

PegasusTM
Powered by Onsite



CLIENT ACCESS VIEW

USER GUIDE- Contractor Management System
Version 1.44



TABLE OF CONTENTS

Login	3
View Company Details	7
Manage Facilities	16
Running Reports	19
Suspending Companies	24



LOGIN TO PEGASUS GATEWAY

Login - Pegasus Gateway



INFORMATION

Pegasus now manages over 250 client sites. We realise connectivity needs to be easier when you are working across multiple clients, so we created Pegasus Gateway to make things easier!

It's a new dashboard that allows you to link all the Portals you access in one handy location. Linking your logins allows you the power to move between Portals with ease.

- Pegasus Gateway is your key to connect your business and workforce to our industries and networks.
- It will allow you to manage all your Pegasus compliance requirements in one place with one username and password.
- Once you register for a Pegasus Account, you can link project portals to your Pegasus Gateway Dashboard.
- Finding the right place to stay compliant and keep working for a project is as simple as clicking a Portal Tile from your Dashboard.
- Also used with the Pegasus Client Portal
- More information at <https://kb.pegasus.net.au/display/CA/Pegasus+Gateway>

Pegasus Powered by Oracle [Return To Dashboard](#)

Dashboard

Portals

- ALDI
- Ausgrid
- BHP Mt Arthur Coal
- Bounty Cook Colliery

Notifications

09/07/2019
7 Reasons to Work with Pegasus
From innovation to security, agility to experience. Here are just 7 reasons to partner with Pegasus! [Read Article](#)

08/07/2019
9 July Release
A Pegasus software deployment is scheduled for 9 July 2019 for bug fixes. At 10.35 pm AEST, Onsite version 2 will be unavailable for approximately 15 minutes while the deployment takes place. [Read Article](#)

