Role Consolidation and Configuring Roles for Portals User Guide

V14/03/2019 1.4

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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.

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.

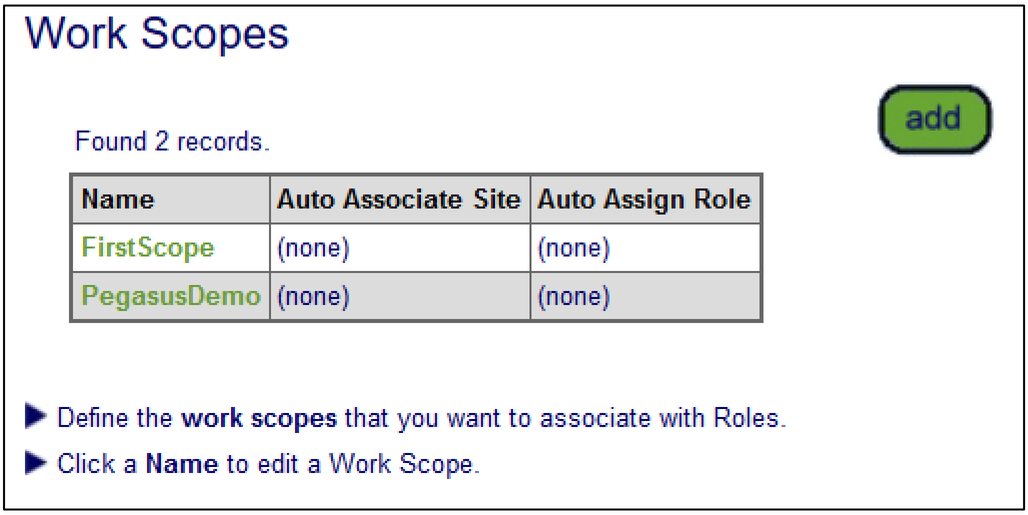
Step 1 – Viewing Work Scopes

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



Work Scopes

add

Found 2 records.

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

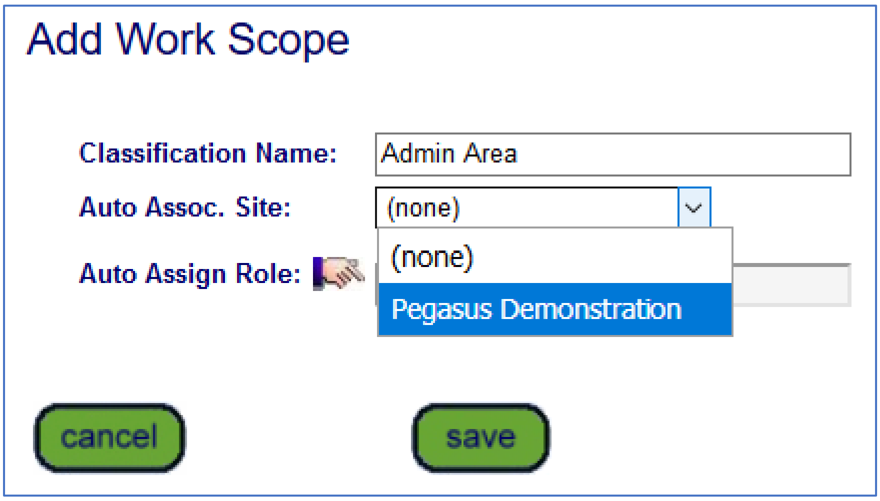
▶ Define the **work scopes** that you want to associate with Roles.

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

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.

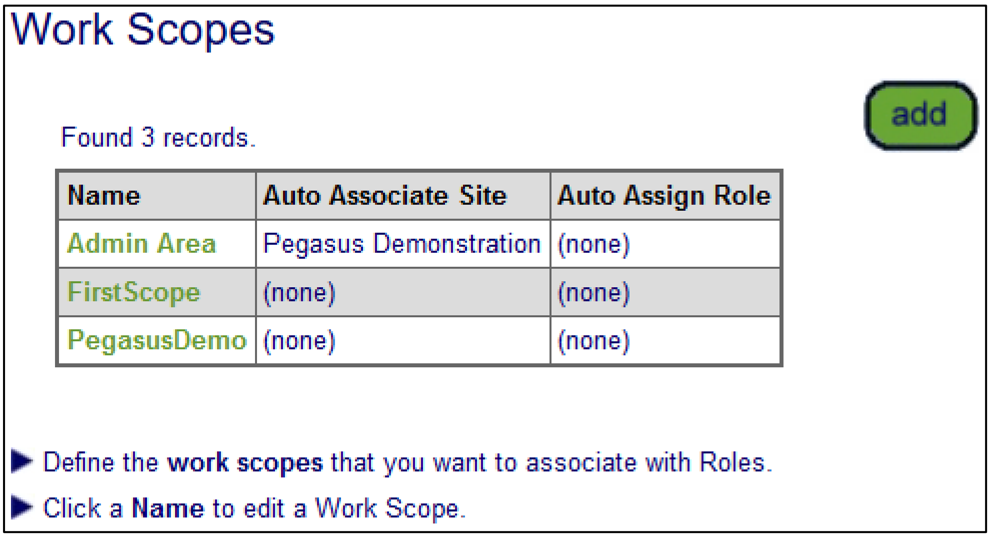


In this example we are creating a new scope for an **Admin Area** location, as it currently does not have one called that.

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.

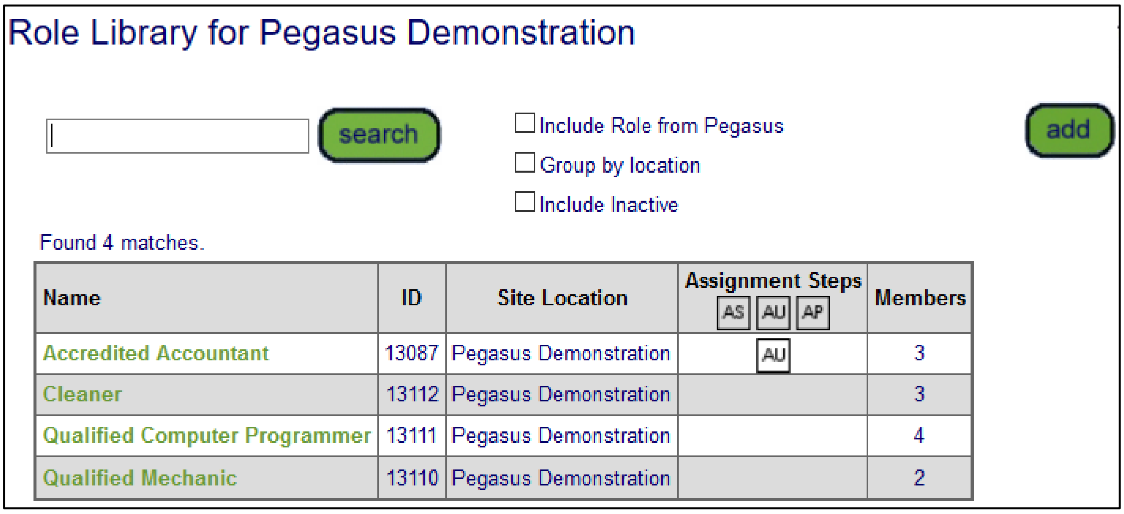


Now the scope – **Admin Area** – exists, we can now create a Role that will link to this Work Scope.

