



PegasusTM
Powered by Onsite

Role Consolidation and Configuring Site
Roles User Guide

V15/03/2019 1.4

Contents

Role Consolidation Project	3
GLOSSARY	3
Configuration of Site Roles	4
Step 1 – Viewing Work Scopes	4
Step 2 – Creating a Work Scope	5
Step 3 – Adding a Role	5
Step 4 - Making life easier using role rules	8
Role Rules - Competency	8
Step 5- Modifying Role Rules	11
Step 6 – Viewing Edit History Notes	12

Role Consolidation Project

Pegasus has implemented the role consolidation project to streamline how roles are configured and managed in sites and portals. This development provides a foundation for future enhancements

This project streamlines the process for clients who create and manage their own roles. They will save time by managing 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 a role change makes them non-compliant, 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.

GLOSSARY

Auto Associate Site

Once assigned to a role during the Work Scope feature, a worker is auto-assigned to that location. This saves extra steps required to associate workers to site.

Auto Associate Role

Designed to help administrators assign default requirements needed to work at sites. Typically, this feature is used along with the Auto Associate Site feature. This will help sites ensure workers are meeting the minimum requirements 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

A tool for managing competencies and how they are signed off to be validated.

Class

Another term for work scope, but in the context of grouping selected roles.

Pending Data

A process for some users to approve changes.

Portal

Client-specific systems where contractors manage the roles, competencies and site access requirements of their business and workers for that particular Pegasus client – different to Onsite.

Realm

A top-level location in Onsite for managing requirements for sites. The realm is where the competencies and roles that companies and workers must adhere to are determined.

Role Rules - Competency

Defines competency and file requirements for roles. Used when the same changes are made to a number of roles; for example, adding a medical to all roles at a work scope. Once defined, the requirement is reflected in the portal to reach compliance. If there is no portal, this is still used to manage role competencies easily.

Role Rules - Upload

Defines the type of files required for uploads, containing parameters for file size, notes and a URL link. This feature is not triggered if there is no portal configured at the site/realm, or if manually adding a role to a profile.

Role Rules - Info

A request for collecting additional information from the worker in the portal. This feature is not triggered if there is no portal configured at the site/realm, or if manually adding a role to a profile.

Site

A site in Onsite managed by an employer. Site Administrators have a login and can manage their workers at the site level.

Verified Document

A document to be verified before it becomes active and is accepted. Generally attached to a competency.

Work Scope

A grouping of roles, typically location-based (i.e. a site name if part of a realm), but can be named to easier define a group of roles. (Accountant, Surface, Underground). Work scope simplifies role grouping and searching.

Configuration of Site Roles

New features make configuring a large number of site roles simpler.

Roles and competencies still need to be named and defined, but tools have been added for easier grouping, and templates (role rules) make for faster management.

Step 1 - Viewing Work Scopes

A work scope is an optional tool to group roles. As a site administrator, you can use these steps to classify roles into groups of similar types, names, location, etc.

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

Go to **Compliance** > **Work Scopes**

We can see that two scopes exist for the site Pegasus Demonstration.

Work Scopes

Found 2 records.

Name	Auto Associate Site	Auto Assign Role
FirstScope	(none)	(none)
PegasusDemo	(none)	(none)

[add](#)

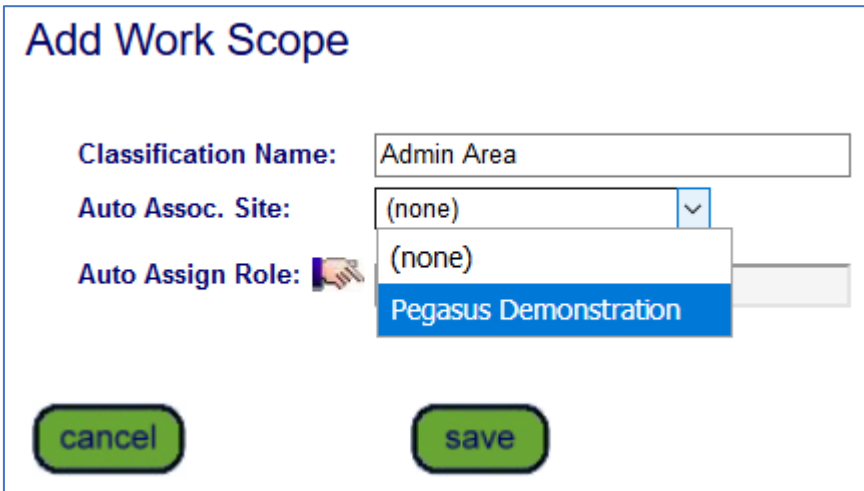
▶ Define the **work scopes** that you want to associate with Roles.
▶ Click a **Name** to edit a Work Scope.

