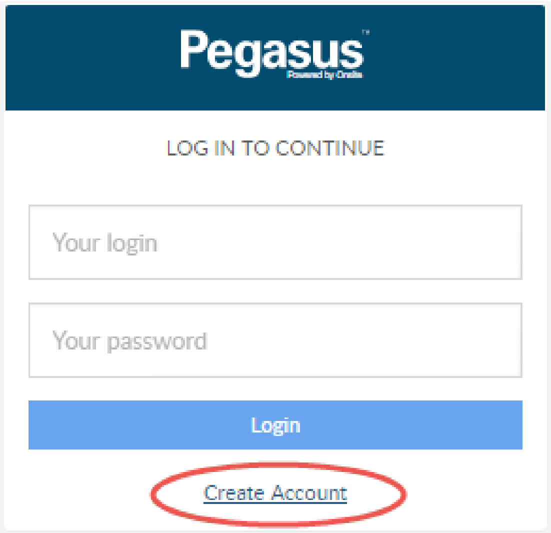
Pegasus

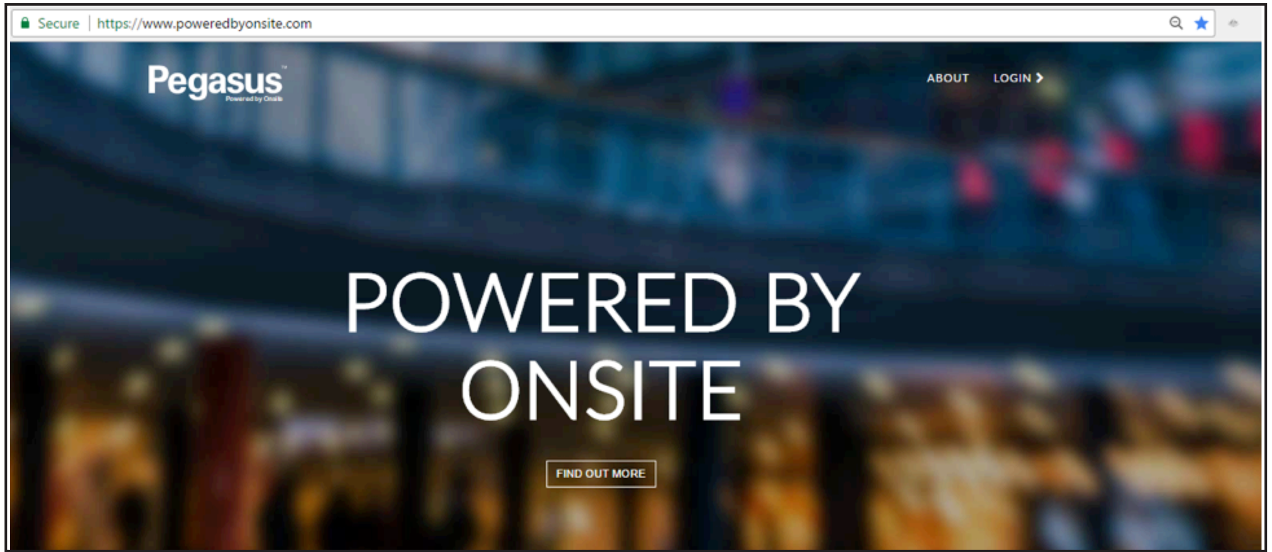
Contractor Management System

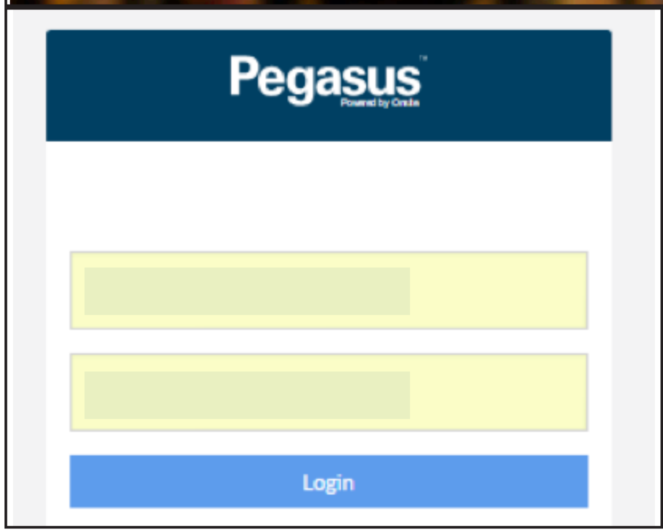
Client View User Guide

Contractor Mangement System

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







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.