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.



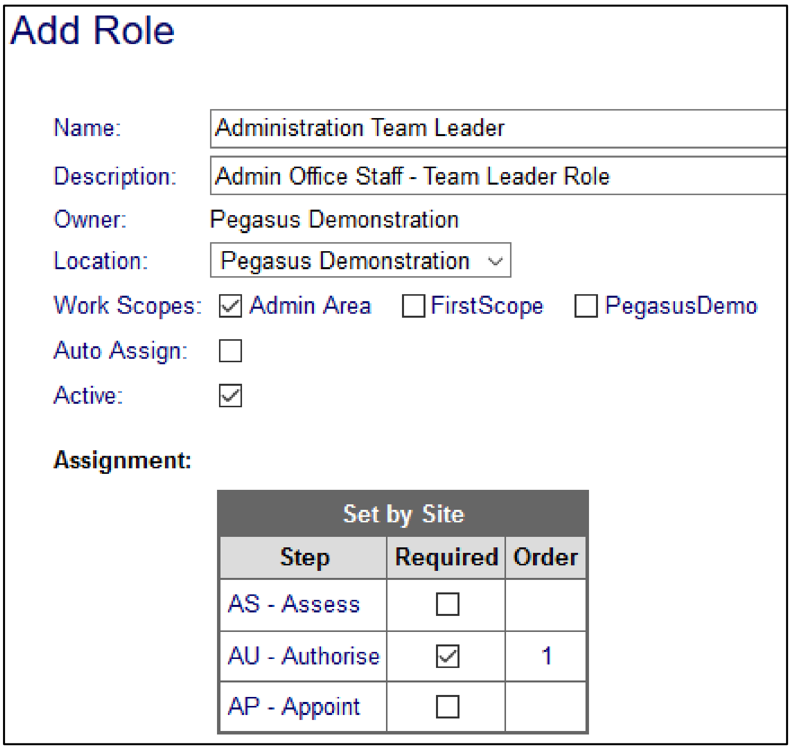
Name	ID	Site Location	Assignment Steps AS AU AP	Members
Accredited Accountant	13087	Pegasus Demonstration	AU	3
Cleaner	13112	Pegasus Demonstration		3
Qualified Computer Programmer	13111	Pegasus Demonstration		4
Qualified Mechanic	13110	Pegasus Demonstration		2

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.



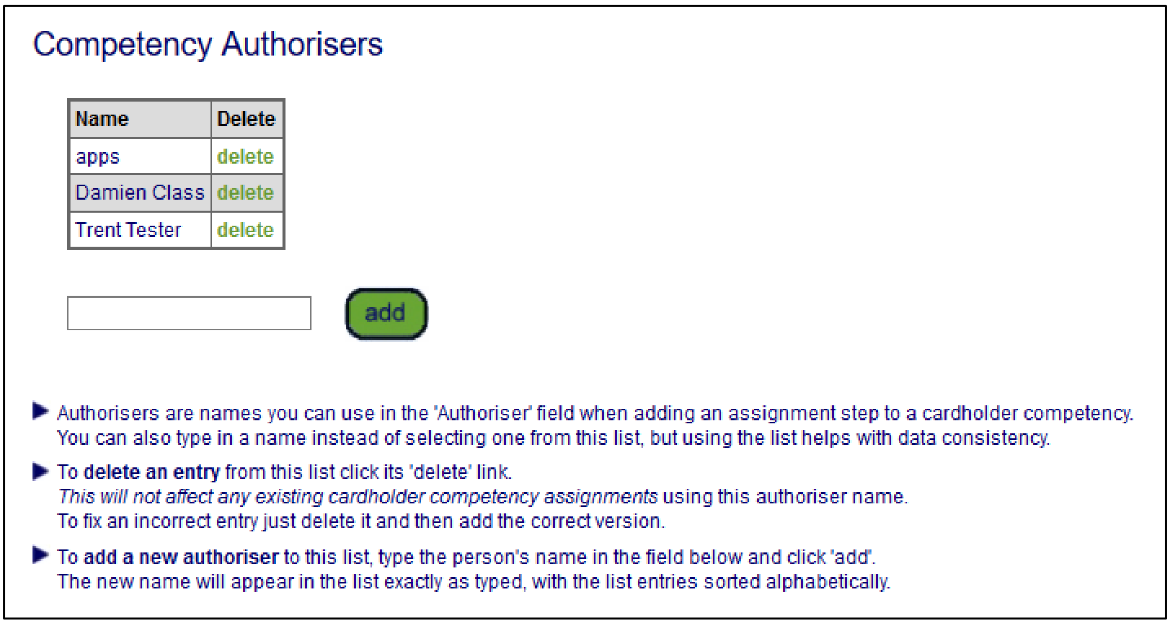
Location defaults to the Site level, you can change this here if its for a specific site location.
If we choose to “Auto Assign”, everyone at site will have this Role applied to them. Its not necessary, but there might be a valid reason you wish to assign a Role to all people at site. (Example: A site-based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

