



Draft Role Consolidation User Guide

Pending Data

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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 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.

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 a Portal when selecting roles.

Pending Data – Process that some realm/site operators need to follow 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.

Managing Pending Data

Due to the changes that Role Consolidation have in Onsite Track Easy, if a Role changes and those changes have been committed, any Role requests currently sitting waiting to be approved, will no longer be valid. Onsite Track Easy reviews the changes to the Role, and any that are currently in a pending state will:

- Sit in Pending Data and cannot be approved.
- Only the option to Return or Reject will be available.
- You will be notified by a Red "Approve Disabled" text
- An admin note message stating the changes made.

Pending Data Location

Pending data is a page that sits on the home page of Onsite Track Easy at a Site/Realm. Any item required to be manually handled by a site or realm potentially will sit here. Items such as Pending Documents, Cards, Roles, Companies etc.

The screenshot shows the 'Pending Data' section of the Onsite Track Easy interface. At the top, there are filters for 'Type', 'Limit', 'Source', and 'Filter By'. The 'Type' dropdown is open, showing a list of categories including Companies, Company Associations, Compliance Certs, Compliance SMS Reviews, Cardholders, Cards, Cardholder Associations, Bookings, Assessments, Verified Docs, and Verified Doc Competency Uploads. Below the dropdown, there are sections for 'Incomplete Actions' and 'Latest Version 2.160.9' with 'New Features' listed.

As some data might be irrelevant, we want to at this stage, simplify our search to just the application for a new role that was applied for by Damien Challen from Pegasus Management.

Step 1 – Viewing Pending Data

Log into Onsite Track Easy with your user account and you will arrive at the Home Page. Click on "show" next to Pending Data / Incomplete Action.

The screenshot shows the Onsite Test Mode Home Page for the Pegasus Safety realm. The navigation menu includes home, person, company, compliance, training, report, setup, help, and system. The session details on the left show the user is Damien Challen. The main content area includes a welcome message, a 'timezone: Australia/NSW' indicator, and a 'Pending Data / Incomplete Actions' section with a 'show' button. Below this, there is a 'Latest Version 2.160.9' section with 'New Features' listed.

From the Pending Data screen, click on the down arrow next to the "Type" and select "--All--"

- Please select --
- Companies
- Company Associations
- Compliance Certs
- Compliance SMS Reviews
- Cardholders
- Cards
- Cardholder Associations
- Bookings
- Assessments
- Verified Docs
- Verified Doc Competency Uploads
- All --

Next, click the drop-down box next to "Filter By" and choose Person. As we are wanting to look up a role applied for by Damien Challen, we choose to put Challen in the person field. Click "apply" when done.

The screenshot shows the Admin Realm interface. At the top right, it displays "timezone: Australia/NSW" and "Latest logout". Below this is a "Welcome To Your Admin Realm" message with a green leaf logo and a note to click "home" in the menu bar. The "Enter Other Webs" section contains fields for "Site" (AC3) and "Portal" (David Jones and Country Road Group), each with an "enter" button. The "Pending Data" section has filters for "Type" (set to "-- All --"), "Limit" (set to "-- All --"), "Source" (set to "-- All --"), and "Filter By" (set to "Person"). A search field contains "challen" and an "apply" button. A dropdown menu is open under "Filter By", listing options: "Nothing", "Company", "Site", "Realm", "Person" (highlighted), "Role", and "RoleClass". Below this is the "Incomplete Actions" section with a "Type" dropdown set to "-- Please select --". At the bottom left, it shows "Latest Version 2.160.9" and a "New Features" link.

Of course, you can just choose to search for all items (the default option).

This will show the results we are looking for under Cards (which is also Roles, they are bundled together under that pending data title).

Step 2 – Managing Pending Data

We want to open the Pending Data for Damien Challen. In this example the Role was changed by somebody at site.

Welcome to NCIG timezone: Australia/Sydney

general charts Latest loginout

Enter Portal

Portal:

Pending Data Type: Limit: Source: Filter By:

Cards: Count: 1 Sort by:

Name	ID	Company	Card Design	Card / Data	To Verify	Source	For Realm/Site	Dependent Sites	Submitted On	Submitted By
Challen, Damien	682798	PEGASUS MANAGEMENT PTY. LIMITED	Onsite Track Easy	Data	2	PORTAL	Site: NCIG	NCIG	12 Mar 2019	Damien Challen

Incomplete Actions Type:

Pending data operators do not necessarily know this, they just recognise that there is an item in Pending Data that needs to be investigated. If other Roles were changed, we would see those Pending Data items reflected here.

