



# Role Consolidation and Configuring Roles for Portals User Guide

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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.

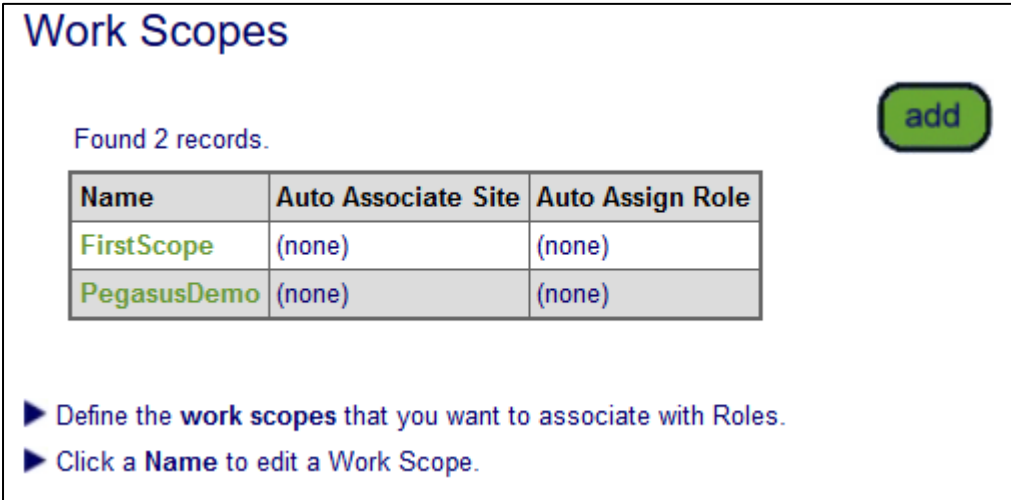
### Step 1 – Viewing Work Scopes

A work scope is an 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**

Found 2 records.

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

[add](#)

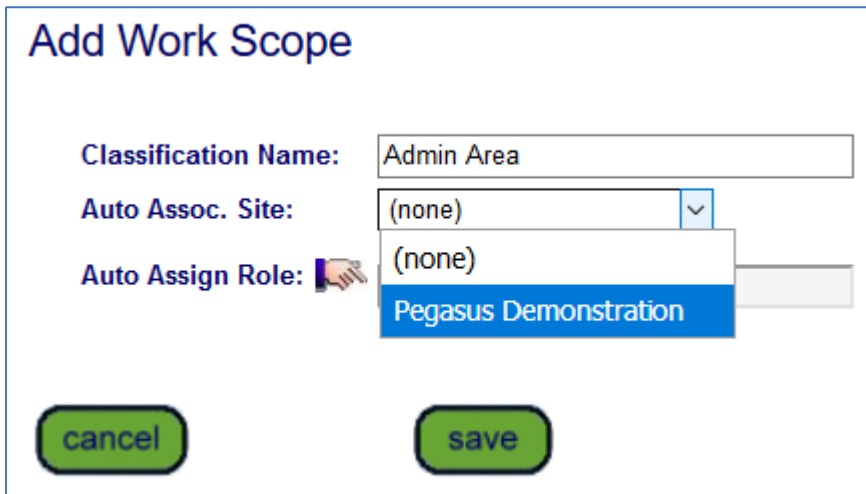
- ▶ Define the **work scopes** that you want to associate with Roles.
- ▶ Click a **Name** to edit a Work Scope.

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.