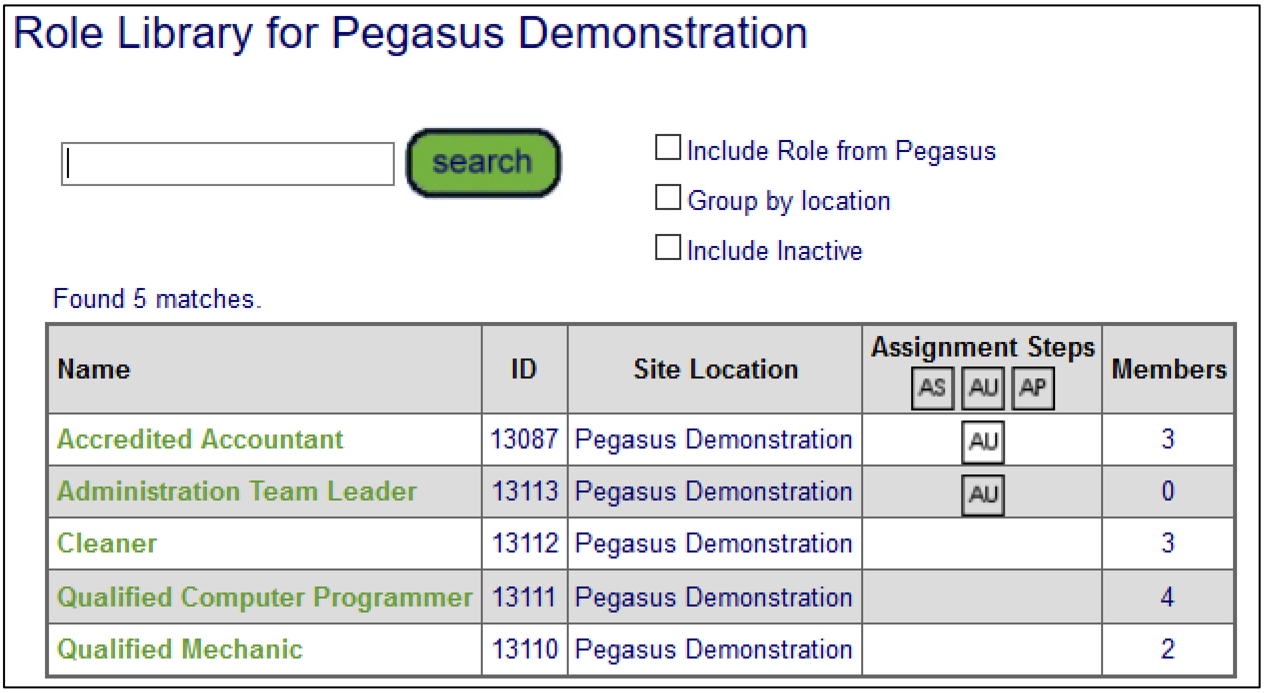
AU – Authorise - If this competency requires an authoriser to sign off first, tick this box. Required authorisers are listed under **Compliance > Competency Authorisers**



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.



Role Library for Pegasus Demonstration

search

☐ Include Role from Pegasus
☐ Group by location
☐ Include Inactive

Found 5 matches.

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.

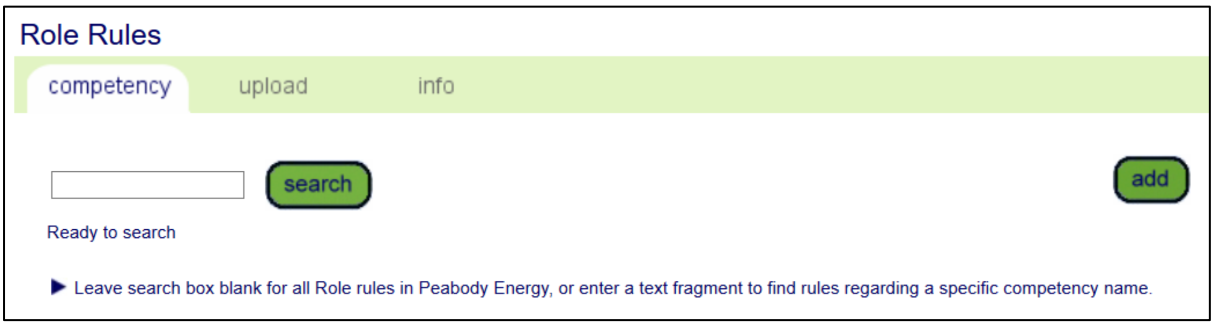
Part 2 - Making life easier using Role Rules.

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.

Click Compliance > Role > Rules

Role Rules - Competency

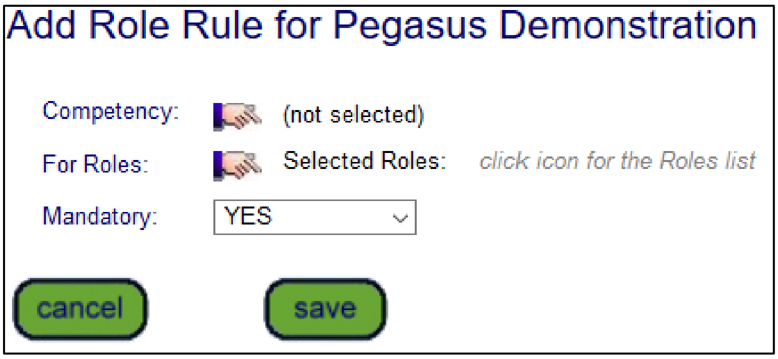
When opening, this page defaults to the Competency page. Clicking the “search” button will do a blank search to see any that have been created.



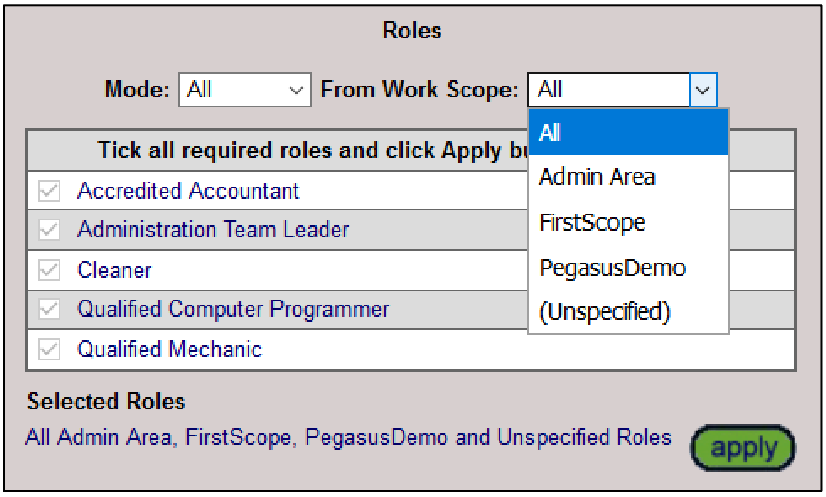
As none currently exist, we will click on “add”.

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.

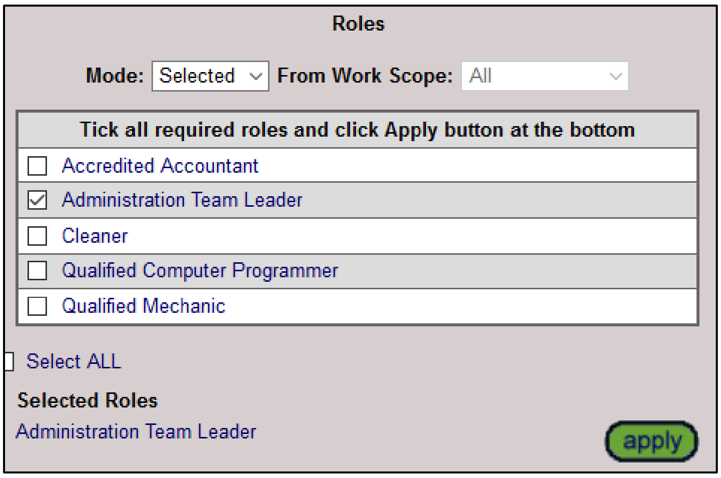


We can see that in the new screen that appears all available site Roles appears. We can see that our Work Scope that we created earlier, is now visible and selectable.

