ONSITE TRACK EASY REALM & SITE

CONFIGURATION GUIDE V1.1



Connecting a competent workforce



Steps in this guide will require the user to have Site or Realm permissions that allow them to modify or change the topics covered in this guide.

Check to see what permissions you have, to see what you might be able to modify if required.

Having Editor Rights and permissions to Edit Realm or Site Settings is what is being focused on in the following pages.

Details on Realm or Site user permissions can be found on the support page: https://kb.pegasus.net.au/display/CA/User +Account+Permissions • See your user permission under Person > Users in Onsite Track Easy and then look up your account.







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REALM OPTIONS OVERVIEW

Realm Configurable Settings

Ensuring you have an appropriate Realm account, click on Setup > Realm to review the Realm settings.

If you don't have editor access, you can still view the Realm configuration. • Typically Realm settings should only be modified by the appropriate Pegasus Account Manager, or your Pegasus Super Users or Admins for your Realm.

Pegasus Demonstration realm

report	setup	help	log out
ame or password.	cardholder com cardmaker bate cardmaker inst company sales corrective actio downloadable of fatigue alert co id check definiti mail merge ten online assessor portal	ches all accounts on » locs nfig ions nplates	a/NSW loginout
	realm shipping		



Realm Configurable Settings

5 x tabs are available.

General – Settings used for managing global notifications, contact details for the Main Administrator and some optional items that can be enabled.

Add-ins – See what options have been enabled for your Realm by Pegasus

Sites - See which sites this realm operates over

Card Designs – View the card layout that will be printed for workers

Compliance – If enabled, see the configuration of the Company Compliance Source

- Note that not all options are enabled for Realms. This highly depends upon the configuration of the Client and what options they have enabled for them.
- If unsure, reach out to your Pegasus Account Manager for more information.

Pe	egasus Dei	monstration F	Realm			
	general	add-ins	sites	card designs	compliance	
	Identity					
	Realm Name:		Pegasus	Demonstration		
	Type:		CORPOR	ATE		
	Restricted Usa	age:	NO	For bundled realms like the ARTC corporates;		
	Scope Id:		43353	43353		
Region:			Australia	Australia and Oceania		
	Timezone:		Australia/	NSW		
	Realm Operat	or:	PEGASU	S MANAGEMENT PTY. L	IMITED	
	Training Provi	der Id:	360			
	Shopping Prov	vider:	Pegasus	Demonstration		
	Allow Financia	al Reports:	\checkmark	This realm can have finar	ncial reports.	
	Verified Doc A	uthority:	\checkmark	This realm is a Verified D	oc Authority	
	Expiry Reminde	rs				
	Comp Remind	lers Enabled:	×			
	Cert Reminde	rs Enabled:	×			

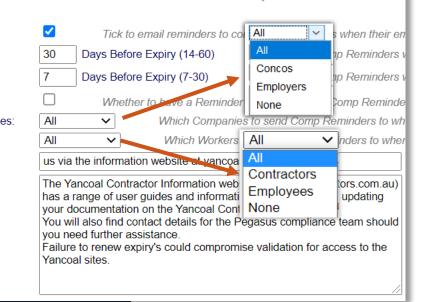


Configurable Items section – Competency Expiry Reminders

- Expiry Reminders can be enabled for Employees and /or Contractor Companies. Typically it is not configured for Employers/Employees, as Clients Manage their employees compliance. It would be enabled to send Contractors notifications that their competencies are due to expire.
- Can set the reminder notification intervals.
- Can edit text that will appear with the email reminding worker of expiring competencies

Expiry Reminders

Comp Reminders Enabled: Comp First Reminder Date: Comp Final Reminder Date: Comp Reminder On Expiry: Comp Reminder Include Companies: Comp Reminder Include Workers: Comp Reminder Contact: Comp Reminder Custom Text:

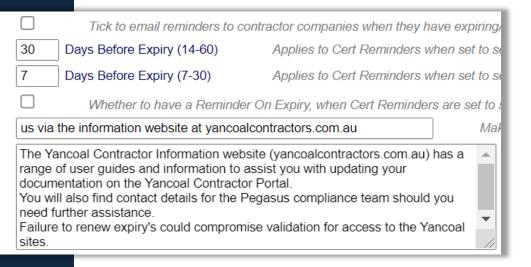




Configurable Items section – Cert Expiry Reminders

- Certs (short for Certificates) is typically a legacy item used for managing Company Compliance. This has been superseded by Company Pre-Qualification.
- Certs operate similar to competencies, but are applied against a Contractor Company Companies > Contractor Company > and then under their Compliance Tab for that Company.
- If enabled can set messages and reminder notification email times.

