Pegasus™

Powered by Onsite

Draft Role Consolidation and Configuring Site Roles User Guide

V11/03/2019 1.0

V12/03/2019 1.1

V12/03/2019 1.2

Contents

Role Consolidation Project

Pegasus have implemented the Role Consolidation Project in order to both streamline how Roles are configured and how they are managed in sites and portals. Additionally, some software groundwork has been implemented for future features as part of this development.

Some of our clients create and manage their own roles, and this project is aimed for them. It is designed to streamline their management of Roles and their settings. The benefits will also be time saving with managing their Roles by adding easy to manage rules for bulk changes.

An additional benefit of Role Consolidation is ensuring the Role management process is seamless. That means when a worker's profile is awaiting verification, and their pending Role application has had changes to the Role in Onsite Track Easy, their application will be efficiently returned. Instant Role compliance management will improve communication to the user, advising them exactly what has changed within the Role.

While this change does not directly impact clients who do not manage their own roles, these changes are certainly implementing the foundations, for more improvements within Onsite Track Easy.

GLOSSARY:

Auto Associate Site – Once assigned to a particular role, during the Work Scope feature, this will automatically assign that worker to that location. Helpful for saving extra steps required to associate workers to site. Previously this was an extra manual step required in order to associate those workers to a site.

Auto Associate Role – Designed to help Role Administrators assign default requirements needed for people to work at sites. Typically, this Auto Associate Role feature is used along with the Auto Associate Site feature. This will help sites manage contractors to ensure they are meeting the minimum requirements to be allowed on site. Example would be a Role called "Site B Generic Worker", where that role might require a Medical, Proof of ID and a Generic Site Induction.

Assignment Settings – Tool for managing Competencies and how they are signed off in order to be valid.

Class - This is another name for Work Scope, but is used in the context of grouping selected Roles.

Pending Data – Process that some Realm/Site operators use in order to approve changes.

Portal – A Separate website to Onsite Track Easy that a Worker (Contractor or Employee) uses to manage their Roles, competencies, site access and depending upon the configuration, card subscriptions.

Realm – A top level location in Onsite Track Easy that is responsible for managing requirements for its associated Sites. Responsible for defining Companywide Competencies and Roles, that all workers (Contractors and Employees) are required to adhere to, in order to work for.

Role Rules - Competency - Defines competency(s) required for roles and what their file requirements are. Used when you need to make the same changes to a large number of roles. (For Example, when you want to add a medical to all roles at a Work Scope) Once defined, in the Portal, it will show what requirement the file needs at the time of upload and provide supporting information to ensure correct file is uploaded by worker. NOTE: If no portal exists, still used to manage competencies for roles more easily.

Role Rules – Upload – Can define types of files required for uploads. Contains parameters for file size, notes and a URL link. *Note: Feature is not triggered if no Portal is configured at the site/realm. Its also not triggered if manually adding a role to a profile.*

Role Rules - Info – An information request for collecting additional information from the worker in the portal. *Note: Feature is not triggered if no Portal is configured at the site/realm. Its also not triggered if manually adding a role to a profile.*

Site – A site in Onsite Track Easy, that is managed by an Employer. Site Administrators have a login and can manage their employees from this interface.

Verified Document - A document that's required to be verified before it becomes active. Generally attached to a competency.

Work Scope: A group name that Roles can be grouped into. Typically, a location-based name (i.e. a site name if part of a Realm) but can be a name reference to easier define a group of roles. (Accountant, Surface, Underground). The principal is to make it easier for Role Administrators to group Roles so that when searching to add a Role, its easier to find.

Part 1 – Configuration of Site Roles

Configuring Site Roles under the new Role Consolidation update for Onsite Track Easy, is still the same in some aspects, but features have been added to better manage large numbers of Roles. You still need to name and define the Roles and its Competencies, but tools have been added to group them easier and allow some templates, called Role Rules, for quick management.

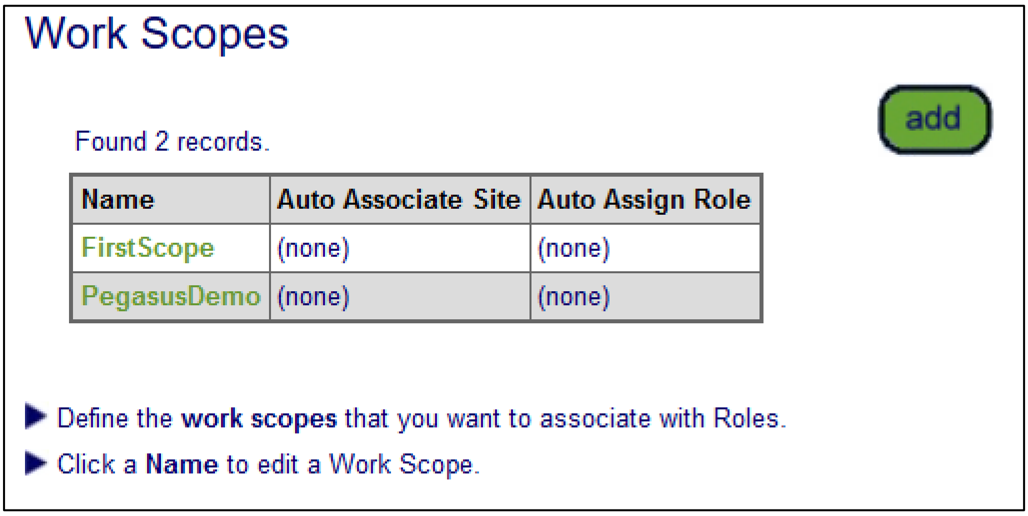
Step 1 – Viewing Work Scopes

A work scope is and optional tool that can be configured against Roles, to group them. As a site administrator, you can use these steps to differentiate Roles into groups of similar types, names, location etc.

Let's view our current work scope in our test site Pegasus Demonstration.