Login - Pegasus Gateway

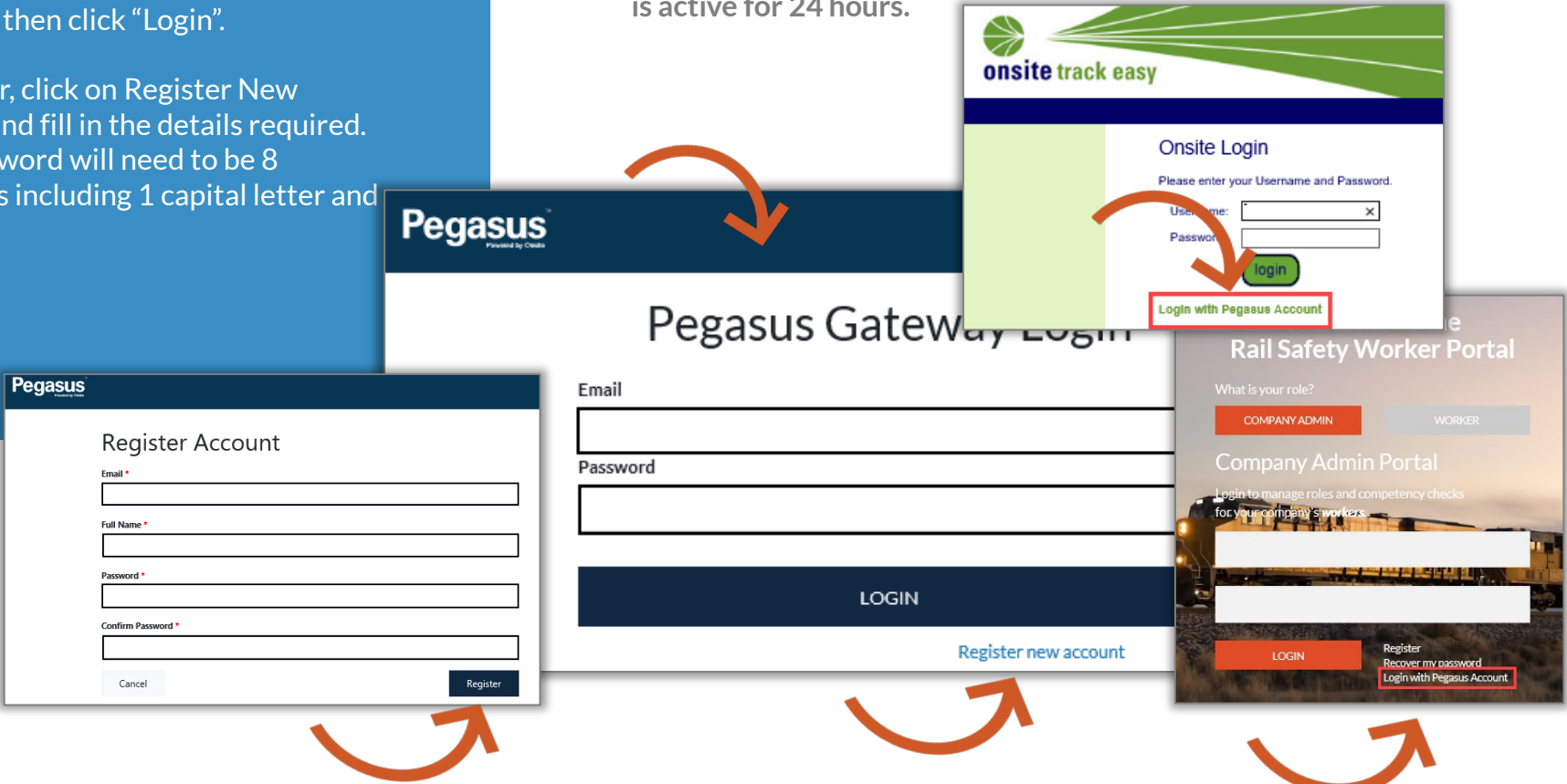


LOGIN

Go to <https://login.poweredbyonsite.com/> and enter your username and password then click "Login".

To register, click on Register New Account and fill in the details required. Your password will need to be 8 characters including 1 capital letter and 1 number.

- If you have not registered for a Pegasus Gateway account yet, click on Register New Account located under the Login button.
- You can also access the Gateway platform from Onsite Track Easy or any of the portals you are already registered with.
- Activate your new account by clicking on the activation link in the email you will receive after clicking "Register". This link is active for 24 hours.



■ Login - Pegasus Client Portal



COMPANIES

Click on Companies

This will launch the Client Access View Page

- All Site/Realm users will have access to view Companies page
- Contractors have no access to this portal or its features
- Dedicated to Site/Realm users only

Dashboard Pegasus Demonstration User

Workers Crews Training Report

Onsite Companies LMS



VIEW COMPANY DETAILS

View Company Details



STEP 1

Select “Organisations” from the side menu to access contractors. Search for a Contractor by entering the company name in the search bar.

To view the company’s profile, select the company name from the list returned.

- View will show all currently Approved (not necessarily compliant) Companies registered to work for you.
- You can filter out unwanted companies by typing in a keyword in the “search Organisations” box and pressing Enter Key.

The screenshot displays the 'Associated Organisations' page. On the left is a dark blue sidebar with a menu containing 'Organisations', 'Facilities', 'Reports', and 'Logout'. The main content area has a light grey header with the title 'Associated Organisations'. Below the title is a search bar labeled 'Search Organisation' and a 'Filter by category' dropdown. Underneath are four filter buttons: 'Compliant', 'Non-Compliant', 'Suspended', and 'Not Suspended'. A table lists the following organisations:

Registered Business Name	Business Number	Compliance Status	Compliance Expiry	Suspension Status
PEGASUS MANAGEMENT PTY. LIMITED (PEGASUS MANAGEMENT PTY. LIMITED)	ABN 91080018800	✓ a day ago	1/8/20	✓
COLINE, ELLA (COLINE, ELLA)	ABN 4111743811	✗ 3 months ago		✗
GRAF, ADRIAN HANS (GRAF, ADRIAN HANS)	ABN 20481908110	✗ 3 months ago		✗
GRAF, ADRIAN HANS (GRAF, ADRIAN HANS)	ABN 20481908110	✗ 3 months ago		✗
Avon Ecology & Heritage Pty Ltd (Avon Ecology & Heritage Pty Ltd)	ABN 94607111464	✗ 3 months ago		✗

View Company Details



STEP 2

Once Selected then click on each of the tabs under the company name to see different options

- Suspend option only appears under the Details page
- If there is an active Suspension you can un-suspend that from this page for that company. Suspensions is covered later in this document .
- **Details** - References the business information including address details
Compliance - Ability to see if the contractor is compliant or not
Modules - Ability to view the responses provided during the registration process
Office Locations - Any additional office locations that the company may have
Contacts - Key contact information
Categories - Categories that have been assigned through the registration process
Documents - View contractors uploaded documents

< PEGASUS MANAGEMENT PTY. LIMITED ✓

Details Compliance Modules Office Locations Contacts Categories Documents Administrators

Suspend Cancel Save

Registered Business Name*
PEGASUS MANAGEMENT PTY. LIMITED

Country*
Australia

Business Name
PEGASUS MANAGEMENT PTY. LIMITED

ABN*
91080018800

View Details and Compliance

- Displays the registered business name and trading name, ABN, email addresses and business information.

< PEGASUS MANAGEMENT PTY. LIMITED ✓

Details Compliance Modules Office Locations Contacts Categories Documents Administrators

Registered Business Name *

PEGASUS MANAGEMENT PTY. LIMITED

Business Name

PEGASUS MANAGEMENT PTY. LIMITED

- Compliance - Based on the workflow that your company uses, you will see two or three overview indicators.
- These overview indicators will display as green ticks once a organisation is compliant.

< PEGASUS MANAGEMENT PTY. LIMITED ✓

Details Compliance Modules Office Locations Contacts Categories Documents Administrators

Overview

✓ 1/1 Subscriptions ✓ 4/4 Certificates ✓ 1/1 Assessments

- While the certificates are being verified or the assessment is being audited, the indicators will display orange.
- Note: The values may change as additional steps are triggered in the workflow.


Overview

✓ 2/2 Subscriptions ! 3/4 Certificates ! 0/1 Assessments

View Compliance


- Subscription will show type and expiry date.
- Renew option will appear at 30 days before expiry
- Certificates will show status in the Compliance system
- Review the status of each certificate and/or assessment in the status column.
- “Active” means that it has been approved.
- “Submitted” means that it is ready for approval and/or audit.
- “In Progress” means that it has not been uploaded or submitted by the organisation.
- Assessments relates to SMS (Safety Management Systems) review category and its score in the system

Subscriptions

Search 

Name	Description	Expiry Date	Status
SCJ20046 - PEG002	SCJ20046 - PEG002	17/2/23	Active


Certificates

Search 

Name	Status
Public and Product Liability Insurance	Active
Professional Indemnity Insurance	Active
NSW - Electrical Licence	Active
NSW - Workers Compensation Insurance	Active

Total: 4

Assessments

Search 

Name	Score	Status
SMS Review High Risk Cat 1	80	Approved

Total: 1

View Modules and Office Location

- Modules – Allows you to see status in the system. Items in blue can be opened to view more information. e.g. Business Registration - See the questions answered during the pre-qualification questionnaire.
- Review the status of each component

Company Registration Complete		
Created	14 Nov. 2019 3:30:42 pm	Last Modified 17 Feb. 2020 3:33:23 pm
Component	Type	Status
Business Registration	Profiling	Complete
Subscription	Subscription	Complete
Document Uploads	Qualification	Complete
SMS Review High - Category 1	Assessment	Complete
SMS Review Low risk - Category 2	Assessment	Not Required

- Office Location - Review the listed contact details that were provided upon registration.
- If the organisation has multiple office locations and have entered the details of those locations into the portal, you will be able to view them here.
- Organisations can maintain their office location and business details through the portal.