**Add Work Scope**

**Classification Name:**

**Auto Assoc. Site:**

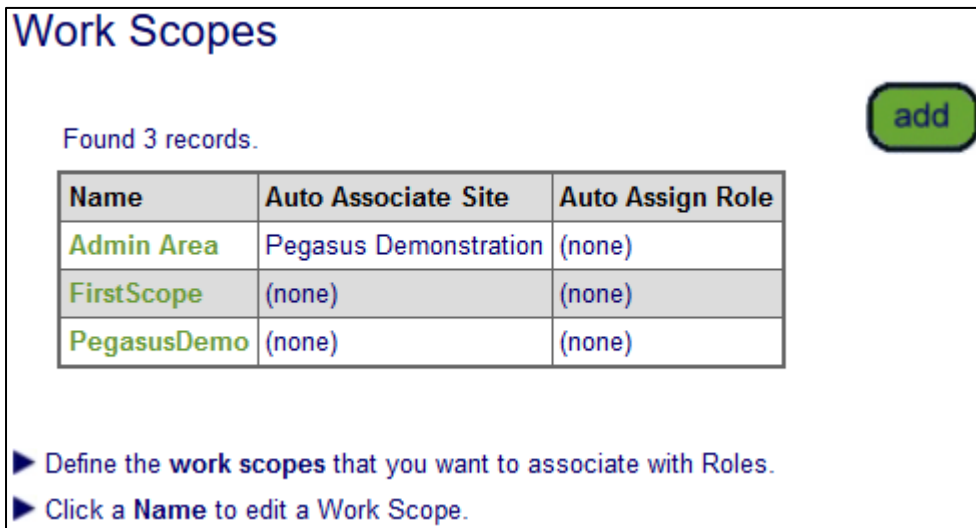
**Auto Assign Role:**

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

Found 3 records.

Name	Auto Associate Site	Auto Assign Role
<b>Admin Area</b>	Pegasus Demonstration	(none)
<b>FirstScope</b>	(none)	(none)
<b>PegasusDemo</b>	(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			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 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.

### Add Role

Name:

Description:

Owner: Pegasus Demonstration

Location:

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, 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**

### Competency Authorisers

Name	Delete
apps	<a href="#">delete</a>
Damien Class	<a href="#">delete</a>
Trent Tester	<a href="#">delete</a>

- ▶ 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 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

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

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.

### Role Rules

competency upload info

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 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.

The screenshot shows a form titled "Add Role Rule for Pegasus Demonstration". It contains the following fields and controls:

- Competency: (not selected)
- For Roles: Selected Roles: *click icon for the Roles list*
- Mandatory: YES (dropdown menu)
- cancel (button)
- save (button)

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.

The screenshot shows a "Roles" selection screen. At the top, there are two dropdown menus: "Mode: All" and "From Work Scope: All". Below these is a table with the following roles and their selection status:

Tick all required roles and click Apply button	
<input checked="" 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

A dropdown menu is open over the table, showing the following options: All, Admin Area, FirstScope, PegasusDemo, and (Unspecified). Below the table, there is a "Selected Roles" section with the text "All Admin Area, FirstScope, PegasusDemo and Unspecified Roles" and an "apply" button.

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”.

The screenshot shows the "Roles" selection screen with "Mode: Selected" and "From Work Scope: All". The table below shows the following roles and their selection status:

Tick all required roles and click Apply button at the bottom	
<input type="checkbox"/>	Accredited Accountant
<input checked="" type="checkbox"/>	Administration Team Leader
<input type="checkbox"/>	Cleaner
<input type="checkbox"/>	Qualified Computer Programmer
<input type="checkbox"/>	Qualified Mechanic

Below the table, there is a "Select ALL" checkbox, a "Selected Roles" section with the text "Administration Team Leader", and an "apply" button.

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

### Add Role Rule for Pegasus Demonstration

Competency: (not selected)

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

Mandatory:

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.

### Add Competency to Role Rule

Include competencies not associated with a template

Found 93 matches

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				<input type="checkbox"/>		non-specified
		Administration.Appointed.Competency MGT Assessor (Admin)	Realm: Pegasus				<input type="checkbox"/>		non-specified
		Administration.Appointed.Consulting Assesor (Admin)	Realm: Pegasus				<input type="checkbox"/>		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.

### 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:

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 completed in order to approve this Role Rule creation.

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

**Role Rules**

competency upload info

Found 1 match.

Rule	Edit	Remove
Competency: <b>Business Administration.Licence.</b> Applies to Roles: Selected Roles: Administration Team Leader Mandatory: YES	<a href="#">Edit</a>	<a href="#">Remove</a>

## 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.

**Role Rules**

competency **upload** info

Found 0 matches.

▶ Leave search box blank for all Role rules in Pegasus Demonstration, or enter a text fragment to find rules regarding a specific upload name.

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”.

**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 type="checkbox"/> Cleaner
<input type="checkbox"/> Qualified Computer Programmer
<input type="checkbox"/> Qualified Mechanic


Select ALL


**Selected Roles**  
Administration Team Leader

Once selected, press “apply”.

