



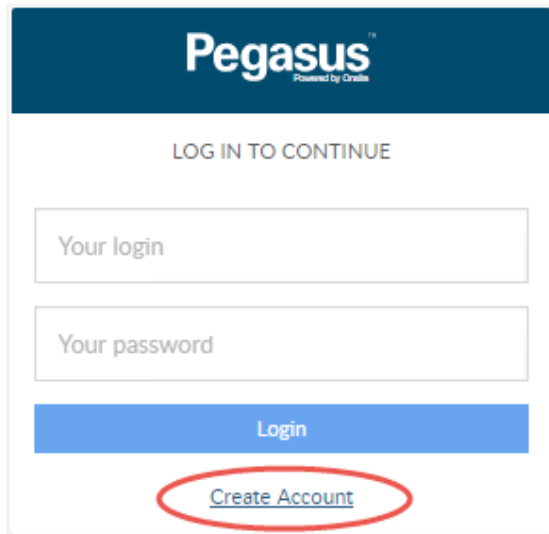
**Pegasus**

Contractor Management System

**Client View User Guide**

## Contractor Mangement System

Please follow this guide to understand the functionality that the client access portal supports in reviewing compliance at the organisational level.



Pegasus  
Powered by Onsite

LOG IN TO CONTINUE

Your login

Your password

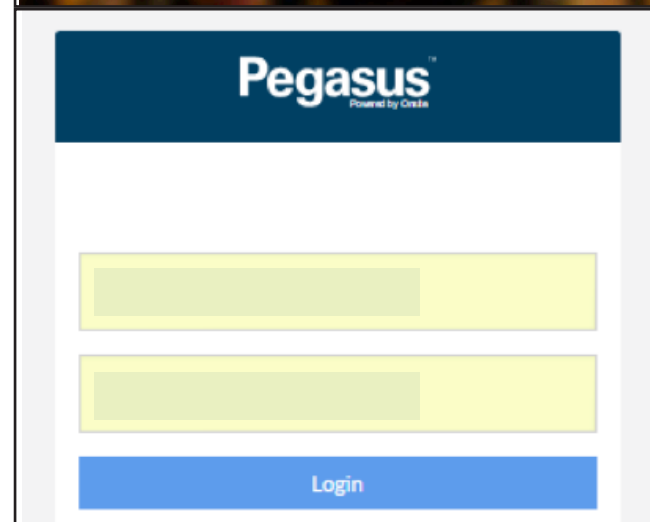
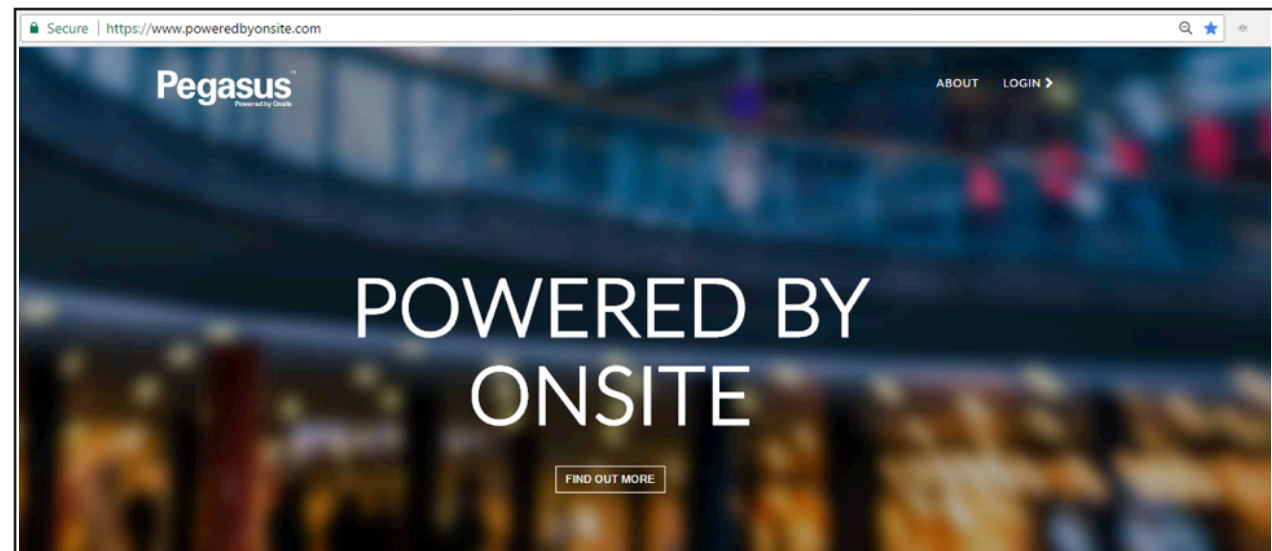
Login