PEGASUS MANAGEMENT PTY. LIMITED		
Details	Contacts	Categories
Name	PEGASUS MANAGEMENT PTY. LIMITED	
Description	PEGASUS MANAGEMENT PTY. LIMITED	
Email Addresses		
Email		Primary
Addresses		
Type	Address	Primary
Physical	426 King Street Newcastle NSW 2300	Yes
Phone Numbers		
Type	Phone	Primary
Work	0409 787 249	Yes

View Contacts and Categories

- **Contacts** – To review the details and responses provided by the organisation, click on the relevant component (ie Business Registration).
- Select the arrow (>) to expand or collapse any sections to view further details.
- **Categories** - can be used to streamline organisational searches and can also be used in reporting.
- Categories and sub-categories are automatically assigned to the organisation once they submit their application and they will be displayed here. The specific categories assigned to an organisation will depend on the responses they have given during the registration process.

Name	Address	Phone
ANIKA RILEY		

Category	Sub-category
Work Categories	
Electrical Services	Air Conditioning and Refrigeration
Electrical Services	Electrical
Insurances	
Professional Indemnity	Yes
Public and/or Product Liability Insurance	\$10 Million

View Documents and Administrators

- Documents - Based on the responses given during registration, the documentation the organisation is required to submit is listed on this page.

Name	Description	Issue Date	Expiry Date	Status	
NSW - Electrical Licence	NSW - Electrical Licence	17/2/20		Approved 17 Feb. 2020 3:31:22 pm	View Document
NSW - Workers Compensation Insurance	NSW - Workers Compensation Insurance	17/2/20	5/9/20	Approved 17 Feb. 2020 3:31:34 pm	View Document
Professional Indemnity Insurance	Professional Indemnity Insurance	17/2/20	1/8/20	Approved 17 Feb. 2020 3:31:47 pm	View Document

- The issue and expiry dates are displayed, as is the status of the document. To review the documentation that has been submitted, click on the “View Document” link.

- Administrators - This a listing of company contacts who are authorised to represent the organisation and maintain data through the portal.

- An organisation can have more than one administrator and all administrators will receive system generated notifications (ie expiry notifications).

User Name	Email	Active	Pending	Created	Last Modified
kdundas	kdundas@pegasus.net.au	Yes	Yes	3 Jul. 2018 11:16:55 am	3 Jul. 2018 11:16:55 am
prukillick	pkillick@pegasus.net.au	Yes	No	8 Aug. 2018 3:26:16 pm	18 Sep. 2019 11:26:32 am
aaron	astevenson@pegasus.net.au	Yes	No	6 Sep. 2018 1:15:41 pm	6 Sep. 2018 1:15:41 pm
kdundas	kdundas@pegasus.net.au	Yes	Yes	14 May 2019 8:17:03 am	14 May 2019 8:17:03 am
ivojdanoski	Ivojdanoski@pegasus.net.au	Yes	Yes	6 Jun. 2019 9:46:30 am	6 Jun. 2019 9:46:30 am



MANAGING FACILITIES

Managing Facilities




STEP 1


Click Facilities


Click the “Add+” option to create a new item


Or Click Blue Text on an existing item to view more details

- The facilities feature is designed to group contractors to a location, for example strata plans, sites or stores. The facilities area allows you to nominate preferred and excluded organisations for work at each facility.
- The facilities function will not work for everyone, but if you are interested in implementing this aspect of the system, please speak to your Account Manager.
- Once a Facility is created, the name can be edited or it can be removed

 Organisations

 Facilities

 Reports

 Logout

Facilities

Search



Add +

Name

 NSW30888

Edit

Remove

Managing Facilities



STEP 2

Click Add to add companies press “Add+” and complete the Business Name details

It will search and fix existing companies and then added them to this facility

Can then remove/edit contents if required.