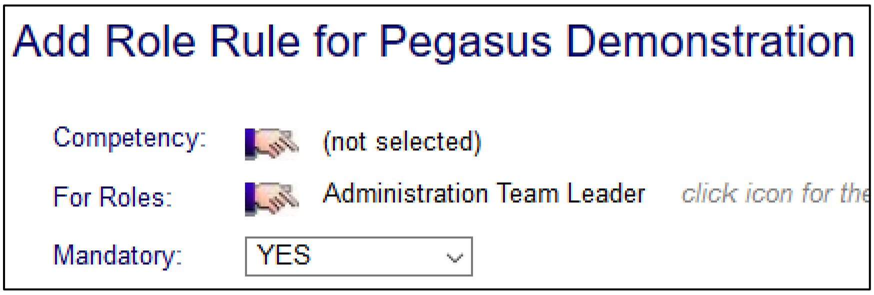


We could choose the Admin Area Work Scope. We can see that the Administration Team Leader Role that has been assigned that Work Scope is visible and selected. This shows the power of the Work Scope feature when managing Roles at a Site. If you had hundreds of Roles, this would take some time to scroll 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.

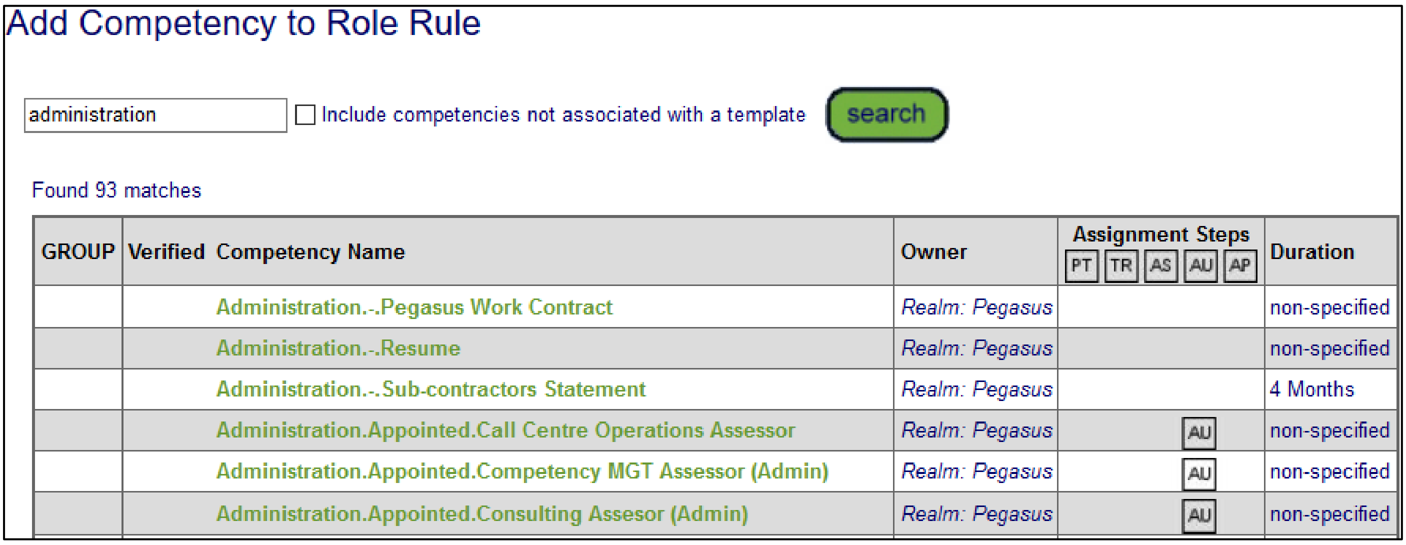
For our example, we only wish to manage the one Role itself. Choose **Mode: Selected** and then tick Administration Team Leader, by itself and click "apply".



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

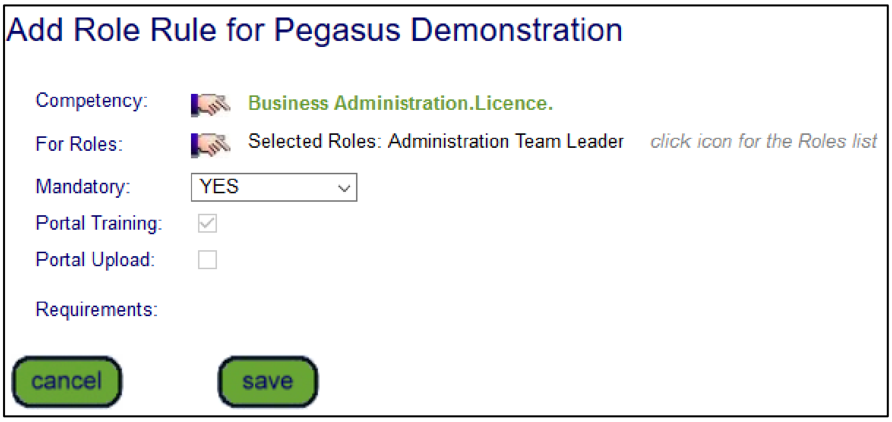


This brings up a new screen where we can search for a competency to add to our Role. Using the subject “administration” and clicking search, produces our results.



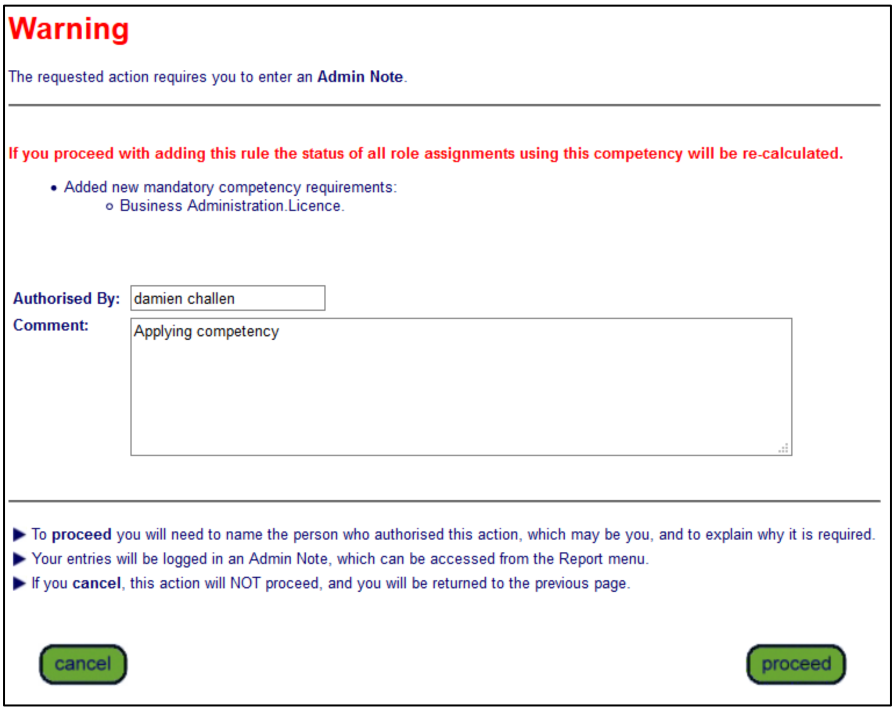
GROUP	Verified	Competency Name	Owner	Assignment Steps PT TR AS AU AP	Duration
		Administration.-.Pegasus Work Contract	Realm: Pegasus		non-specified
		Administration.-.Resume	Realm: Pegasus		non-specified
		Administration.-.Sub-contractors Statement	Realm: Pegasus		4 Months
		Administration.Appointed.Call 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 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.

