Pegasus™

Powered by Onsite

SUPPLIER PORTAL

FULL USER GUIDE

V1.6

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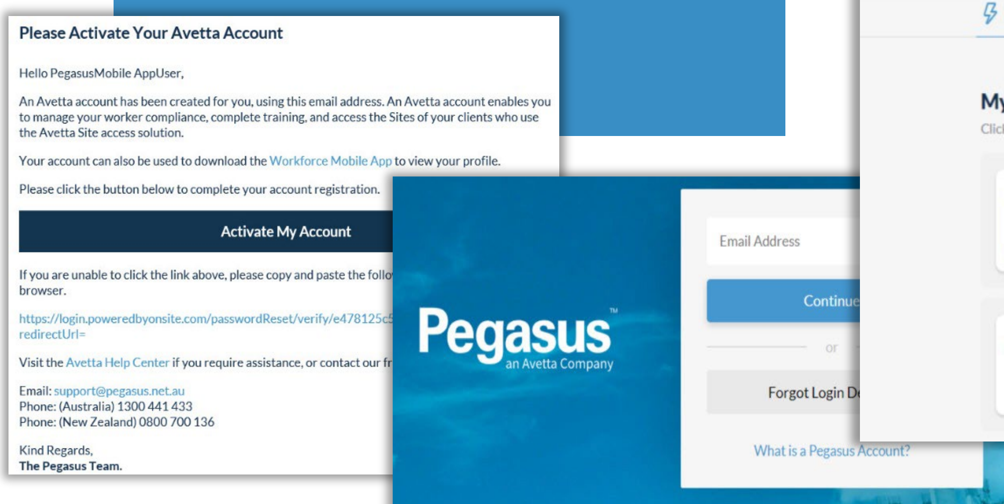
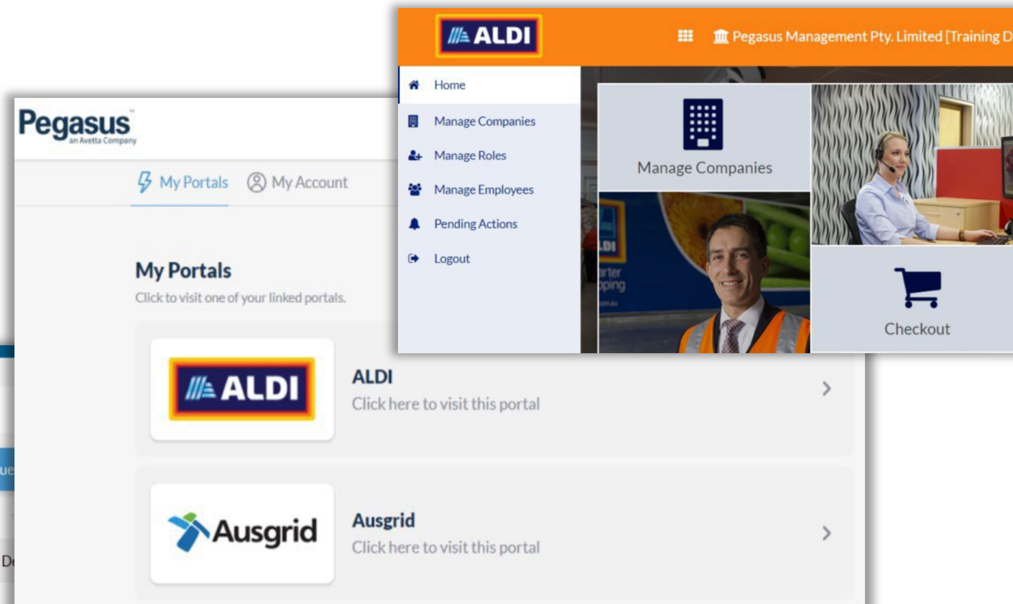
Log Into Supplier Portal – From Avetta Account

Access from your Avetta Account

From your invitation email
Log into your Avetta Account
Add the relevant Supplier Portals
Click on a Client Tile to launch that webpage

- Pegasus Gateway = Avetta Account. Avetta Account is the new name for this tool that some Company Administrators might be familiar with.
- If you do not have an Avetta Account for the Supplier Portals, your Company Administrator might need to issue you one or contact Pegasus Support team members can help you gain one if you think you should have one.
- For more information on an Avetta Account visit https://kb.pegasus.net.au/display/OCCS/Pegasus+Gateway
- For an interactive course of this guide [visit this support page]()





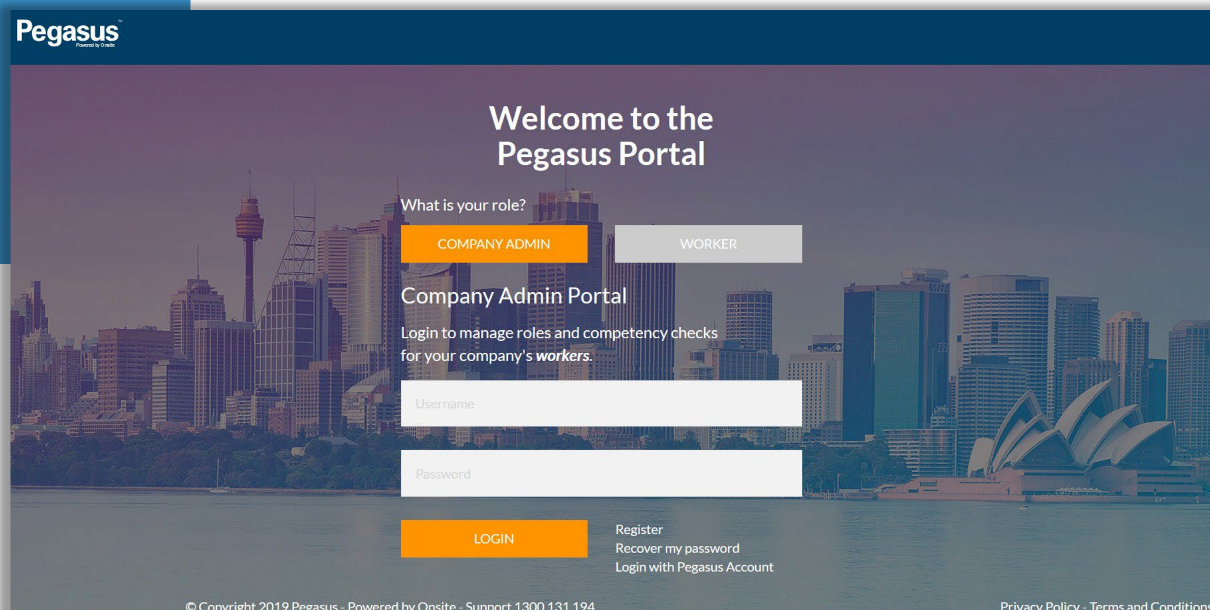
Log Into Supplier Portal Manually – old process

LOGIN

Select, “Company Admin” Enter your username and password and **“Login”.**

If prompted, enter your company name and “select”.

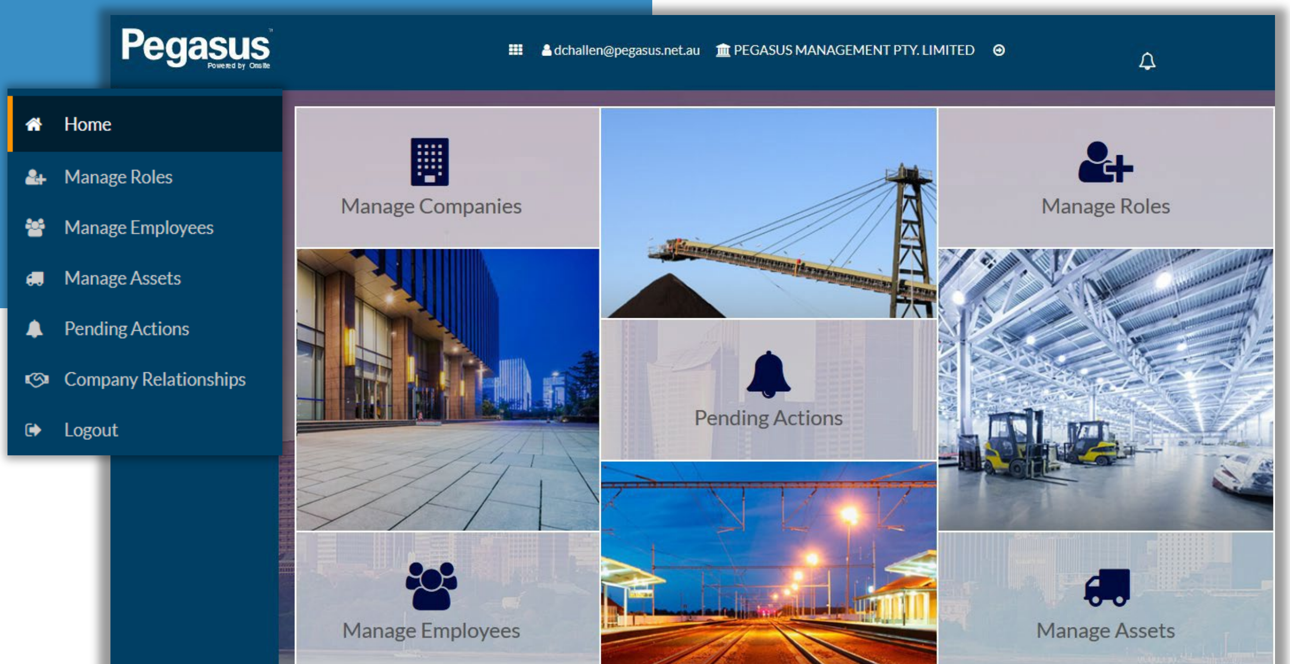
- Some company administrators have an Onsite Track Easy account and you can use that to manually log into a Supplier Portal if you know the URL
- For Company Administrators, Select the **Company Admin** option before logging in. This will ensure you are correctly signing in to manage all of your company’s workers.
- For the correct Worker Roles portal you want to enter, head to: https://Pegasus.net.au/contractors and open the Client’s Contractor facing information page for more detail. The correct portal link page will be listed there.
- For all things Worker Portal Related head to https://kb.Pegasus.net.au/display/occs/Worker+Portal



Successful login to Supplier Portal

The home page allows access to Manage Roles, Manage Employees, and Pending Actions

- Once logged in you will see the options:
  - Home
  - Manage Companies (if applicable – not covered in this guide)
  - Manage Roles
  - Manage Employees
  - Mange Assets (if applicable – not covered in this guide)
  - Company Relationships (if applicable – not covered in this guide)
  - Pending Actions
  - Logout



COMPANY COMPLIANCE NOTIFICATION

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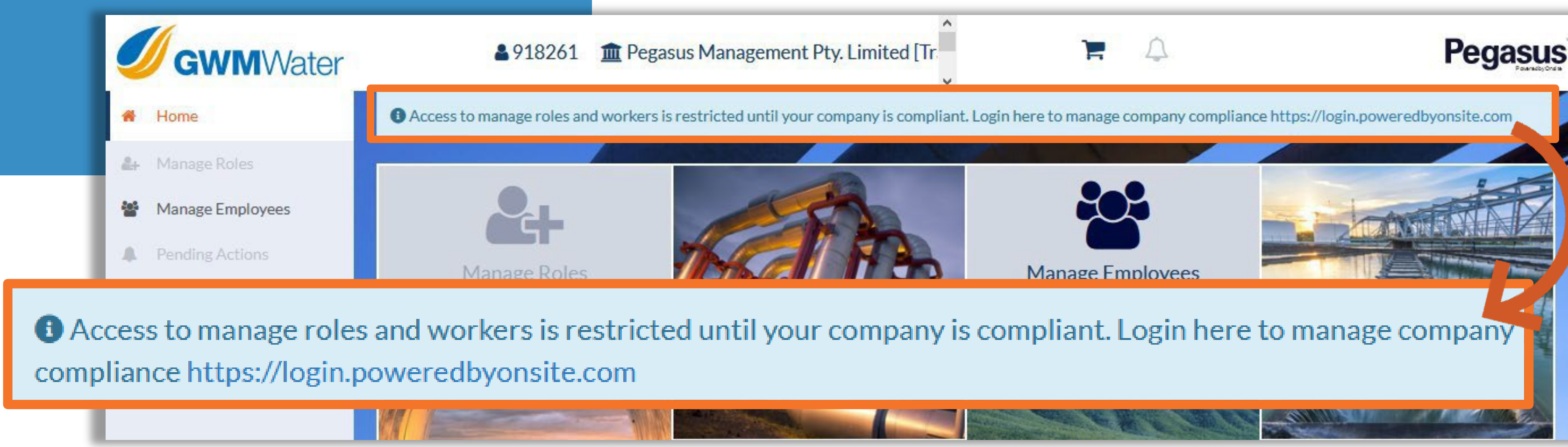
Company Compliance Notification

NOTICE

If your Company Compliance is Expired, or not completed, it will need to be rectified before managing workers.