Currently, neither work scope has anything automatically assigned to them.

Step 2 – Creating a Work Scope

Creating a work scope is adding an extra option to help separate groups of roles.

Click *add* to start this process. On the screen that appears, we have created a work scope called “Admin Area” and assigned two roles to that scope. Let’s give the classification a name relevant to what it will be used for:



Add Work Scope

Classification Name:

Auto Assoc. Site:

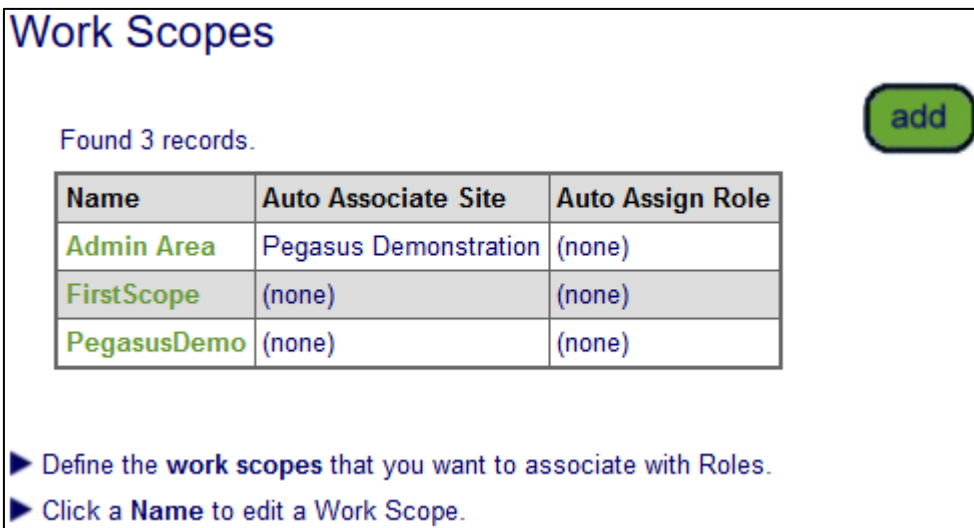
Auto Assign Role:

In this example we are creating a new scope for an **Admin Area** location.

To have this always associated to the site, click the drop-down button and select the site name.

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

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 we can now create a Role that will link to this work scope.

Step 3 – Adding a Role

In the Role Library, we will add a role to this new work scope – Admin Area.

Click *Compliance > Role Library*. Click *search* for a 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			Members
			AS	AU	AP	
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 see four roles exist at our Pegasus Demonstration site. We want to create a new administrator worker role, and assign it to the new work scope we created.

Start by clicking *add* to start the Add New Role process.

First, we need to give this new role a relevant name and description and choose the associated **Admin Area** work scope.

Add Role

Name: Administration Team Leader

Description: Admin Office Staff - Team Leader Role

Owner: Pegasus Demonstration

Location: Pegasus Demonstration

Work Scopes: Admin Area FirstScope PegasusDemo

Auto Assign:

Active:

Assignment:

Set by Site		
Step	Required	Order
AS - Assess	<input type="checkbox"/>	
AU - Authorise	<input checked="" type="checkbox"/>	1
AP - Appoint	<input type="checkbox"/>	

Location defaults to the site level but can be changed.

If we choose to *Auto Assign*, everyone at site will have this role applied to their profile.