Click on Company to View their profile

- Preferred organisation is represented by a green tick in the “Preferred Status” column.
An excluded organisation is a red cross.
A compliant organisation is represented by a green tick in the “Compliance Status” column.
A non-compliant organisation is a red cross in the “Compliance Status” column.
- To edit an existing organisation preference, click on “Edit”.
Make your changes and press “Save”.

Edit

Organisation *

All Door Services Pty Ltd Clear

Preferred Status *

Preferred

Manager ID

AHADJ

Edit Remove Save

< NSW30888

Search Q All Preferred Excluded Add +

Preferred Status	Business Name	Compliance Status	Last Modified	
✓	All Door Services Pty Ltd	✗	a year ago	Edit Remove
✓	Crest TV Antenna & Satellite Services Pt...	✓	a year ago	Edit Remove
✗	STOREBAY AUSTRALIA	✗	31 minutes ago	Edit Remove



RUNNING REPORTS

Running Reports



STEP 1

Select "Reports" from the side menu to access the general reports.

Login using the BI Reporting username and password you have been given by your Project or Account Manager

- Talk to your Pegasus Account Manager if you require access to the report features
- Site/Realm administrators may also have this login

TIBCO Jaspersoft

Getting Started

- ▶ [Jaspersoft Quick Start Guide](#)
- ▶ [Free Jaspersoft Documentation](#)
- ▶ [Self-service subscriptions](#)
- ▶ [Find the right edition for you](#)
- ▶ [Contact us](#)

What's new in Jaspersoft Version 6?

Report Workbooks
View Jaspersoft Studio-authored tabbed workbooks that include options to export with cover and table of content pages

More Interactive Reporting
Zoom magnify reports, string search, and bookmark content panel

Variable Report Page Layout
View Jaspersoft Studio-authored reports that contain variable layouts across pages

Repository

Run	Edit	Open	Copy	Cut	Paste	Delete		
							Name	Description
							Compliance Dashboard	
							Compliance Report	
							Configuration Report - Facilities Listing	
							Configuration Report - Region Listing	This report
							Configuration Report - Work Scope Listing	This report

User ID:

Password:

Show locale & time zone

Need help logging in?

Running Reports



STEP 2

Select "Reports" from the side menu to access the general reports.

Select your report parameters by ticking the relevant checkboxes or using the all, none or inverse options and click Apply. Once the report is visible in the background, click OK.

- Note: The parameters will vary depending on the report selected.
- Report can

Repository						
Run	Edit	Open	Copy	Cut	Paste	Delete
Name	Description					
Compliance Dashboard						
Compliance Report						
Configuration Report - Facilities Listing						
Configuration Report - Region Listing	This report					
Configuration Report - Work Scope Listing	This report					

Input Controls

* **Select the Scope**

Pegasus

* **Select the Module**

Pegasus Business Registration

* **Select the Component(s)**

Business Registration

Subscription

Document Upload

SMS Review

All None Inverse

Apply OK Reset Cancel

Running Reports



REPORTS

Here are the details of a typical report for company compliance

The report name, date and time is displayed in the top left corner.

- 1. To refresh the report, click on the refresh icon.
- 2. Clicking on the “Back” button will exit the report and take you back to the report library.
- 3. The export icon will allow you to export the report as pdf and/or xls files.
- 4. The input control icon will allow you to view and reselect your parameters.
- 5. When viewing the report on screen, you can use the zoom functions to increase/decrease the visual size of the report.
- 6. When viewing the report on screen, you can use the search box to search for specific words, numbers etc.
- 7. When viewing the report on screen, you can use the page selector to move through the report.