Step 2

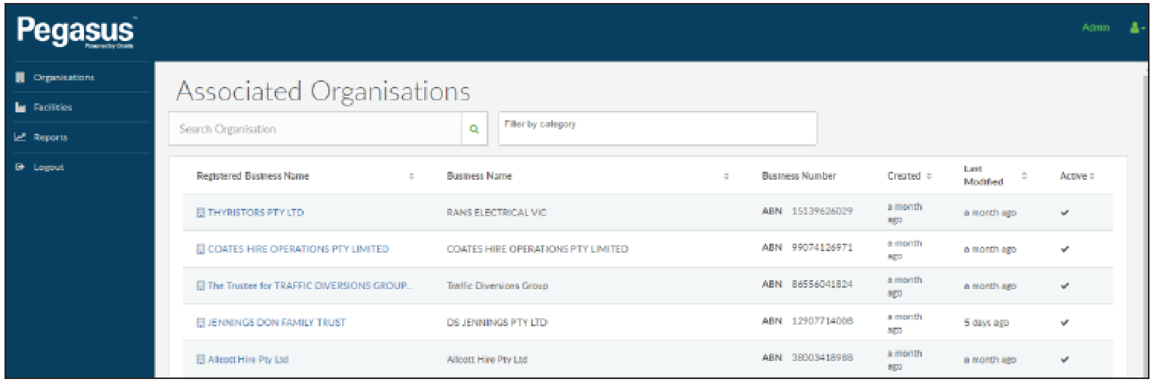
Once your user account has been configured, go to https://poweredbyonsite.com

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

Step 3

Select your scope

ORGANISATION



Step 1

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

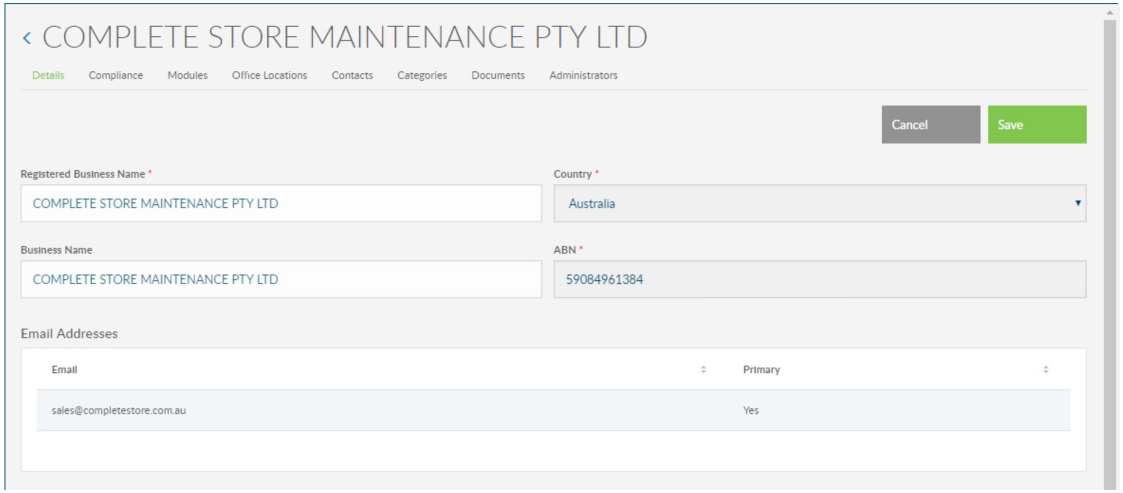
To view the company's profile, select the company name from the list returned.

Step 2

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

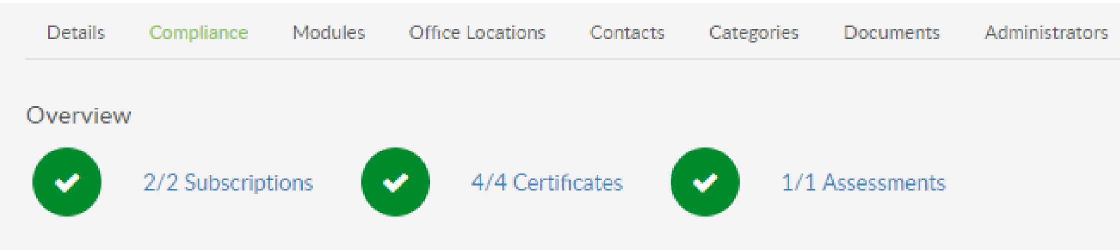
Details	References the business information including address details
Compliance	Ability to see if the contractor is compliant or not
Modules	Ability to view the responses provided during the registration process
Office Locations	Any additional office locations that the company may have
Contacts	Key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

REVIEWING AND VERIFYING SUBMITTED INFORMATION



Details

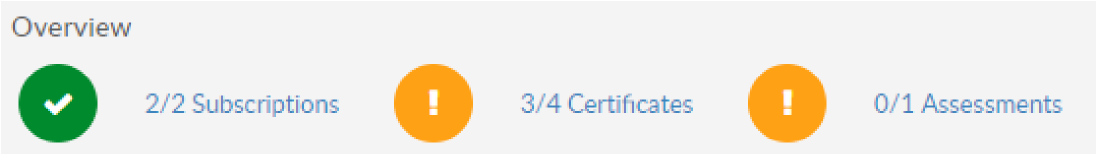
Displays the registered business name and trading name, ABN, email addresses and business information.