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

**Add Role Rule for Pegasus Demonstration**

Upload:  (not selected)

For Roles:  Selected Roles: Administration Team Leader

Mandatory:

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

**Search File Upload Requirements**

Found 1 match

ID:	7452
Name:	Accredited Accountant
Expiring:	No
Multiple Uploads:	No
Upload File Size Limit:	10 Mb
Requirements:	Upload verification of Account Background
Help Link URL:	https://to.be.added

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

### Add Portal File Upload Requirements

Name:

File Size Limit:

Expiring:

Allow Multiple:

Requirements:

Help Link URL:

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

### Add Role Rule for Pegasus Demonstration

Upload: Business Courses Qualifications

For Roles: Selected Roles: Administration Team Leader

Mandatory:

Requirements:

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 information and then save to apply.

### Warning

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

---

**Added Rule**

- Added new mandatory upload requirements:
  - Business Courses Qualifications

Authorised By:

Comment:

And now we have a Upload Role Rule in place.

### Role Rules

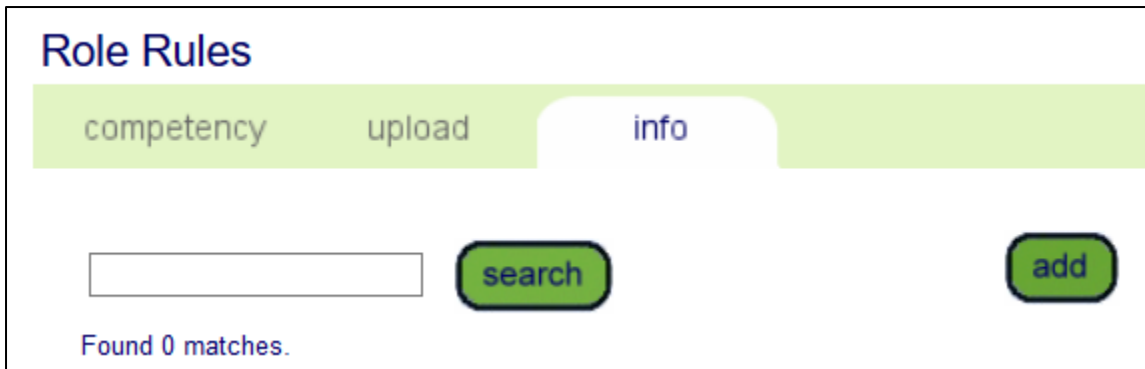
competency upload info

Found 1 match.

Rule	Edit	Remove
Upload: Business Courses Qualifications Applies to Roles: Selected Roles: Administration Team Leader Mandatory: YES	<a href="#">Edit</a>	<a href="#">Remove</a>

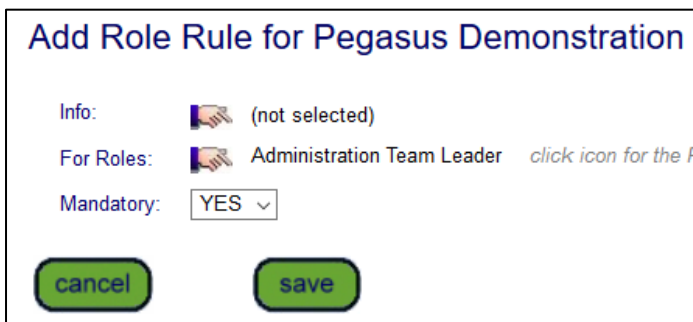
## Role Rules – Info

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 screenshot shows the 'Role Rules' interface with three tabs: 'competency', 'upload', and 'info'. The 'info' tab is currently selected. Below the tabs, there is a search bar, a 'search' button, and an 'add' button. The text 'Found 0 matches.' is displayed below the search bar.

The same Role selection screen appears again. As per before, let's 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”.