[Create Account](#)

### Step 1

Go to <https://www.poweredbyonsite.com/admin/#/start/login> and "Create Account".

Contact your Pegasus site representative to complete the configuration of your account.



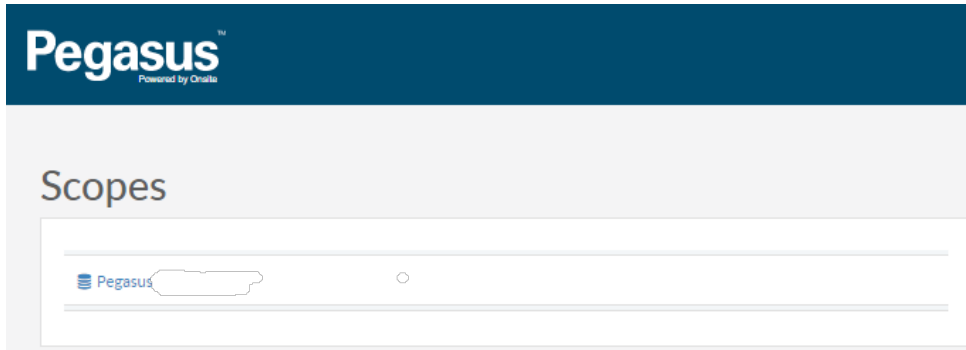
Pegasus  
Powered by Onsite

Login

### Step 2

Once your user account has been configured, go to <https://poweredbyonsite.com>

On the homepage, select "Login" and login using your new account credentials.