*** Only in effect fort some Australian Clients, not all.**

- This is a newly added component requested by the Client of the portal where this is appearing
- For companies that are compliance, the portal will work as normal
- Notifications would have been previously sent to the Company Administrator informing of expiring Company Compliance documents
- Check your company information to see who is listed as the Company Administrator and possibly change if that is incorrect.
- More information on Company Compliance can be found here:
- https://kb.pegasus.net.au/display/OCCS/Company+Pre-Qualification+Portal



Company Compliance Notification

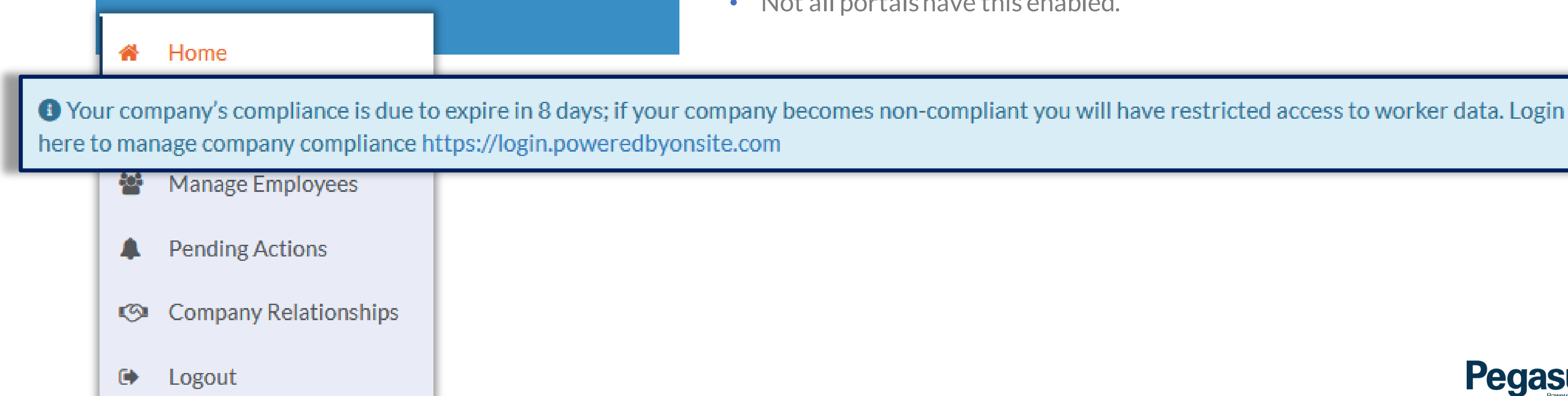
NOTICE

If your Company Compliance is Expiring withing 30 days, you will see a Warning message instead.

You will retain Full Functionality until the Company Compliance Expires.

Keep your company compliance current to avoid these screens

- The message "Access to mange roles and workers is restricted until your company is compliant. Login here to manage company compliance https://login.poweredbyonsite.com"
- The above link points to the Pegasus Gateway, were you can link your Company Pre-Qualification Portal account and Worker Portal Account (also called Onsite Track Easy account) together to then mange your Company Compliance data under the one login. More information on the Pegasus Gateway can be found here: https://kb.pegasus.net.au/display/OCCS/Pegasus+Gateway
- If unsure of steps, first check the Contractor Website for the Company Compliance Process.
  Go to https://Pegasus.net.au/contractors
  Scroll to the relevant Client page
  Read the "How to Register Company" section for all required steps for that Client.
- Not all portals have this enabled.

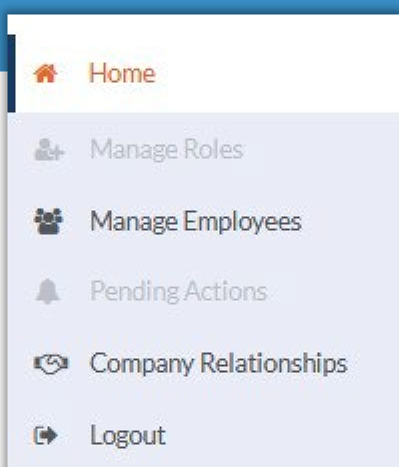


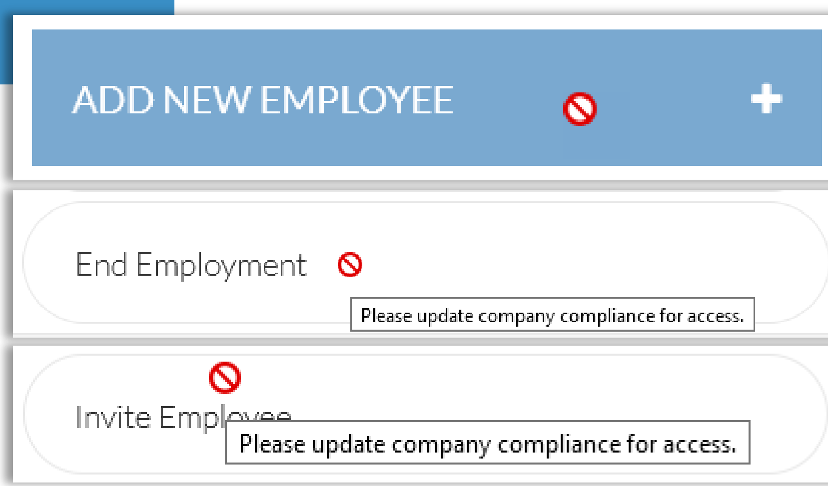
Company Compliance Notification

NOTICE

Certain restrictions are in place. You cannot add new employees, or edit personal data for existing employees, if your company is no longer compliant.

- A message "Please update company compliance for access" will appear when trying to :
  - Purchase a Cardholder Subscription
  - Invite worker to Individual Worker Portal
  - End Employment
- This will disable the Manage Roles and Pending Actions modules
- This will not apply to the Asset Management Portal
- This will not apply to the Trainers Portal
- This will not apply to Company Relationships





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WORKER REGISTRATION

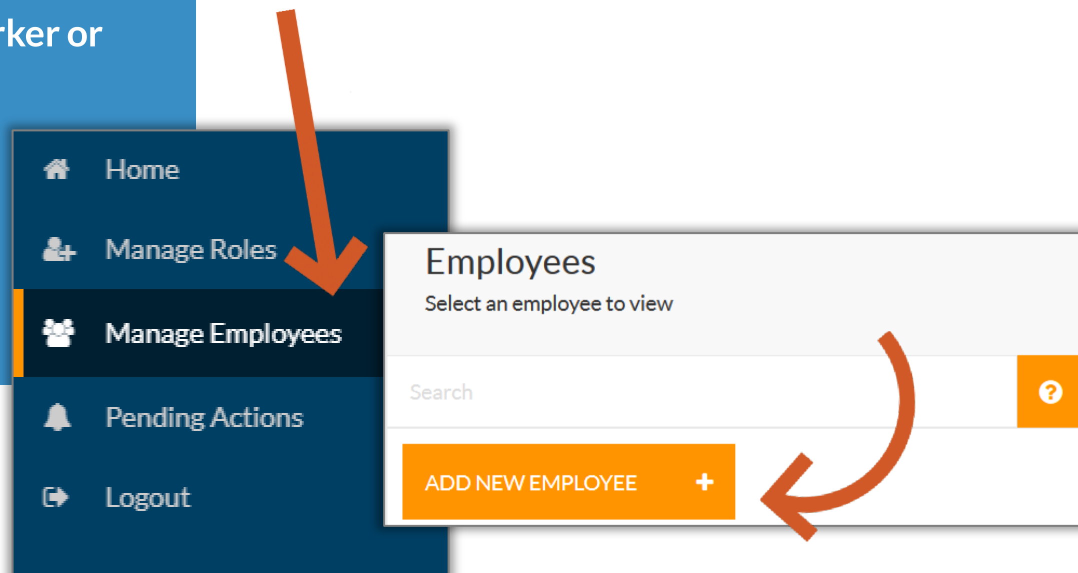
Worker Registration – Adding New Employee

STEP 1

On the home page, click “Manage Employees”.

Search for an existing worker or add a new worker.

- This is where you will enter your company’s Workers. If required, you will order their site access cards and book inductions
- Use the system to update Worker profiles and information, or to add competencies and skills
- If you are not adding a new Worker, but wanting to manage an existing one, skip to page 9 to check if that Worker has a Subscription for the portal.



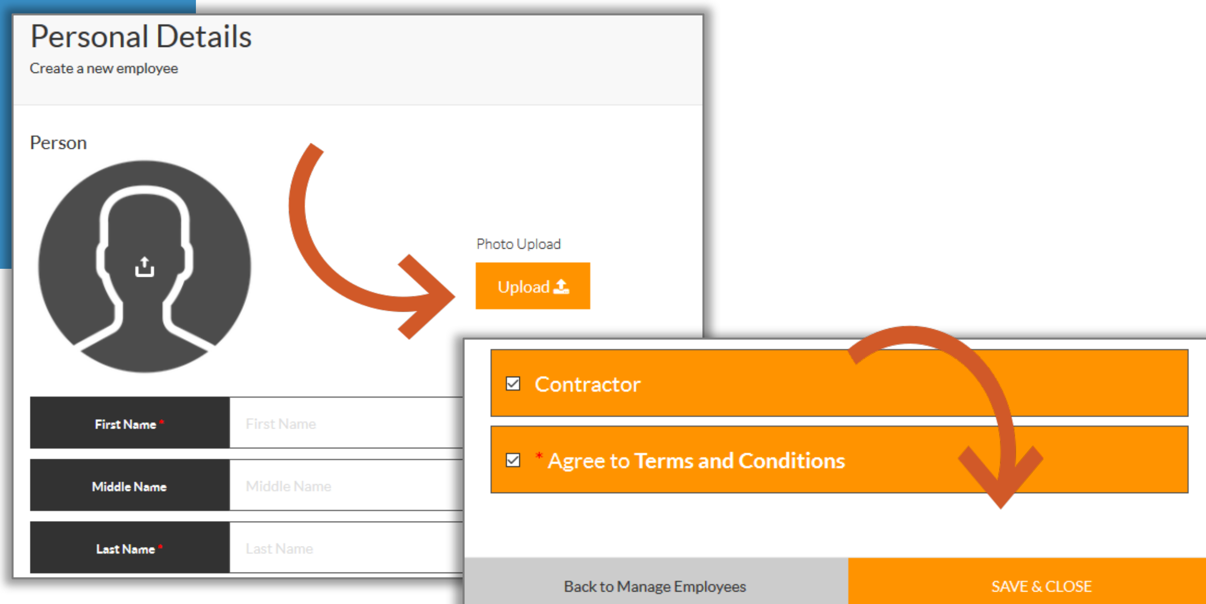
Worker Registration – Adding New Employee

STEP 2

Upload a photo and enter the employee's details.

Scroll and complete all fields, then click "Save & Close".

- The information entered here will be displayed on the Worker's Pegasus profile
- If the Worker is a contractor and not an employee of your company, tick the box next to "Contractor"
- Read the Terms and Conditions and tick the box to create a new Worker in the system
- Will need to enter in Email address and Mobile number. These fields are used to contact the worker using various systems the Client has, and for login information for any Learning Management System or Mobile Application the worker may be enrolled into.



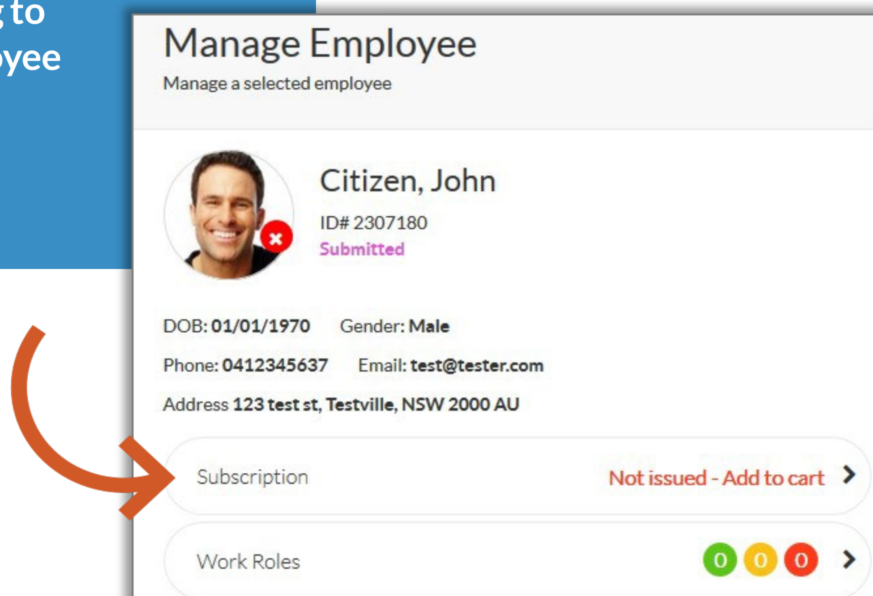
Worker Registration – Adding New Employee

STEP 3

You can process the payment for the worker's subscription (if required) at a later time.

Or click "Subscription" and pay before proceeding to add roles to Employee

- If you need to leave the process and come back at a later time, log out or process the payment and then log out. The card application will be under Pending Actions > Continuing Applications
- If you are completing the process now, click on the Subscription tab and follow the process to pay for that Subscription (if applicable)
- ***A Paid Subscription is required for some portals before being able to add Roles***
- For payment process, refer to the Shopping Cart section later in this guide



MANAGING A WORKER'S SITES

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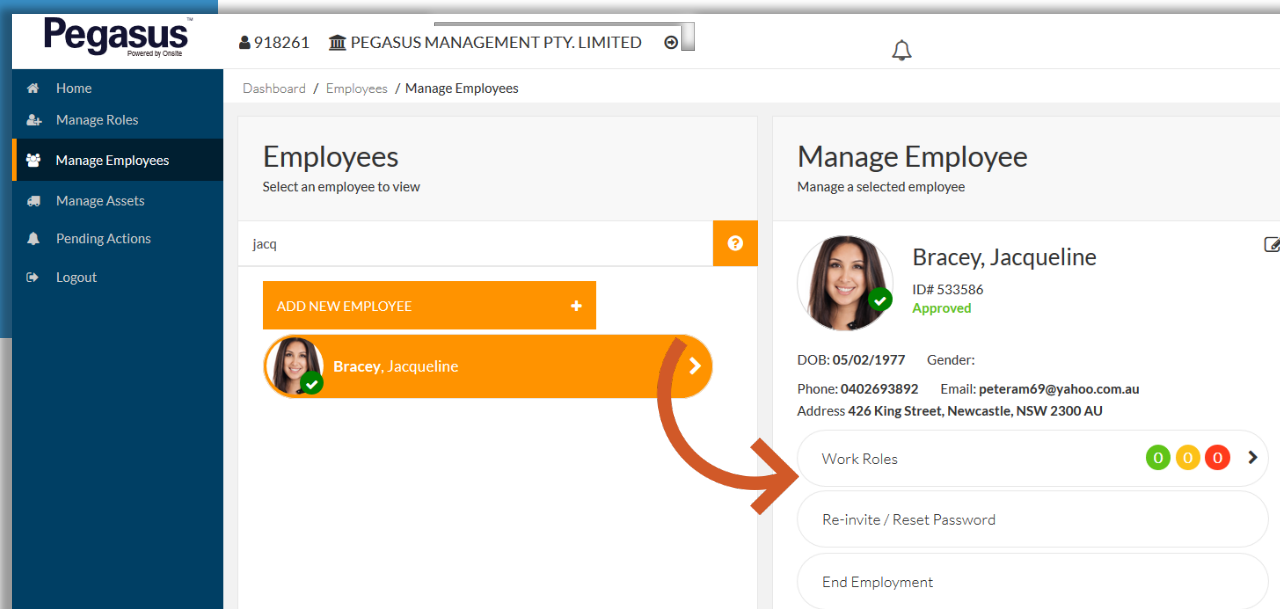
Adding Sites

STEP 1

On the “Manage Employees” page, search for the worker and click on the worker.
Then under their profile click “Work Roles”.

