile number
 - This will be the phone number used to contact the worker or to send digital lock codes to (in future)
 - The field is **mandatory**
- i. Column I: Skill
 - Select from the dropdown list either clicking on the dropdown or typing in at-least 1 character to display list:



- Minimum skill required for a worker is **Fortysouth Site H&S Induction**
- Skill selected is to be in line with Fortysouth H&S Competency Framework
- The field is **mandatory**
- j. Column J: Skill Code
 - The Skill code is automatically displayed based on the skill selected
 - No input is required
- k. Column K: Valid From
 - Input the date the competency is valid from in date format DD/MM/YYYY
 - If un-know, either enter current date or leave blank. System will automatically update with current date if field blank
 - Please do not enter non-valid date or text
- l. Column L: Valid To
 - Input the date the skill is valid to in date format DD/MM/YYYY
 - Please do not enter non-valid date or text. If no valid to date, then enter 31/12/2050
 - The field is **mandatory**

- m. Column M: Status
 - This is a formula-based column. Copy the formula for each added row
 - If the dates entered are correct, the column will show **"Current"**, correct dates if shown as **"Invalid date"** or **"Expired"**
 - The field is only for your verification and is not imported.

Notes:

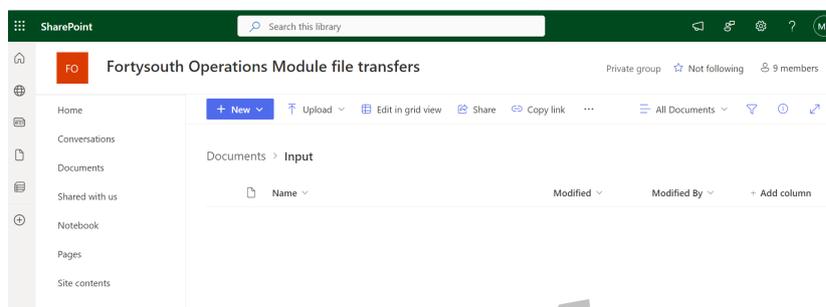
- Any existing records in SiteTracker is automatically changed to "Expired" if it has passed current date. **There is no need to send records for expired competencies.**
- If the **worker** is no longer employed or not required to be selectable on a Site Access Request, then create a row in file with **Valid to** date as today's date (current date).

4. Saving the Excel file in CSV format

1. Prior to saving file, ensure that:
 - No extra columns have been added or removed, and the column titles remain unchanged
 - There are no blank records (i.e., no rows with partial data)
 - All mandatory fields are populated
2. Save file with file name as FS_Resourceskill_AccountCode_YYYY_MM_DD
 - AccountCode is as per Column B (above)
 - Date is format YYYY_MM_DD
 - Leave "_" in filename
 - **Save as *CSV format only**

5. Copying File to Fortysouth Sharepoint

1. The person loading the file must be set-up to access Fortysouth SharePoint directly with user ID and Password. Fortysouth uses SSO (Single Sign On) with Two-Factor Authentication (2FA). If you experience any issues accessing SharePoint, please contact sar@fortysouth.co.nz.
2. Copy the saved file to the [designated SharePoint Input folder](#) by either uploading it or using drag-and-drop. Reminder: Only *.CSV files will be processed (files in *.xls, *.xlsx, or other formats will not be accepted).



6. File processing by SiteTracker system

1. The file is processed by the SiteTracker integration every hour.
2. If there is an issue with the Worker and Competency register you provided, Fortysouth may contact you. If you have any questions or concerns, please email sar@fortysouth.co.nz.