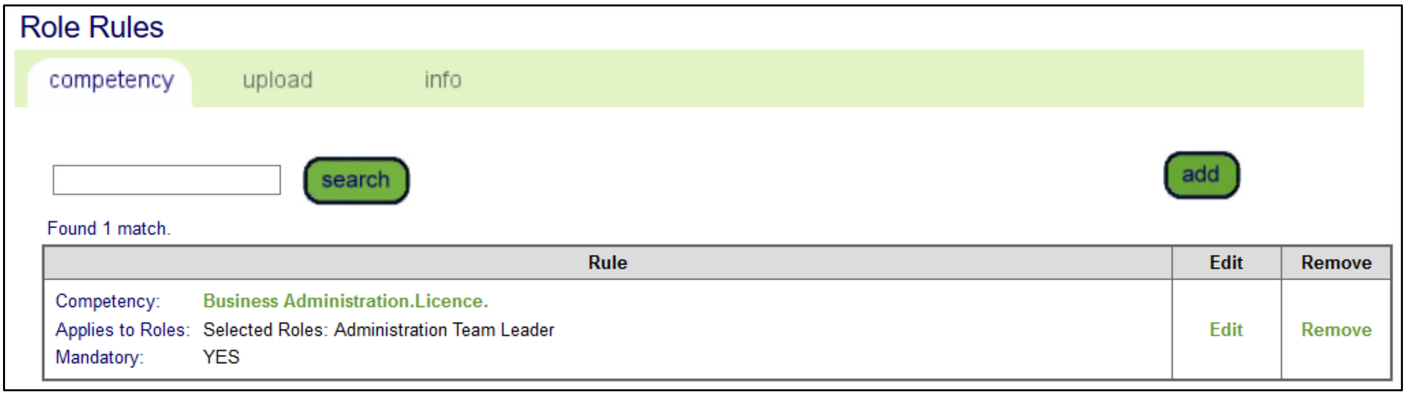


By default, the Mandatory option for this competency is applied. This can be changed to YES/NO/CONDITIONAL.
NOTE: Conditional is not currently in use, but added for future work.

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

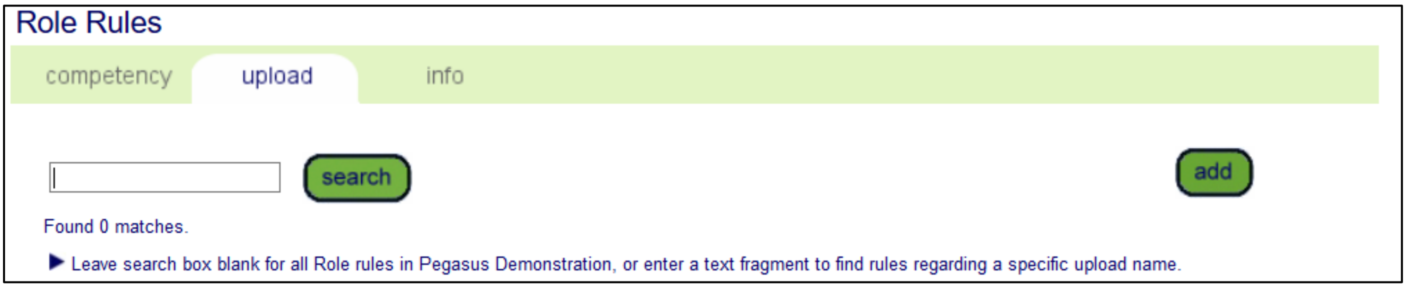


This will apply the competency to the Role and we now have a Role Rule.



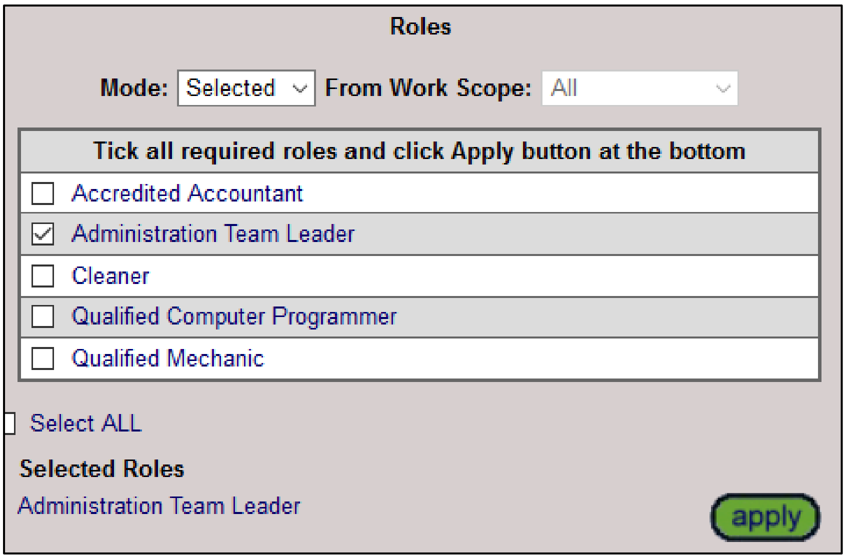
Role Rules – Upload

Similar to the previous Competency section, this allows a base upload requirement that can be applied to multiple Roles. For this example, click the “add” button to create a new one.



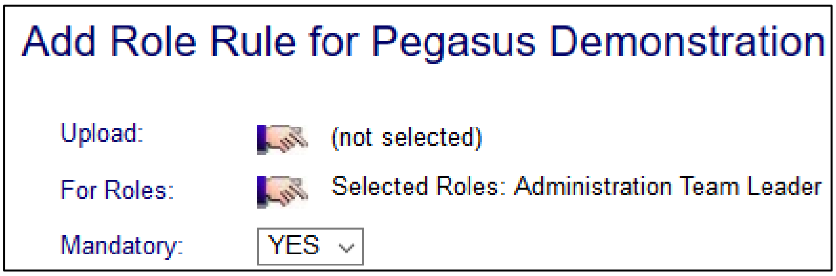
This will take us to a new screen where we are required to choose the Role we wish to have this rule applied to.

