Holocentric

Manage Roles

Antoinette France - 2023-12-06 - People

How to create and manage roles in Holocentric Connect

Holocentric Connect administrators can create and assign new staff roles. A staff role can be a job title (e.g. human resources manager) or a broad indicator of responsibilities (e.g. office worker). Roles added to the web app can be:

- attached to specific policies, processes and documents
- assigned to specific staff members that have an account on the web app.

This article includes the following topics:

1. Create new roles
2. Edit role
3. Approve and publish role

1. Create new roles

1.1 Go to the **People** tab and access the **Roles** subtab.

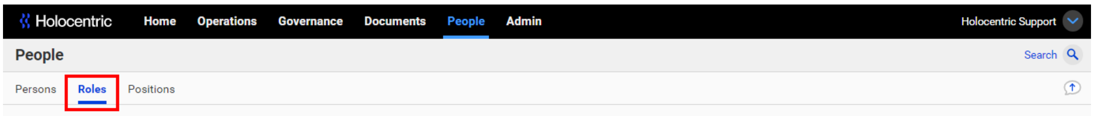
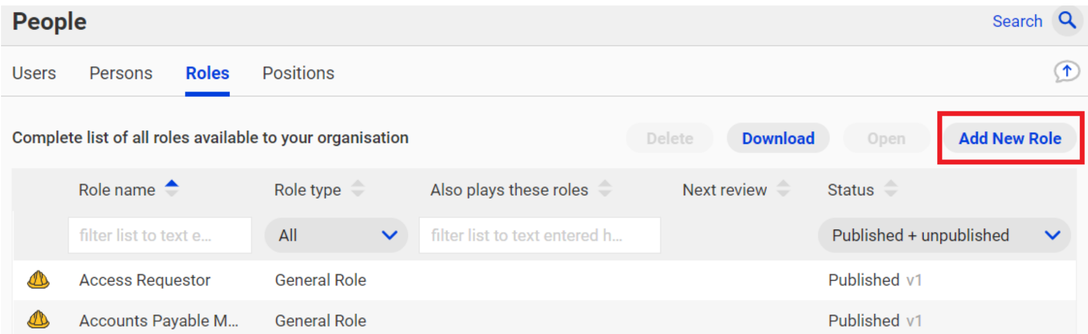
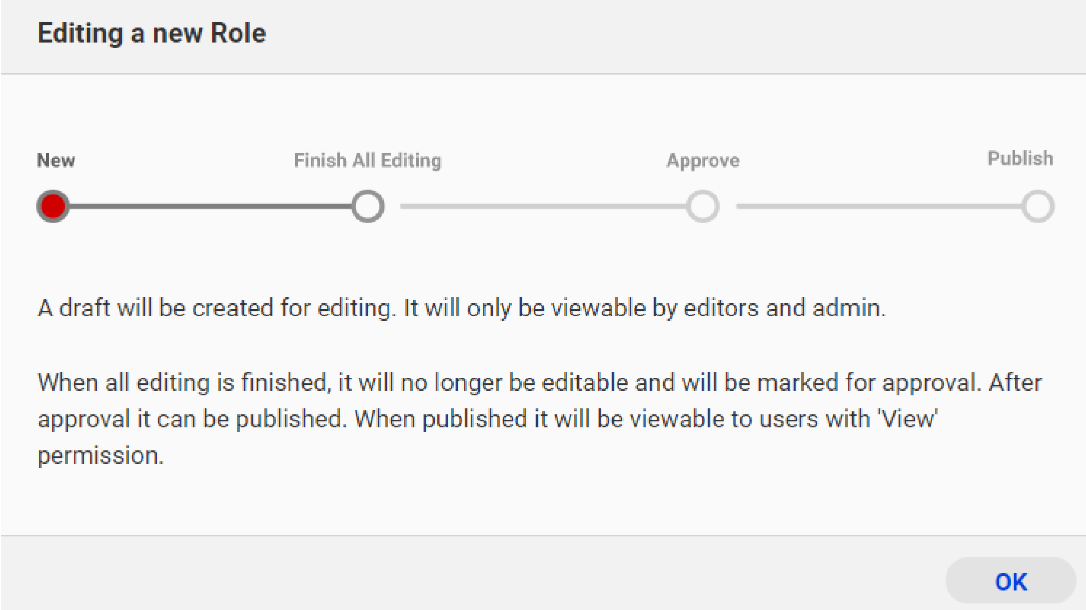