Go to Compliance > Work Scopes

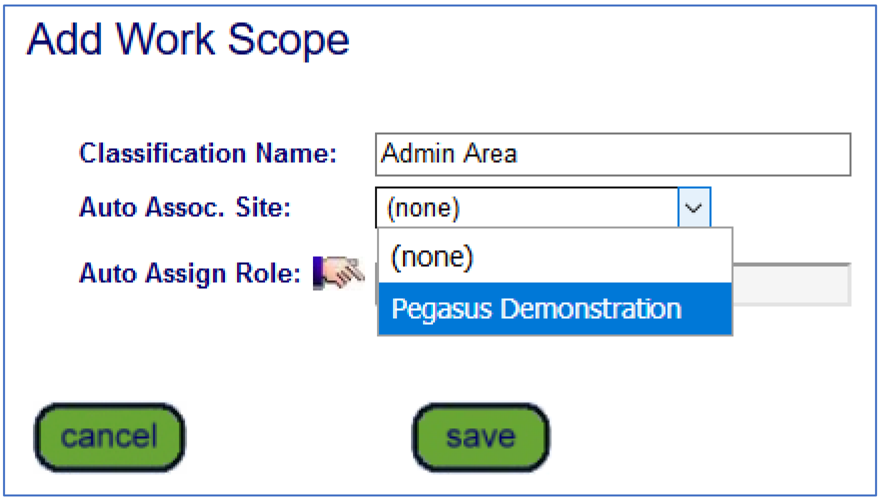
We can see that a scope already exists for the Site Pegasus Demonstration



We can see that 2 scopes exist. Currently there are no Work Scopes that have anything automatically assigned to them. These two names were created for testing. Your site may have a multitude or none currently.

Step 2 – Creating a Work Scope

By creating a Work Scope, we are adding an extra option to help separate groups of Roles. Click "add" on the Work Scope Page to start this process. The following screen will appear.
We will work with creating a Work Scope called "Admin Area" and then assigning two Roles to that scope.
Lets give the classification a name relevant to its usage.

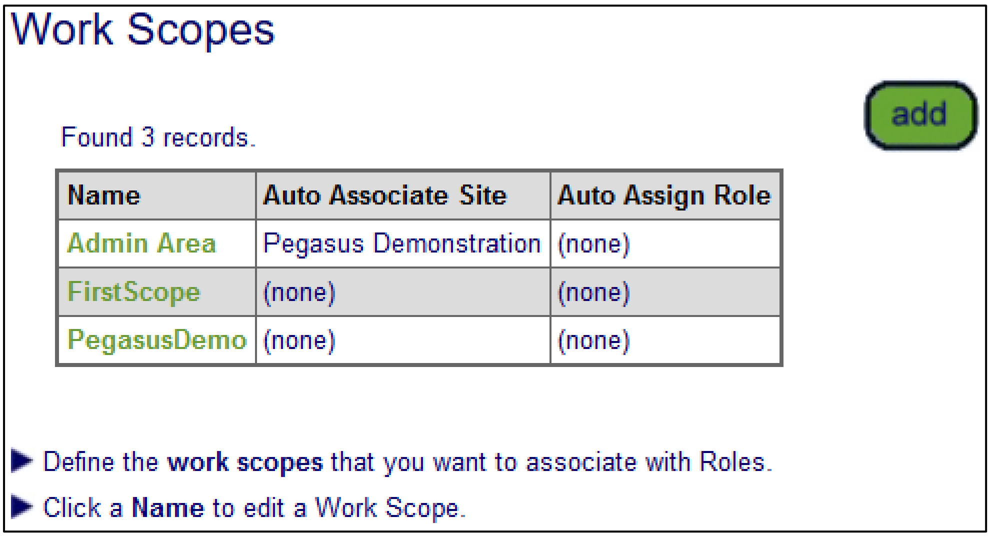


In this example we are creating a new scope for an **Admin Area** location, as it currently does not have one called that.

As we are wanting this to be always associated to our Pegasus Demonstration site, click the drop-down button and select the Pegasus Demonstration option.

NOTE: We do not want to Auto Assign a role in this example

We have now created an additional Work Scope called Admin Area with our site automatically assigned to it.


Work Scopes

add

Found 3 records.

Name	Auto Associate Site	Auto Assign Role
Admin Area	Pegasus Demonstration	(none)
FirstScope	(none)	(none)
PegasusDemo	(none)	(none)

▶ Define the **work scopes** that you want to associate with Roles.

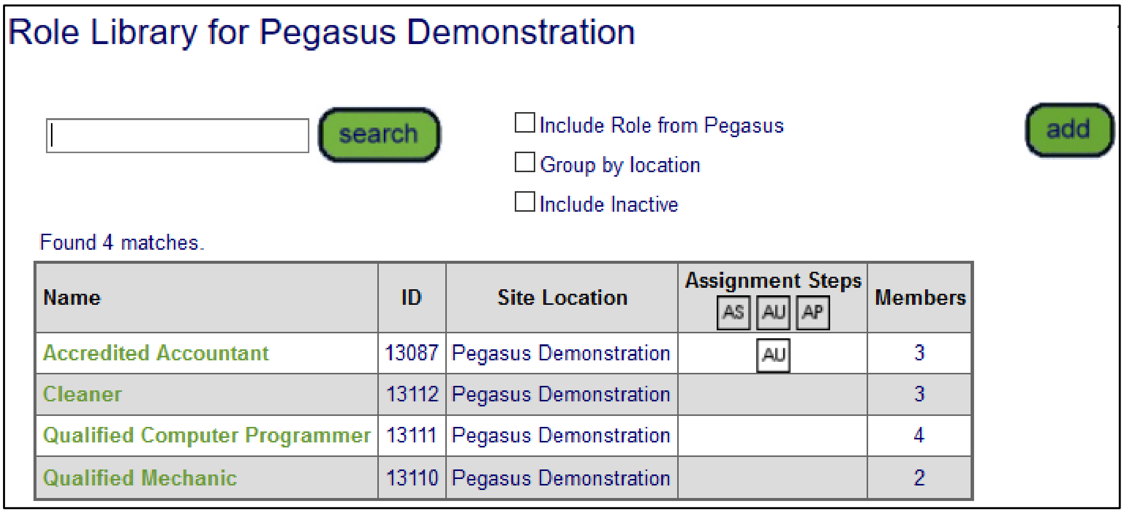
▶ Click a **Name** to edit a Work Scope.