Cert Reminders Enabled: Cert First Reminder Date: Cert Final Reminder Date: Cert Reminder On Expiry: Cert Reminder Contact: Cert Reminder Custom Text:





Configurable Items section – Corrective Actions, Shipping, Responsible Party

- These are legacy items no longer in use.
- None of these are required to be enabled at a Realm.

Corrective Action Reminders	
Send Submitted Notification To Owner:	
First Reminder Date:	0 Days Before Expiry
Send Reminder On Due Date:	
Overdue Reminder Interval:	0 Days Between Reminders After Due Date
Send Overdue Notification To Owner:	
Shipping	
Support Name:	
Support Email:	
Support Phone:	
Tracking # Mandatory:	
Responsible Party	
Notification To:	
Notification Email:	



Configurable Items section – Settings

Note some are legacy items and are not commented on for this reason.

Settings

Cal Basis:	Concurrent Login
Cals:	10
Show Card Image Button:	YES
Gender Compulsory:	
Realm Assign Groups:	Realm or Site V Allow re
Realm Assign Comps:	Allow realm assignment
Our Verified Comps in Other Card Defs:	Allow our sites and the
Our Certs in Other Compliance Subs:	Allow other realms to
Repeatable Corrective Actions:	Allow file definitions a
Industry:	Training Industry ~
Show On Site Now Location:	Include Location colu
Active:	\checkmark

- Cal Basis Configured by Pegasus. Is either Concurrent Licencing or Ber seat Licencing. Can restrict number of users utilising Onsite Track Easy at the same time. CALS = number of licences.
- Realm Assign Groups Allows Group Competencies at Sites and/or Realms
- Realm Assign Comps Allows competencies created at a site to be able to be used across the Realm
- Repeatable Corrective Actions usually enabled to allow for managing Competencies and how they are configured and managed under Pending Data.
- Asset Management Enabled when using the Worker Portal Asset Feature. This adds additional Asset option under User Permissions.
- Industry Flag for reporting Realm type to Pegasus Management
- Site Based Card Printing allows sites to print cards
- Active when disabled, this turns off the Realm! BEWARE You will lose instantly lose access for you disable this.



Realm Configurable Settings – Add-ins

Configurable Items section – Add-ins

Note some are legacy items and are not commented on for this reason.

- Analytics An additional paid component for reviewing Worker, Company, Training data and other information in a real-time interface. More information can be <u>found here</u>
- Assessments An additional paid component for managing training and assessing out in the field. More information can be <u>found here</u>
- Broadcasting An additional paid component for sending emails and/or SMS's to workers, companies, crews or sites. More information can be <u>found here</u>.

Realm Add-ins

- Analytic Reports Enable Analytic Reports
 - Assessments
 - Broadcasting Module
- Maintenance of Competency Enable Maintenance of Competency Integration

Enable Assessments

Enable Broadcasting



Realm Configurable Settings – Sites

Item section – Sites

Your Realm's list of site(s) is visible here as well as the listed Employers at the site level. • Sites can not be added here. Your Pegasus Account Manager will do this for you should new sites be added to your Realm

Sites

This realm currently has 8 sites.

Name	ld	Usage Mode	Employers
Avetta - Amazon	704	Full	Onsite HQ Site Employer Pty Limited
Avetta - BGIS	703	Full	Onsite HQ Site Employer Pty Limited
Avetta - CBRE	707	Full	Onsite HQ Site Employer Pty Limited
Avetta - Cargill	705	Full	Onsite HQ Site Employer Pty Limited
Avetta - Cushman	706	Full	Onsite HQ Site Employer Pty Limited
Avetta - Qual Tek	709	Full	Onsite HQ Site Employer Pty Limited
Avetta - Rio Tinto	708	Full	Onsite HQ Site Employer Pty Limited
Onsite HQ	9	Full	Onsite HQ Site Employer Pty Limited, PEGASUS MANAGEMENT PTY. LIMITED



Realm Configurable Settings – Card Design

Item section – Card Design

The card design that will print out for Workers will be shown here. Some sites have multiple formats they accept, or have previous card configurations.