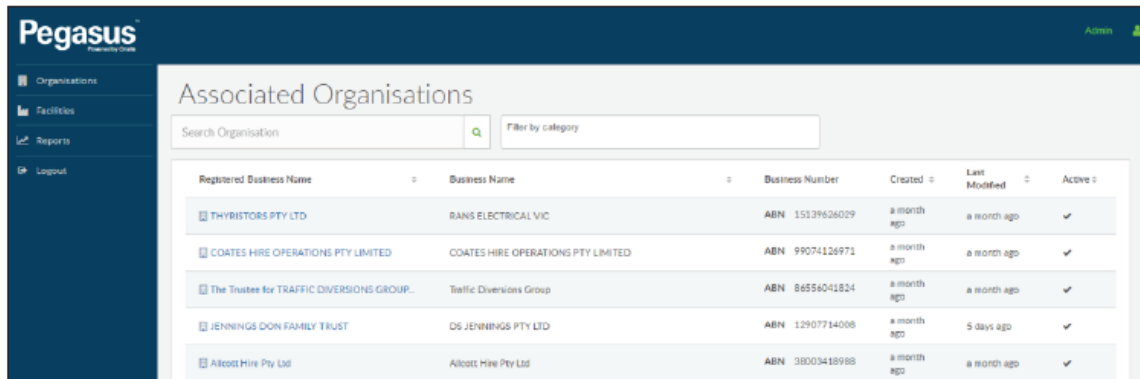


**Step 3**

Select your scope

# ORGANISATION

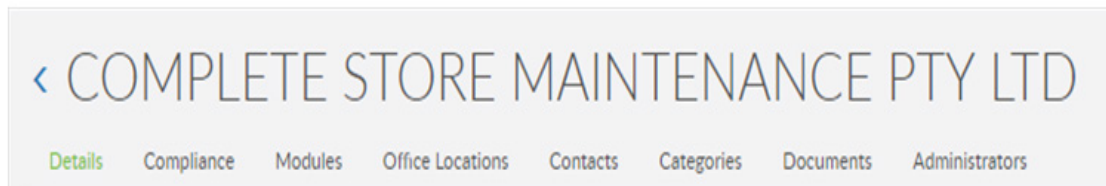
## REVIEWING AND VERIFYING SUBMITTED INFORMATION



### 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.



### Step 2

Once in the profile of the organisation, use the tab options to navigate the organisation sections which are outlined below.

<b>Details</b>	References the business information including address details
<b>Compliance</b>	Ability to see if the contractor is compliant or not
<b>Modules</b>	Ability to view the responses provided during the registration process
<b>Office Locations</b>	Any additional office locations that the company may have
<b>Contacts</b>	Key contact information
<b>Categories</b>	Categories that have been assigned through the registration process
<b>Documents</b>	View documents that have been uploaded by the contractor
<b>Administrators</b>	The administrator email address specified is the email that is receiving email alerts from the system.

## REVIEWING AND VERIFYING SUBMITTED INFORMATION

< COMPLETE STORE MAINTENANCE PTY LTD

Details Compliance Modules Office Locations Contacts Categories Documents Administrators

Cancel Save

Registered Business Name \* COMPLETE STORE MAINTENANCE PTY LTD Country \* Australia

Business Name COMPLETE STORE MAINTENANCE PTY LTD ABN \* 59084961384

Email Addresses

Email	Primary
sales@completestore.com.au	Yes

### Details

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

Details Compliance Modules Office Locations Contacts Categories Documents Administrators

Overview

2/2 Subscriptions 4/4 Certificates 1/1 Assessments




### Compliance

Based on the workflow that has been arranged for you, you will see two or three overview indicators.

These overview indicators will display as green ticks once a organisation is compliant.

## REVIEWING AND VERIFYING SUBMITTED INFORMATION

Overview

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

Name	Status
ISO 14001	Active
AS/NZ 4801	Active
Public Liability Insurance	Active
Workers Compensation NSW	In Progress
SMS Review	Submitted

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.

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.

## REVIEWING AND VERIFYING SUBMITTED INFORMATION

Component	Type	Status
Business Registration	Profiling	Complete
Subscription	Subscription	Complete
Document Upload	Qualification	Complete
SMS Review	Assessment	Complete

### Modules

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.

Office Location	Active
New South Wales	Yes
Queensland	Yes

### Office Locations

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.



## REVIEWING AND VERIFYING SUBMITTED INFORMATION

Name	Address	Phone
Accounts		1300 441 433
Sales		1300 448 971

▼ Business Type
Public Company
▼ Safety Accreditation
AS/NZ 4801
ISO 14001
▼ Regions
NSW

### 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

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.

## REVIEWING AND VERIFYING SUBMITTED INFORMATION

Name	Description	Issue Date	Expiry Date	Status	
Tax Invoice Sample	Tax Invoice Sample	3/01/2018		Approved	<a href="#">View Document</a>
AS/NZ 4801	AS/NZ 4801	3/01/2018		Approved	<a href="#">View Document</a>
ISO 14001	ISO 14001	3/01/2018		Approved	<a href="#">View Document</a>
Public Liability Insurance	Public Liability Insurance	3/01/2018	31/12/2018	Approved	<a href="#">View Document</a>
Workers Compensation NSW	Workers Compensation NSW	3/01/2018	31/12/2018	Approved	<a href="#">View Document</a>

User Name	Email	Active	Pending	Created	Last Modified
kdundas	kdundas@pegasus.net.au	Yes	No	3 Jan 2018 10:00:30 AM	3 Jan 2018 10:00:30 AM

### Documents

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

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.