This will open the “Manage Roles” section.

- NOTE: This section has assumed that the Worker already has a Subscription (if applicable), as this is a prerequisite for adding Sites and Roles. *Please note that not all Portals use this feature.*
- Multiple sites can be added at once
- Worker must be associated to a site to work there
- If you do not see the site access required, check that you are in the correct portal



Adding Sites

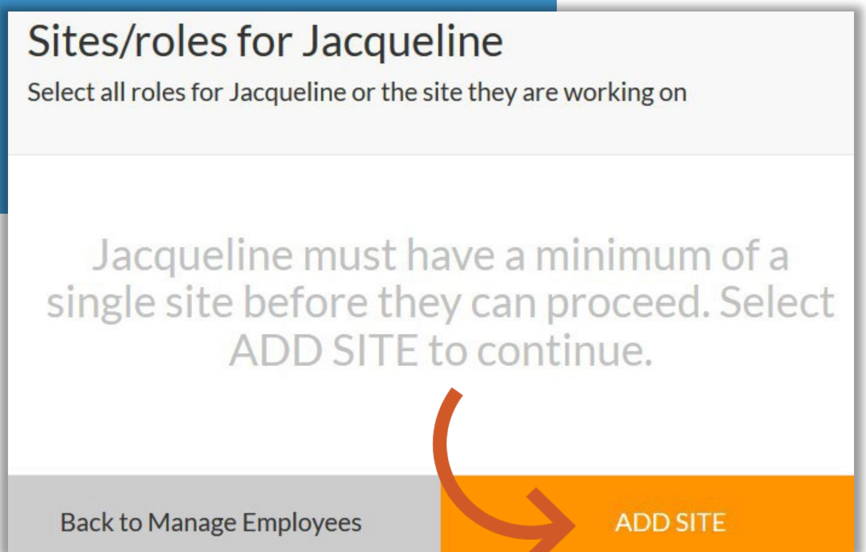
STEP 2

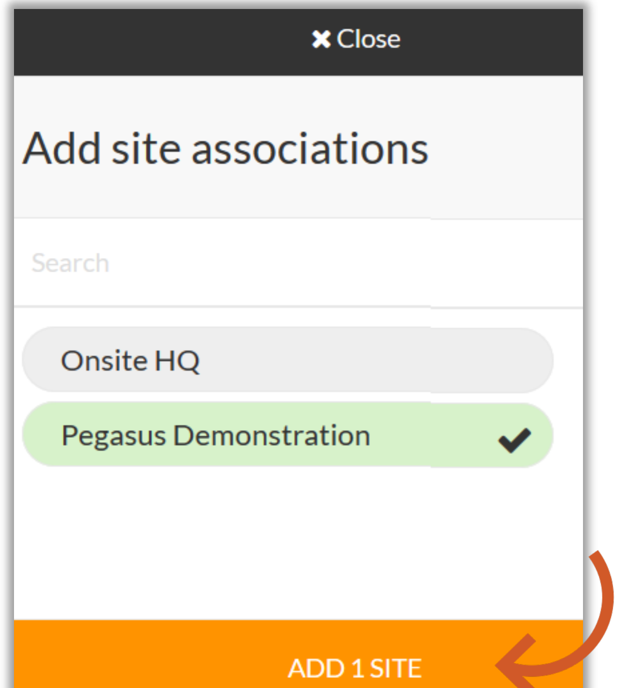
If no Sites are previously selected, you will be prompted to select a site first.

Click "ADD SITE"

Choose the sites the worker will be at, then click "ADD # SITE"

- Multiple sites can be added at once
- Roles can not be chosen/managed until sites are selected first
- If you do not see the site where access required, check that you are in the correct portal
- Other company administrators can see what sites this Worker is associated with in the Portal, so that may help when managing employees. Where possible, only add sites Worker will be attending. You can remove site associations if Worker no longer needs to attend that site.





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Adding Sites

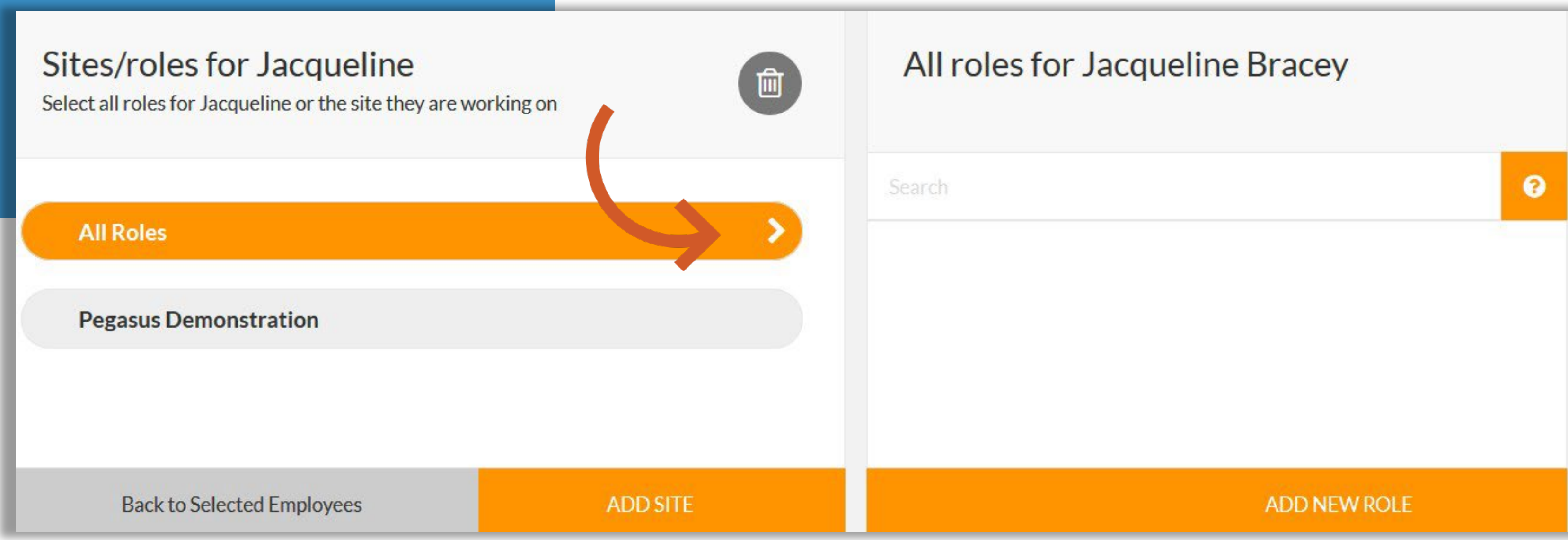
STEP 3

Selected Site(s) added will now be displayed for the Worker.

Click on "All Roles" tab, this will open the option to add or manage roles on the right of the screen.

Roles can now be added if required.

- ***You MIGHT get roles added automatically depending upon the site and the Portal you are in.***
- If you have had roles automatically added, these are a Site requirement and need to be completed. Site will be looking for these roles to be complete and active.
- If you delete a role, you can re-add it.
- Adding new roles are covered in the next section of this guide



SHOPPING CART PAYMENTS

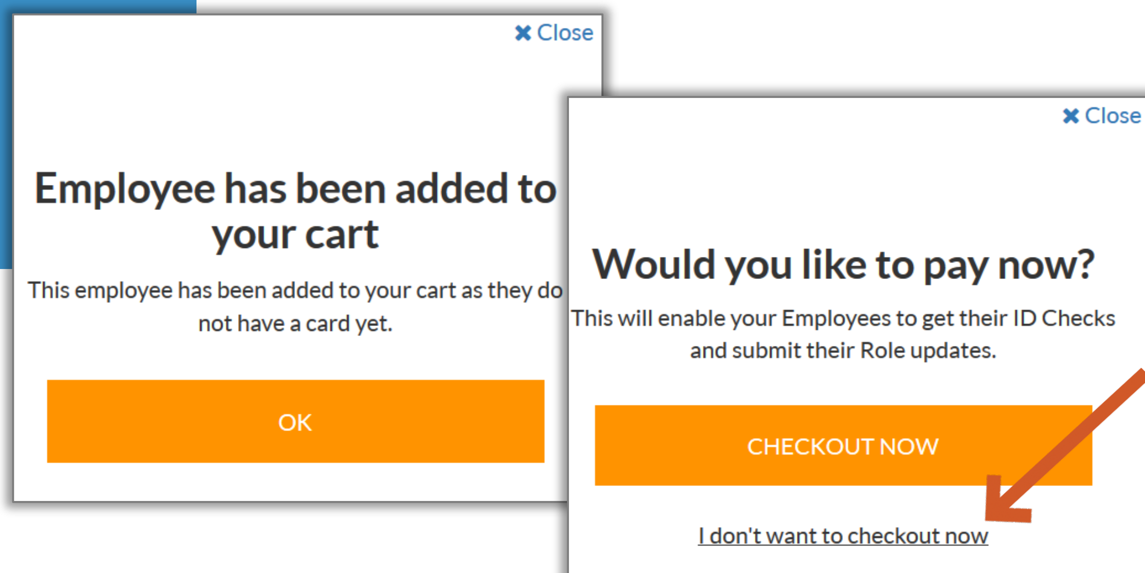
Shopping Cart Payments

STEP 1

Review the shopping cart prior to processing payment.

Click the "Shopping Trolley" icon to continue.

- Payment depends on the portal system and may be for adding or updating a subscription, applying for cards, and some roles and inductions.
- If something requires payment, the shopping cart  will be highlighted at the top of the page
- Multiple items can be paid for at the same time.
- You can continue in the system and return to the Shopping Cart later, to pay items in one go.



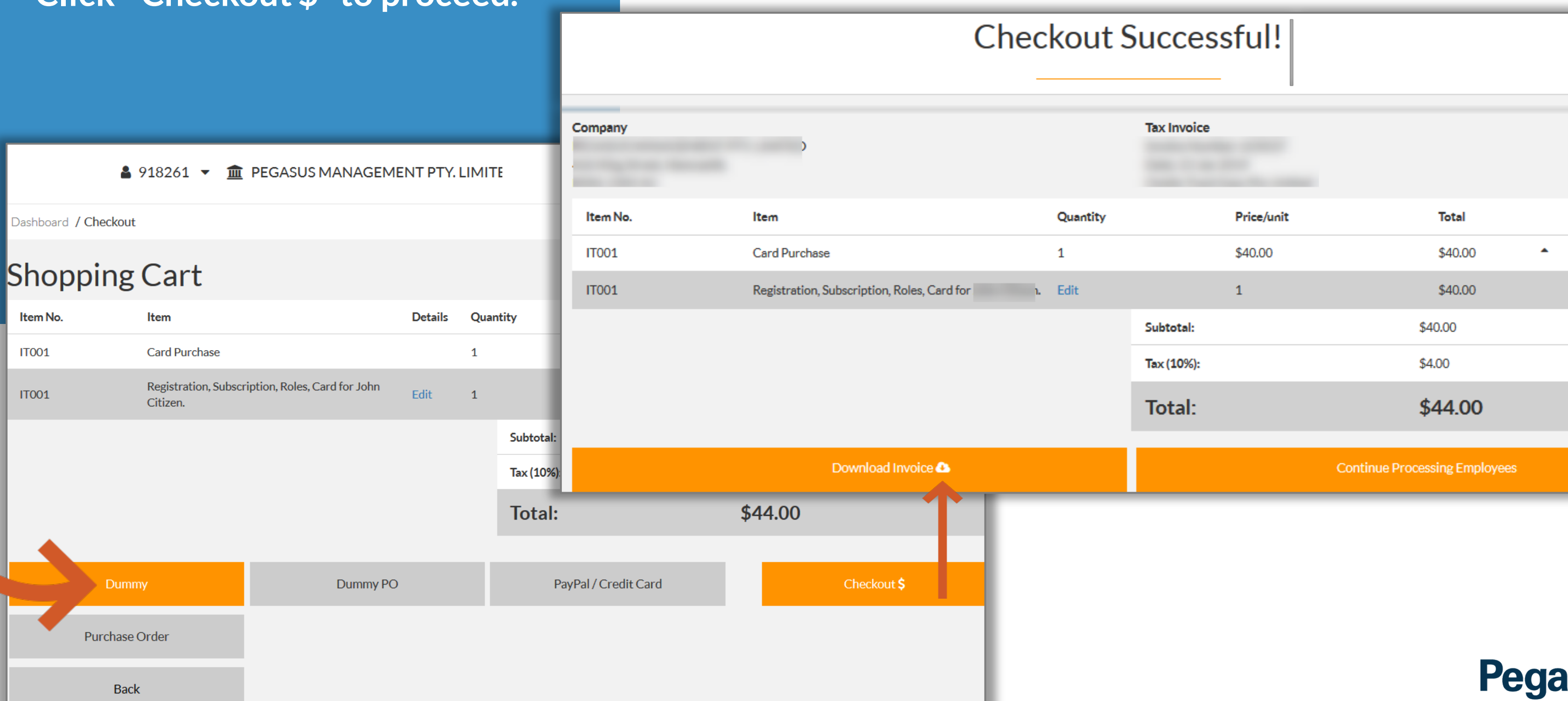
Shopping Cart Payments

STEP 2

Review the shopping cart prior to processing payment.

Click " Checkout $" to proceed.