Card Design	Association Context	View
Onsite Track Easy	Site: Visy Gepps Cross	View
Onsite Track Easy	Realm: Visy Industries	View
Onsite Track Easy	Site: Visy Logistics	View
Onsite Track Easy	Site: Visy Springvale	View
Onsite Track Easy	Site: Visy Tumut	View
Pegasus	Realm: Visy Industries	Viewing

Found 6 active associations

- Click a view link to view a card design.
- Click an add button to add a new card design to this realm.
- Card designs containing compliance elements should only be added to the site/realm where the compliances are from. There are currently no smarts in place to prevent this.
- The ability to remove a card design is only possible if all realm sites with access to realm card designs will still have at least one card design post removal.
- X Card Print Requires Pending Record This card print setting only applies to the Pegasus card design and the Visy Industries Realm. PEGASUS CARD DESIGN **View Structure** X Subscription Required Proximity Card X One Card X Magnetic Stripe X Desfire Card X Bar Code X Watermark Side 1: Pegasus 000 000 000 CARDHOLDER NAME

VISY INDUSTRIES CARD PRINT SETTINGS

- If your site has multiple cards that it can accept they will be shown here.
- You can review the configuration of each card type (Magnetic strip, Bar Code, Proximity Chip etc)
- Can not add cards here. Pegasus Account Managers can perform this for • you.







SITE OPTIONS OVERVIEW

Ensuring you have an appropriate Site account, click on Setup > Site to review the settings.

If you don't have editor access, you can still view the Site configuration.

- Note that not all options are enabled for Sites. This highly depends upon the configuration of the Client and what options they have enabled for them.
- If unsure, reach out to your Pegasus Account Manager for more information.

Onsite H(ي site	
report	setup	help
	activities	
	activity types	
	alerts	
	cardmaker ba	tches
	cardmaker ins	tall
rname or password.	company sales	s accounts
	corrective acti	ion ×
	downloadable	docs
	flash induction	าร
	id check defin	itions
	locations	
	logpoints	
	mail merge te	mplates
	site	
yet multiple-company aw	site messages	
, company an	watermarks	



With the correct Edit permissions, you can modify the Site information as shown below

• Note that an Edit History is recorded against all changed made to this page. Pressing the Clicking the clock next to the edit button will reveal any previous settings and who changed anything.



Site Name: Site Type: Description:

Verified Doc Authority:

Location

Region:

Address:

Town:

State:

Post Code:

Country:

Contact

Phone:

Fax:

Email:

Contact Person:

Manua	ally entered test value
\checkmark	This site is a Verified Doc Authority
Austral	ia and Oceania
426 K	ing Street
New	
NSW	
2300	
Austra	alia 🗸
1300 4	141 433
02 65	71 8889
devtea	am@onsitetrackeasy.com.au
Phil C	harley



edit

Options for expiry for Competency and Certificates can be modified.

- These settings are typically configured for your Realm level. Enabling Competency Reminders on the Site as well will cause duplicate Reminders to be sent to the listed group (employees/contractors).
- Typically only enabled for those Clients that do not have a Realm configuration.