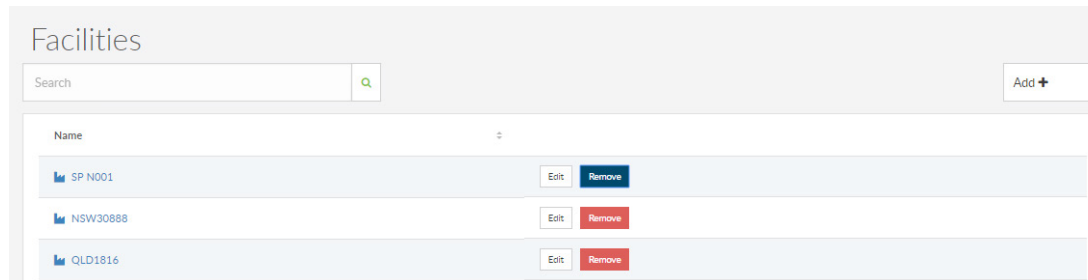
An organisation can have more than one administrator and all administrators will receive system generated notifications (ie expiry notifications).

**FACILITIES**

## Managing Facilities

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.



Select "Facilities" from the side menu to access.

Search for a facility by entering the facility name or partial name in the search bar.

## REVIEWING AND VERIFYING SUBMITTED INFORMATION

New

Name \*

Edit

Name \*

✔ Confirm Remove ×

Are you sure you want to remove Facility SP N001.

To add a new facility, click on “Add”.

Enter the facility name and press “Save”.

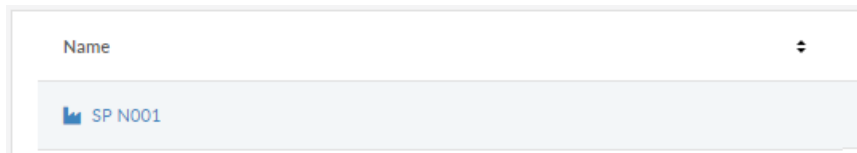
To edit a facility, click on “Edit”

Make your changes and press “Save”.

To remove a facility, click on “Remove”.

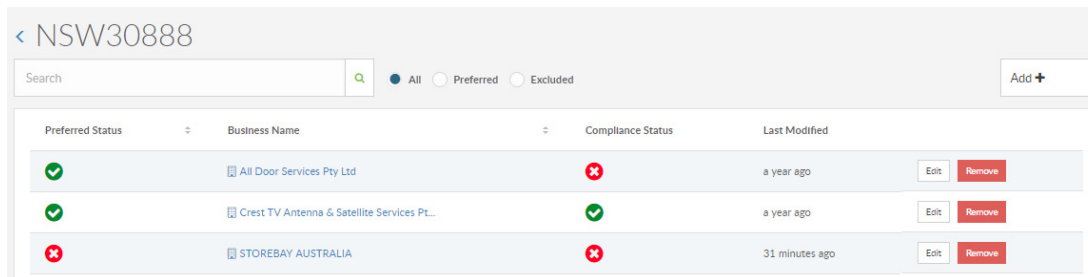
To confirm the removal of the facility, click “Yes”.

## REVIEWING AND VERIFYING SUBMITTED INFORMATION



A dropdown menu with the label "Name" and a downward arrow. The selected item is "SP N001" with a small blue icon to its left.

To view a facility, select the facility name from the list returned.



Facility list for NSW30888. The table has columns for Preferred Status, Business Name, Compliance Status, and Last Modified. It contains three rows of data.