- Payments can be processed by credit or debit card, or Purchase Order (upon prior approval)
- A tax invoice will be produced and will also be emailed on successful payment.
- Items can be removed from shopping cart
- NOTE: Some portals have a default currency and will choose that depending upon your company's registration. EG. NZD/AUD



ADDING ROLES

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Worker Registration – For New or Existing Employees

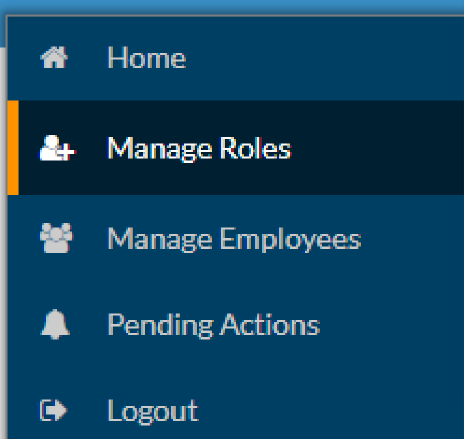
STEP 1

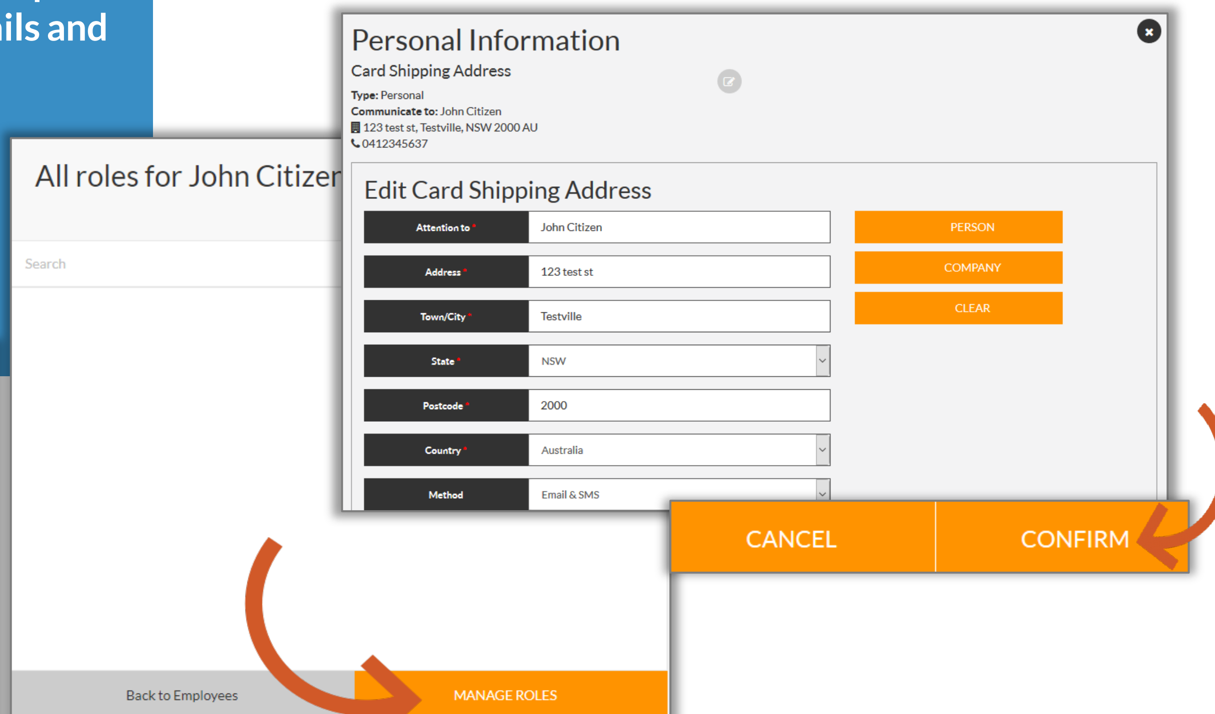
Click "Manage Roles".

Search for Employee you wish to manage. If Employee has no Subscription, you will be prompted to confirm the worker's details and card shipping address if a card is required.

Press "CONFIRM" when done

- The shipping address can be the worker's or your company. Simply click the buttons on the right to change details
- Scroll down to view all of the information and click "Continue"
- A screen confirms this worker was added to the shopping cart. We will return to the shopping cart later
- *A Paid Subscription is required for some portals before being able to add Roles*





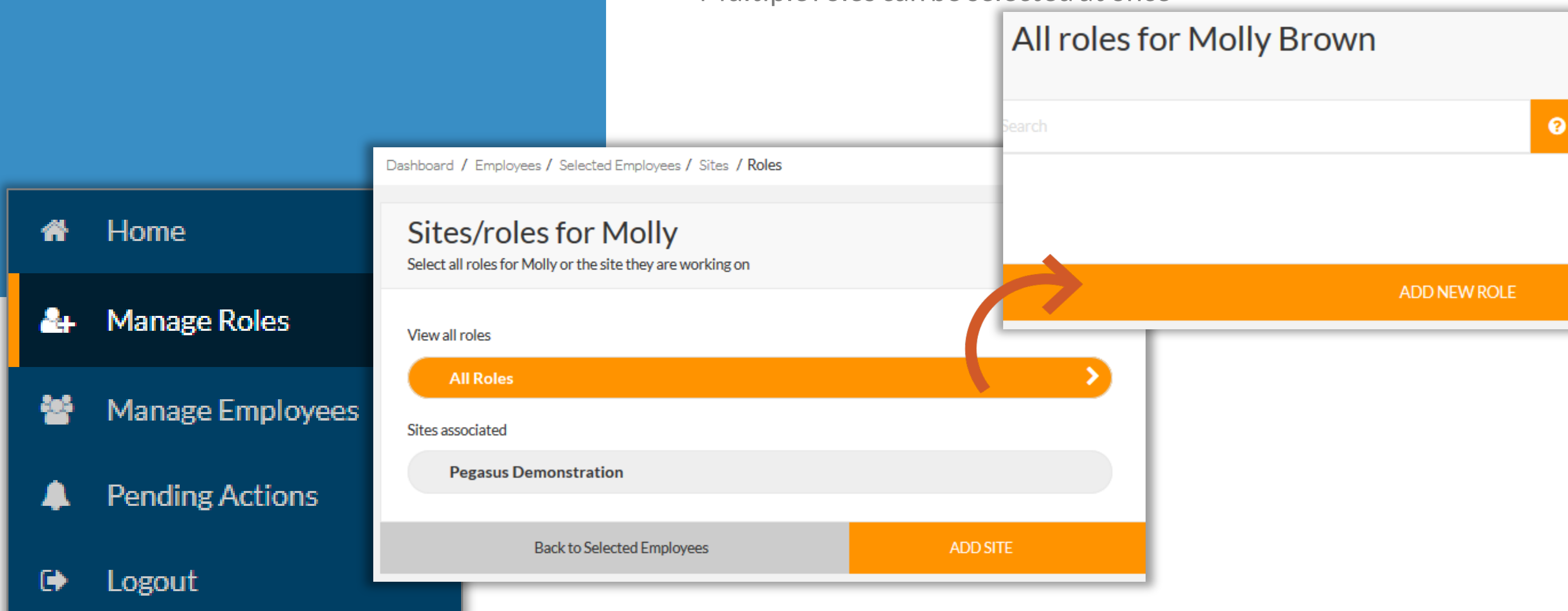
Worker Registration – For New or Existing Employees

STEP 2

Under the "Manage Roles" section, for your selected worker, click "All Roles"

If Worker already has Roles already they will be displayed. If none, click on "ADD NEW ROLE".

- Step 2 assumes Employee has a subscription.
- Step 2 Assumed you have already assigned at least one Site to your worker.
- A list of site approved roles will be displayed. Roles are descriptions of what task the worker will be undertaking at sites but may not reference a title.
- Roles are set by site. If you cannot find a suitable one to select, speak to your site contact
- Multiple roles can be selected at once



Worker Registration – For New or Existing Employees

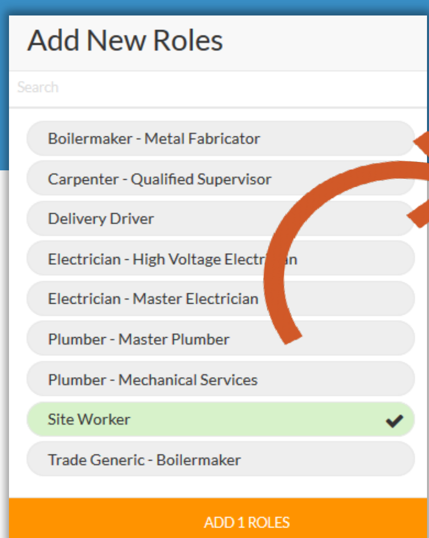
STEP 3

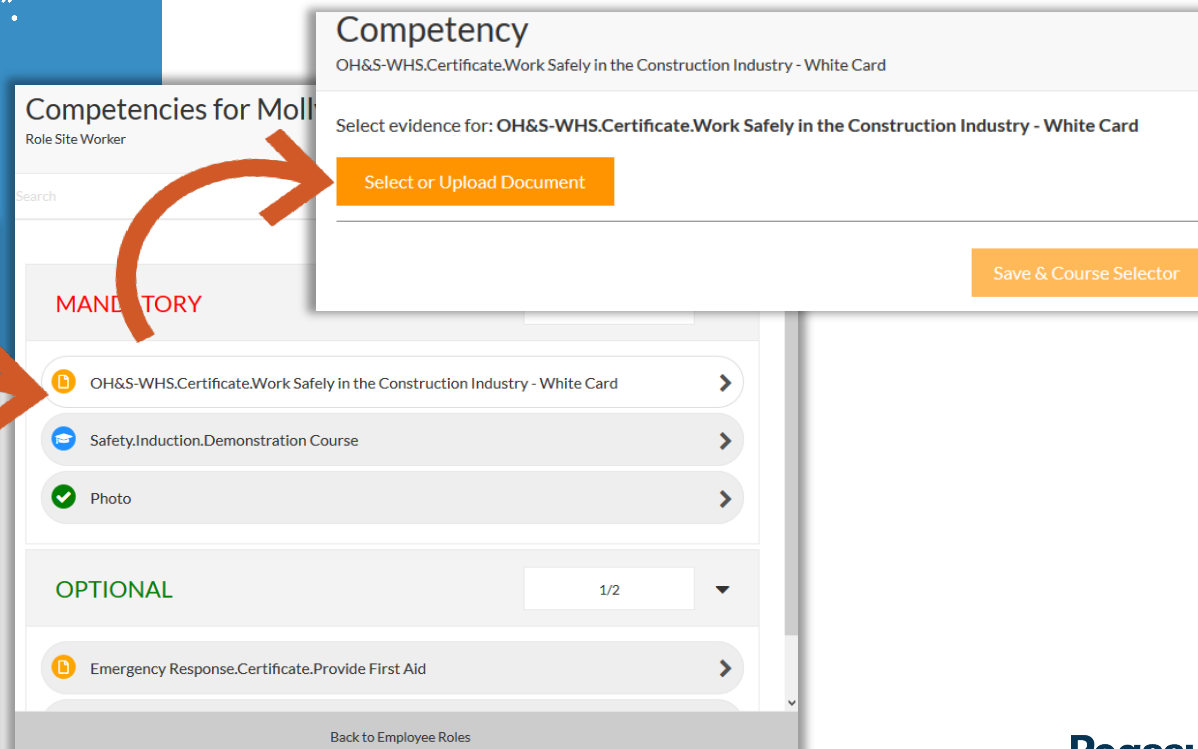
Click an added role to open the document upload section.

Click on the competency you are uploading against and then click “Select or Upload Document”.

Complete all relevant information then click “Save & Next”.

- You need to upload a document that meets the role requirements. The document will need to be scanned and saved to your computer to do this
- The system will step through all the competencies listed. Mandatory items must be uploaded to submit the application.
- The Document Library will store previously uploaded documents to save you having to re-upload





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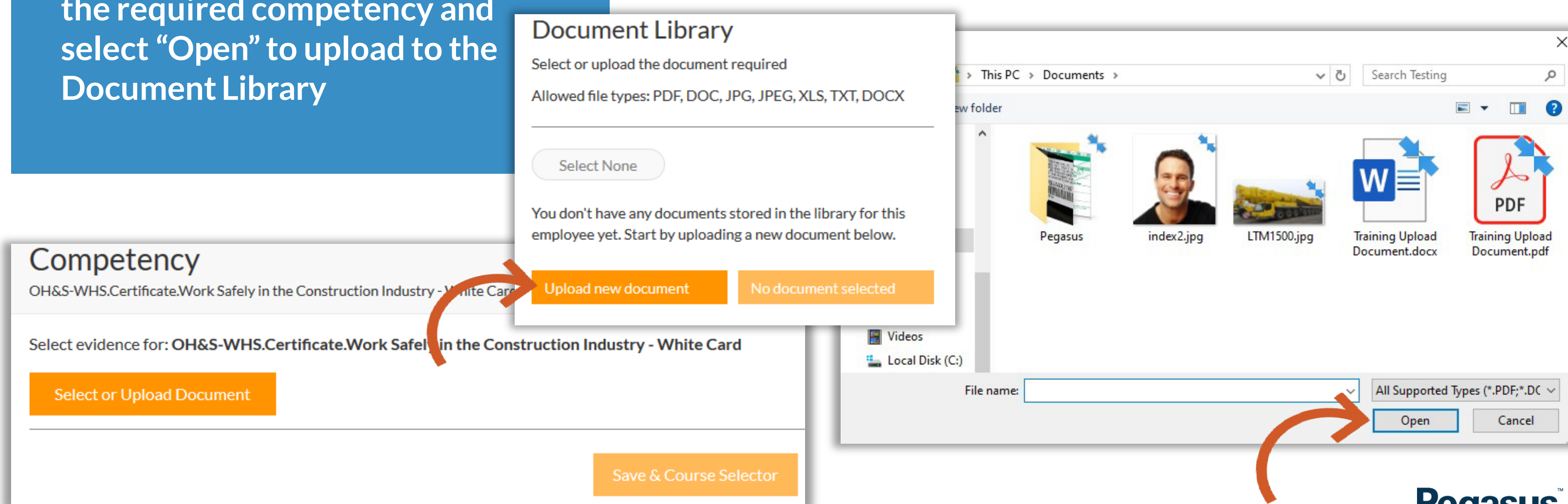
Worker Registration – The Document Library