Expiry Reminders

Comp Reminders Enabled: Comp First Reminder Date: Comp Final Reminder Date: Comp Reminder On Expiry: Comp Reminder Include Companies: Comp Reminder Include Workers: Comp Reminder Contact: Comp Reminder Custom Text:

Cert Reminders Enabled: Cert First Reminder Date: Cert Final Reminder Date: Cert Reminder On Expiry: Cert Reminder Contact: Cert Reminder Custom Text:

	Tick to email reminder	s to contractor companies whe	n their e
30	Days Before Expiry (14-60)	Applies to Comp Rem	inders v
7	Days Before Expiry (7-30)	Applies to Comp Rem	inders v
	Whether to have a Rei	minder On Expiry when Comp	Remina
All	Vhich Cor	mpanies to send Comp Remind	ders to v
All	✓ Which We	orkers to send Comp Reminde	rs to wh
Pega	asus Safety & Training - 1300 3	06 384 - inductions@pegas	1
Failu work	re to provide renewed docume site	ntation may effect access righ	ts to the
\checkmark	Tick to email reminder	s to contractor companies whe	n they l
30	Days Before Expiry (14-60)	Applies to Cert Remin	ders wh
7	Days Before Expiry (7-30)	Applies to Cert Remin	ders wh
	Whether to have a Rei	minder On Expiry when Cert R	eminde
Pega	asus Safety & Training - 1300 3	06 384 - inductions@pegasi	1
Failu work	re to provide renewed docume site	ntation may effect access righ	ts to the



Safety Sections is covered in another guide in full.

Auto logout configuration required a Pegasus account Manager to enable.

- All information on Safety Selections can be <u>viewed here</u> under the Safety Section of the page.
- Realm assignment steps if enabled will allow Roles to have additional steps (Assign, Authorise, Approve) required before they become Active.
- Auto Logout Configuration will automatically log out workers from Onsite Track Easy when reaching a times threshold. Can be set for time duration for worker, or for a specific time each day. Can only be enabled by a Pegasus Account Manager.

Safety Selections		
Notify Crew Leaders:	\checkmark	Tick to email crew leaders when
Show in Emerg Evac:	\checkmark	Tick to include unprocessed sele
Emerg Evac Name:	Escorted	l Personnel W
Use Realm Assignment Steps		
For Site Roles:	YES	This can only be changed by Pe
Auto Logout Configuration:		
From Period Start	Elapsed time from person's period start login (not actual total time on site)	
Hours:	12	
Logout Message:	Automa	ated system logout
Active:	\checkmark	
Specified Time	Specifie	ed time of day, regardless of time logged in
Time:	00:00	
Logout Message:		
Active:	×	

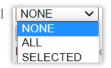


Some options are legacy items and have not been commented on.

Other

CAL Count:	10
CAL Basis:	Concurrent Login
Gender Compulsory:	NO
Emp Legacy Id Locked:	NO
Legacy Id Name:	Legacy ID
Legacy Id Auto Prefix:	(none) Only applies
Auto Con Key:	(none) Give acces
Auto Emp Key:	(none) Give acces
Con Assoc Requires Card:	NO
Emp Assoc Requires Card:	NO
Offline Validation:	NO
Issue Temp Card From Online Training:	NO
Repeatable Corrective Actions:	YES
Asset Management:	NO Enable asset
BAC Block:	NO Enable autom
Emergency Evac Report Sort:	Logpoint Emergence
Familiarity Blocks For:	No Workers Which
Familiarity Days:	90 Number of days
Industry:	Training Industry In
Onsite Log Visibility:	Global Visibility of L
Parent Style Realm:	Pegasus Demonstration
Project Ids:	Project ids associat
Represent In Portal Default:	No Employers The
Safety Selection Offline Logpoints:	YES Allow selection
Show On Site Now Location:	NO Include Locati
View Foreign Data Default:	No Employers The
Multiple Logpoint Identities:	NO This can only b
Remember Last Logpoint Selection:	NO Sets home pag
Lp Manual Button Requires Desfire Card:	NO 'YES' forces se
Multi Crew Membership Allowed:	NO
General Notes:	

- Legacy ID Can configuration the name of the ID field here that will show under worker profile if used.
- Auto Com/Emp Key Automatically assign Access Keys. This will show available single key, or all keys, that can be applied to Contractor or Employees automatically upon being associated to the site.