Now the scope – **Admin Area** – exists, we can now create a Role that will link to this Work Scope.

Step 3 – Adding a Role

Now we move onto the Role Library and are going to add a Role to this new Work Scope – Admin Area.

Click Compliance > Role Library. Click the “search” button for a blanket list of all roles available at site.


Role Library for Pegasus Demonstration

search

☐ Include Role from Pegasus

☐ Group by location

☐ Include Inactive

add

Found 4 matches.

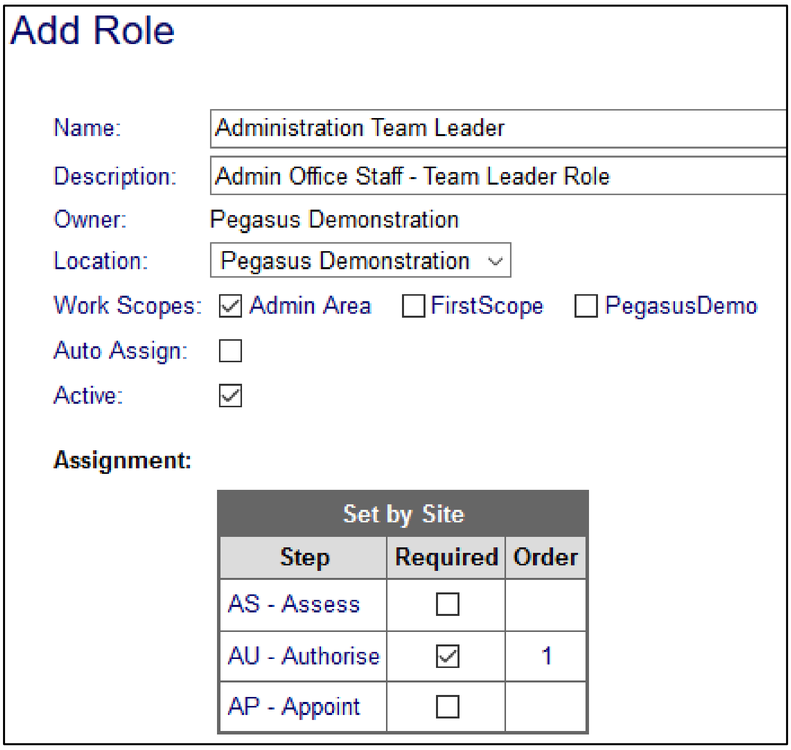
Name	ID	Site Location	Assignment Steps AS AU AP	Members
Accredited Accountant	13087	Pegasus Demonstration	AU	3
Cleaner	13112	Pegasus Demonstration		3
Qualified Computer Programmer	13111	Pegasus Demonstration		4
Qualified Mechanic	13110	Pegasus Demonstration		2

We can currently see four Roles that exist at our Pegasus Demonstration site.

We wish to create a new administrator worker Role, and we want to assign it to the new Work Scope we created – Admin Area.

Start this by clicking “add” to start the Add New Role process.

First we need to give this new Role a relevant name and description. Additionally, in this example we will also choose the associated **Admin Area** Work Scope.



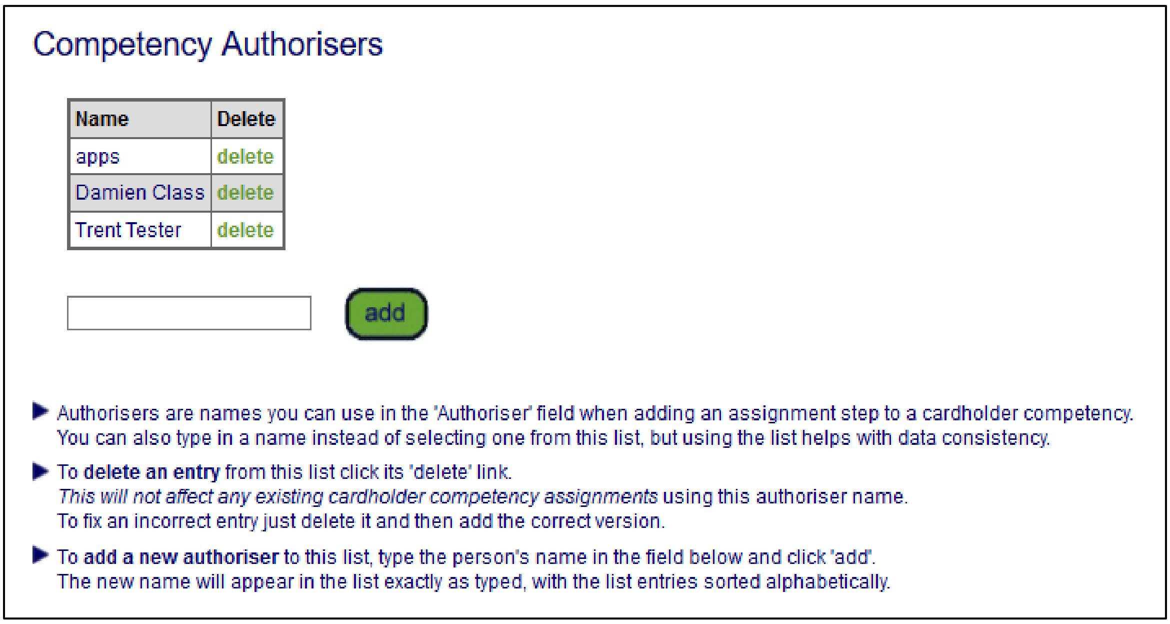
Location defaults to the Site level, you can change this here if its for a specific site location.
If we choose to “Auto Assign”, everyone at site will have this Role applied to them. Its not necessary, but there might be a valid reason you wish to assign a Role to all people at site. (Example: A site-based induction).