The Document Library supports PDF, DOC, JPG, JPEG, XLS, TXT, DOCX, XLSX files

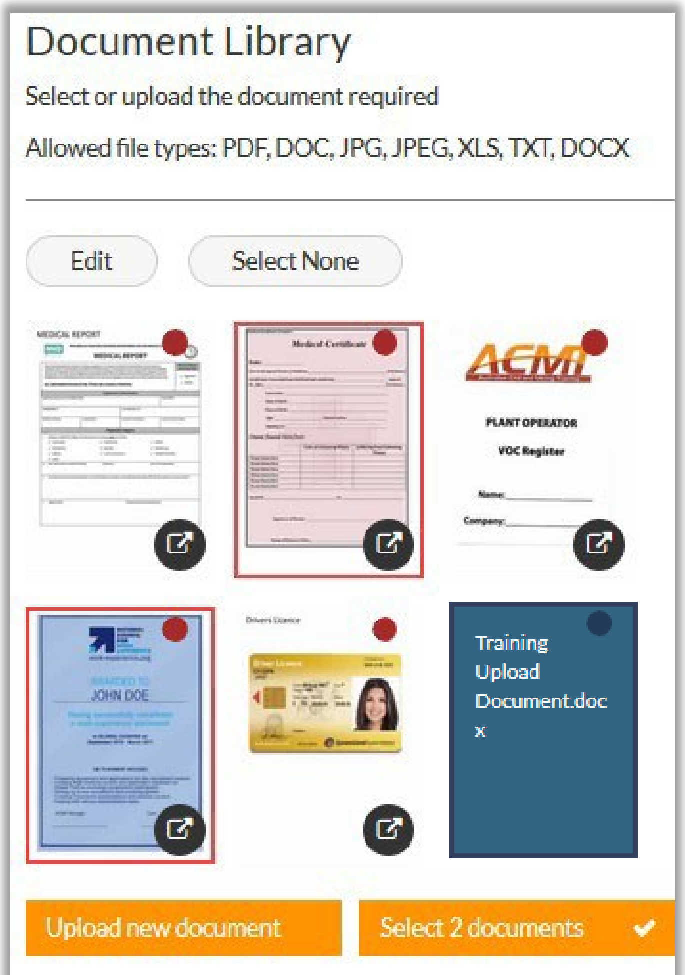
Uses the normal interface to upload files according to your operating system

Select the file to upload against the required competency and select “Open” to upload to the Document Library

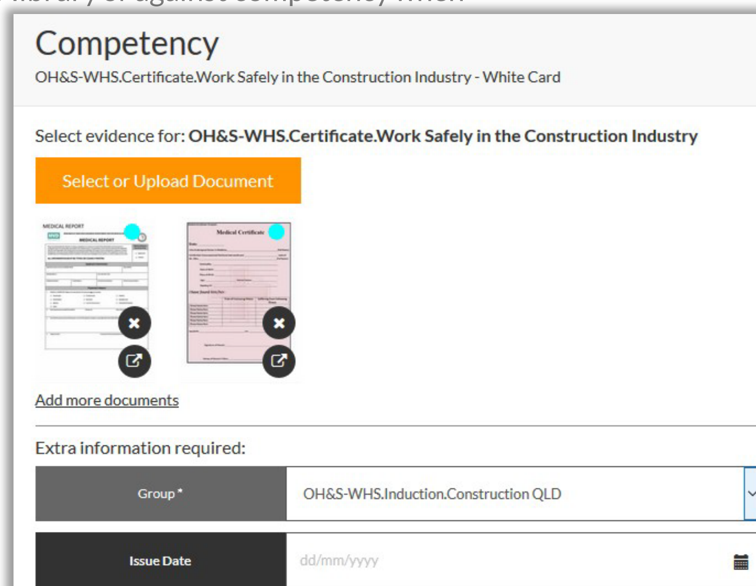
- You need to upload a document that meets the competency business rule requirements. The document will need to be scanned and saved to your computer to do this
- Previously uploaded documents will show for this employee, if used before and if still stored in your internet browser cache.



Worker Registration – The Document Library

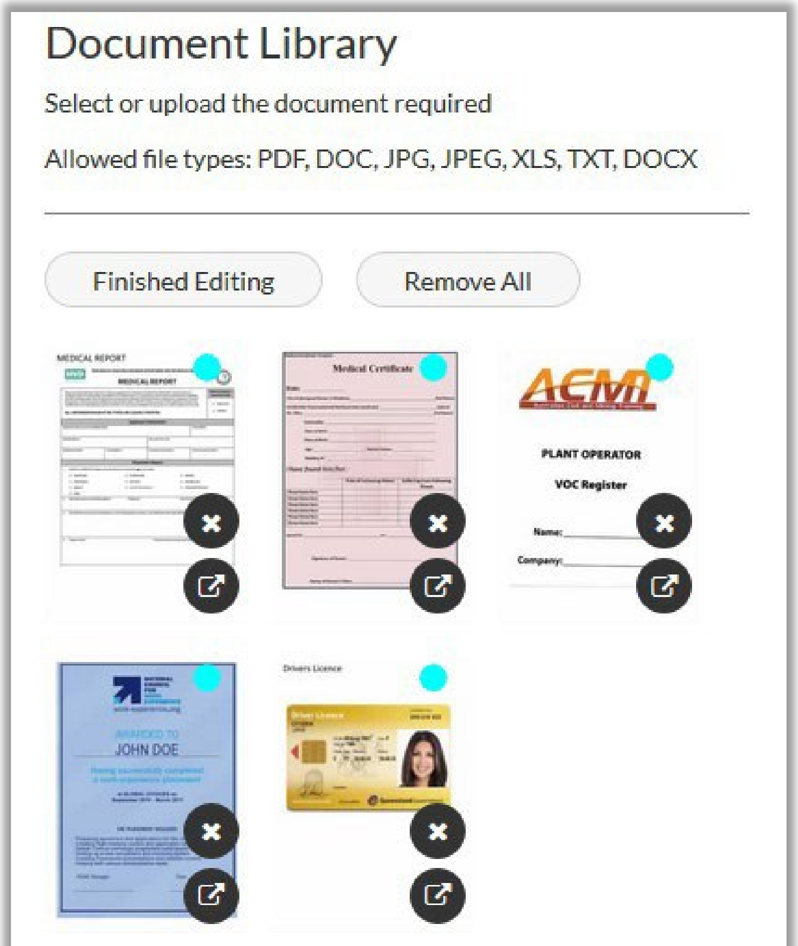


- Multi-Page PDF documents are read by the library and pages are extracted so they can be previewed. Arrow in bottom right of each icon allows to preview file in new window to see contents in more detail
- Multiple documents can then be selected if needed to supply correct evidence for the competency you are uploading evidence for
- Can upload additional documents if necessary (if evidence is across a PDF and Word document for example) and they can also be selected together when uploading the evidence
- Word Documents are NOT extracted. You can only select the word document as evidence, you can not preview it.
- No limit on uploads to library or against competency when uploading evidence.



Worker Registration – The Document Library

- Select Edit in Document Library to edit what current documents are visible for this worker.



- Old documents will be displayed, if previously uploaded. Use the EDIT button to display the option to DELETE the documents no longer required to stay in the Document Library for ease of access.
- Click the “X” next to each document to instantly remove it from the Document Library. This will NOT remove it from the Workers competency. It just removes the quick access to that document. You can always re-upload the document if the incorrect one was deleted.
- Once finished editing the document in the library, click “Finished Editing” to return the Document Library view back to the normal layout.

Worker Registration – Upload Proof or Do Training

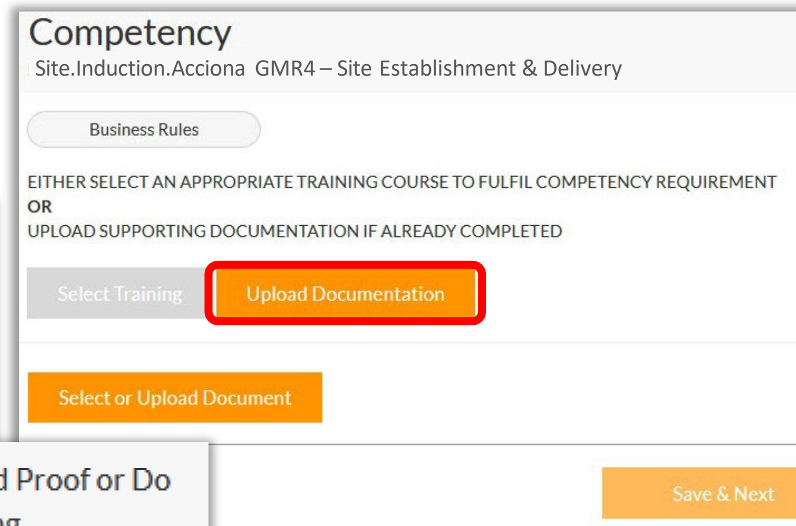
OPTION

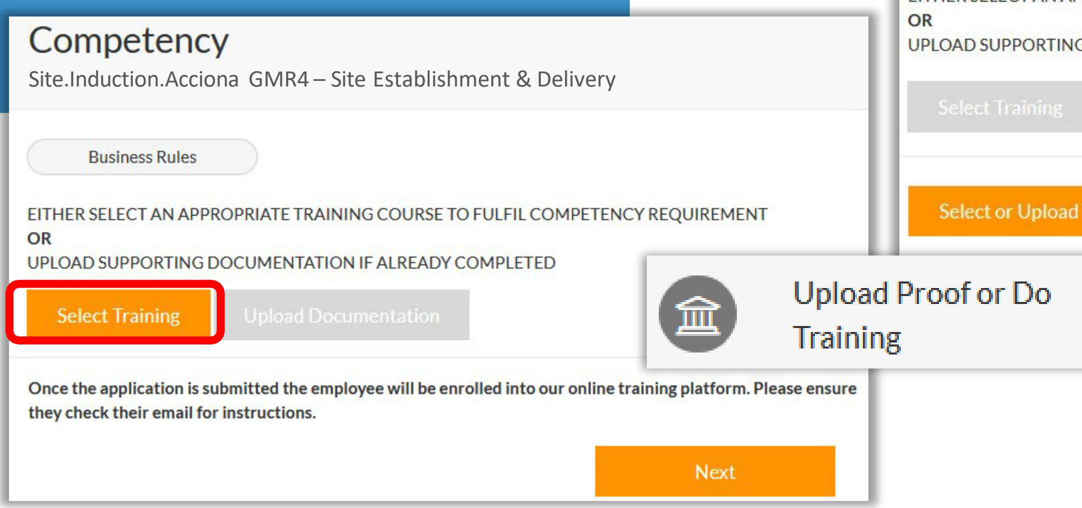
Click on the Competency next in your list. If applicable this following options will appear.

"Select Training" or "Upload Documentation"

Choose the relevant option, undertake any action required, then press Save and Next to continue.

- Some Roles will offer a new option - Select Training or Upload Documentation
- These are recognisable by the University Icon next to the competency.
- Process is the same as Training or Uploading documents, but the feature is available under the one competency to do should that competency allow for that option.
- Only one selection is required here. Click on Business Rules button if unsure of what evidence to supply for this competency,





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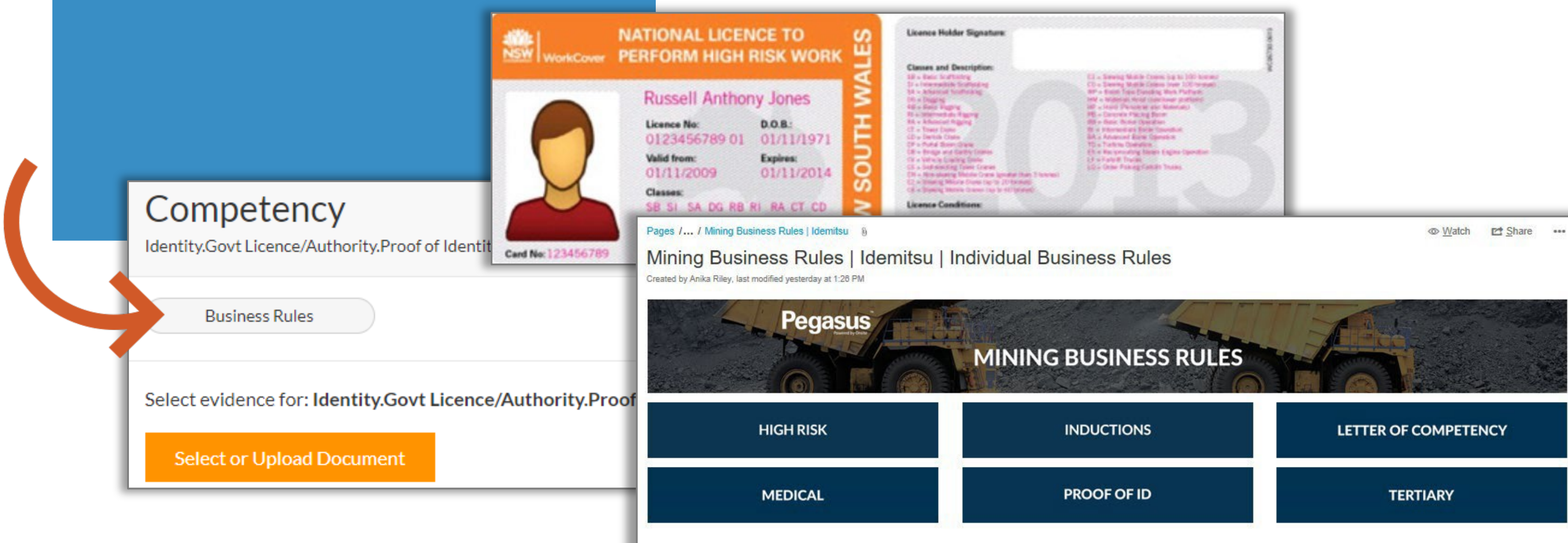
Worker Registration – Note on Business Rules

BUSINESS RULES FOR ROLE AND COMPETENCY REQUIREMENTS

Click on the Business Rules link in the file details section.