In this example, lets click on the card application for **Damien Challen**.

Welcome to NCIG timezone: Australia/Sydney

general charts Latest loginout

Enter Portal

Portal:

Pending Data Type: Limit: Source: Filter By:

Cards: Count: 1 Sort by:

Name	ID	Company	Card Design	Card / Data	To Verify	Source	For Realm/Site	Dependent Sites	Submitted On	Submitted By
Challen, Damien	682798	PEGASUS MANAGEMENT PTY. LIMITED	Onsite Track Easy	Data	2	PORTAL	Site: NCIG	NCIG	12 Mar 2019	Damien Challen

This will open a new page and show the Pending Data information relating to this cardholder – Damien Challen. Its from that page we will be handling what to do with this application.

Step 3 – Returning Application for a Changed Role

We can see straight away under the cancel button that “**Approve disabled**” is highlighted. If we click the “+” next to the GENERAL option on the right, it expands, and we can see the Role for NCIG Employee Only shows that there are notes under the “Admin Notes Since Last Submit”.

Process Registration, Roles for Damien Challen

▶ Please review and approve this person's registration, roles.
▶ Each file should be opened and checked to ensure it matches the requirements.

1. Summary

Person: Damien Challen
Cardholder Id: 918338
Date of Birth: 27 Jun 1975
Company: Pegasus Management Pty. Limited
Uploads: 2 files
Request Type: Registration, Roles

I approve Damien Challen's registration, roles and have verified the uploaded files

cancel return reject approve

▶ **Cancel** pending processing. Your home page will list the unprocessed data.
▶ **Return** this registration, roles to creator for data completion before processing.
▶ **Reject** this registration, roles to prevent this person from having their data updated.
▶ **Approve disabled.** This person has not completed all the mandatory requirements. Your only options are to return or reject the registration, roles.

2. Data

GENERAL Reviewed • Roles: NCIG Employee Only hide general -

Registration, Roles

Role	Admin Notes Since Last Submit
NCIG Employee Only	(notes)

Communicate To: Damien Challen
Communicate By: Email
Email: dchallen@pegasus.net.au

TRAINING Reviewed • 0 Training Courses show training +

FILES Reviewed • 2 Pending show files +

3. History

Date/Time	Status Set To	Status Set By	Comm	Comment
12 Mar 19 at 17:02	STARTED	Damien Challen		
12 Mar 19 at 17:04	SUBMITTED	Damien Challen		Submitted in portal
12 Mar 19 at 17:12	EDITED	Damien Challen		Opened for editing
12 Mar 19 at 17:12	SUBMITTED	Damien Challen		Submitted in portal

As a Pending Data editor, we can choose to see the changes made to the Role. This will be needed in order to reply to the person that had this Role in Pending Data, so that we can communicate the reason this Role is no longer valid.

Click on the green (notes) to see the changes made to this Role.

This Role has had a new mandatory competency added to it. The competency *High Risk Work.Licence.EWP – Elevated Work Platform*, is now an extra component of this Role.

Site: NCIG edit

Note# 4594102.1 Version Date: 12 Mar 19 17:22 Role/Task Requirements Change

Created By: Damien Challen
Authorised By: damien challen
Scope: NCIG

Action: Role/Task Requirements Change
Lookup Id: 12588 (Role)
System Information: Requirements changed of Role 'NCIG Employee Only':

- Added new mandatory competency requirements:
 - High Risk Work.Licence.EWP - Elevated Work Platform

Action Date: 12 Mar 19 17:22
Comment: changed to add extra high risk qualification

The only option we have is to return this to the Portal for the extra file to be uploaded for this person. Use the information gathered from the Admin notes, to give the reason in the explanation section as to why this role is not being approved. This will send an email to the person that submitted this Role explaining why.

NOTE: Rejecting the role will completely cancel this application.

Process Registration, Roles for Damien Challen

- ▶ Please review and approve this person's registration, roles.
- ▶ Each file should be opened and checked to ensure it matches the requirements.

1. Summary

Person:	Damien Challen
Cardholder Id:	918338
Date of Birth:	27 Jun 1975
Company:	Pegasus Management Pty. Limited
Uploads:	2 files
Request Type:	Registration, Roles

I approve Damien Challen's registration, roles and have verified the uploaded files

cancel **return** **reject** **approve**

- ▶ **Cancel** pending processing. Your home page will list the unprocessed data.
- ▶ Please explain **why this card print should be returned**.
Your explanation will be visible to users from this person's company.

The Role has changed since this was submitted. You now need to upload an additional document - High Risk Work License EWP - Elevated Work Platform

apply

This will then remove this application from Pending Data.