COMPLIANCE REPORT Data refreshed 04/01/2018 at 3:13:53 AM

Legend Table

Compliant	Not Applicable	In Review
Non-Compliant	Not Granted	Approved
Expired	Not Ready	Returned
Expires in X days	Submitted	Rejected

ID	Business Name	Registered Entity Name	Business Number	Compliance	Category	Expiry	Insurance Status	Licence/Certificate Status	SARS Status
3285	Kabodok post wicklow		3178180/107						
3181	Della Investments (Keshiko) Pty Ltd		21112405/248						
3192	Djwinda Jntercom		14921/152138					N/A	
3179	Musaka Outback		6086280/190						

Scheduling Reports



REPORTS

Right click an report and select “schedule” to start the report schedule feature

Documentation exists for these steps as well as video guides

- Reports can be shared to team members once created by adding their email address to the scheduled report
- Page dedicated to Business Intelligence Reports and other guides is here: <https://kb.pegasus.net.au/display/CA/Business+Intelligence+Reporting>
- User guide for Scheduling Reports is here: <https://kb.pegasus.net.au/download/attachments/7968433/User%20Guide%20-%20Scheduling%20a%20BI%20report.pdf>
- Multiple schedules times, multiple email addresses, multiple file types, alerts are all configurable items in these scheduled reports
- Can disable a report temporarily if required.

Recurrence:

Recurrence Type:

Months:

Every Month

Selected Months:

- Jan
- Feb
- Mar
- Apr
- May
- Jun
- Jul
- Aug
- Sep
- Oct
- Nov
- Dec

Days:

Every Day

Selected Days:

- Sun
- Mon
- Tue
- Wed
- Thu
- Fri
- Sat

Dates in Month:

Enter dates (9, 12, 15) or date ranges (9-12, 1-17)

Times:

Hours (required):

Enter 24-hour times like 9:00 or ranges like 9-12, 1-11

Minutes (required):

Enter 0, 15, 30, 45 to run every 1/4 hour

Output File Options

File name (required):

Description:

Time Zone:

Formats:

<input checked="" type="checkbox"/> CSV	<input type="checkbox"/> HTML	<input type="checkbox"/> RTF
<input type="checkbox"/> DOCX	<input type="checkbox"/> ODS	<input checked="" type="checkbox"/> XLSX
<input type="checkbox"/> Excel (Paginated)	<input type="checkbox"/> ODT	<input type="checkbox"/> XLSX (Paginated)
<input type="checkbox"/> Excel	<input type="checkbox"/> PDF	<input type="checkbox"/> PPTX



SUSPENDING COMPANIES

Overview

Suspending

Contractor Admins or a Client Admin can Suspend a Company.

Reasons:

1. You no longer wish the Contractor Company to attend site.
2. You wish to suppress email notifications about Compliance, SMS, Documents Expiring or Registrations for the Contractor Company at their request.
2. The Contractor Company Suspended themselves for some reason.

While Suspended they will NOT:

1. Be able to renew any documents
2. Receive any expiry or status notifications relating to Compliance, Subscription, Documents Expiring, etc.
3. Contractor Company is no longer in any of the Business Intelligence Reports.
4. Will show Suspended status in the Portal.

Un-suspending

Contractor Admins or a Client Admin can Un-Suspend a Company.

When you un-suspend a company:

1. Will no longer show as Suspended in the Portal.
2. Company Compliance calculated at time of un-suspension. This could mean the company is no longer compliant if items that needed renewing have expired.
3. You can check if the company is suspended at any time in the Portal. Click the "Suspended/Not Suspended" button to filter out the Companies.

Suspending Companies



STEP 1

Select “ Organisations”

Use the filter options of “Compliant/Non-Compliant” and “Not Suspended” to find the company you wish to Suspend

Click on that Company Name to open

- The new filter options easily help you find the company that is in a status position you wish to view
- Only Registered companies associated with your Realm will be visible
- Companies that have not registered to work with you are not listed.