- Asset Management Enables Asset Portal module in the Worker Portal and mobile app user permissions under the users rights screen.
- Familiarity Block Configure to Block workers that have not attended site for a designated period of time. Even if fully compliant with Valid Access, this will block them from logging on until their profile block is lifted.
 This is a configurable item that Site users with the "Can edit site settings" are able to enable. Can be set for particular worker types as well with a configurate time frame. It only apples to Associated workers to site.
 On the Logpoint a new message will now be displayed "Blocked due to inactivity" message will now appear when the working is trying to access site.
 - No Workers
 All Workers
 Contractors Only
 Employees Only
 No Workers
- Safety selection Offline Logpoints- when enabled assumes that selected logpoints for part of Safety Selections will be active when the Safety Selection will be run. Disable to only allow online logpoints to be shown and selected.



Site Configurable Settings - Options

Generally this section is a legacy item.

- Options can be enabled for what should appear on Stickers printed at logpoints.
- Can choose to have Roles or Competencies printed on Stickers.
- Can be enabled for specific site locations and disabled where not needed/required to show stickers

OPTIONS

Reports

Show Site Log Location Moves

Logpoint Location Sticker Print

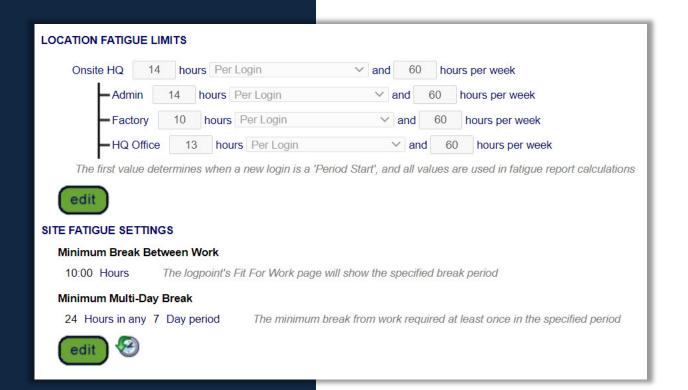
Dnsite HQ: 🛛 Visitor: Border 🗹 🛛 Cardholder: Type 🗌 Keys 🗹 🖸 Competencies 🛩 Condense 🗌 Use '\$' For Appts 🗹 Always Prt Appts 🗹
Admin: Visitor: Border V Cardholder: Type Keys Competencies Condense Use '\$' For Appts Always Prt Appts V Always Prt Appts Always Prt Appts Always Prt Appts Always Prt Appts V Always P
- Factory: Visitor: Border 🗹 Cardholder: Type 🗌 Keys Roles 🗸 Condense 🗌 Use '\$' For Appts 🗹 Always Prt Appts 🗹
🛏 HQ Office: 🛛 Visitor: Border 🗹 🛛 Cardholder: Type 🗌 Keys 🗹 🛛 Competencies 🗸 🖓 Condense 💭 Use '\$' For Appts 🗹 Always Prt Appts 🗹
🗕 LP6: 🛛 Visitor: Border 🗹 🛛 Cardholder: Type 🗌 Keys 🗹 Competencies 🛩 Condense 🗌 Use '\$' For Appts 🗹 Always Prt Appts 🗹
- Monitoring: Visitor: Border 🗹 Cardholder: Type 🗌 Keys 🗹 Competencies 🗸 Condense 🗌 Use '\$' For Appts 🗹 Always Prt Appts 🗹
🖵 Warehouse : Visitor: Border 🗹 Cardholder: Type 🗌 Keys 🗹 Competencies 🗸 Condense 🗌 Use '\$' For Appts 🗹 Always Prt Appts 🗹



Site Configurable Settings - Fatigue

Location Specific Fatigue Alerts

- Used in conjunction with Setup > Alerts feature to trigger email alerts when worker ahs hit fatigue limits in site locations.
- Minimum Break will display in conjunction with the logpoint message tick box, an alert on screen if worker has not had the sufficient break. Will not block them from site, but prompts on screen the alert.
- Minimum multi day break calculates across the 7 day rolling period that worker has had at least on full day off.



