Jane Glennon 19.03.2014 draft 1

Roles Directory Tool

Adding roles to the tool.-Administrator

1. There will be a template available for the job/role to be entered onto the tool, this will be in the final stages of development before being entered onto the tool, and will be Quality Assured for content before being "published", as this makes it available to any external user.

2. The role/job will need to have a list of NOS available in My Lists, (at present Templates1, Roles1).
   There will be at least two NOS lists associated with each job/role, one will be a <u>Core</u> list for the Career framework level, the other will be <u>Specific</u> to the job/role.
   Some jobs/roles also have <u>Facets</u>, and if there are facet lists of NOS associated with a job, these will also need to have a list in My Lists, and the specific and facet lists for any job/role should be kept in a folder in My Lists, together.
   Some jobs also have a number of NOS associated with them which are suggestions for the user, to be used locally by the user if they are relevant. these should also be stored in a list in the folder and labelled appropriately.

3. To add a job or role,
   Log into Tools, (at present Templates1, Roles1).
   Select Roles Directory Tool
   Select Add Role
   Complete the template for the role, adding the NOS lists. All boxes should have content. The <u>short summary</u> only requires a short sentence, the <u>scope</u> and other boxes will hold 4,000 characters. If there are suggested useful NOS for local use, these should be listed n the NOS box.

4. When the job/role has been completed, signed off and quality assured, the job/role can be changed from <u>Completed Draft</u> to <u>Published.</u> The associated documents can then be generated using the <u>Generate</u> button in first page of the Roles Directory Tool. If you are adding more than one job/role, it is advisable to generate all when all have been added.

5. If changes are made to a job/role after the role has been published, these should be recorded in the <u>Changes</u> box, and all users who have downloaded the job/role will be automatically notified of the change.

6. If NOS are updated in the lists associated with jobs, they are changed in the Directory by making the changes in the My List area and copying across to the Job/role in the directory. When NOS in the Core NOS list are updated they will need to changed by IT. The updated NOS will be automatically downloaded to any user who has downloaded the job/role, and a notification sent.

7. Changes to Core NOS, these will need to be actioned by IT. Update in the CORE NOS lists in Templates1 first.

8. Changes to documents, e.g. Job description and Template, and uploading, these can be made with IT help. The originals will be kept on the S Drive with other Roles information.
   Any changes to the standard documents will require:
   - the uploading of the changed document to the server,
   - the carry across from the form on the Directory to be checked,
   - and all of the jobs/roles to be regenerated.

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Using the Roles Directory Tool- User

1. **Download job/role information by selecting the job/role title**
   This will download the template created for that job in pdf format for your information by pressing the title of the role.
   You can also download a draft Job description and Person Specification, in word format, which you can then adapt for your own purposes. Select the arrow by the role title, and more information is revealed.
   Selecting **Job description** (JD) will download a JD containing:
   - Career framework level information and
   - associated Employability Skills,
   - and the lists of NOS associated with the Role.

   You can use the Template information and the NOS lists to compare jobs, and adapt to a job/role for your own service.

2. **To download NOS lists from a role**
   Select the arrow by the role title to view information, and the select either the **Core NOS** list, or **Specific NOS,** there will be at least two available.
   Core NOS relate to every role at that Career framework level, Specific NOS relate to a particular role.
   These lists are viewed and copied to your My Lists in the usual way.

3. **To download all of the NOS associated with a role**
   If you want to create a folder specifically for your role, do so first. Highlight the folder. Then select Import Roles in your My Lists area. Select the role from which you want to import NOS lists. The lists will be imported to your folder.

4. **To edit and create and take information from the roles, copy roles to your local area.**
   Choose the option Copy to My Roles. You can then change some of the information in the template to fit your local requirements. You can change:
   - the title
   - the status
   - the learning and development information
   - add NOS in the local list, copying from a *My List*, chosen for your own service requirements.

   The new role in your My Roles will have an ID number. It will also have an area were any changes to the role must be recorded after the role has had its status changed to *Published* as opposed to being in a *draft* format.
   You can also copy a list of Specific NOS across to your My Lists area by pressing the **"My Lists"** button on the page next to the list of Specific NOS. This list will be copied directly to your My Lists area.
   Any changes made to a template in your My Roles area need to be saved by pressing **Update** at the bottom of the Template fields.

5. **To save the information in a role you are adapting in your My Roles,** press update at the bottom of the page. To publish the role in your area, change the status of the role for draft in development to Publish. Documents, that is a Local Role template and a Job description, can now be generated by pressing the generate button on the Roles Directory landing page.