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.



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.

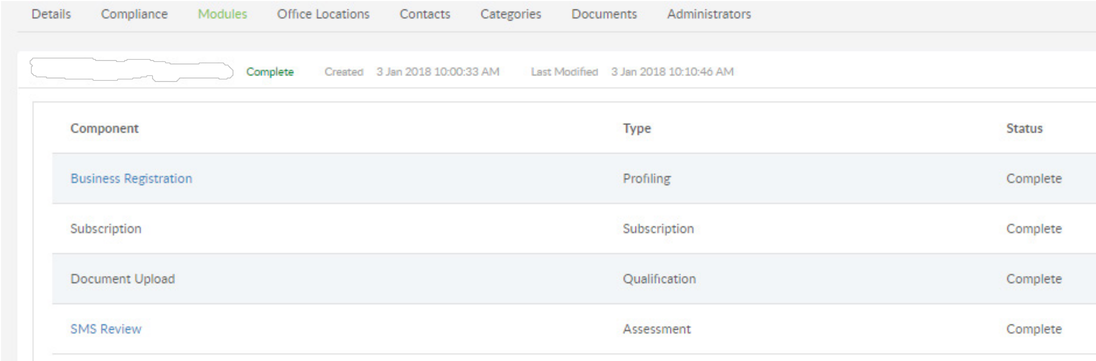
Name	Status
ISO 14001	Active
AS/NZ 4801	Active
Public Liability Insurance	Active
Workers Compensation NSW	In Progress
SMS Review	Submitted

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.

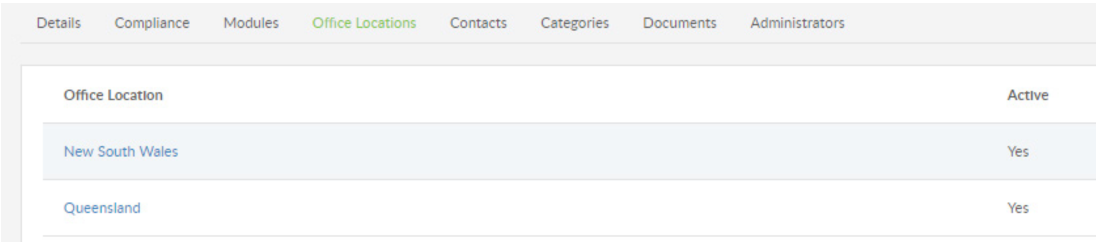
“In Progress” means that it has not been uploaded or submitted by the organisation.



Modules

To review the details and responses provided by the organisation, click on the relevant component (ie Business Registration).

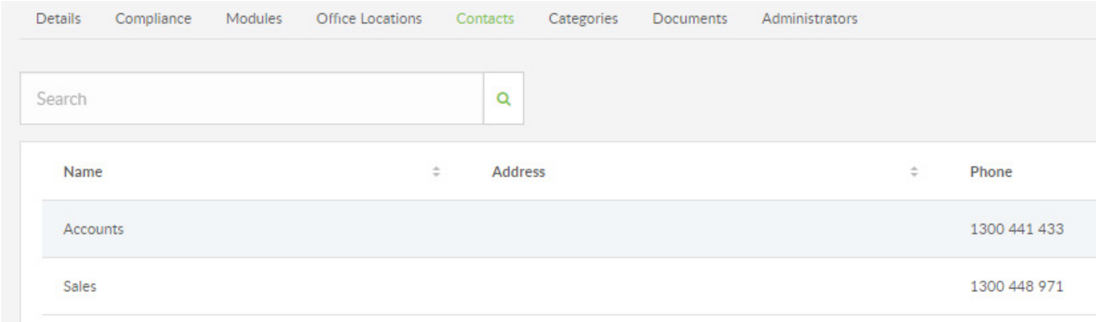
Select the arrow (>) to expand or collapse any sections to view further details.



Office 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.