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

Assignment settings determine how you wish to manage the role. Enabling these options will stop the competency being automatically assigned to a worker. If required, tick the appropriate options:

AS- Assess - If this competency needs to be assessed.

AU – Authorise - If this competency requires authorisation. Required authorisers are listed under *Compliance > Competency Authorisers*

Competency Authorisers

Name	Delete
apps	delete
Damien Class	delete
Trent Tester	delete

- ▶ Authorisers are names you can use in the 'Authoriser' field when adding an assignment step to a cardholder competency. You can also type in a name instead of selecting one from this list, but using the list helps with data consistency.
- ▶ To **delete an entry** from this list click its 'delete' link.
This will not affect any existing cardholder competency assignments using this authoriser name.
To fix an incorrect entry just delete it and then add the correct version.
- ▶ To **add a new authoriser** to this list, type the person's name in the field below and click 'add'.
The new name will appear in the list exactly as typed, with the list entries sorted alphabetically.

AP – Appoint - If this competency requires appointment, ticking this box will require a name is entered against the competency.

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

Click **save**. When we return to the role library page, we can see our new Role - Administration Team Leader - is listed.

Role Library for Pegasus Demonstration

Include Role from Pegasus
 Group by location
 Include Inactive

Found 5 matches.

Name	ID	Site Location	Assignment Steps			Members
			AS	AU	AP	
Accredited Accountant	13087	Pegasus Demonstration		<input type="checkbox"/>		3
Administration Team Leader	13113	Pegasus Demonstration		<input type="checkbox"/>		0
Cleaner	13112	Pegasus Demonstration				3
Qualified Computer Programmer	13111	Pegasus Demonstration				4
Qualified Mechanic	13110	Pegasus Demonstration				2

With the role created, we can edit it.

Step 4 - Making life easier using role rules

In the previous example, we created a role, added it to a work scope, and can now select it.

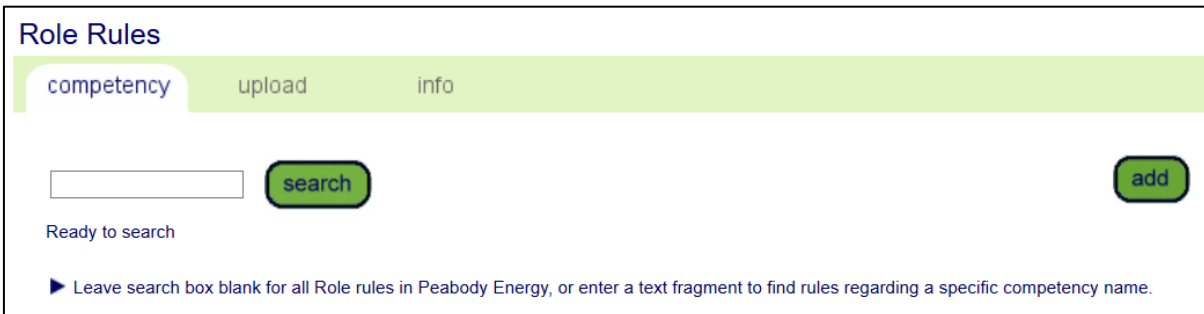
This role has no competencies applied to it, so we will use role rules to modify it and demonstrate the new role consolidation features.

NOTE: Upload and Info options are not applied at site roles. This is a feature of **Portals**. File uploads are completed manually by administrators, so these options will have no effect at site.

To continue, Click *Compliance > Role > Rules*

Role Rules - Competency

This page defaults to the Competency page. Click *search* to display any that have been created.