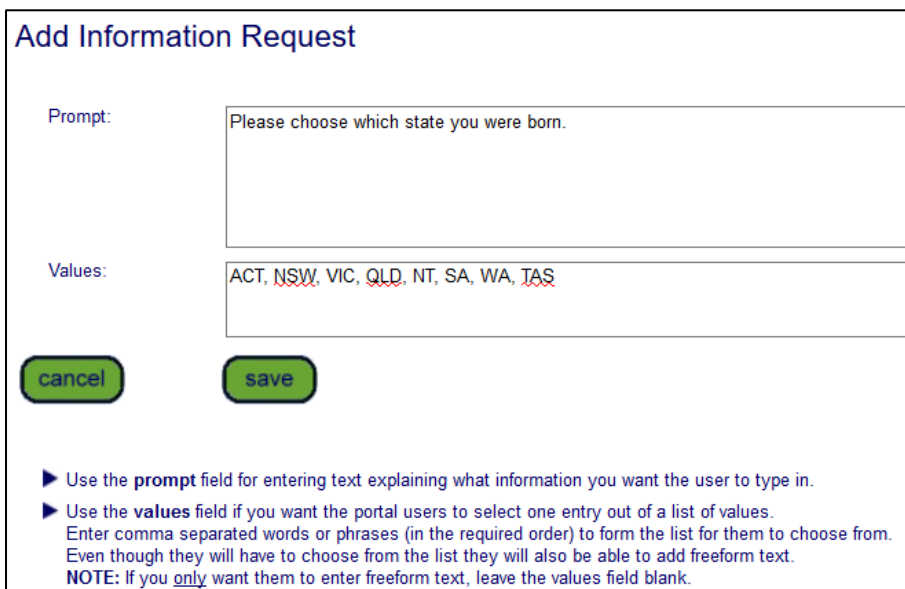


The screenshot shows the 'Add Role Rule for Pegasus Demonstration' form. It includes the following fields and options:

- Info:** (not selected) with a hand icon.
- For Roles:** Administration Team Leader with a hand icon and the text 'click icon for the P'.
- Mandatory:** YES (dropdown menu).

At the bottom, there are 'cancel' and 'save' buttons.

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”.



The screenshot shows the 'Add Information Request' form with the following details:


- Prompt:** Please choose which state you were born.
- Values:** ACT, NSW, VIC, QLD, NT, SA, WA, TAS


At the bottom, there are 'cancel' and 'save' buttons. Below the form, there are instructions:

- ▶ Use the **prompt** field for entering text explaining what information you want the user to type in.
- ▶ Use the **values** field if you want the portal users to select one entry out of a list of values. Enter comma separated words or phrases (in the required order) to form the list for them to choose from. Even though they will have to choose from the list they will also be able to add freeform text. **NOTE:** If you only want them to enter freeform text, leave the values field blank.

This will add that new Information Request against this Role.

## Add Role Rule for Pegasus Demonstration

Info:  Please choose which state you were born.

For Roles:  Selected Roles: Administration Team Leader

Mandatory: YES

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 your reason for the new note and press “save”.

### Warning

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

---

**Added Rule**

- Added new mandatory info requirements:
  - Please choose which state you were born.

Authorised By:

Comment:

The new Role Rule Info request has been created.

### Role Rules

competency upload **info**

Found 1 match.

Rule	Edit	Remove
Info: Please choose which state you were born. Applies to Roles: Selected Roles: Administration Team Leader Mandatory: YES	<a href="#">Edit</a>	<a href="#">Remove</a>

## 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.

**REQUIREMENTS**

**COMPETENCIES**

TYPE	GROUP	Name	ID	Owner	Assignment Definition	Assignment Steps					Members	Mandatory	Active	Remove
						PT	TR	AS	AU	AP				
COMPETENCY		Business Administration.Licence.	4802	Pegasus	Pegasus					AP	0	YES	✓	Cannot remove: Rule requirement

[add](#)

**PORTAL UPLOADS**

File to Upload	Downloadable Document	Edit	Remove
ID: 7511 Name: Business Courses Qualifications Mandatory: Yes Expiring: No Multiple Uploads: Yes Upload File Size Limit: 5 Mb Requirements: Details of business courses that have been completed. Can be TAFE or University courses. Certificate 4 is a minimum requirement Help Link URL: Nul	Cannot add: Rule requirement	Cannot edit: Rule requirement	Cannot remove: Rule requirement

[add](#)

**DATA REQUESTS**

Order	Info Request Details	Edit	Remove
1	Prompt: Please choose which state you were born. Values: <ul style="list-style-type: none"> <li>• ACT</li> <li>• NSW</li> <li>• VIC</li> <li>• QLD</li> <li>• NT</li> <li>• SA</li> <li>• WA</li> <li>• TAS</li> </ul> Mandatory: No	Cannot edit: Rule requirement	Cannot remove: Rule requirement

[add](#)

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..

**Role Rules**

competency
upload
info

search
add

Found 1 match.

Rule	Edit	Remove
Competency: Business Administration.Licence. Applies to Roles: Selected Roles: Administration Team Leader , Qualified Computer Programmer, Qualified Mechanic Mandatory: YES	<a href="#">Edit</a>	<a href="#">Remove</a>

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.