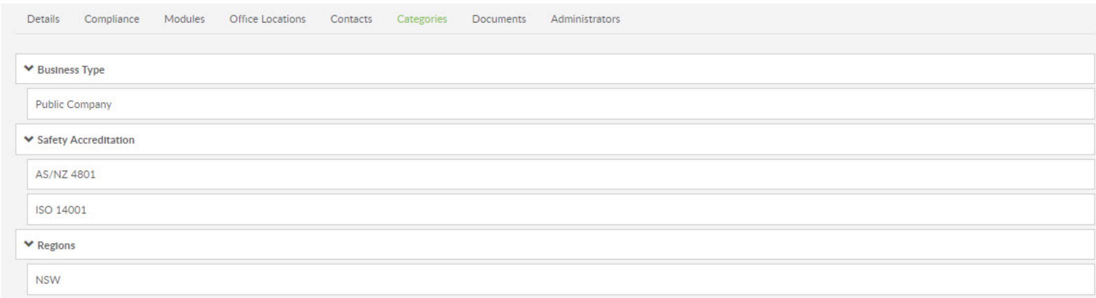
Organisations can maintain their office location and business details through the portal.



Contacts

To review the details and responses provided by the organisation, click on the relevant component (ie Business Registration).

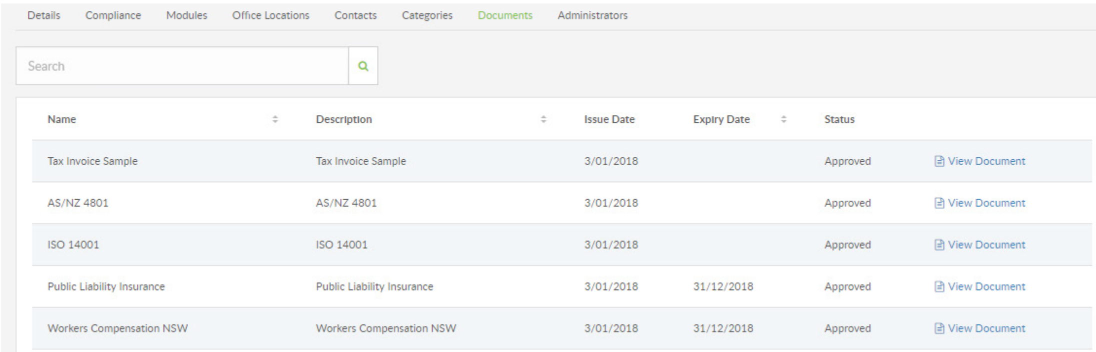
Select the arrow (>) to expand or collapse any sections to view further details.



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.



Details | Compliance | Modules | Office Locations | Contacts | Categories | Documents | Administrators

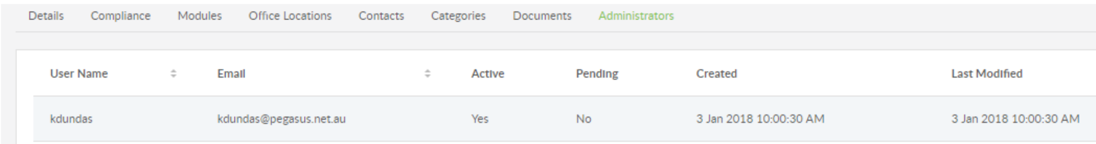
Search

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

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.



Details | Compliance | Modules | Office Locations | Contacts | Categories | Documents | Administrators

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

Administrators

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

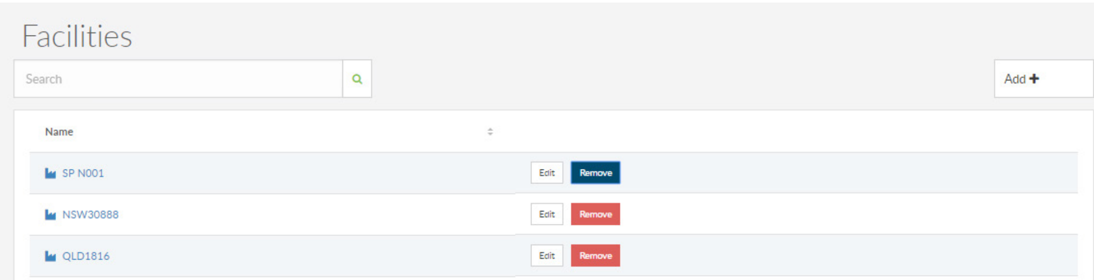
An organisation can have more than one administrator and all administrators will receive system generated notifications (ie expiry notifications).

FACILITIES

Managing Facilities

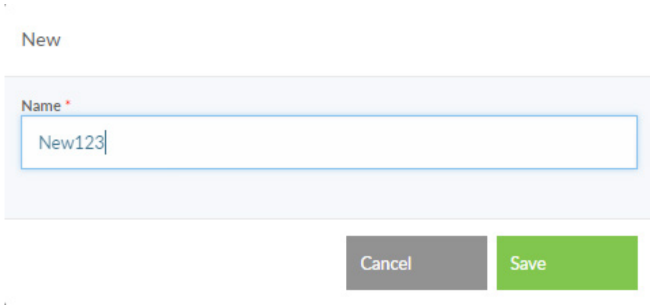
The facilities feature is designed to group contractors to a location, for example strata plans, sites or stores. The facilities area allows you to nominate preferred and excluded organisations for work at each facility.

