User Guide

ROLES | Creating Site Roles

Configuration of Site Roles

The following instructions are for configuring Site Roles using the new Role Consolidation update for Onsite Track Easy.

Roles allow you to group any number of competencies under one heading, defining the requirement to be met by cardholders to qualify for that title. Roles make it easier for reporting and tracking of competences grouped against a cardholder.
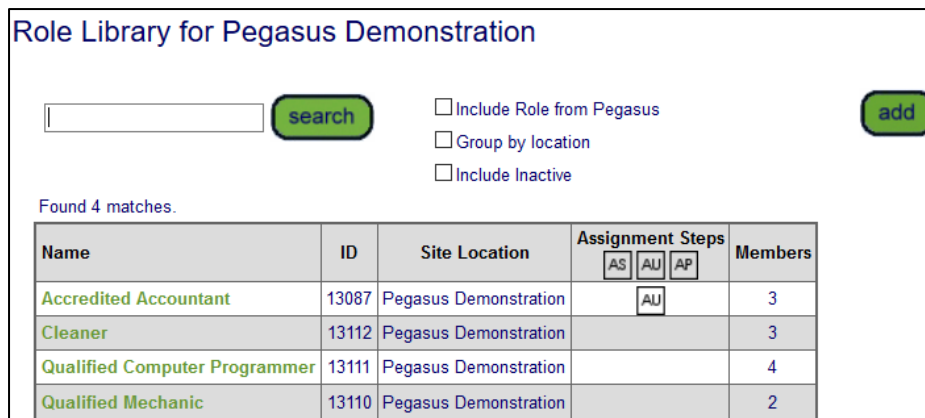
Step 1 – Adding a Role

Click Compliance > Role Library.

Step 2 - Search

Click "search" to do a blanket search of all roles listed at site.

This brings up the list of Roles at our demonstration site.

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Step 3 – Adding a Role

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

We wish to create a new administrator worker Role. Start this by clicking "add" to start the Add New Role process.

Give the new Role a relevant name and description. We have chosen "Administration Team Leader".

Enter relevant description. This aids other users understanding the detail of the Role.

Location defaults to the Site level, you can change this here if its for a specific site location. Roles are visible across all locations, but for ease of searching, a specific location can be chosen.

Work scope is also an optional selection. This option also makes it easier when searching for Roles.

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.

Step 4 – Assignment Settings

Assignment settings are relating to how you wish to manage the Role. These are optional. 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.

Step 5 – Saving the Role

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