Choose the “For Roles” hand icon first. This will open the Role selection Screen again and select our Administration Team Leader Role from before. Select it and then press “apply”.

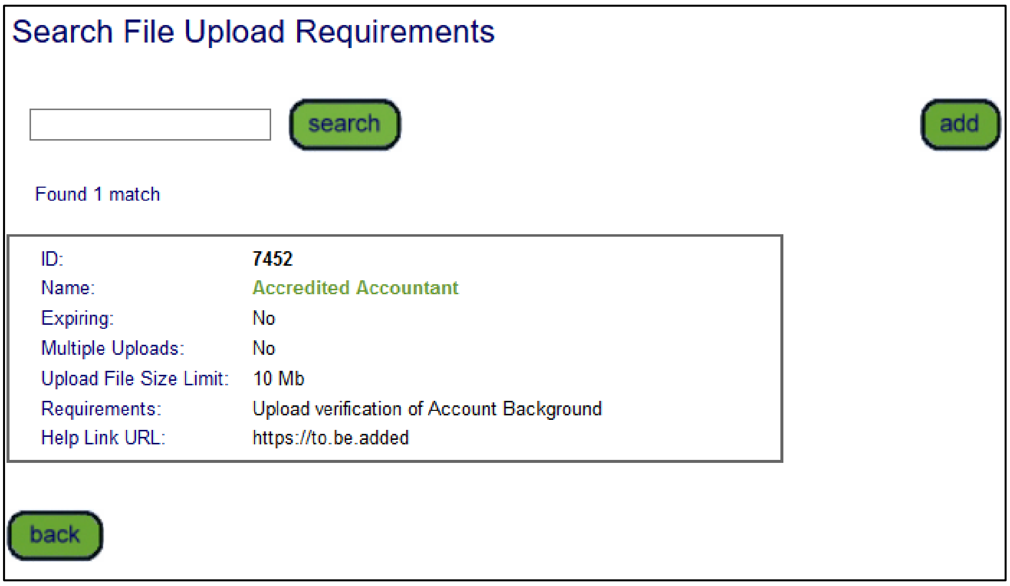


Once selected, press “apply”.

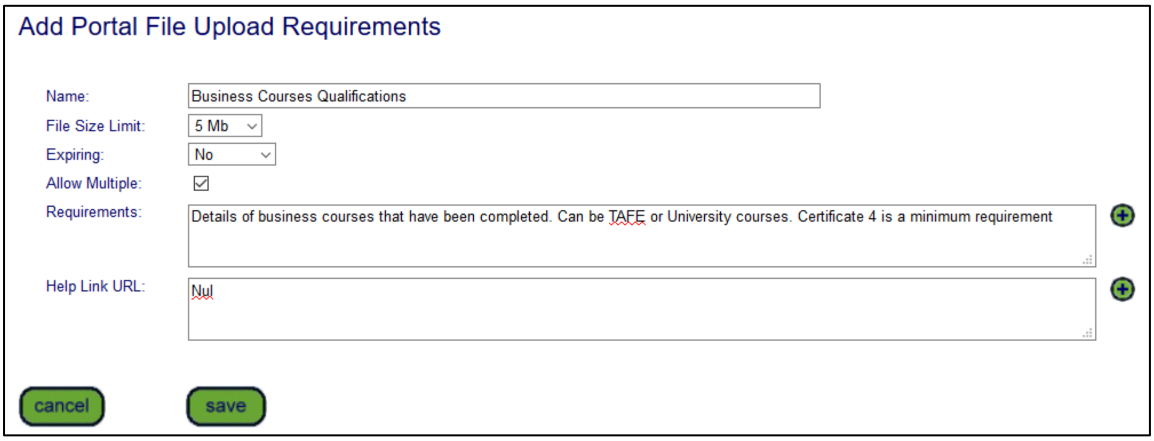
Now want to create a new Upload requirement. Click the hand icon next to the “Upload” option.



We will see the familiar search screen. Press search to see any that have been previously creted. One has been created previously for an Accountant Role. Those file requiremets are not related to our Administration Team Leader role, so we will create a new one. Click “add”.

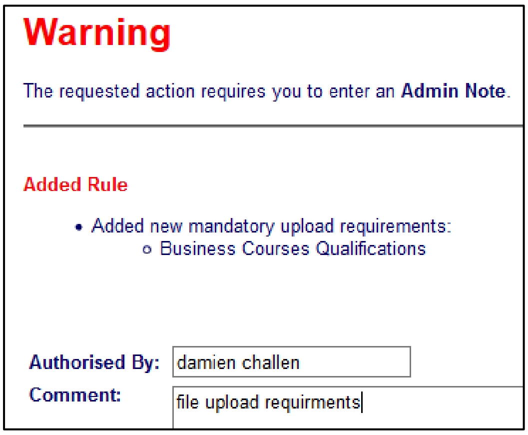


This screen is where we define the requirements for any uploads needed against this competency in the Portal.

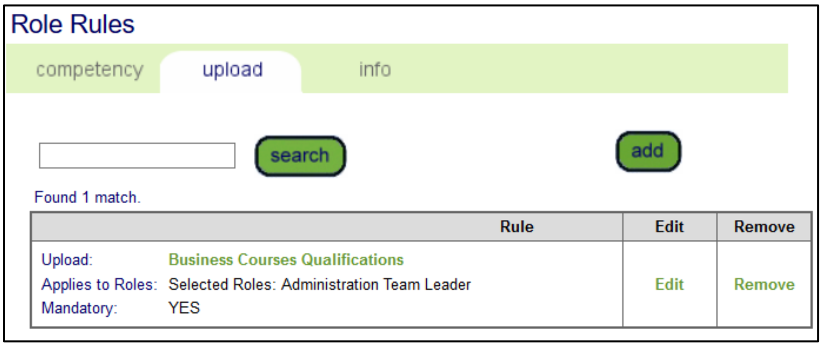


Define and press “save”. This will then create this Role Rule for a File Upload against this Administration Team Leader Role.

Press”save” again to keep this setting. This will produce another Admin Note, in order to commit these changes. Note that the added rule states what have been added, a new mandatory upload requirement. Enter in the required infromation and then save to apply.

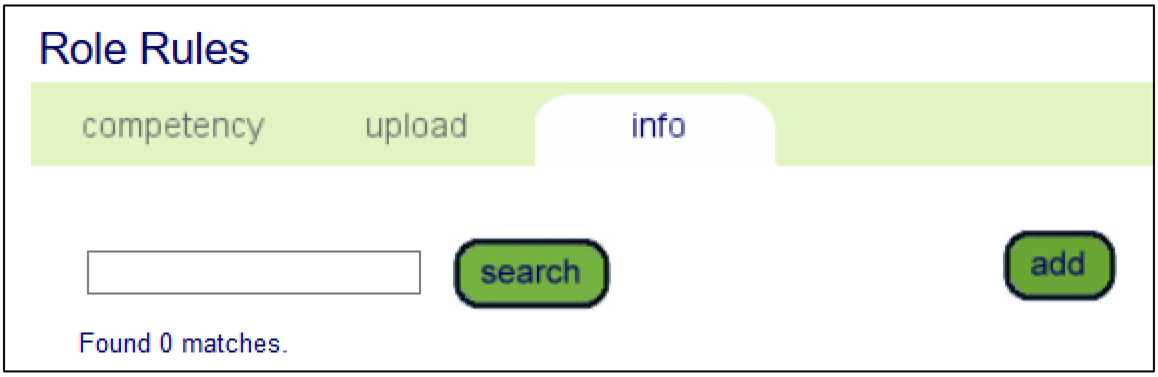


And now we have a Upload Role Rule in place.