The “Active” tick is automatically enabled. If unticked, this role will not be made active.

Assignment settings are relating to how you wish to manage the Role. Enabling these options will stop the competency being automatically assigned to a worker. Here administrators can choose those as they create the Roles. If required, tick the appropriate options:

AS- Assess - If this competency needs to be assessed before it can be completed, tick this to require it to be signed off first.

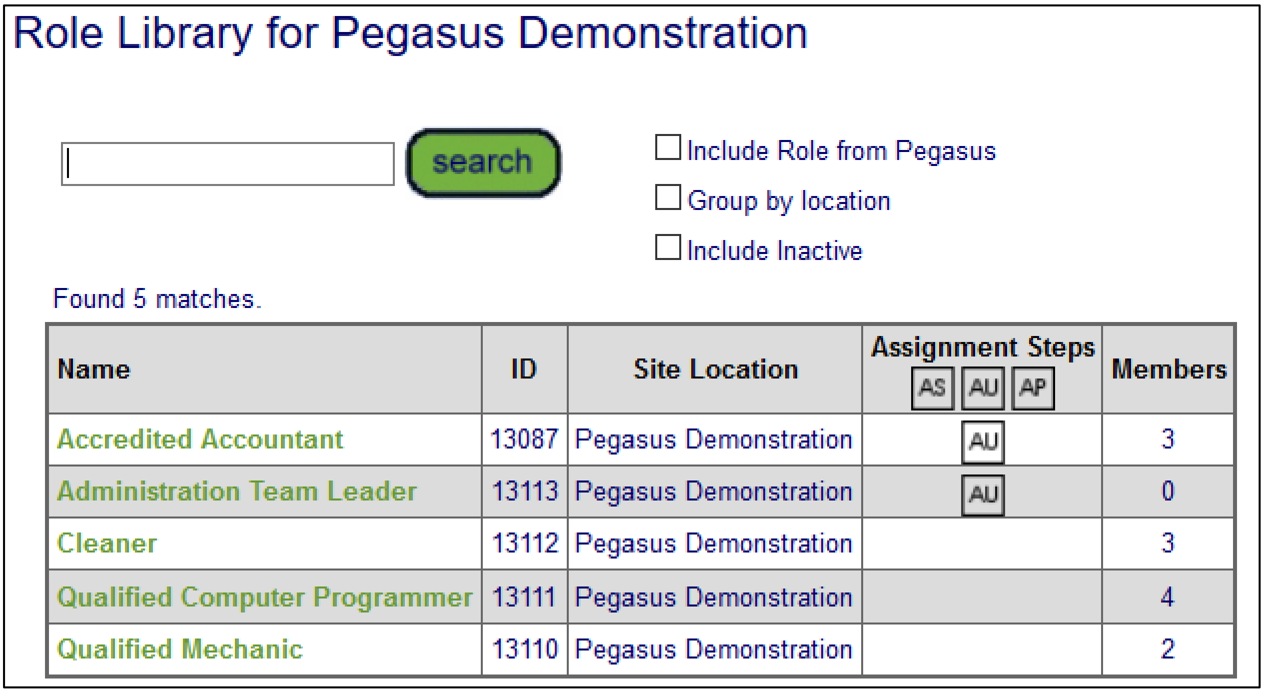
AU – Authorise - If this competency requires an authoriser to sign off first, tick this box. Required authorisers are listed under **Compliance > Competency Authorisers**



AP – Appoint - If this competency requires this to be appointed first, ticking this box will require a person to enter in a name against the competency before it will be complete.

We have chosen the step - **AU -** in this example.

Click “save” and when we return to the Role Library page we can now see our new Role - Administration Team Leader - is listed.



Name	ID	Site Location	Assignment Steps AS AU AP	Members
Accredited Accountant	13087	Pegasus Demonstration	AU	3
Administration Team Leader	13113	Pegasus Demonstration	AU	0
Cleaner	13112	Pegasus Demonstration		3
Qualified Computer Programmer	13111	Pegasus Demonstration		4
Qualified Mechanic	13110	Pegasus Demonstration		2

Now that the Role is created, we can look to edit some additional options for this new Role.

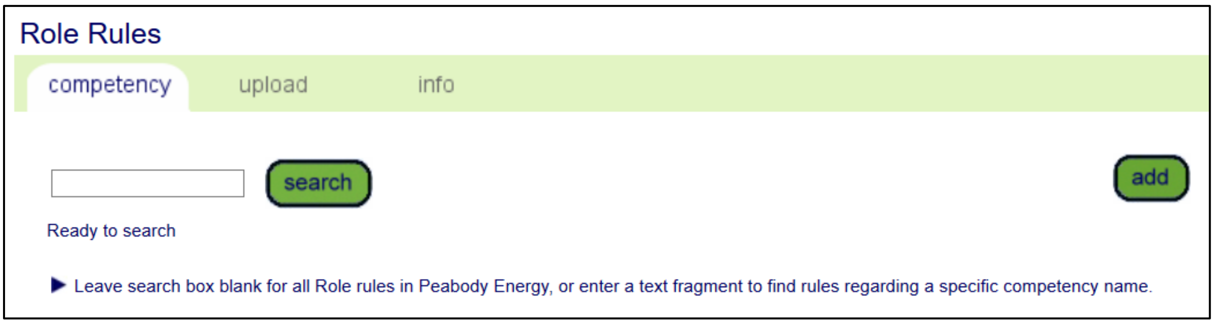
Step 4 - Making life easier using Role Rules.

In the previous example we created a Role from scratch, added it to a Work Scope and it now appears as a Role we can choose from. This Role has no competencies applied to it. We will use the Role Rules feature to modify it and demonstrating the new Role Consolidation features.
NOTE: Upload and Info options are not applied at Site Roles. This is a feature of **Portals**. As file uploads against a role are completed manually by administrators, completing these options will have no effect at site.