- The Business Rules will help you understand the information that must be supplied to meet role requirements.
- Business rules will display the document and upload requirements, and an example document. Competency expiry periods may also be noted.
- Uploading the correct document(s) will ensure a smoother application of roles to your worker. Incorrect documents will be returned to the submitter and can cause delays in role applications.
- If you wish to view all the business rules for this client, visit their Contractor page by clicking on the relevant tile at https://Pegasus.net.au/contractors



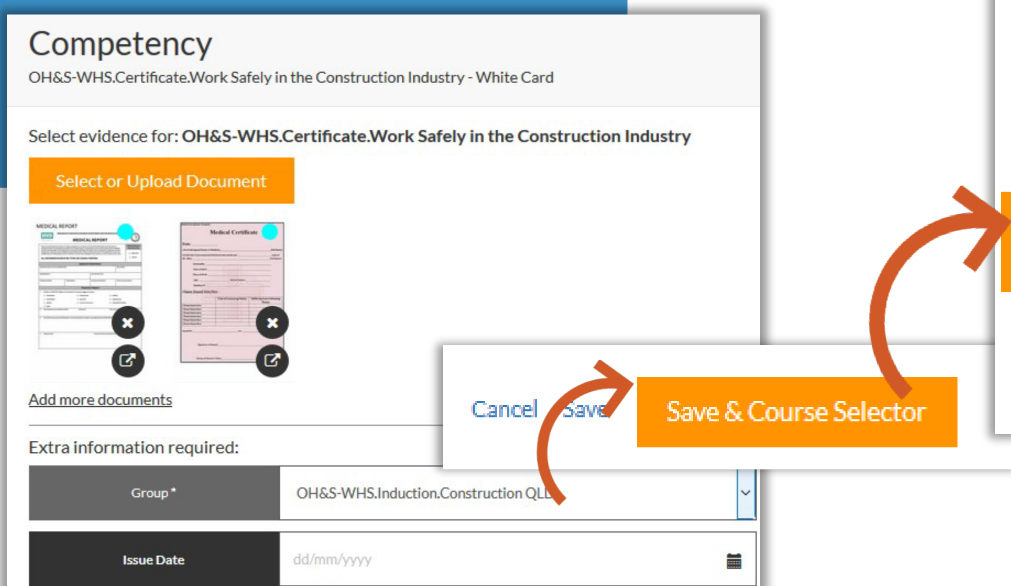
Worker Registration – For New or Existing Employees

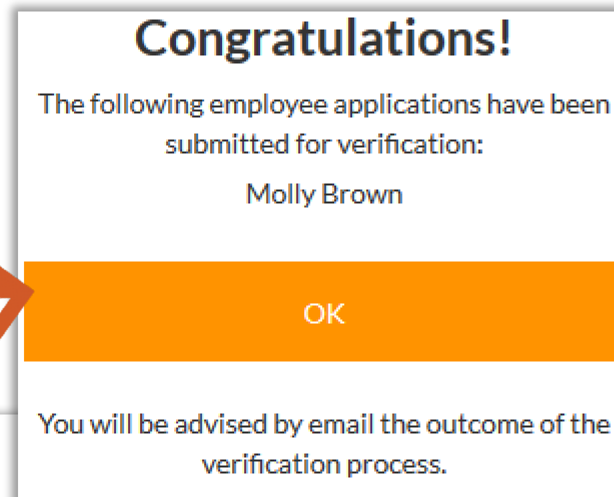
STEP 4

After documents are uploaded and evidence supplied, for each Mandatory Competency, Submit button will appear.

Click "SUBMIT" to finish processing role(s) for worker

- Once documents selected against the competency, the option to add further documents can be done if needed with the "Add more documents" link
- Complete any mandatory fields, marked with an Asterix, to complete the competency upload process.
- Depending upon Role applying for, will either require online or classroom course sections
- If a Role requires a Course booking, it will NOT display at this time, but remain pending until supplied documents are approved first.





PENDING ENROLMENTS UNTIL DOCUMENTS APPROVED

Pending Enrolments Until Documents Approved

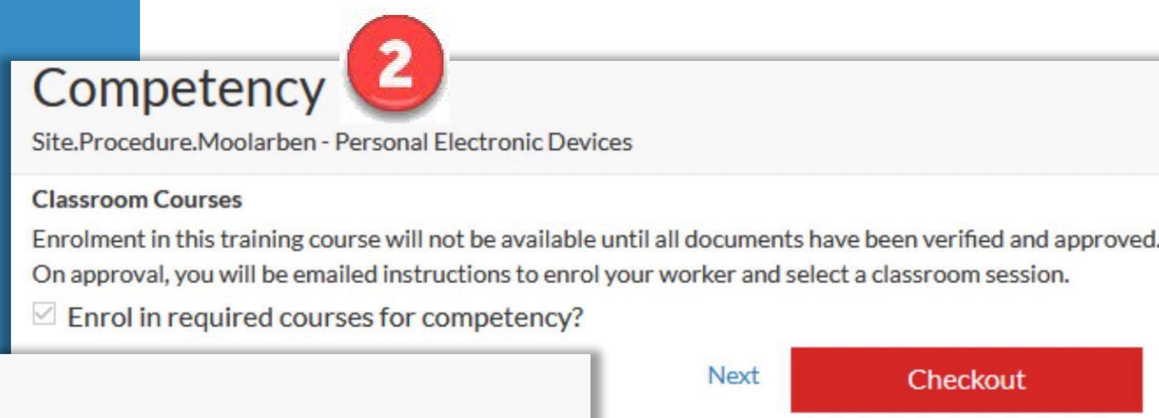
NOTE

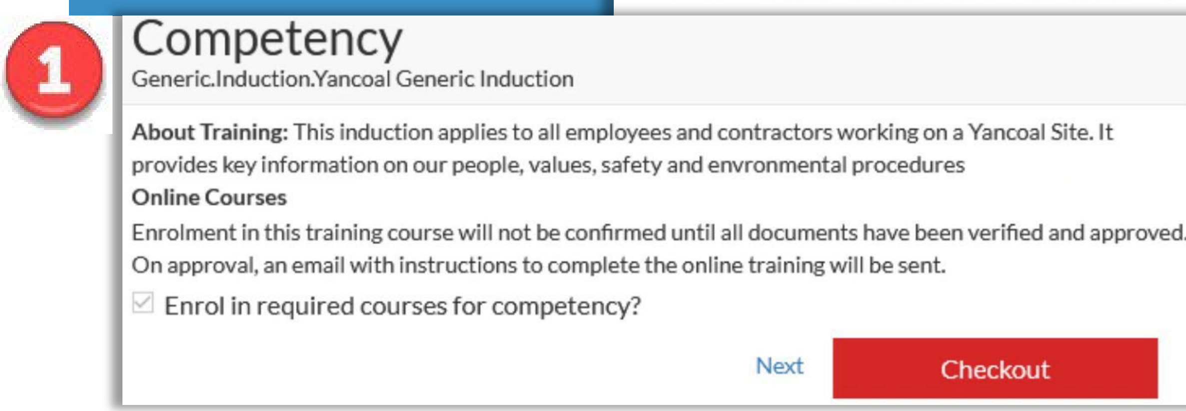
If Portal has feature enabled, details will show when prompted to continue with:

1. Online Courses

2. Classroom Courses

- Notes below will appear in portals with this activated
- Does not stop Portal Administrator from continuing with the Worker Role application
- Training related emails will follow once documents to be submitted, are approved.
- Should Worker application be returned; documents will need to be actioned, re-submitted and approved, before training enrolments will be sent.





Pending Enrolments Until Documents Approved

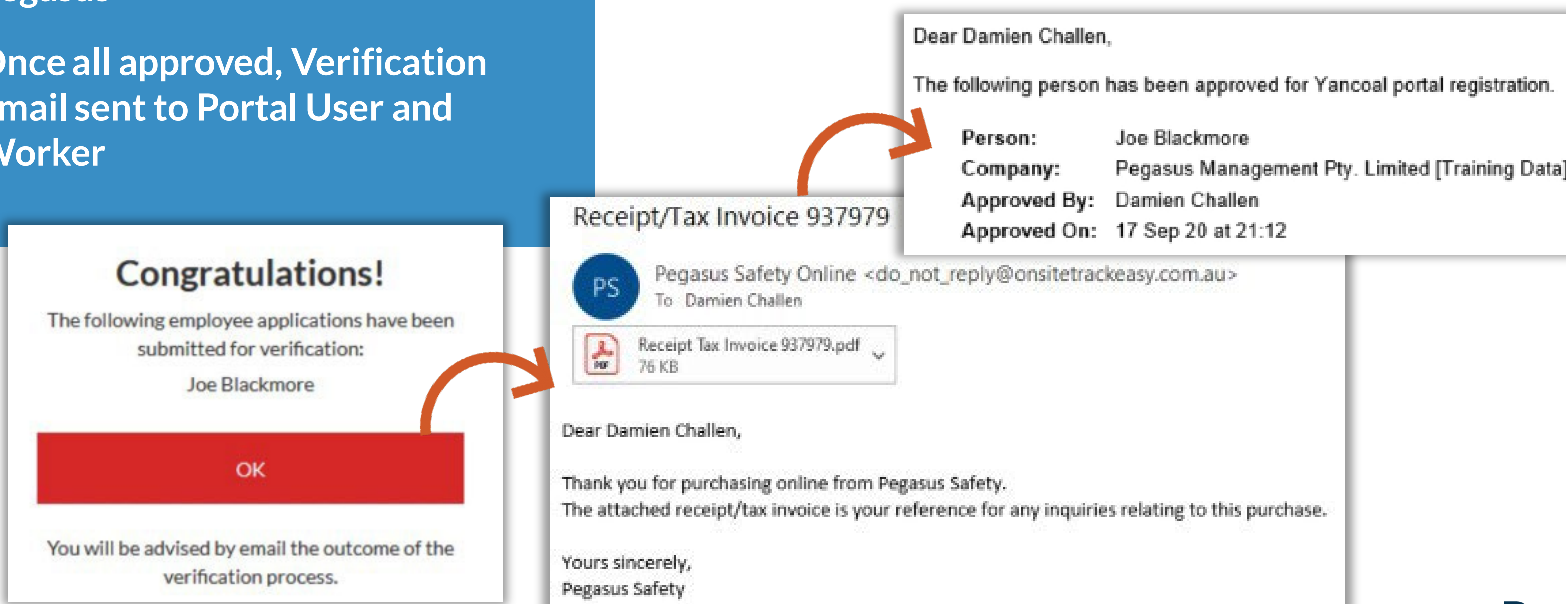
SUBMISSION PROCESS

After Portal User submits role application

Documents are viewed and verified where appropriate by Pegasus

Once all approved, Verification email sent to Portal User and Worker

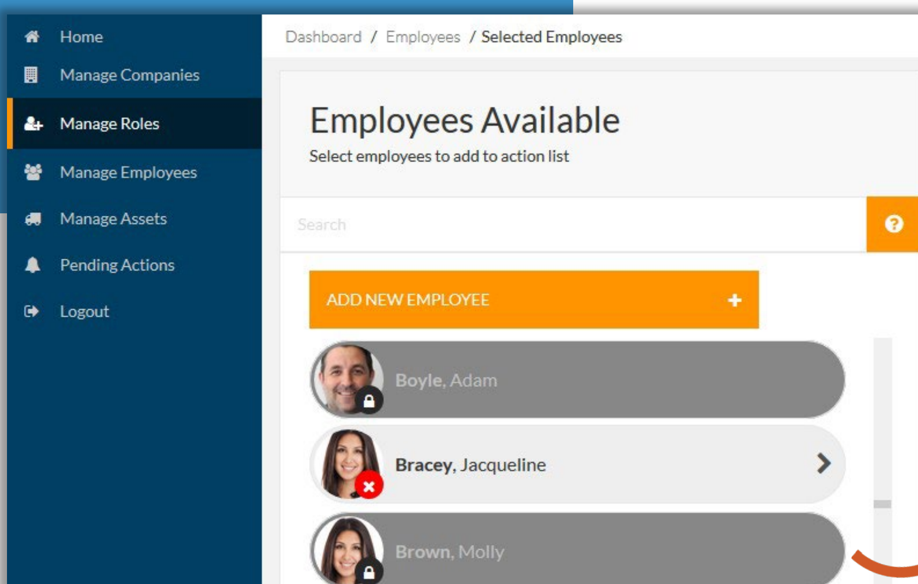
- New feature added to configured Worker Role portals.
- Training enrolments are NOT sent through to the worker until uploaded documents are approved first, can take up to 48 hours to be actioned.
- If Application is returned to Portal Administrator, requested action MUST be resolved, role re-submitted and verified BEFORE training enrolments will be sent.
- Once documents are approved, Portal Administrator and the relevant Worker are informed.

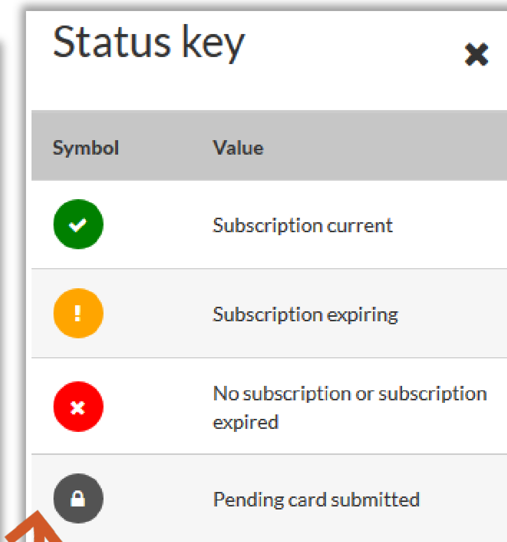


Pending Enrolments Until Documents Approved

Once all uploads are completed and role has been submitted, the worker is now locked, pending document approval from Pegasus

- NOTE: if multiple roles are being added at same time, documents for ALL ROLES need to be uploaded before SUBMIT button is available.
- Processing times for application submissions **will vary per client** site however the standard processing timeframe is up to 2 business days
- Can now process other workers if necessary
- Portal Administrator that processed this Employee will be notified via email of approval/application return status.
- Can view under Pending actions if Company Administrator is away and has been returned in their absence. Notes will be listed in Pending Actions if some action are required to re-submit.