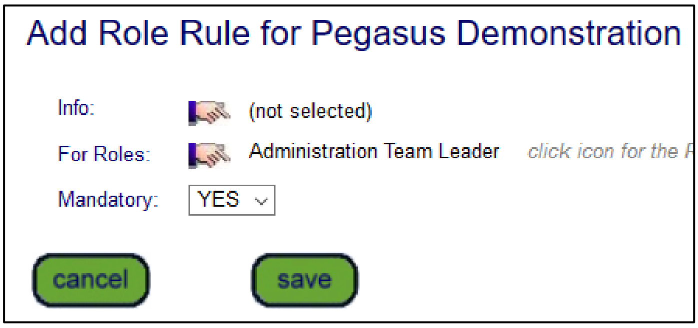


Role Rules – Info

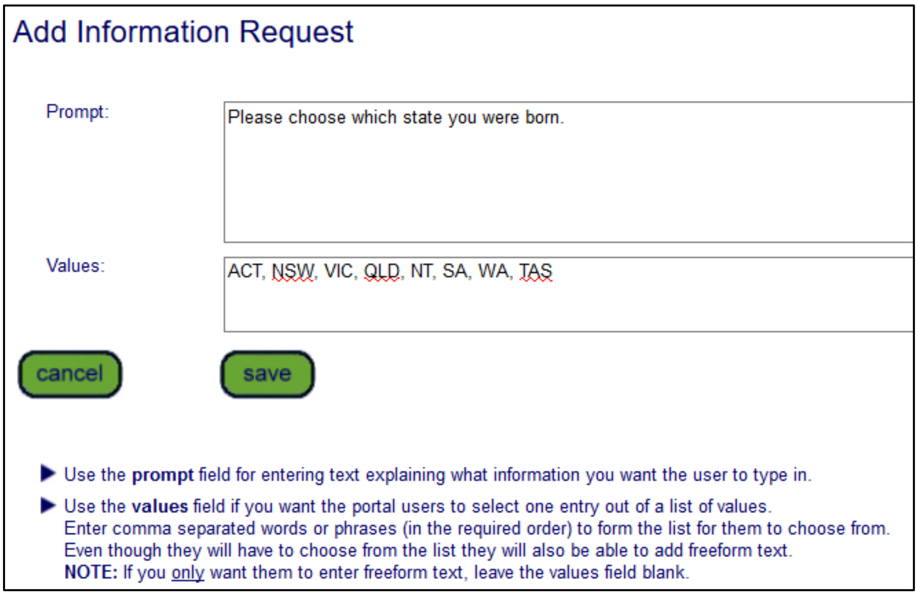
Under the Info Role Rules we can create an Information (also called Data Requests) Role Rule. These can be mandatory questions that are needed to be answered as part of applying for the related Role in the Portal. Create a new one by pressing the “add” button.



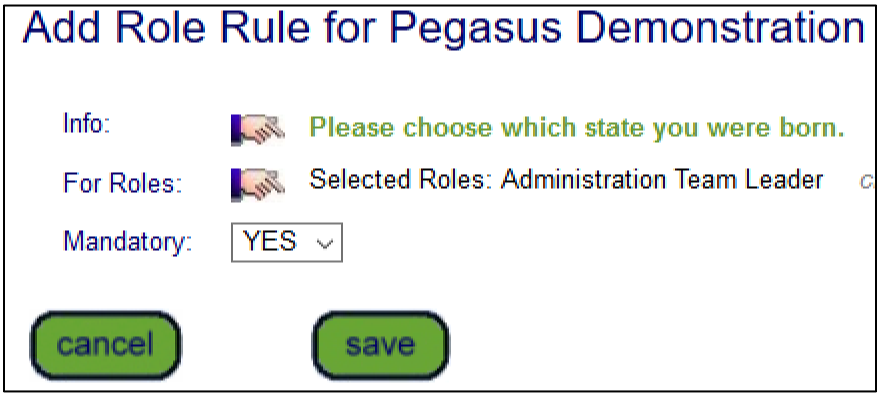
The same Role selection screen appears again. As per before, lets choose our Administration Team Leader Role once again for familiarity. Click the hand icon next to “For Roles” and choose our Administration Team Leader Role and click”apply”.



Click on the hand icon next to “Info”. This will bring up a screen to search again. We wish to create a new one, so click “add” and the below screen will appear. The Add Information Request screen will inform you of how to prepare questions for the person applying for the Role. Once the Rule is created, press “save”.

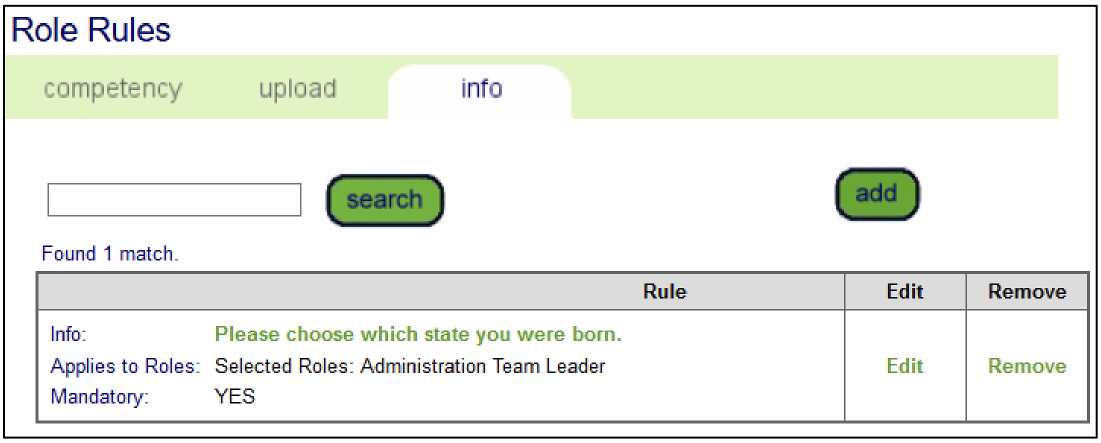


This will add that new Information Reques against this Role.