To continue, Click Compliance > Role > Rules

Role Rules - Competency

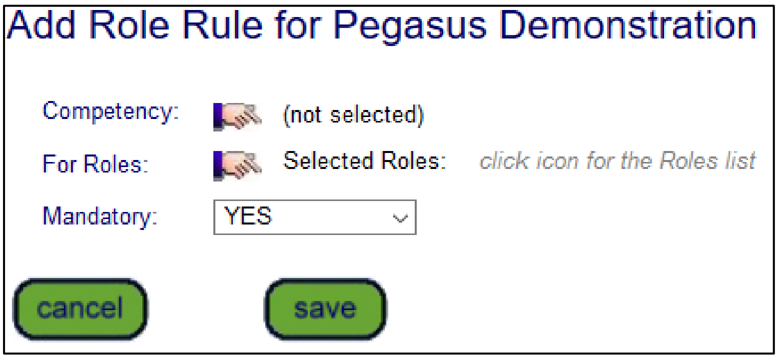
When opening, this page defaults to the Competency page. Clicking the “search” button will do a blank search to see any that have been created.



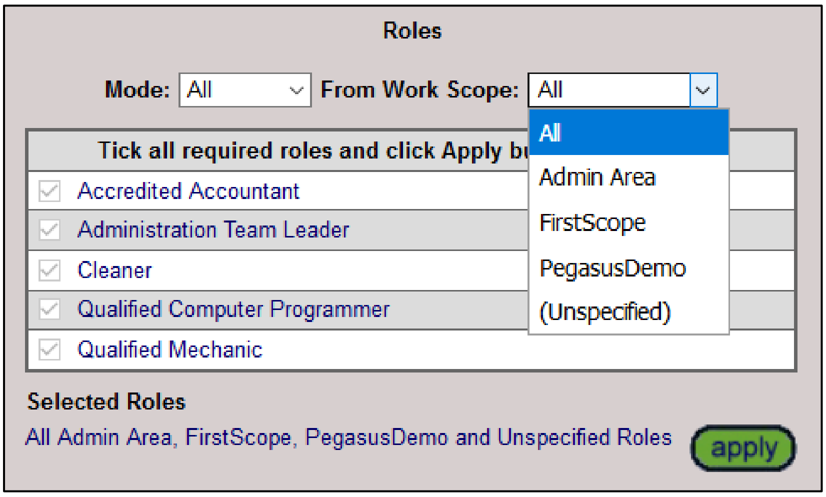
As none currently exist, we will click on “add”.

This opens a new screen and shows some options. First, we want to choose the Role we want to edit.
As no competencies have been applied to the Administration Team Leader Role, we first need to choose that Role as the one we wish to edit, and then add the competencies after.

Click the hand icon next to "For Roles" to continue.

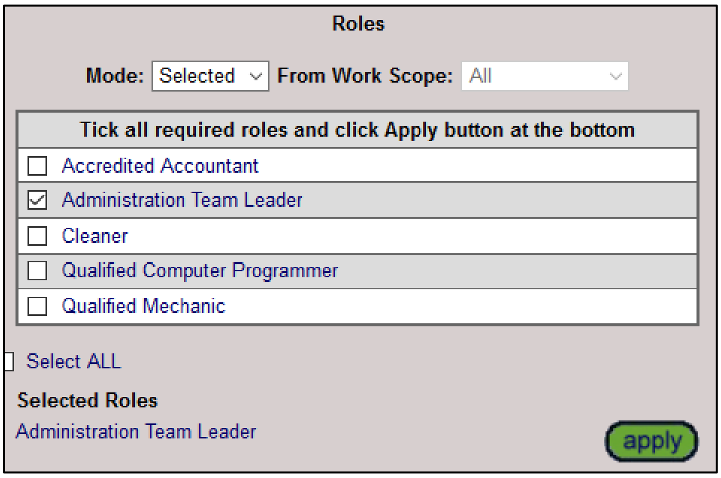


We can see that in the new screen that appears all available site Roles appears. We can see that our Work Scope that we created earlier, is now visible and selectable.

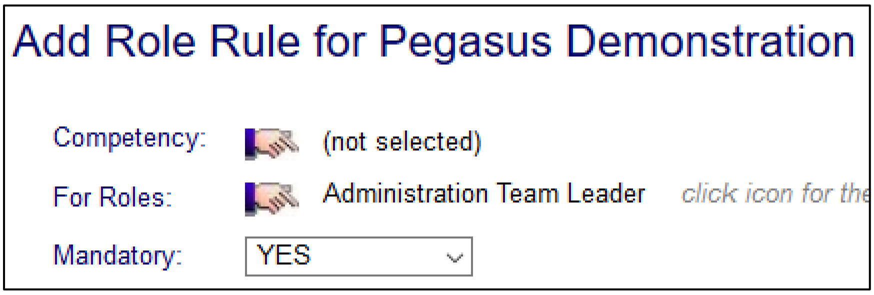


We could choose the Admin Area Work Scope. We can see that the Administration Team Leader Role that has been assigned that Work Scope is visible and selected. This shows the power of the Work Scope feature when managing Roles at a Site. If you had hundreds of Roles, this would take some time to scroll through all to find the ones required. Using the Work Scope feature, those tagged roles are easier to display. Additionally with the **Mode:All** option, all roles for that scope can be chosen at once.