Organisations

Facilities

Reports

Logout

Associated Organisations

Search Organisation Filter by category

Registered Business Name	Business Number	Compliance Status	Compliance Expiry	Suspension Status	Created	Last Modified
The trustee for Nisbet Family Trust <small>(Nisbet Security Systems Pty Ltd)</small>	ABN 24970260755	6 months ago	16/4/20		7 months ago	7 months ago
PEGASUS MANAGEMENT PTY.LIMITED <small>(PEGASUS MANAGEMENT PTY. LIMITED)</small>	ABN 91080018800	15 minutes ago	1/8/20		2 years ago	3 days ago
Kelaher Instrumentation & Electrical Pty.. <small>(Kelaher Instrumentation & Electrical Pty Ltd)</small>	ABN 79606126792	20 days ago	30/6/20		4 months ago	2 months ago

Suspending Companies



STEP 2

Enter a Comment for Suspending that Company

Click "Suspend" when ready

Suspend Reason and Date/Time will now show on Details page

- Text box will allow any text to be entered in.
- A Comment is Mandatory before saving.

Suspend

Suspends the company's relationship with the Scope. Once suspended, the company will not receive email notifications and will not be able to use the portal. Company administrators will see the message and can remove the suspension in the portal.

Message *

Suspending this company due to no longer working with Pegasus

Cancel Save

< PEGASUS MANAGEMENT PTY. LIMITED ✓

Details Compliance Modules Office Locations Contacts Categories Documents Administrators

Suspend Cancel Save

Registered Business Name * PEGASUS MANAGEMENT PTY. LIMITED

Country * Australia

Suspending Companies



STEP 3

Suspend Reason and Date/Time will now show on Details page

Visual Indicator appears against the Company now when viewing the Details page

- The Client Administrators and that Company Administrators will be able to read the comment you enter in for why you are suspending they company at this time.
- You will see notification immediately on-screen that you have suspended this company.
- Admin note contains the comment made of the suspension and user account that did the suspension.
- Notifications emails are no longer being sent out for this Company.

✓ Successfully suspended relationship. ✕

Suspend

Suspends the company's relationship with the Scope. Once suspended, the company will not receive email notifications and will not be able to use the portal. Company administrators will see the message and can remove the suspension in the portal.

Message *

Suspending this company due to no longer working with Pegasus

Cancel Save

Suspended Remove Suspension

By dchallen

Date 17 Feb. 2020 3:51:07 pm

Reason Suspending this company due to no longer working with Pegasus

Suspending Companies Visibility



VIEWING

Select "Organisations" and use the filter options to see which companies have or have not been suspended with the related filter

Click on that Registered Business Name to open.

- Compliant Status
 - Green Tick equals Valid Compliance
 - Red Tick equals Not Compliance
- Suspension Status
 - Green Tick equals Has Suspension
 - Red Tick equals Not Suspended

Associated Organisations

Search Organisation Filter by category

Compliant Non-Compliant **Suspended** Not Suspended

Registered Business Name	Business Number	Compliance Status	Compliance Expiry	Suspension Status	Created	Last Modified
PEGASUS MANAGEMENT PTY. LIMITED (PEGASUS MANAGEMENT PTY. LIMITED)	ABN 91080018800	17 minutes ago	1/8/20		2 years ago	3 days ago

Total: 1

10 25 50 100

Un-Suspending A Company



STEP 1

Enter a Comment for Un-Suspending that Company

Click "Save" when ready

Company will no longer be Suspended

- Text box will allow any text to be entered in.
- A Comment is Mandatory before saving.
- Repeat procedure for other companies that need Un-suspending.

< PEGASUS MANAGEMENT PTY. LI

Details Compliance Modules Office Locations Contacts Categories Do

Suspended

By dchallen

Date 17 Feb. 2020 3:51:07 pm

Reason Suspending this company due to no longer working with Pegasus

Remove Suspension

Remove Suspension

Message *

Suspension lifted- Returning to work with us

Cancel

Save

Cancel

Save

✓ Suspension removed successfully



For questions or assistance please call 1300 131 194
or email support@onsitetrackeasy.com.au