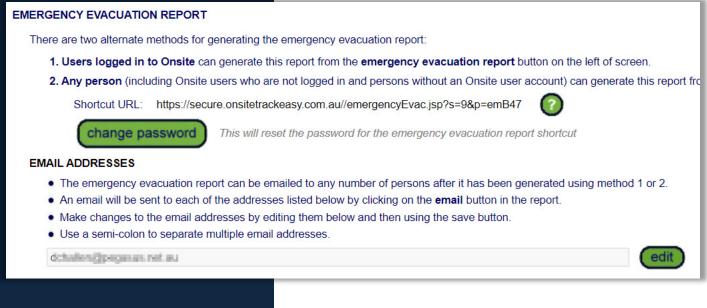


Site Configurable Settings – Emergency Evac

Create a dedicated web link to the Emergency Evacuation Page.

Can be shared to users to view on mobile browser or computer website without needing an Onsite Track Easy login

- Superseded by the Onsite Now Feature in the Client Portal and the Pegasus Mobile app
- Now considered a Legacy Item

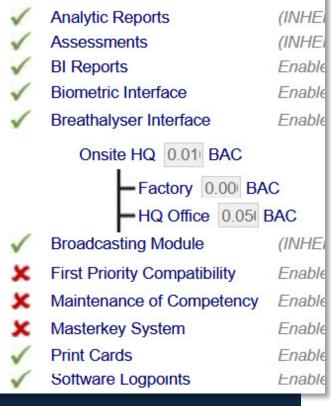




Site Configurable Settings – Add-ins

Items that are enabled by Pegasus Account Mangers

ADD-INS



- Analytics, Reports, Assessments, BI Reports and Broadcasting are all option items that appear in the Client Portal once enabled for this site.
- Biometric Interface legacy item for Fingerprint Readers
- Breathalyser Interface Once enabled, allows BAC devices to be used on Logpoints and results recorded. Can configure BAC limits for specific locations here, that will eb applied to Logpoints at those locations.
- First Priority, Maintenance of Competency and Masterkey Legacy Items
- Print Cards, allows cards to be printed at site, to those with Can Print Card permissions
- Software Logpoint. Enables an additional tool in Onsite Track Easy for a logpoint to run in Software mode found on the Onsite Track Easy Home Screen Replicates a LP5 interface.





Site Configurable Settings – Realms

Lists the current Realms this site is linked to.

- Can only be modified by Pegasus Account Managers
- When linked to multiple Realms, can see the Competencies and Roles associated with those other Realms.

REALMS

This site belongs to 2 realms.

Name	ld	Туре
Pegasus	3	Corporate
Pegasus Safety	1	Admin



Site Configurable Settings – Card Designs

Card Design Section

The card design that will print out for Workers will be shown here. Some sites have multiple formats they accept, or have previous card configurations.

Card Design	Association Context	View
Onsite Track Easy	Site: Visy Gepps Cross	View
Onsite Track Easy	Realm: Visy Industries	View
Onsite Track Easy	Site: Visy Logistics	View
Onsite Track Easy	Site: Visy Springvale	View
Onsite Track Easy	Site: Visy Tumut	View
Pegasus	Realm: Visy Industries	Viewing

Found 6 active associations

- Click a view link to view a card design.
- Click an add button to add a new card design to this realm.
- Card designs containing compliance elements should only be added to the site/realm where the compliances are from. There are currently no smarts in place to prevent this.
- The ability to remove a card design is only possible if all realm sites with access to realm card designs will still have at least one card design post removal.

PEGASUS CARD DES	IGN	View Struc
X Subscription Requ		new ou do
Proximity Card	X One Card	
X Magnetic Stripe	X Desfire Card	
🗶 Bar Code	🗶 Watermark	
Side 1:		
Pegasu	AS consite	no photo
000 000 000		
000 000 000 CARDHOLDER		关系成合

VISY INDUSTRIES CARD PRINT SETTINGS

- If your site has multiple cards that it can accept they will be shown here.
- You can review the configuration of each card type (Magnetic strip, Bar Code, Proximity Chip etc)
- Can not add cards, Pegasus Account Managers can perform this for you.



Site Configurable Settings – Report

Report - A printable configuration page of all the current configuration screens and the applied options for this Site.

All General options, Fatigue, BAC, card designs etc.



Peq

FOR ANY QUESTIONS OR ASSISTANCE PLEASE CALL YOUR PEGASUS ACCOUNT MANANGER OR EMAIL **info@pegasus.net.au**

Pegasus an Avetta Company

Connecting a competent workforce