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.



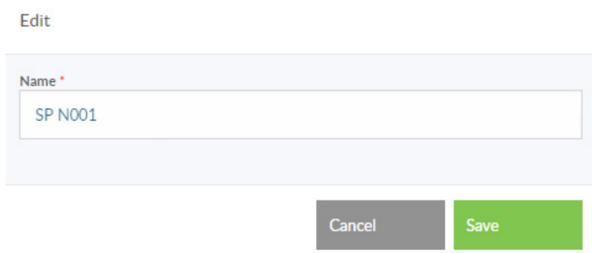
Select "Facilities" from the side menu to access.

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



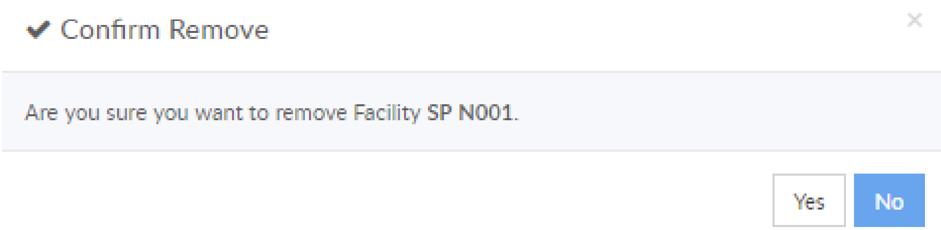
To add a new facility, click on “Add”.

Enter the facility name and press “Save”.



To edit a facility, click on “Edit”

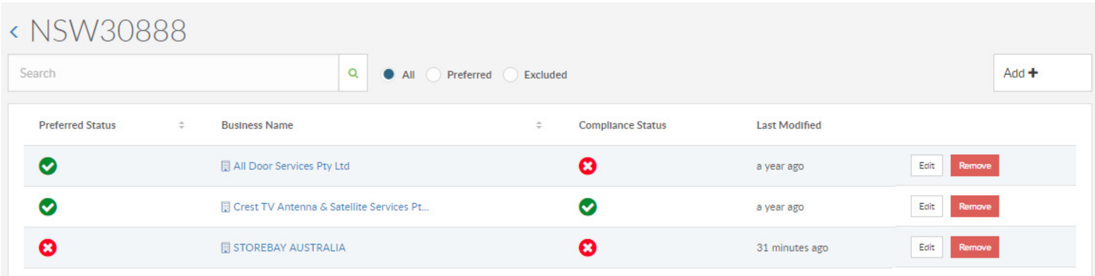
Make your changes and press “Save”.



To remove a facility, click on “Remove”.

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

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

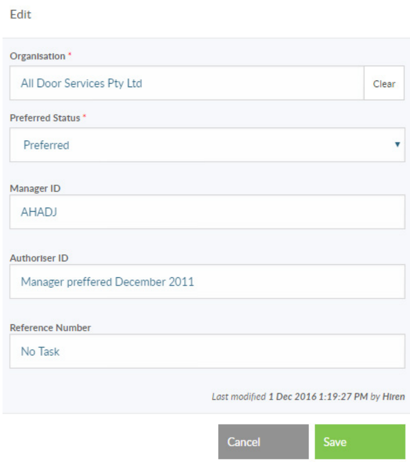


A preferred organisation is represented by a green tick in the "Preferred Status" column.

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

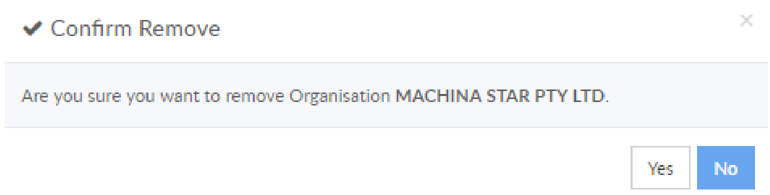
A compliant organisation is represented by a green tick in the "Compliance Status" column.

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



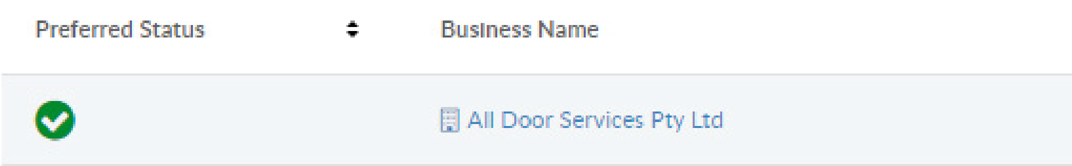
To edit an existing organisation preference, click on "Edit".