**Image is for illustrative purposes only. Menu bar options vary based on your permissions or organisation's subscription .*

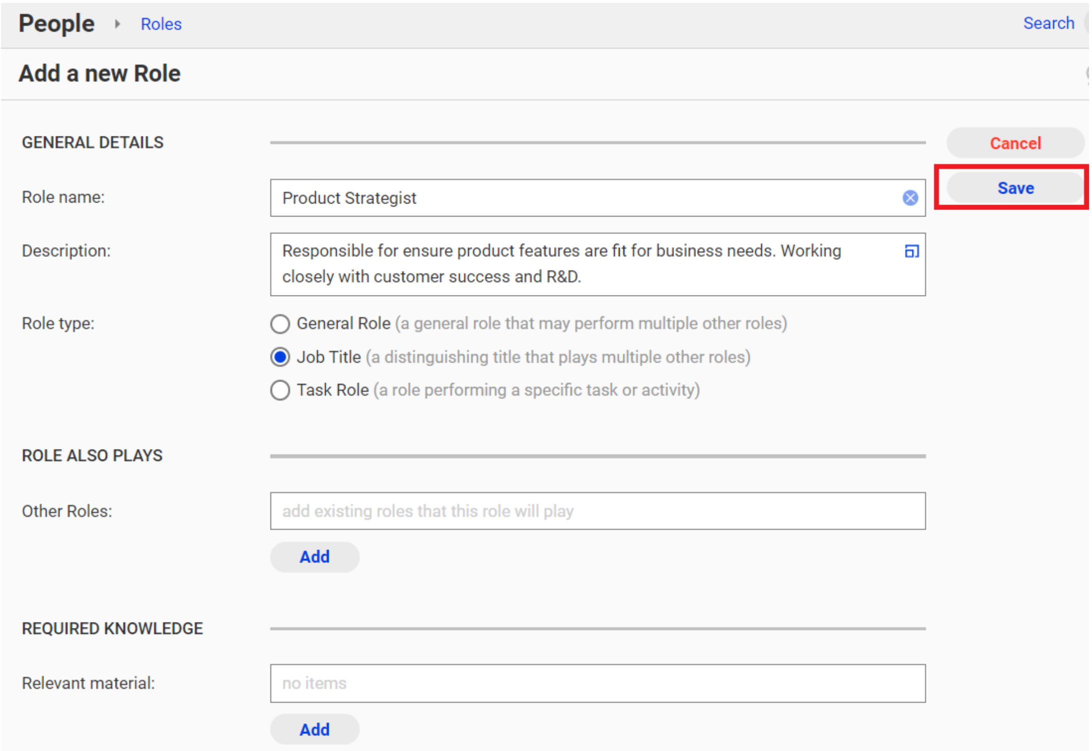
1.2 Click **Add New Role.**



1.3 A release management workflow appears. Click **OK** to start adding a role.



1.4 Enter information about the role and click **Save** when done.



Field	Description
Role name	The name of the role.
Description	Description of role and responsibilities.
Role type	The type of role.
Other roles	Other existing roles that the role will play.

Relevant material (for customers with attestation only)	Content items (e.g. policies) that are relevant to the role.
Keywords for 'Search'	Keywords that, when searched in Holocentric Connect, will make the item come up in search results.
Remove from view	Tick the box to hide the item. This will make the item only visible to users with Administrator permissions. Hidden items will: • not shown in lists • not shown as a related item on any other items. • not accessible by URL (will show item not found message) • not shown in any downloadable report.