By default, the Mandatory option for this Info Role rules is applied. This can be changed to YES/NO/CONDITIONAL. Once again, click “save” to complete the modification and produce the Admin Note page to commit the changes. Enter in yor reason for the new note and press “save”.

The new Role Rule Info request has been created.



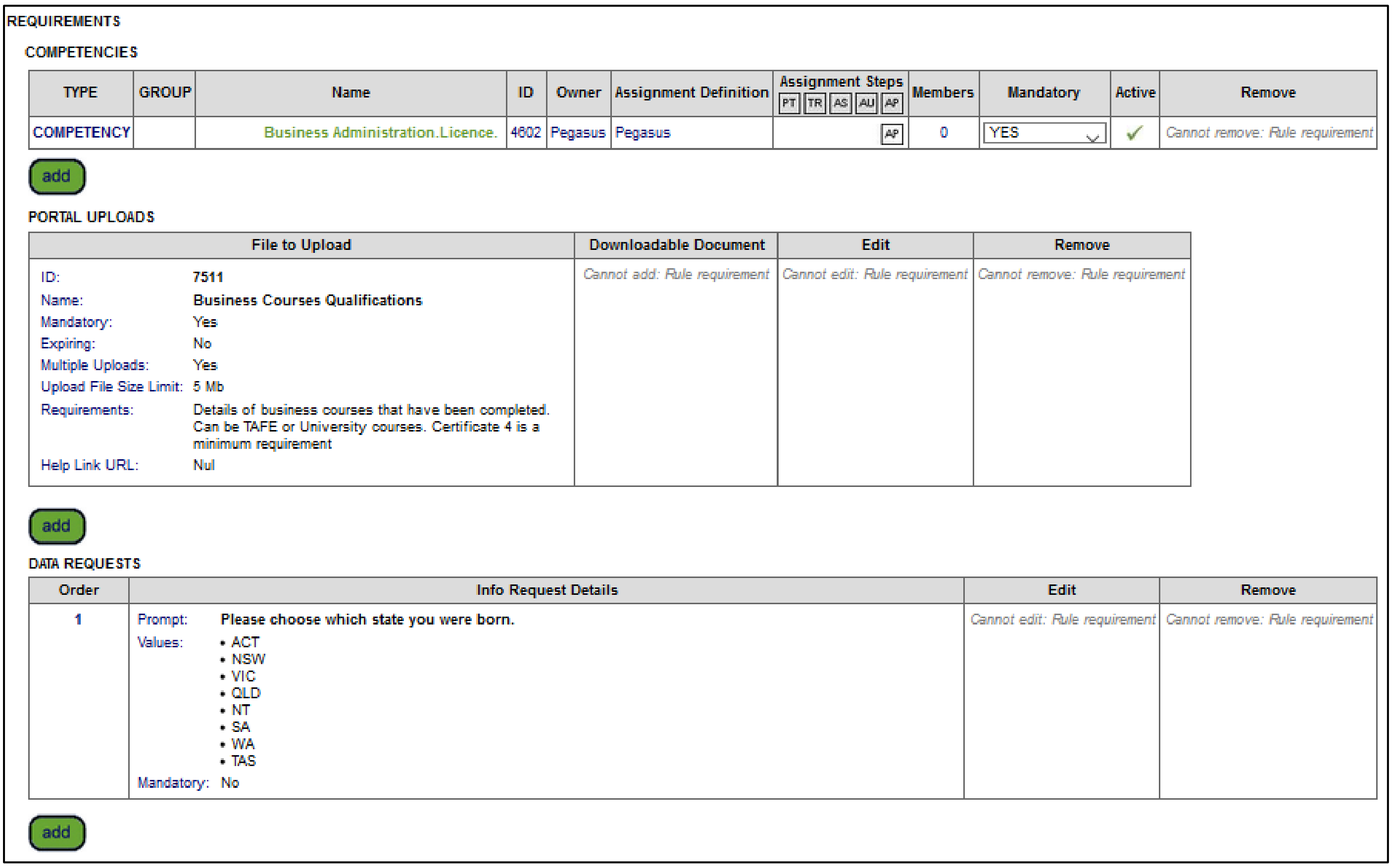
Part 3 - Viewing Role Rules against a Role

Now that we have created some role rules, there is now a shortcut to applying those Role Rules to other Roles. We also have the ability to look at the Role itself and see what has been applied to it.

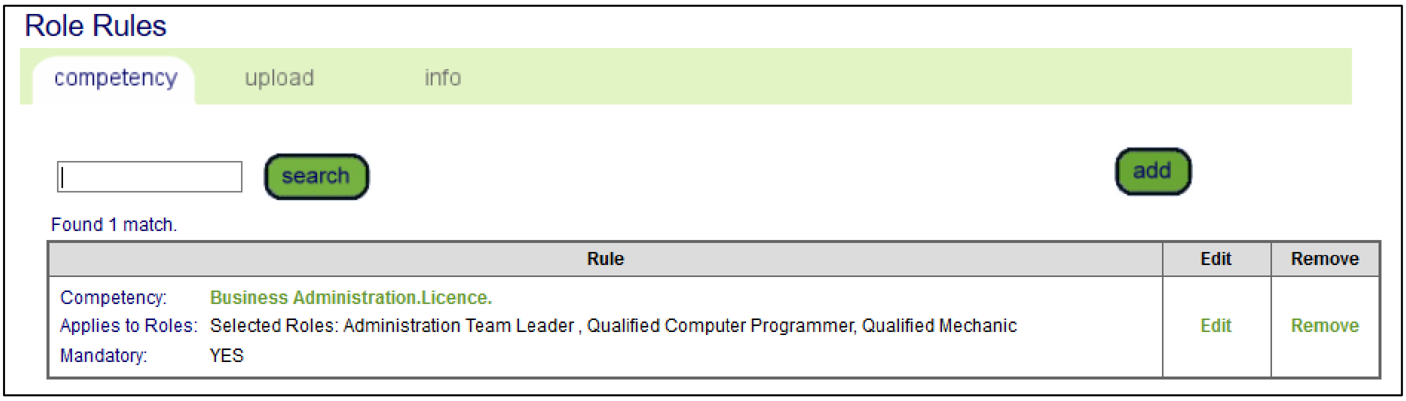
Viewing the full Role

Click on Compliance > Role > Role Library

Search for our Administration Team Leader Role and open it. It now shows the full three items we created for this Role. Adding a Competency to the new Role, a Portal Upload and a Data Request. With the Edit button at the bottom of the page, we can make changes if required to this Role if needed.



Additionally, we have the option to go to the Role Rules section and make bulk changes there against these new rules we created. Compliance > Role > Role Rules..



Running a search here will show the three items we created. With the “edit” button we can now add those rules to multiple Roles at site. This negates the need to create them every time, as well as making it easier to remove them from Roles if they change.

Previously, this was a manual process that either the site or Pegasus had to manage through the tool, **Setup > Cardholder Compliance > Role Management**. That tool still exists, however, its now only used for view access.