Make your changes and press "Save".

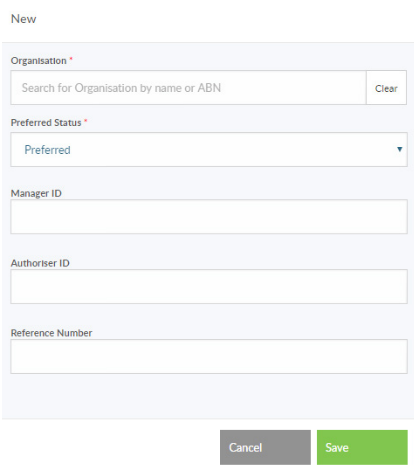


To remove an existing organisation preference, click on “Remove”.

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



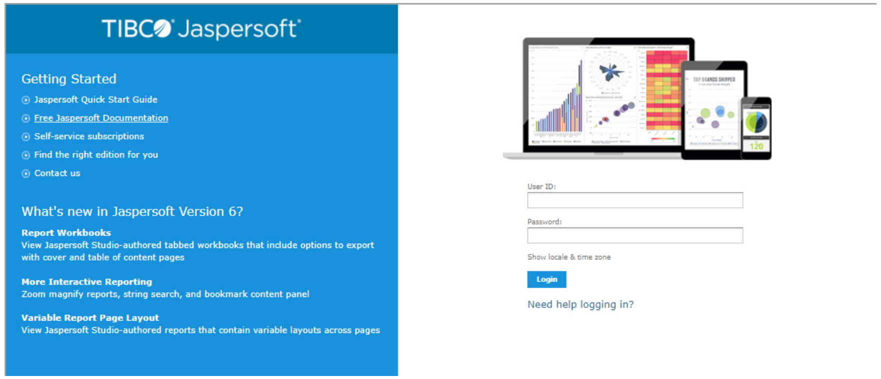
To add a organisation or to exclude a organisation, click on “Add“.

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”.

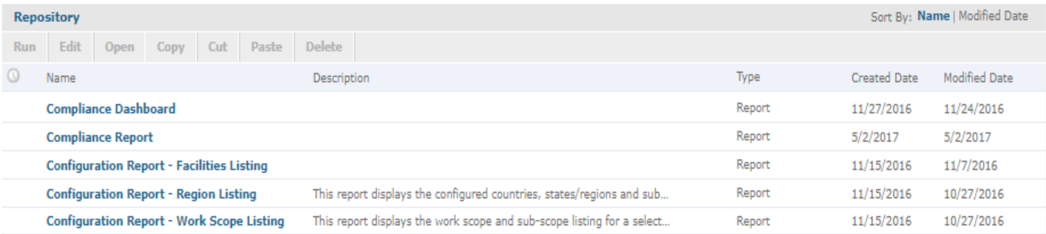
REPORTS



General Reports

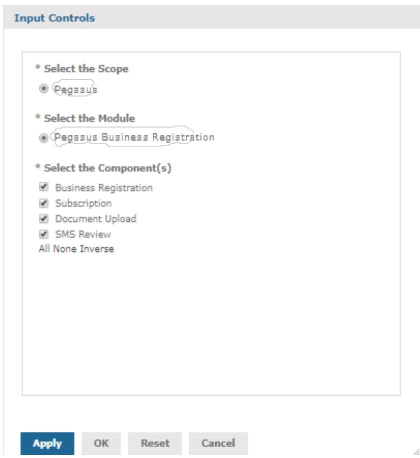
Select "Reports" from the side menu to access the general reports.

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



Running a Report

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



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 to you to export the report as pdf and/or xls files.

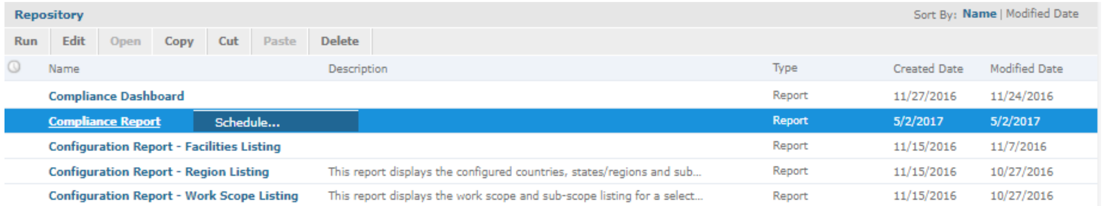
4. The input control icon will allow you to view and reselect your parameters.