2. Edit role

2.1 Go to the **People** tab and access the **Roles** subtab.

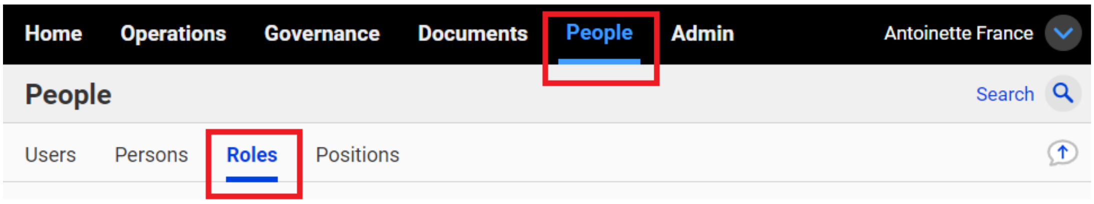
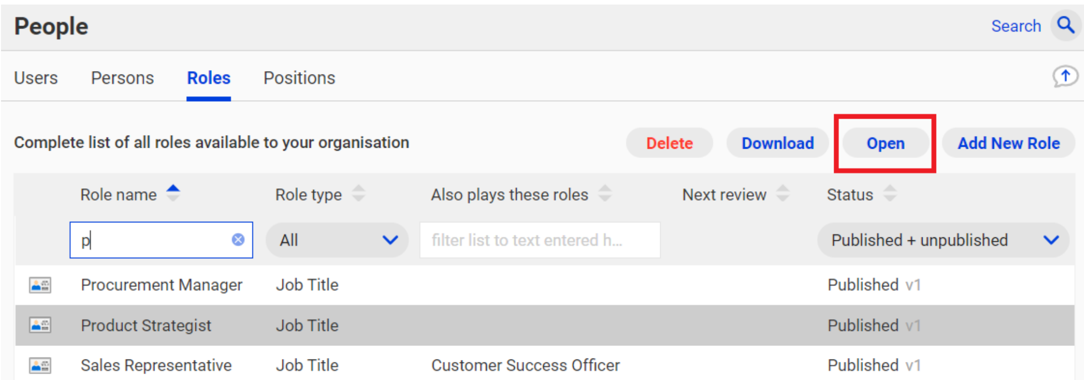
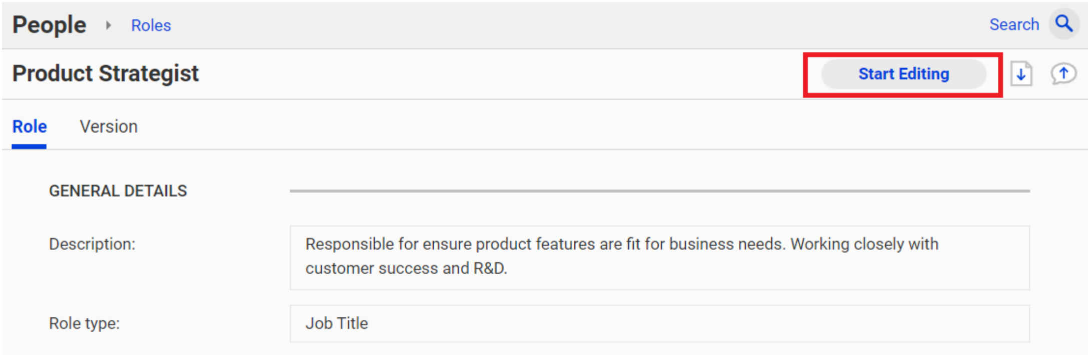


**Image is for illustrative purposes only. Menu bar options vary based on your permissions or organisation's subscription .*