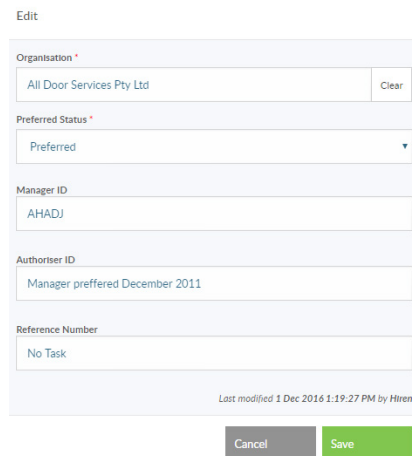
Preferred Status	Business Name	Compliance Status	Last Modified	
✓	All Door Services Pty Ltd	✗	a year ago	Edit Remove
✓	Crest TV Antenna & Satellite Services Pt...	✓	a year ago	Edit Remove
✗	STOREBAY AUSTRALIA	✗	31 minutes ago	Edit Remove

A preferred organisation is represented by a green tick in the “Preferred Status” column.

An excluded organisation is represented by a red cross in the “Preferred Status” column.

A compliant organisation is represented by a green tick in the “Compliance Status” column.

A non-compliant organisation is represented by a red cross in the “Compliance Status” column.



An "Edit" form for an organisation preference. It includes fields for Organisation, Preferred Status, Manager ID, Authoriser ID, and Reference Number. The form is pre-filled with data for "All Door Services Pty Ltd".

Organisation \*  
All Door Services Pty Ltd Clear

Preferred Status \*  
Preferred

Manager ID  
AHADJ

Authoriser ID  
Manager preferred December 2011

Reference Number  
No Task

Last modified 1 Dec 2016 1:19:27 PM by Hiren

Cancel Save

To edit an existing organisation preference, click on “Edit”.

Make your changes and press “Save”.

## REVIEWING AND VERIFYING SUBMITTED INFORMATION

✓ Confirm Remove ×

Are you sure you want to remove Organisation MACHINA STAR PTY LTD.

Yes

No

Preferred Status



Business Name



All Door Services Pty Ltd

New

Organisation *	<input type="text" value="Search for Organisation by name or ABN"/>	<input type="button" value="Clear"/>
Preferred Status *	<input type="text" value="Preferred"/>	
Manager ID	<input type="text"/>	
Authoriser ID	<input type="text"/>	
Reference Number	<input type="text"/>	
<input type="button" value="Cancel"/>		<input type="button" value="Save"/>

To remove an existing organisation preference, click on “Remove”.

To confirm the removal of the preference, click “Yes”.

To view an existing organisation’s compliances, modules, documents etc, select the organisation name from the list returned

To add a organisation or to exclude a organisation, click on “Add”.

Search for the organisation by entering the organisation name, a partial name or the ABN, and then selecting from the list provided.

Choose the preferred status of preferred or excluded.

Enter your authorisations and references in the remaining fields and click on “Save”.

# REPORTS



# REVIEWING AND VERIFYING SUBMITTED INFORMATION

**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



User ID:

Password:

Show locale & time zone

Need help logging in?

## General Reports

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

Repository					Sort By: Name   Modified Date	
Run	Edit	Open	Copy	Cut	Paste	Delete
Name	Description			Type	Created Date	Modified Date
<b>Compliance Dashboard</b>				Report	11/27/2016	11/24/2016
<b>Compliance Report</b>				Report	5/2/2017	5/2/2017
<b>Configuration Report - Facilities Listing</b>				Report	11/15/2016	11/7/2016
<b>Configuration Report - Region Listing</b>	This report displays the configured countries, states/regions and sub...			Report	11/15/2016	10/27/2016
<b>Configuration Report - Work Scope Listing</b>	This report displays the work scope and sub-scope listing for a select...			Report	11/15/2016	10/27/2016

## Running a Report

To run a report, select the desired report from the list provided by clicking on the report name.