Role Rules

competency upload info

search add

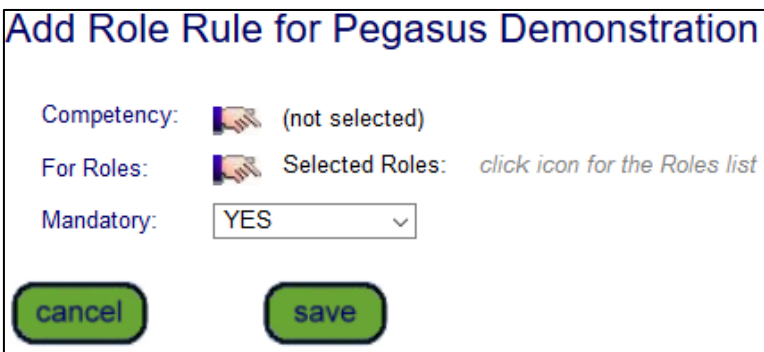
Ready to search

▶ Leave search box blank for all Role rules in Peabody Energy, or enter a text fragment to find rules regarding a specific competency name.

As none currently exist, we will click *add*.

On the new screen, we choose the role we want to edit.

Choose our new Administration Team Leader Role. Click the hand icon next to *For Roles* to continue.



Add Role Rule for Pegasus Demonstration

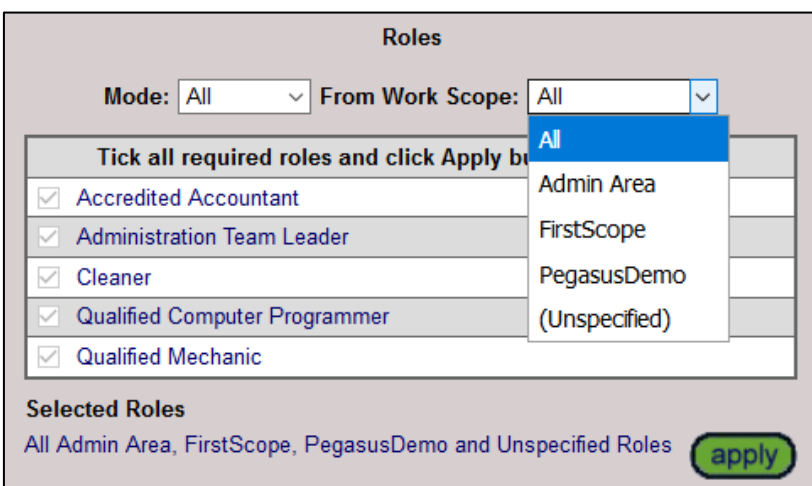
Competency: (not selected)

For Roles: Selected Roles: *click icon for the Roles list*

Mandatory: YES

cancel save

All available site roles, and the work scope we created earlier, are now visible and selectable.



Roles

Mode: All From Work Scope: All

Tick all required roles and click Apply below

<input checked="" type="checkbox"/>	Accredited Accountant	All
<input checked="" type="checkbox"/>	Administration Team Leader	Admin Area
<input checked="" type="checkbox"/>	Cleaner	FirstScope
<input checked="" type="checkbox"/>	Qualified Computer Programmer	PegasusDemo
<input checked="" type="checkbox"/>	Qualified Mechanic	(Unspecified)

Selected Roles
All Admin Area, FirstScope, PegasusDemo and Unspecified Roles

apply

Choosing the Admin Area Work Scope, we can see that the Administration Team Leader is visible and selected, demonstrating the work scope feature when managing roles at a site. Tagged roles are easier to display using this feature. With the **Mode:All** option, all roles for that scope can be selected at once.

For our example, we will manage one role. Choose **Mode: Selected**, tick Administration Team Leader and click *apply*.

With the role chose, we add competencies. Click the hand icon next to *Competency*.

On the new screen, searching “administration” displays our results.

GROUP	Verified Competency Name	Owner	Assignment Steps					Duration
			PT	TR	AS	AU	AP	
	Administration.-.Pegasus Work Contract	Realm: Pegasus						non-specified
	Administration.-.Resume	Realm: Pegasus						non-specified
	Administration.-.Sub-contractors Statement	Realm: Pegasus						4 Months
	Administration.Appointed.Call Centre Operations Assessor	Realm: Pegasus				AU		non-specified
	Administration.Appointed.Competency MGT Assessor (Admin)	Realm: Pegasus				AU		non-specified
	Administration.Appointed.Consulting Assesor (Admin)	Realm: Pegasus				AU		non-specified

This competency is chosen for the rule we are creating. In the example, we have chosen the competency Business Administration.Licence.