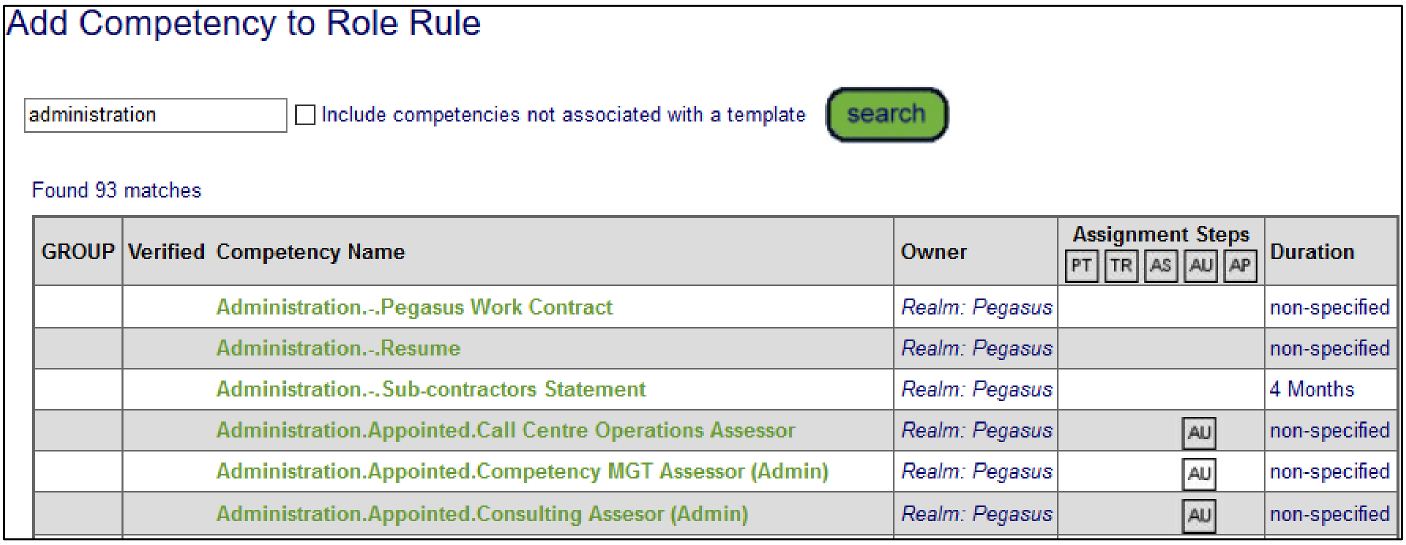
For our example, we only wish to manage the one Role itself. Choose **Mode: Selected** and then tick Administration Team Leader, by itself and click "apply".



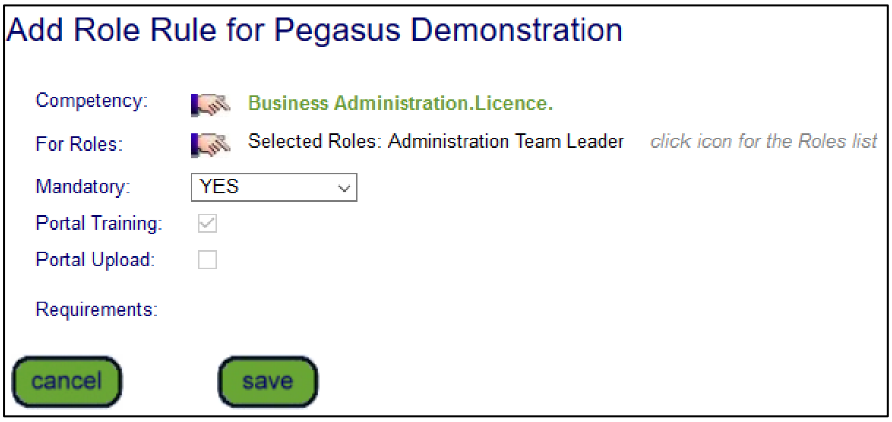
Having chosen the Role, now we add competencies against this Role. Click the hand icon next to “Competency”.



This brings up a new screen where we can search for a competency to add to our Role. Using the subject “administration” and clicking search, produces our results.

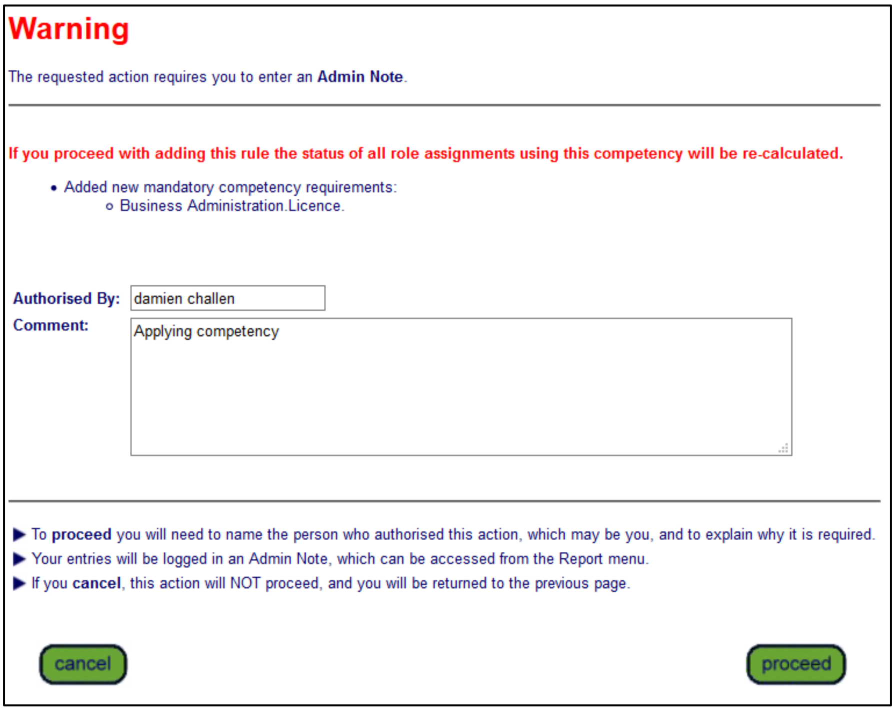


This will set that competency as the chosen one for this Rule we are creating. In our example we have chosen Business Administration.Licence to be our competency.