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.

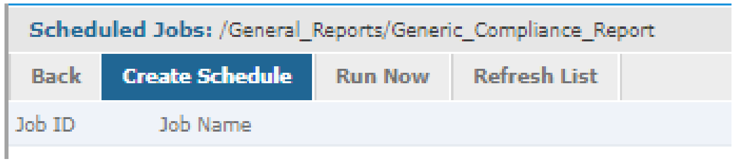
7. When viewing the report on screen, you can use the page selector to move through the report.

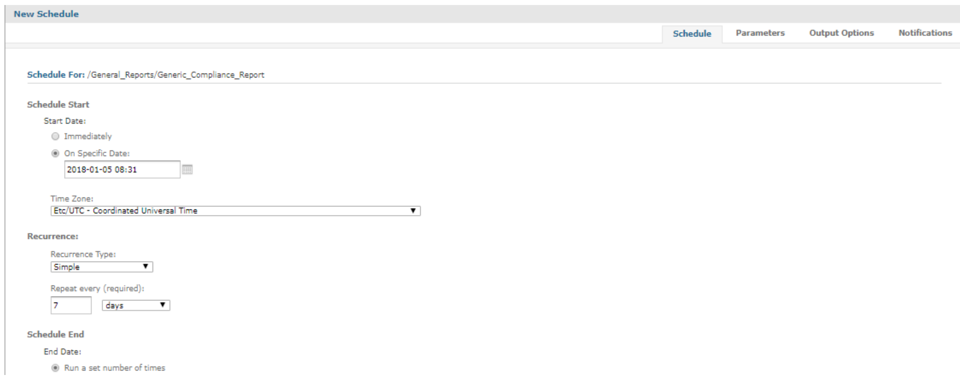
Note: If you prefer a csv report, we recommend running the csv version of the report rather than exporting the standard report as a csv file.



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.

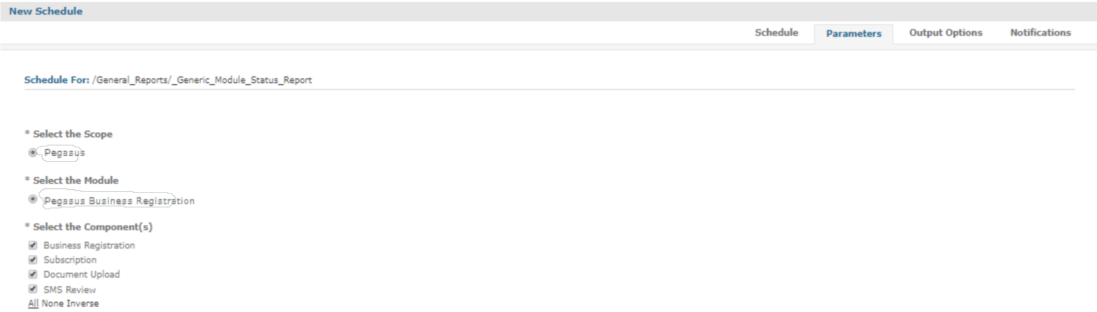
On the schedule tab, leave the default set to immediately or choose the required start date/time by clicking on the calendar icon.

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

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

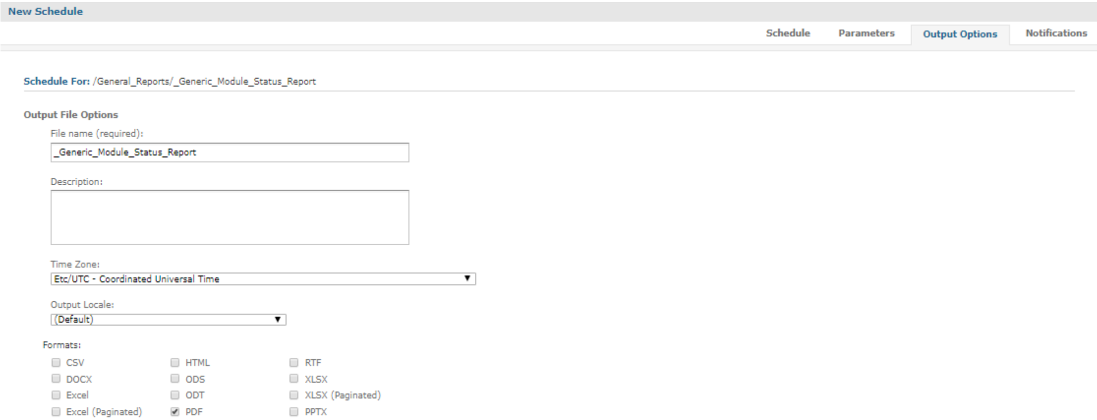
- Simple – to run the report every x number days/weeks, or
- Calendar – to be a bit more specific (ie run every Monday and Thursday)

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



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

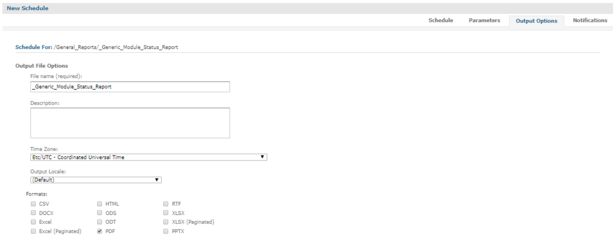
Note: The parameters will vary depending on the report selected.