2.2 Click on the role you wish to edit and click **Open .**

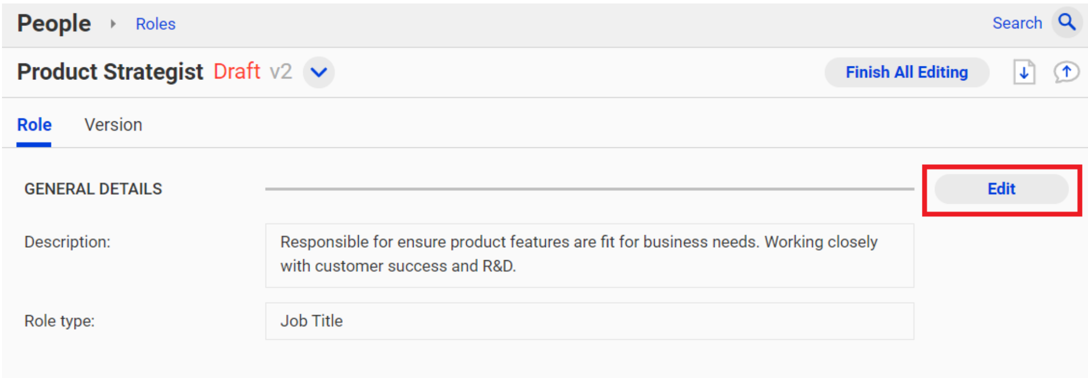


2.3 Click **Start Editing**, a release management workflow will appear. If the role is already marked 'Awaiting Approval' or 'Ready to Publish', open the role and revert to a draft so you can edit it.