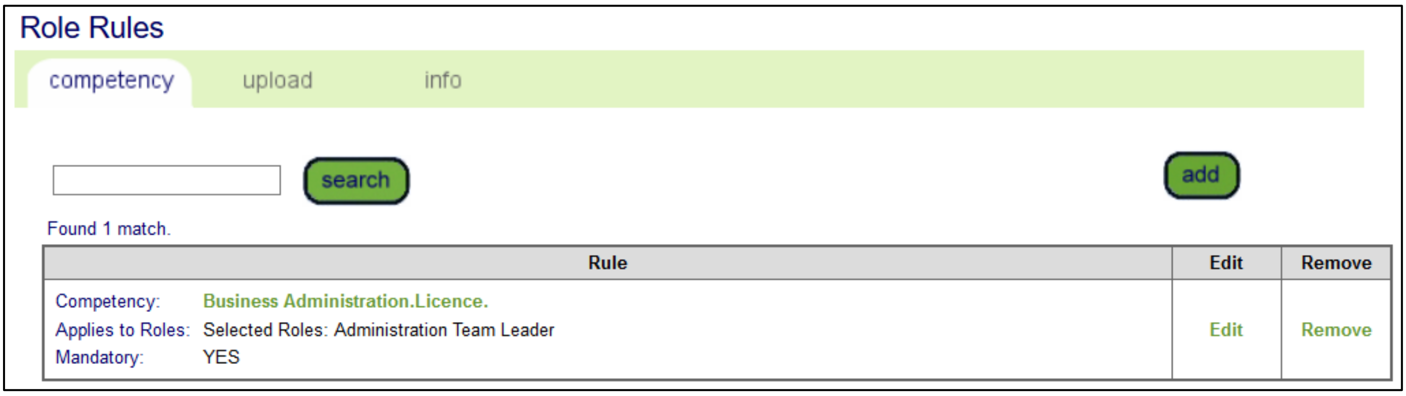


By default, the Mandatory option for this competency is applied. This can be changed to YES/NO/CONDITIONAL. *NOTE: Conditional is not currently in use, but added for future work.*

Clicking “save” now will pop open the Admin Note screen, which is required to be compelted in order to approve this Role Rule creation.



This will apply the competency to the Role and we now have a Role Rule.

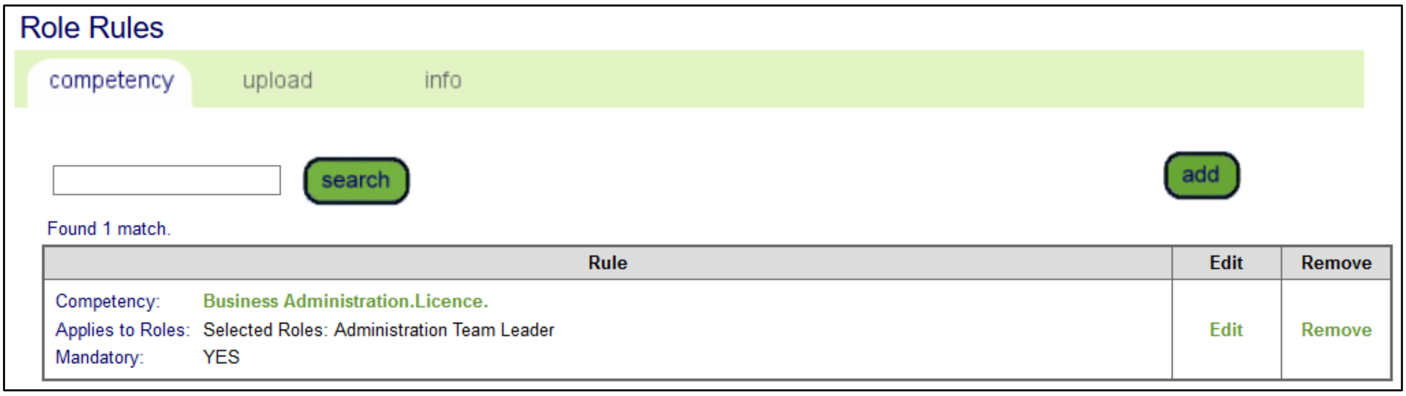


NOTE: Upload and Info Role Rules do not have any function on a Site that manages their Roles manually. These two features relate to the Portal function. You can configure those if you wish, but they will have no function unless the Portal feature is enables for your site.

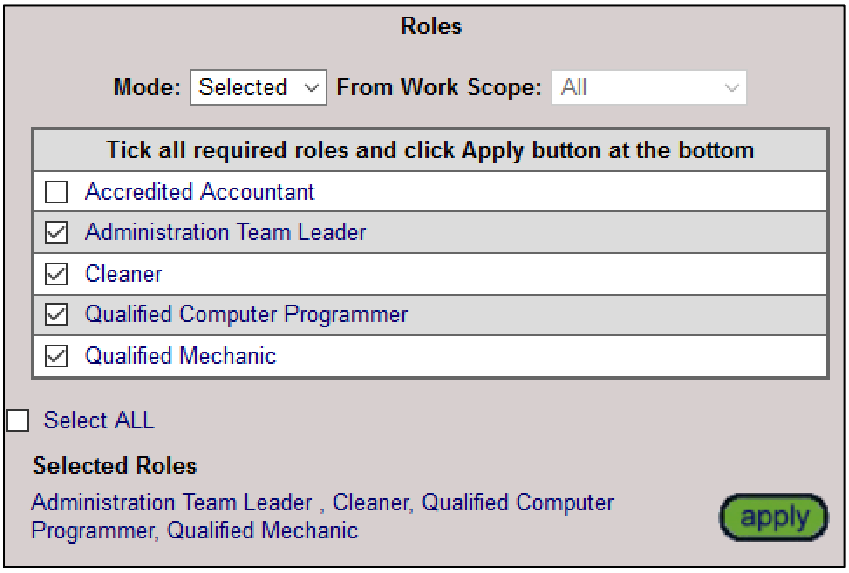
Step 5- Modifying Role Rules

Now that we have this Business Administration Licence Role rule, we can now use the power of Role Consolidation tools to apply this new rule to multiple rules at once.