Add Role Rule for Pegasus Demonstration

Competency: **Business Administration.Licence.**

For Roles: Selected Roles: Administration Team Leader *click icon for the Roles list*

Mandatory:

Portal Training:

Portal Upload:

Requirements:

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

Click **save** to complete the Admin Note screen, which is required to approve this role rule.

Warning

The requested action requires you to enter an **Admin Note**.

If you proceed with adding this rule the status of all role assignments using this competency will be re-calculated.

- Added new mandatory competency requirements:
 - Business Administration.Licence.

Authorised By:

Comment:

▶ To **proceed** you will need to name the person who authorised this action, which may be you, and to explain why it is required.

▶ Your entries will be logged in an Admin Note, which can be accessed from the Report menu.

▶ If you **cancel**, this action will NOT proceed, and you will be returned to the previous page.

This final step applies the competency to the role - and we now have a role rule.

Role Rules

competency upload info

Found 1 match.

Rule	Edit	Remove
Competency: Business Administration.Licence. Applies to Roles: Selected Roles: Administration Team Leader Mandatory: YES	Edit	Remove

NOTE: Upload and Info role rules do not have any function on a site that manages roles manually. These two features relate to the portal. You can configure them, but they will have no function unless the portal feature is enabled for your site.

Step 5- Modifying Role Rules

With the Business Administration Licence role rule in place, we can now use role consolidation tools to apply this new rule to multiple rules at once.

We can see our role rule applied to just the one role, Administration Team Leader. If new role(s) require this competency, we can click *Edit*.

Role Rules

competency upload info

Found 1 match.

Rule	Edit	Remove
Competency: Business Administration.Licence. Applies to Roles: Selected Roles: Administration Team Leader Mandatory: YES	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>

This opens our roles selection screen. In this example, we will choose multiple roles.

Roles

Mode: From Work Scope:

Tick all required roles and click Apply button at the bottom

<input type="checkbox"/> Accredited Accountant
<input checked="" type="checkbox"/> Administration Team Leader
<input checked="" type="checkbox"/> Cleaner
<input checked="" type="checkbox"/> Qualified Computer Programmer
<input checked="" type="checkbox"/> Qualified Mechanic

Select ALL

Selected Roles
Administration Team Leader , Cleaner, Qualified Computer Programmer, Qualified Mechanic

Click *apply*. This adds those roles into the *For Roles* section.

Edit Role Rule for Pegasus Demonstration

Competency: **Business Administration.Licence.**

For Roles: Administration Team Leader , Cleaner, Qualified Computer Programmer, Qualified Mechanic

Mandatory:

Clicking *save* will produce a confirmation screen.

Be aware that your selection will affect the roles you added.

Adding new roles to a competency rule is not impacted by this. However, if we were editing this list and **REMOVING** a role, we would click **OK**, so the role we **REMOVED** would no longer have the Business Administration Licence competency against it.

Do you want to remove the original competency from all affected roles?

In our example, we click cancel, and the Admin Note page appears so we can authorise this change.
NOTE: This will re-calculate the role assignments that use this competency.

Warning

The requested action requires you to enter an **Admin Note**.

If you proceed with editing this rule the status of all role assignments using this competency will be re-calculated.

Authorised By:

Comment:

Returning to the role rules page, we can see the Business Administration Licence has been applied to all these roles at once.

Role Rules

competency upload info

Found 1 match.

Rule	Edit	Remove
Competency: Business Administration.Licence. Applies to Roles: Selected Roles: Administration Team Leader , Cleaner, Qualified Computer Programmer, Qualified Mechanic Mandatory: YES	Edit	Remove

Step 6 - Viewing Edit History Notes

Edit history now displays who altered the role. If someone edits a role, an Admin Note screen is completed. These are now more easily displayed by clicking the green (notes) link to open the page and display the Admin Note and reason for role change.

[\(notes\)](#)