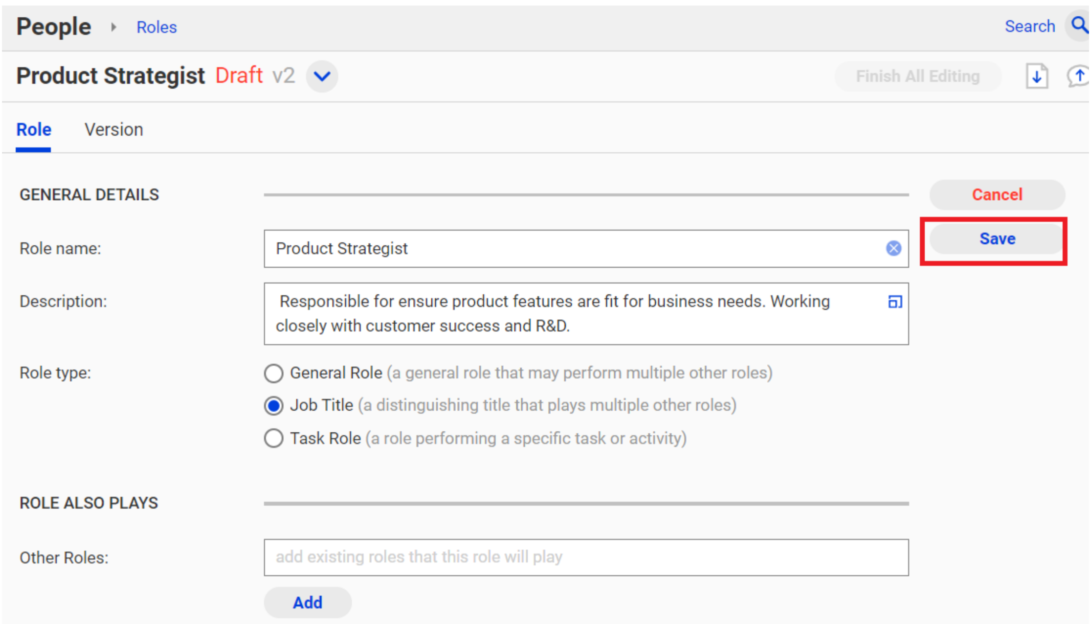


2.4 Click **OK**. This will mark the role as ‘Draft’.

2.5 Click **Edit**

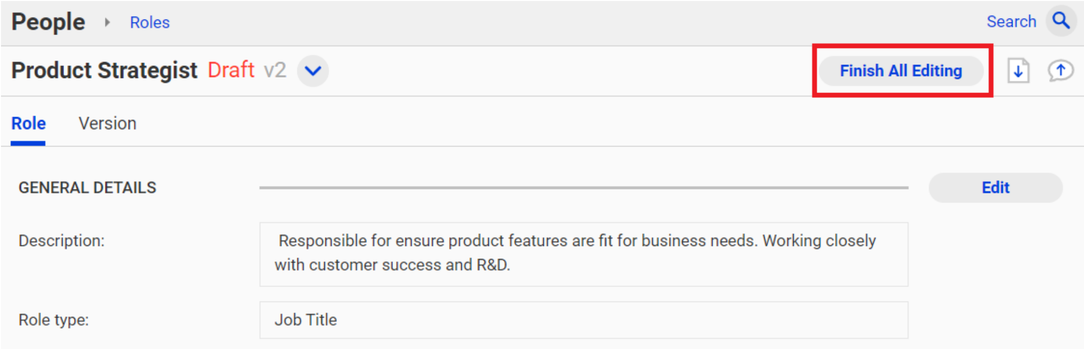


2.6 Make the necessary changes using the edit interface and click **Save** to commit the changes.

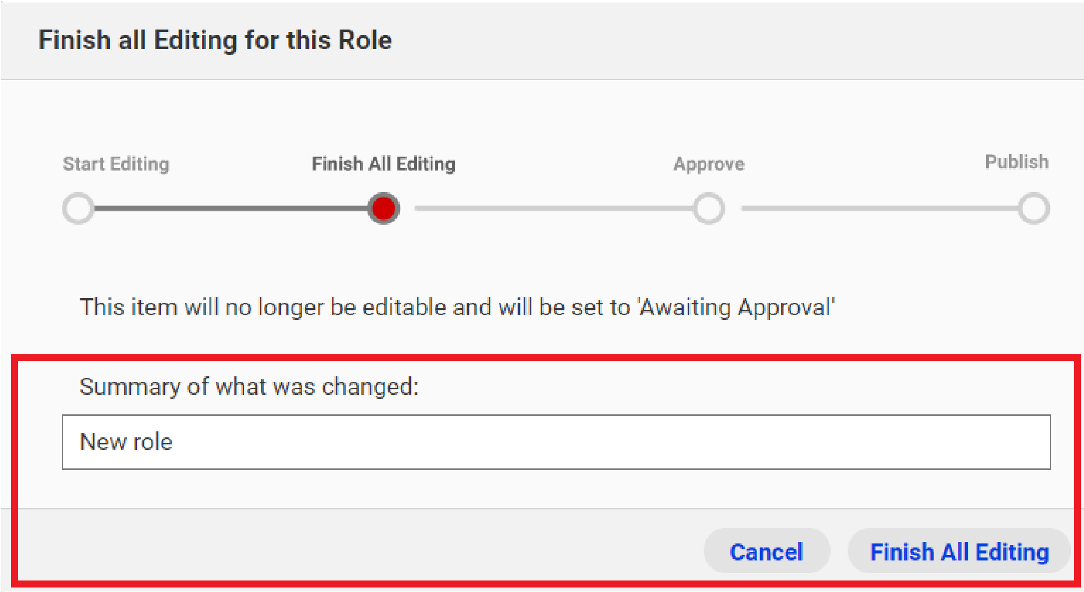


3. Approve and publish role

3.1 Open the draft role. Click **Finish All Editing**.

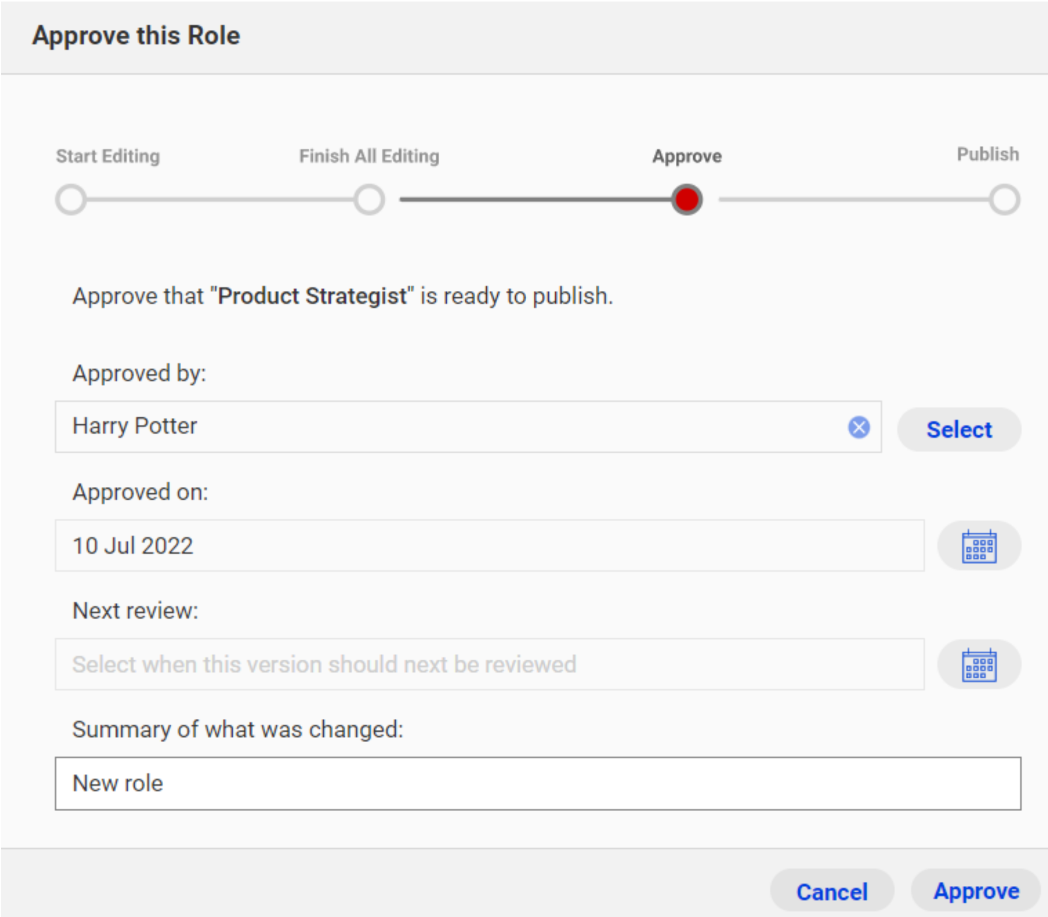


3.2 A release management workflow appears. Write a summary of what was added and click **Finish All Editing**. The new role is now ready to be approved.



3.3 If you agree with all the changes, approve the new role by clicking **Approval.** You will have the option to either approve the role or revert it to a draft (if you need to continue editing).

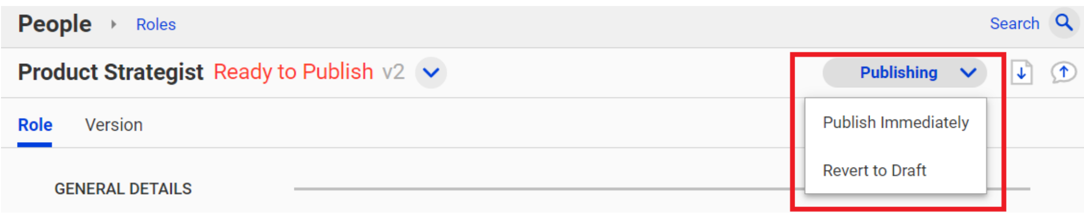
3.4 Click **Approve** and a release management workflow will appear. You can edit the summary of what was changed. You also have the option to select who approved the item, the date on which it was approved as well as the next review date. Click **Approve** to confirm changes. The role will now be marked ‘Ready to Publish’.