**Input Controls**

\* Select the Scope

Pegasus

\* Select the Module

Pegasus Business Registration

\* Select the Component(s)

Business Registration

Subscription

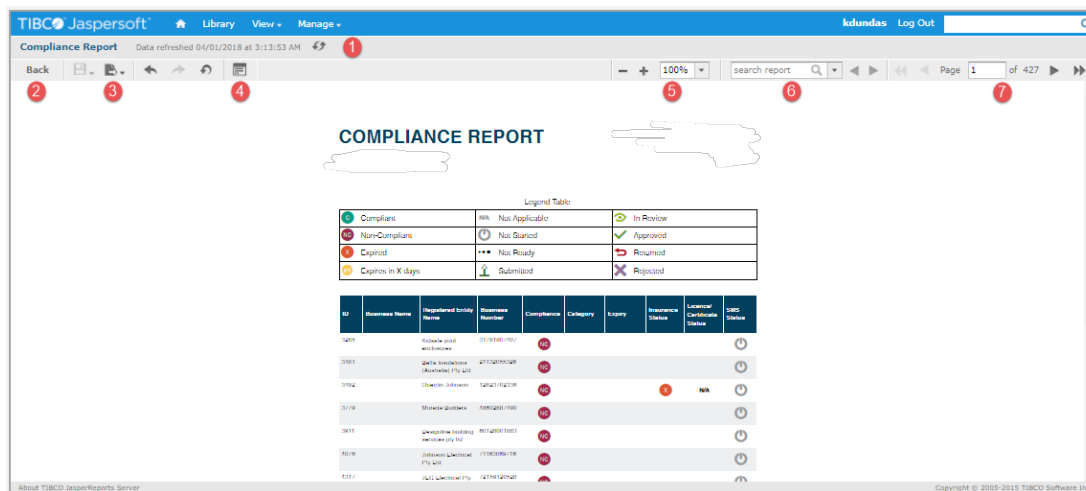
Document Upload

SMS Review

All None Inverse

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.



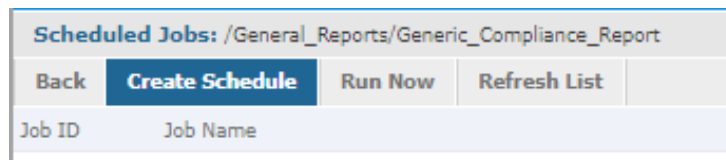
## Report Functions

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

**Note:** If you prefer a csv report, we recommend running the csv version of the report rather than exporting the standard report as a csv file.

## REVIEWING AND VERIFYING SUBMITTED INFORMATION

Repository					Sort By: Name   Modified Date				
Run	Edit	Open	Copy	Cut	Paste	Delete			
Name	Description	Type	Created Date	Modified Date					
<b>Compliance Dashboard</b>					Report	11/27/2016	11/24/2016		
<b>Compliance Report</b>	Schedule...	Report	5/2/2017	5/2/2017					
<b>Configuration Report - Facilities Listing</b>					Report	11/15/2016	11/7/2016		
<b>Configuration Report - Region Listing</b>					Report	11/15/2016	10/27/2016	This report displays the configured countries, states/regions and sub...	
<b>Configuration Report - Work Scope Listing</b>					Report	11/15/2016	10/27/2016	This report displays the work scope and sub-scope listing for a select...	



**New Schedule**

Schedule For: /General\_Reports/Generic\_Compliance\_Report

Schedule Start

Start Date:

Immediately

On Specific Date: 2018-01-03 08:31

Time Zone: (UTC - Coordinated Universal Time)

Recurrence:

Recurrence Type: Simple

Repeat every (required): 7 days

Schedule End

End Date:

Run a set number of times

### Scheduling a Report

To schedule a report, select the desired report from the list provided by right-clicking on the report name and selecting schedule.

### Select Create Schedule.

On the schedule tab, leave the default set to immediately or choose the required start date/time by clicking on the calendar icon.

If this is a one-off report, leave the recurrence option to none.

If you would like the report to reoccur, you can choose: -

- Simple – to run the report every x number days/weeks, or
- Calendar – to be a bit more specific (ie run every Monday and Thursday)

Both options allow for an end date or an indefinite running period.