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Pending Enrolments Until Documents Approved

Any enrolled training is now sent to the Portal admin and the Worker

1.Online courses can be started now by the Worker

2.Classroom Courses require Session Selection

- Portal administrator that submitted the role application gets a copy of training emails for reference or to action if required.
- Click on the hyperlinks to launch training content
- Classroom courses require choosing a date/time to attend

2

Yancoal Australia
Enrolment Approved

Hello Joe Blackmore,

As part of your compliance to work for Yancoal Australia you must successfully complete the following training which has just been approved -

Moolarben General Induction V2

This is a classroom course so you will need to select the session that you wish to attend by clicking the 'Select Session' button below, or by pasting the link below into your browser.

Select Session

https://qa.onsitetrackeasy.com.au/training-service/enrolment/cf6b389c-30e1-4691-92c7-0a04e1daa497/select-session

1

Yancoal Australia
Enrolment Approved

Hello Joe Blackmore,

As part of your compliance to work for Yancoal Australia you must successfully complete the following training which has just been approved -

Yancoal Generic Induction

Pending Enrolments Until Documents Approved

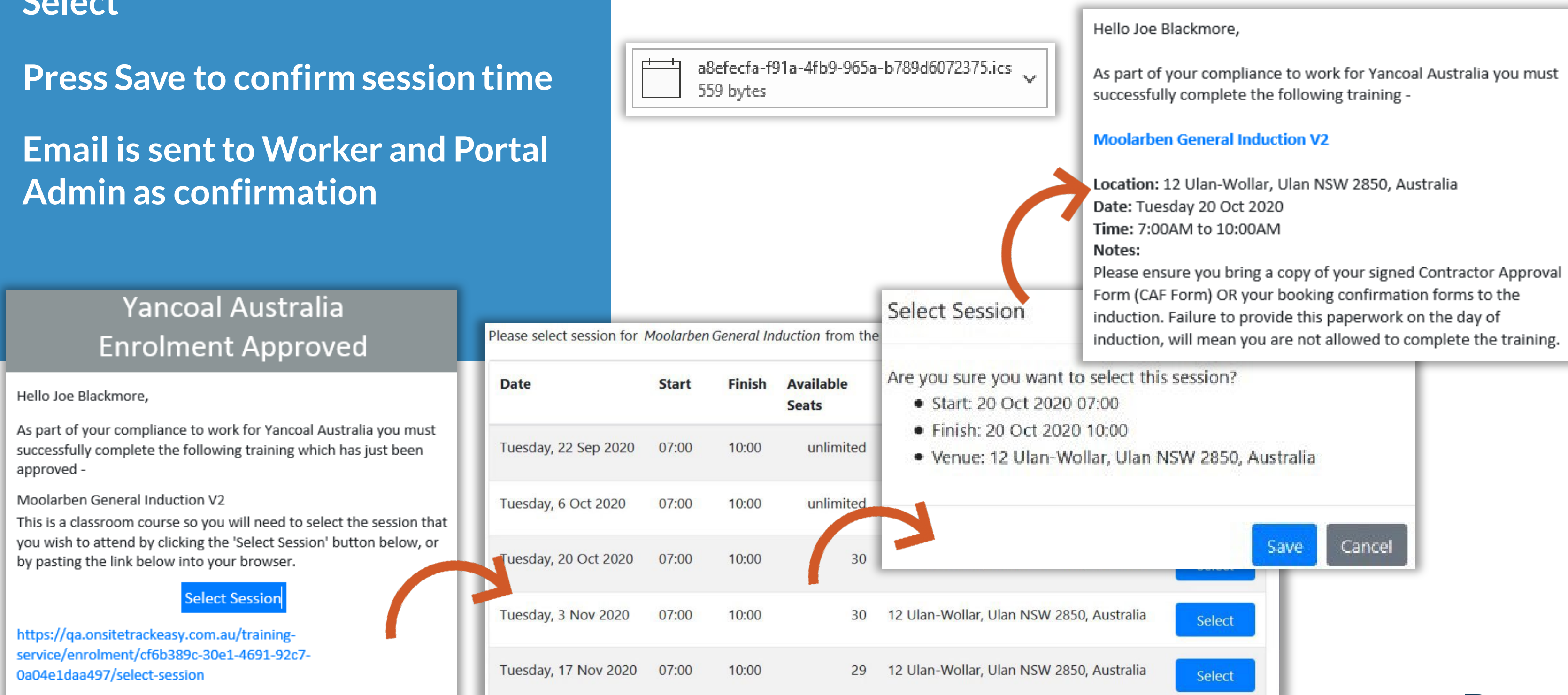
Classroom Courses Prompt for Session Selection

Choose Suitable session and press Select

Press Save to confirm session time

Email is sent to Worker and Portal Admin as confirmation

- Portal administrator that submitted the role application gets a copy of Date/Time of session selected for reference
- Once selected, Session Date/Time are locked in.
- Additional notes regarding course requirements, location, site requirements etc will be in the email
- Microsoft Calendar file attached to booking, for additional reminder in worker and Portal Administrators calendars

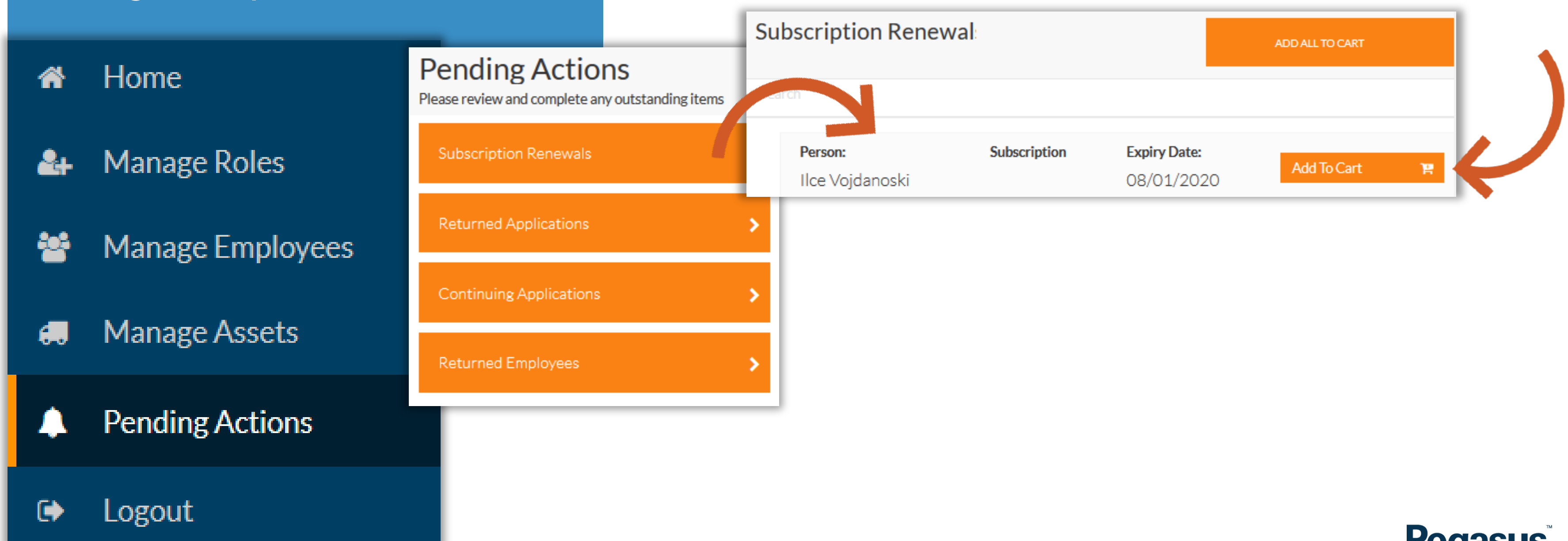


PENDING ACTIONS

Pending Actions – Subscription Renewals

Continuing Applications – Shows any unsubmitted applications that were started by administrators. You can search for a worker and continue, or cancel these applications. Helpful if original person that submitted has changed and you want to continue.

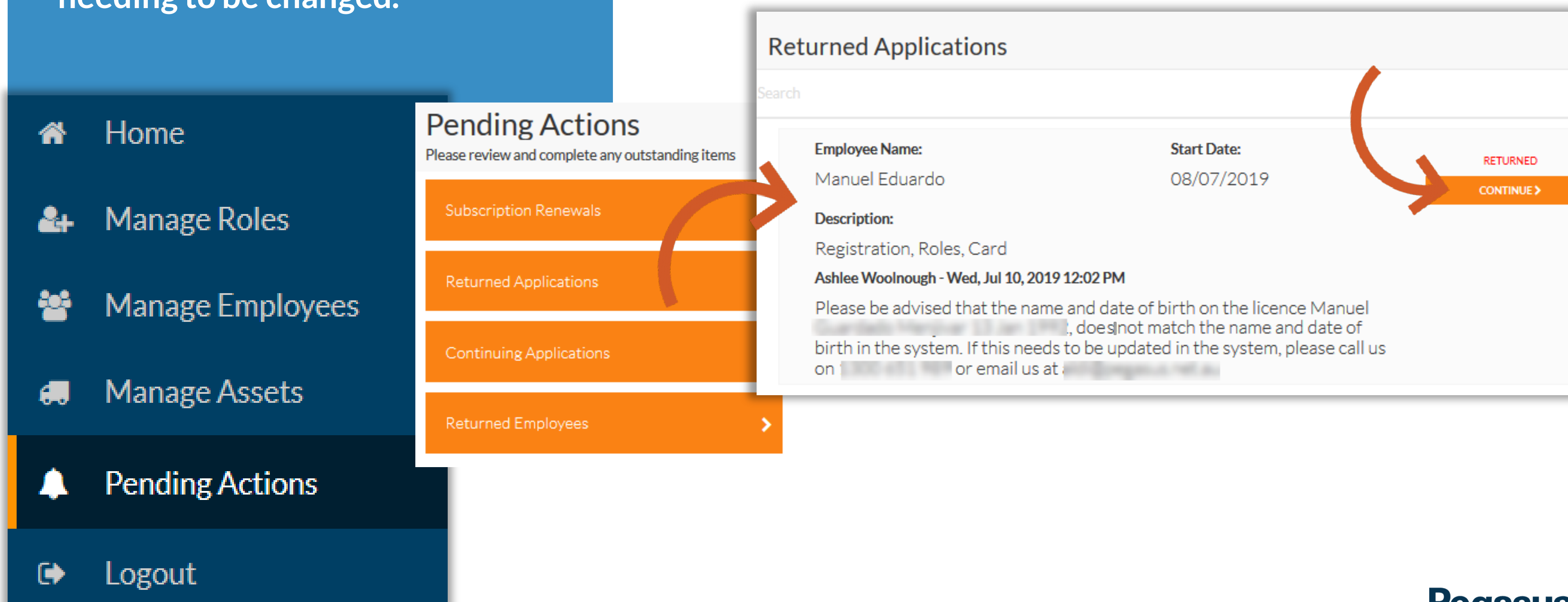
- Pending actions essentially allows company administrators to check on the status of applications and workers without a lot of searching.
- If you had not originally submitted an application, (i.e. Administrator that did is now on leave) you can see the status of any unfinished items.



Pending Actions – Returned Applications

Returned Applications – Any application that does not meet the Client's Business Rules will be returned to be resolved. You can then re-open the application and correct the item(s) listed as needing to be changed.

- Pending actions essentially allows company administrators to check on the status of applications and workers without a lot of searching.
- If you had not originally submitted an application, (i.e. Administrator that did is now on leave) you can see the status of any unfinished items.
- Common returns are: Incorrect document uploaded (i.e. wrong paperwork for a competency), expired documents uploaded, incorrect photo uploaded that is not in a passport style format.
- Application can be continued and only the returned items will need to be addressed before re-submitting.



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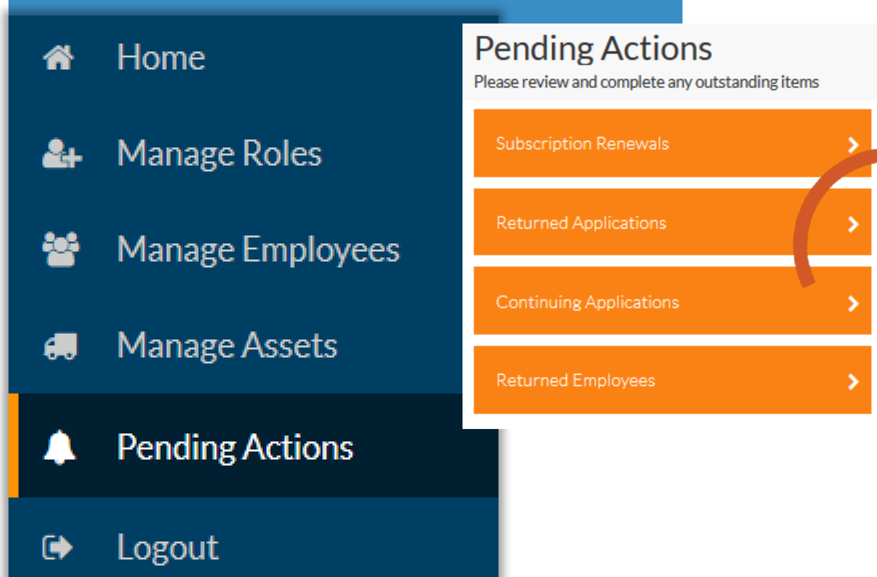
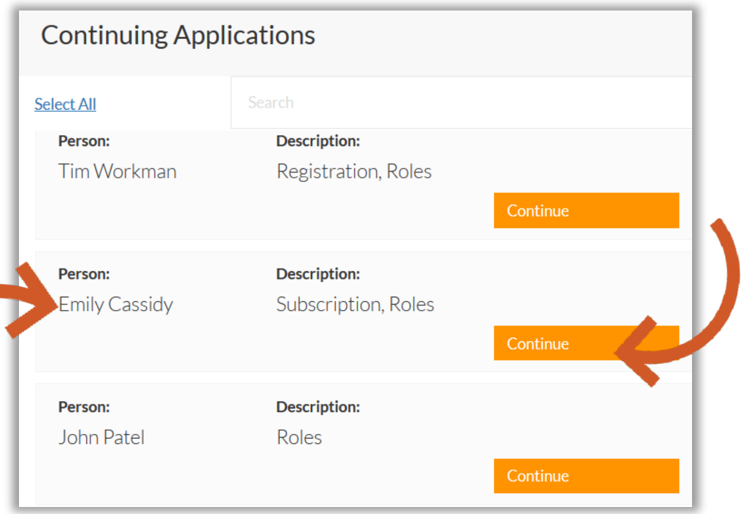
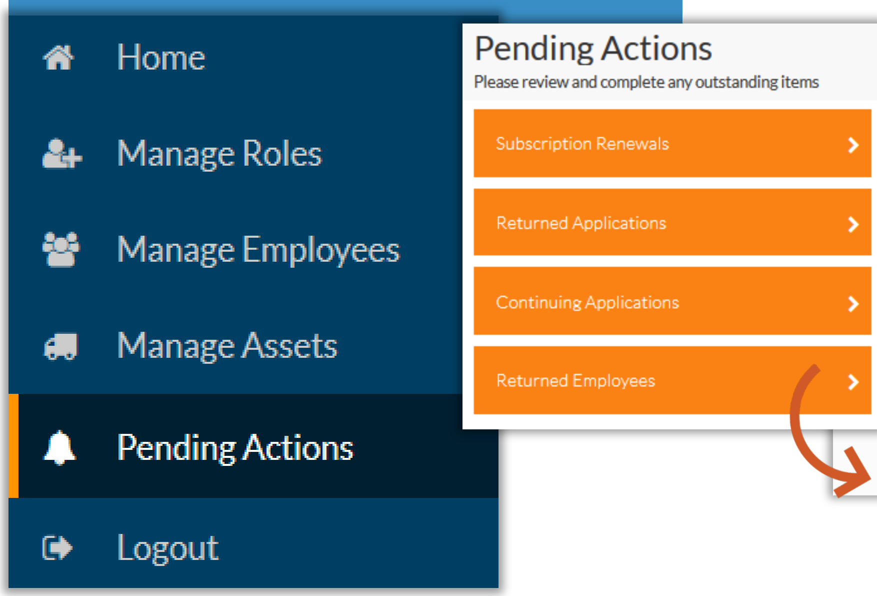