On the output options tab: -

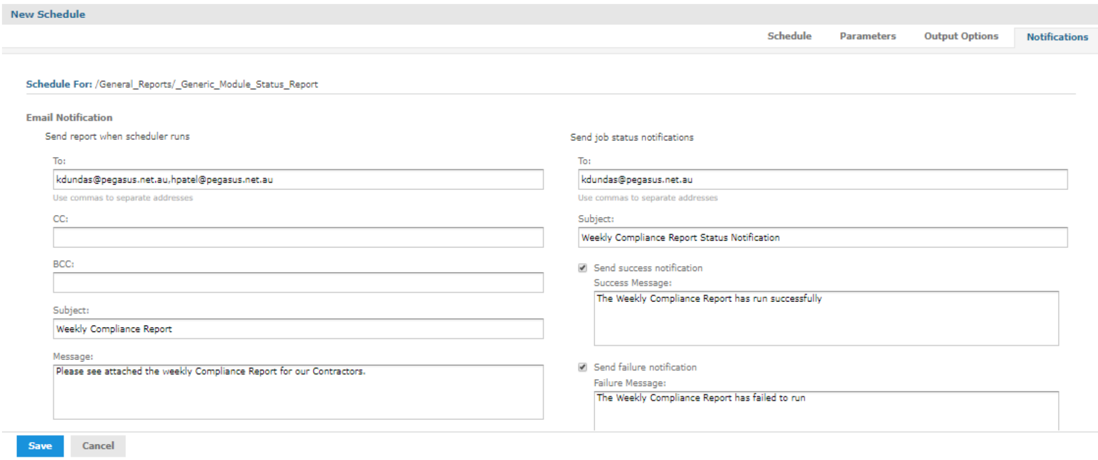
- Go to the formats section and choose your preferred format (ie pdf and/or xlsx)
- Go to the file handling section and untick the overwrite files option
- Go to the output destination section and untick the output to repository option
- Leave all the other defaults as they were

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.



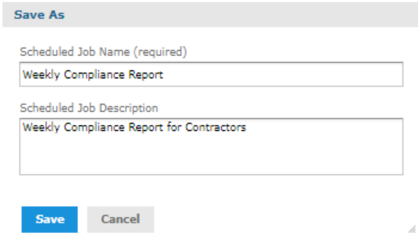
Select your report parameters by ticking the relevant checkboxes or using the all, none or inverse options and click “Apply”. Once the report is visible in the background, click OK.

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



On the notifications tab: -

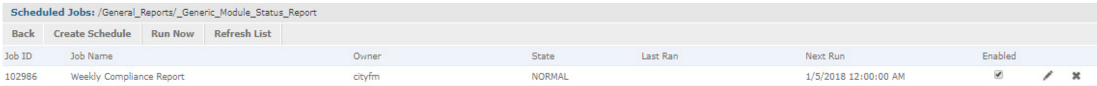
- Enter the email address of the person(s) the report needs to be sent to. If you have more than email address to enter, you will need to separate them with a comma
- Enter the email address of any person(s) that need to be copied on the report
- Enter the email address of any person(s) that need to 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.



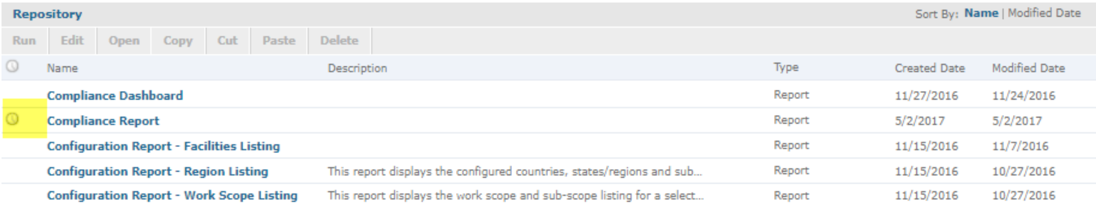
Once all of the tabs are complete, click “Save”.

You will be prompted to: -

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



The scheduled report will now display in the schedule list.



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.

Pegasus™
Powered by Onsite

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