## REVIEWING AND VERIFYING SUBMITTED INFORMATION

**New Schedule**

Schedule Parameters Output Options Notifications

Schedule For: /General\_Reports/\_Generic\_Module\_Status\_Report

\* Select the Scope  
@ Pegasus

\* Select the Module  
@ Pegasus Business Registration

\* Select the Component(s)  
 Business Registration  
 Subscription  
 Document Upload  
 SMS Review  
 None Inverse

**New Schedule**

Schedule Parameters Output Options Notifications

Schedule For: /General\_Reports/\_Generic\_Module\_Status\_Report

Output File Options

File name (required):  
\_Generic\_Module\_Status\_Report

Description:

Time Zone:  
Etc/UTC - Coordinated Universal Time

Output Locale:  
[Default]

Formats:

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

On the parameters tab, select your report parameters by ticking the relevant checkboxes or using the all, none or inverse options.

**Note:** The parameters will vary depending on the report selected.

On the output options tab: -

- Go to the formats section and choose your preferred format (ie pdf and/or xlsx)
- Go to the file handling section and untick the overwrite files option
- Go to the output destination section and untick the output to repository option
- Leave all the other defaults as they were

**Note:** If you prefer a csv report, we recommend scheduling the csv version of the report rather than using the standard report in a csv format.

## REVIEWING AND VERIFYING SUBMITTED INFORMATION

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.

On the notifications tab: -

- Enter the email address of the person(s) the report needs to be sent to. If you have more than email address to enter, you will need to separate them with a comma
- Enter the email address of any person(s) that need to be copied on the report
- Enter the email address of any person(s) that need to be blind copied on the report
- Enter the subject as you would like it to appear in the subject line of the email
- Enter a message to display in the body of the email (this can be left blank).
- If you would like to receive notifications re whether the scheduled report ran successfully or failed, enter your email address in the “To” field on the right-hand side of the screen
- Enter the subject as you would like it to appear in the subject line of the email
- If you would like to receive an email every time the report ran successfully, tick the send success notification box
- Enter a message to display in the body of the email (this can be left blank).
- If you would like to receive an email every time the report fails to run, tick the send failure notification box
- Enter a message to display in the body of the email (this can be left blank)
- Ensure the include report files as attachments option is selected.

## REVIEWING AND VERIFYING SUBMITTED INFORMATION

**Save As**

Scheduled Job Name (required)

Scheduled Job Description

Once all of the tabs are complete, click “Save”.

You will be prompted to: -

- Enter a name for the scheduled job
- Enter a description for the scheduled job (optional)
- Click save.

Scheduled Jobs: /General\_Reports/\_Generic\_Module\_Status\_Report

Back Create Schedule Run Now Refresh List

Job ID	Job Name	Owner	State	Last Ran	Next Run	Enabled
102986	Weekly Compliance Report	cityfm	NORMAL		1/5/2018 12:00:00 AM	<input checked="" type="checkbox"/>

The scheduled report will now display in the schedule list.

Repository Sort By: Name | Modified Date

Run	Edit	Open	Copy	Cut	Paste	Delete	Name	Description	Type	Created Date	Modified Date
							Compliance Dashboard		Report	11/27/2016	11/24/2016
							Compliance Report		Report	5/2/2017	5/2/2017
							Configuration Report - Facilities Listing		Report	11/15/2016	11/7/2016
							Configuration Report - Region Listing	This report displays the configured countries, states/regions and sub...	Report	11/15/2016	10/27/2016
							Configuration Report - Work Scope Listing	This report displays the work scope and sub-scope listing for a select...	Report	11/15/2016	10/27/2016

To temporarily stop the report from running, untick the enabled button.

To edit the schedule or to add a new email address etc, click on the pencil icon.

To permanently delete the report from the schedule, click on the cross.

To confirm that the report has been scheduled, you can check back in the library where you will see a clock alongside the report that has been scheduled.



For questions or assistance please call 1300 131 194  
or email [support@onsitetrackeasy.net.au](mailto:support@onsitetrackeasy.net.au)