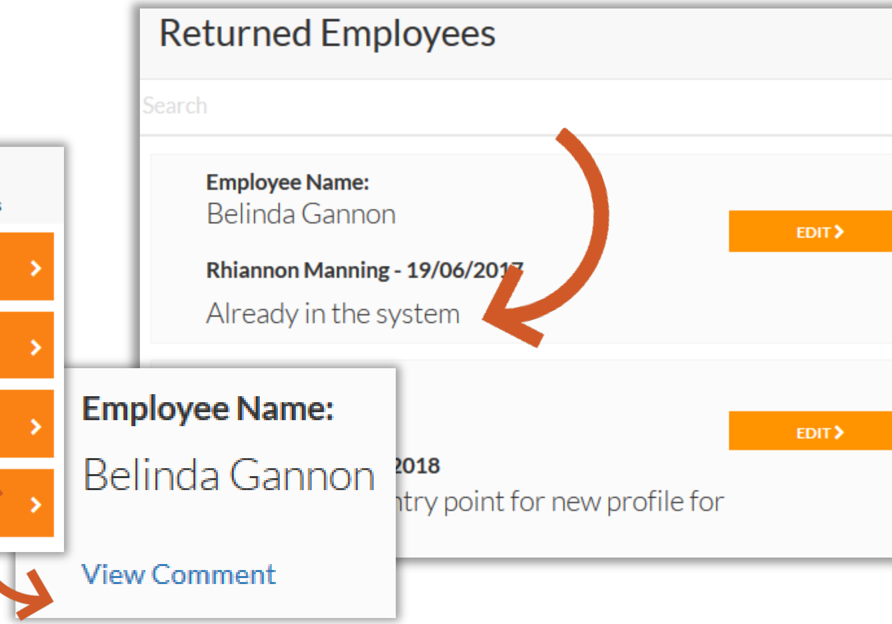


Pending Actions – Returned Employees

Returned Employees – Shows any new Employees that were created by an Administrator.
Reasons for returning are generally the submitted employee has details that match and existing one in the system, or incorrect data was submitted in application.

- Pending actions essentially allows company administrators to check on the status of applications and workers without a lot of searching.
- If you had not originally submitted an application, (i.e. Administrator that did is now on leave) you can see the status of any returned items
- If Employee Returned, please contact Pegasus Support in order to either merge this new cardholder or have the existing employee found associated with your company.





Pegasus

RENEWING EXPIRING DOCUMENTS

Renewing Documents

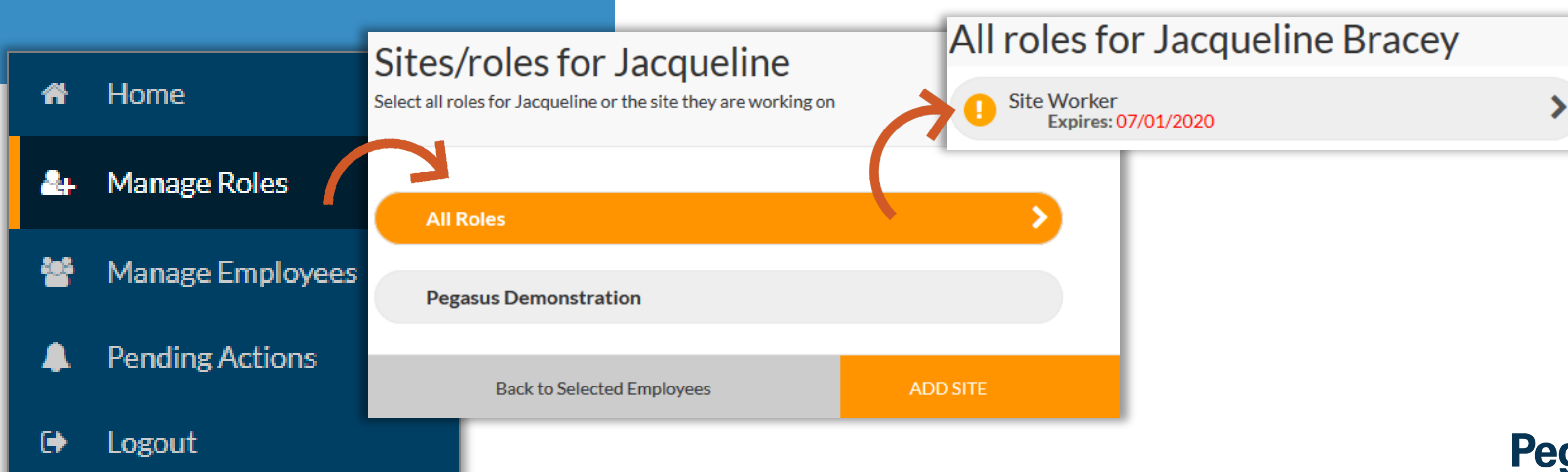
STEP 1

Click on "Manage Roles" and find the Employee you wish to view.

View the Role you wish to see the Status of.

If the Role has an expiring Competency, it will list the earliest expiring date against the Role.

- Documents that ***have*** expired will generally be requested when applying for Roles. As that document related to a competency has already expired, then you would follow the normal process on the slides under "Adding Roles" section starting on slide 14.
- Renewing a document that is ***due*** to expire, you can upload a newer document in advance of it expiring. Once approved, this will then add the updated document to your profile and the competency will then reflect the new end date of that document.
- Some competencies never expire, due to the business rules of the client. Check the relevant business rules for that competency.
- Expiring Competency notifications are sent to Company Administrators and Worker's email address at both 30 days and 7 days before expiry.



Renewing Documents

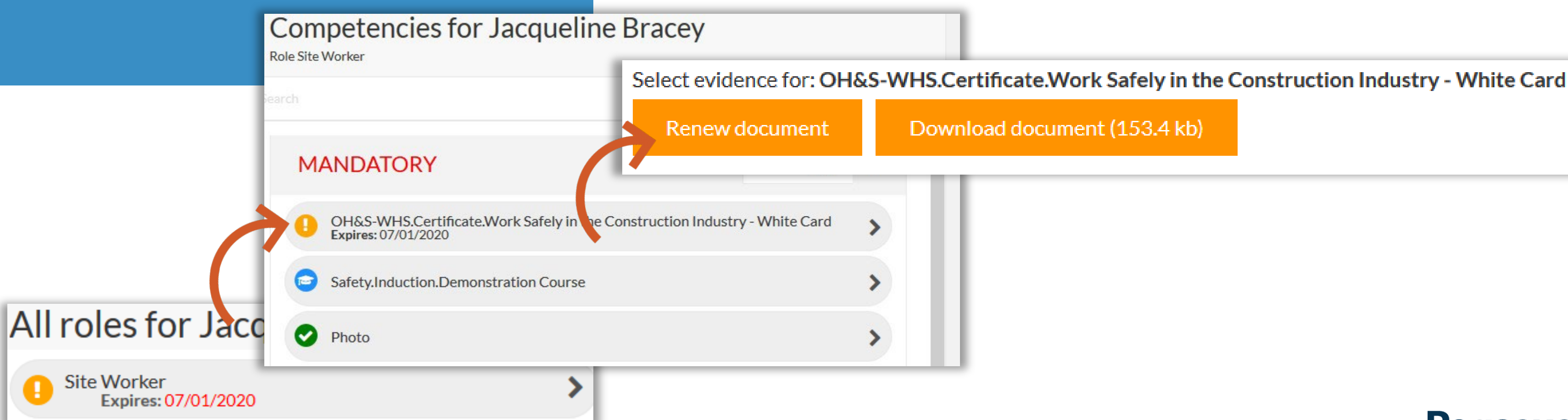
STEP 2

Click the competency you wish to update.

Click the “Renew document” button

This will open the Document Library page.

- In order to renew a document, the option will only appear after the competency reaches the 30 day expiry period. Prior to this, the “Renew document” option does not appear.
- You can at any time download the existing approved document assigned to the competency by pressing “Download document” and save it to your computer., even if it isn’t due to expire. This is useful if you are requiring to upload this in a different clients portal, or can not easily find the file on your computer.



Renewing Documents

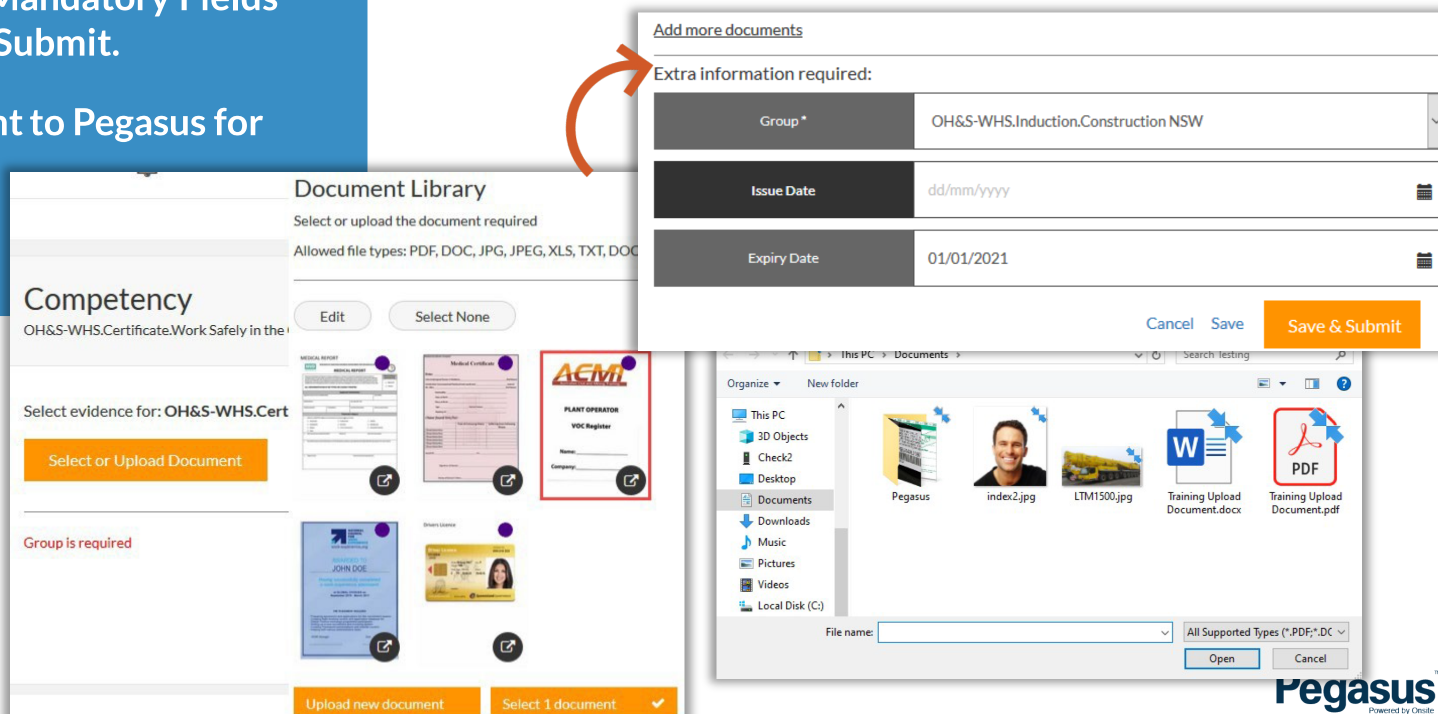
STEP 3

Click on the required option for upload (already in Document Library or Upload new document)

Complete any Mandatory Fields Click Save and Submit.

Now will be sent to Pegasus for approval.

- Follow the same steps shown in "Adding Roles" slide 18, to understand how the Document Library works if unsure.
- Additional document evidence can be uploaded against the competency if required. So multiple files can be uploaded and submitted for the competency.
- Not all file uploads require "Group" "Issue Date" "Expiry Date" "Comments" contents to be filled out. If one is Mandatory, you will not be able to submit until it id completed.
- Once Submitted, will then lock profile with Pegasus to aprove.



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FOR ANY QUESTIONS OR ASSISTANCE PLEASE CALL

1300 131 194

OR EMAIL **info@pegasus.net.au**

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