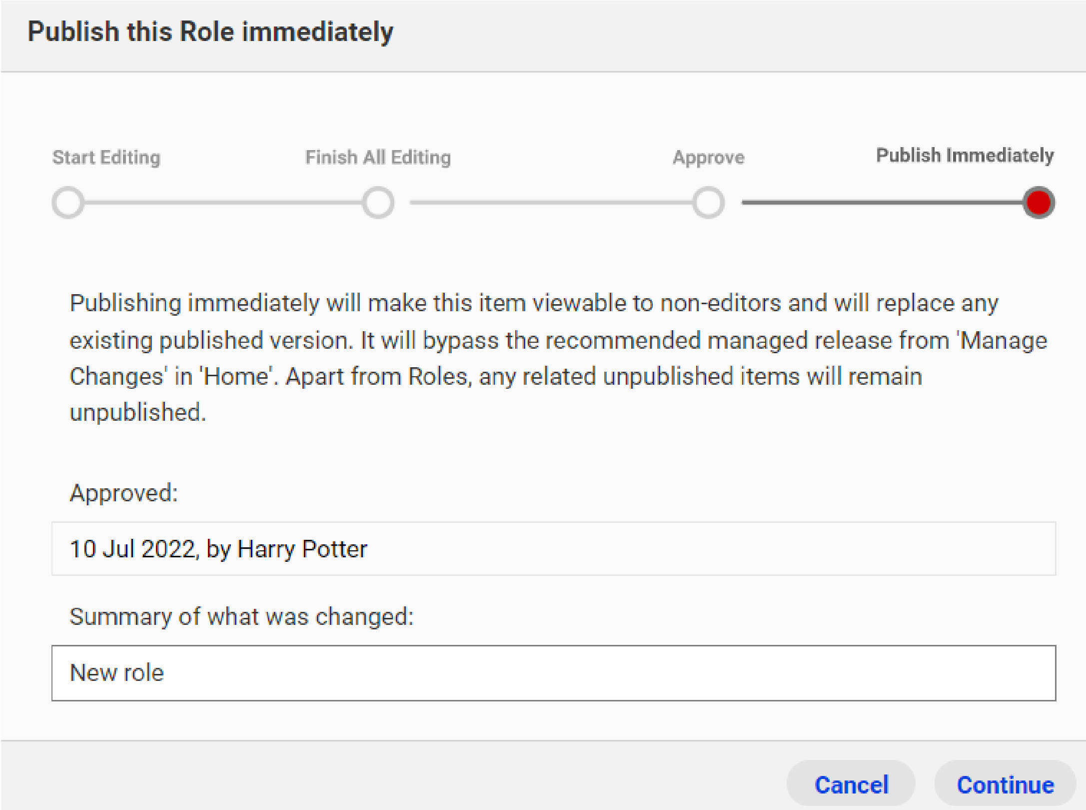
TIP

If the new role is part of a larger release (i.e. a release with multiple content updates), leave it marked ‘Ready to Publish’. When you are ready, you can publish it at the same time as your other content updates by accessing the **Home** tab and clicking **Manage Changes**.