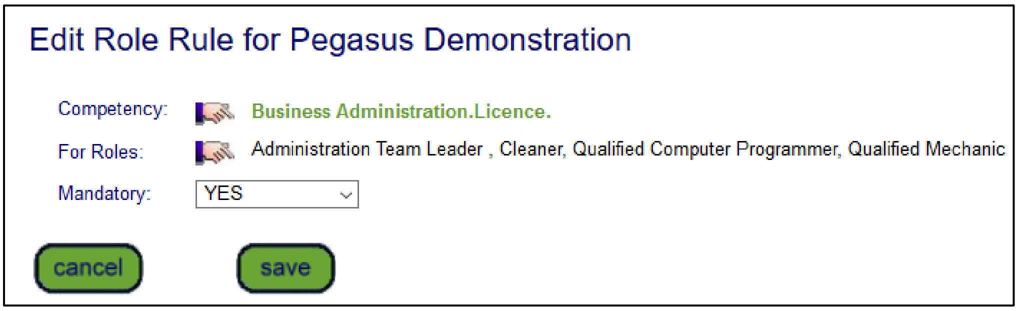
We can currently see our Role Rule applied to just the one role, Administration Team Leader. If in the future a new role(s) were now requiring this competency against it, we can click on the "Edit" button



This will open our familiar Roles selection screen. In this example, we will choose multiple Roles.

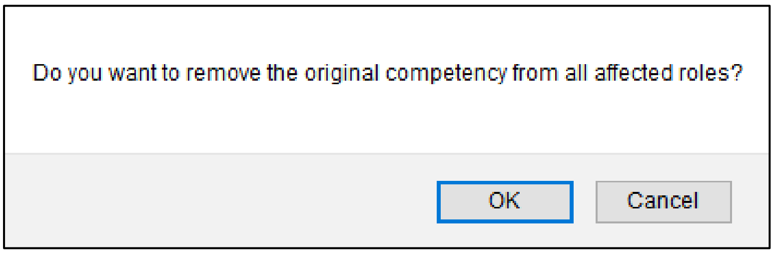


Click "apply". This now adds those other Roles into the "For Roles" section.



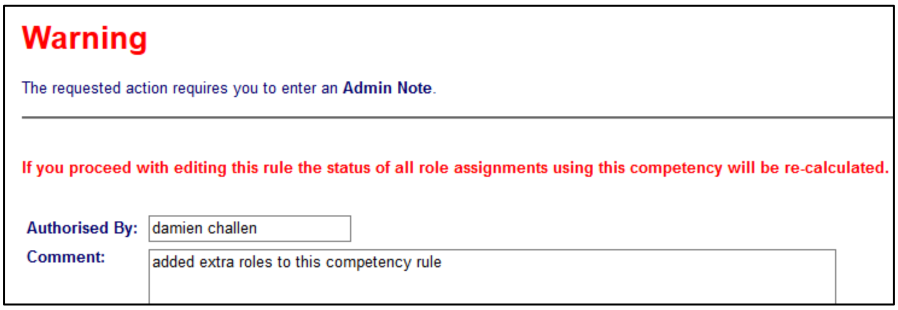
Clicking "save" will now produce a confirmation screen.

NOTE: This is an important screen to consider. The selection you choose will affect the Roles you added. As we are **ADDING** new roles to this competency rule, this is not an issue. We can choose **CANCE**L, as we are **NOT** removing a Role from the list that was previously there.

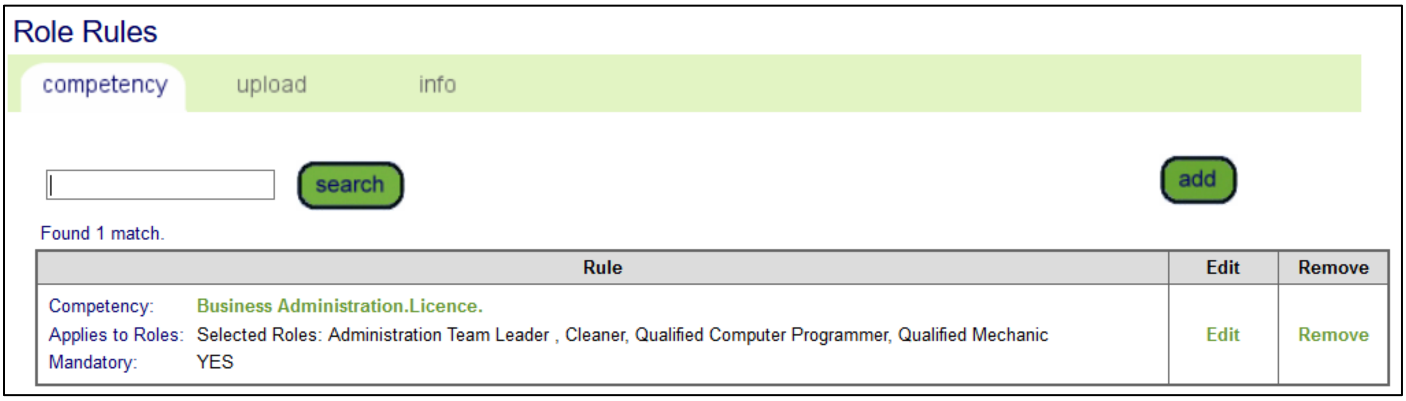


If we were editing this list and **REMOVING** a Role, the logical answer is to click **OK**, so that the role we **REMOVED** would no longer have the Business Administration.Licence competency against it.

In our example, we click Cancel, and the usual Admin Note page appears so we can authorise this change.
NOTE: As the Admin Note mentions, this will re-calculate the Role assignments that use this competency.



Now when we are returned to the Role Rules page, we can see that the Business Administration Licence has now been applied to all these roles at once.



Step 6 – Viewing Edit History Notes

Edit history on Roles is enabled, so you could see who altered the Role. If a Role was edited by someone, there was an Admin Note screen that would need to completed, to update the Role. However, there was no history of the Admin Notes that could easily give the reason for the change. This has been added to the edit history of the Role, so that the reason for the change of Role edits is more easily trackable.

Clicking the green (notes) will open the page and you can read the answer to the admin note question given for the change.