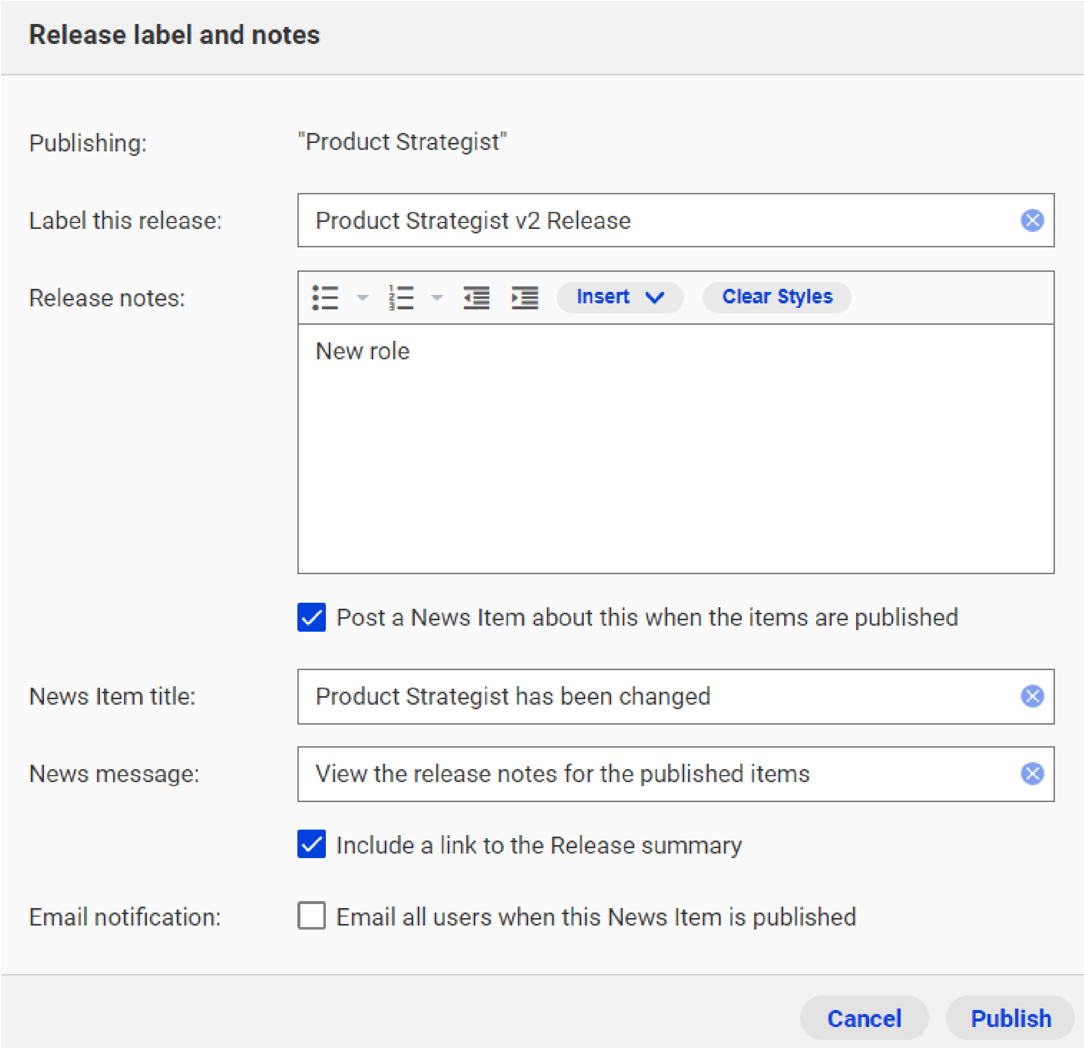
3.5 Click **Publishing** to officially publish latest version of that role. You also have the option to revert the role to a draft. Click **Publish immediately** to proceed with publication.



3.6 When you confirm publication, a release management workflow will appear. You have the option to edit the summary of what was changed. Click **Continue** to publish the new role.



3.7 The **Release label and notes** window appears. Write official release notes about the new role. You can edit the release notes later if required.



Field	Description
Label this release	The official name of this release.
Release notes	Details about what updates you have made.
Post a news item about this when the items are published	If selected, you can post a news item on the Home tab to notify users about your content changes.
News item title	Title of the news item that will appear in the Home tab.
News message	The message that will appear under the news item title.
Include link in release summary	If selected, this option will allow you to include a link to the release notes for the item.
Email all users when this News Item is published	If selected, all web app users in your organisation (provided they have activated their account) will receive an email notification about the release at 5:30 am AEDT/AEST the following day.

3.8 Click **Publish** to officially include the new role in the system. You will receive confirmation when the item is published.

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