



# Business Intelligence Reporting



# Reporting Overview

This Quick Reference Guide outlines the inputs and outputs of the common reports used in Business Intelligence

The Business Intelligence Reports are a separate module of the Pegasus Workforce Management database and data is calculated at different intervals.

The sync information is:

- Roles status checks are synced every hour on the hour
- Cardholder Requirements are synced every hour from 7am – 5pm AEDT on the hour
- Worker Details are synced every hour from 7am – 5pm AEDT on the hour
- Personnel on-site login information is always live data
- Role Requirements are completed overnight e.g. Role Person Matrix Reports

*Note: On most Reports, unless you select a particular company or person to report on, it will default to selecting all Companies and Persons.*

*With reports using competency status, where you wish to see all that are still current, its best to select Current, 1, 2 & 3 Month Expiry. This will then show a complete results of all still active competencies. This is due to the fact that competencies “change” their status as they enter the 90 day or less expiry period and are no longer “current” but instead change to “expiring”.*

The following pages show the most commonly run reports and the inputs that the report requires from the user. It details what the report will return to the user in the form of column headings and data.



# Reporting Overview

Note not all reports will appear for you.

The list of reports you can view depends upon the Realm/Site you are running the report from. Additionally, if you use these below features, additional reports will appear as options that can be run:

- Mobile App Logins
- Access Control Hardware
- Asset Management
- Emergency Evacuations

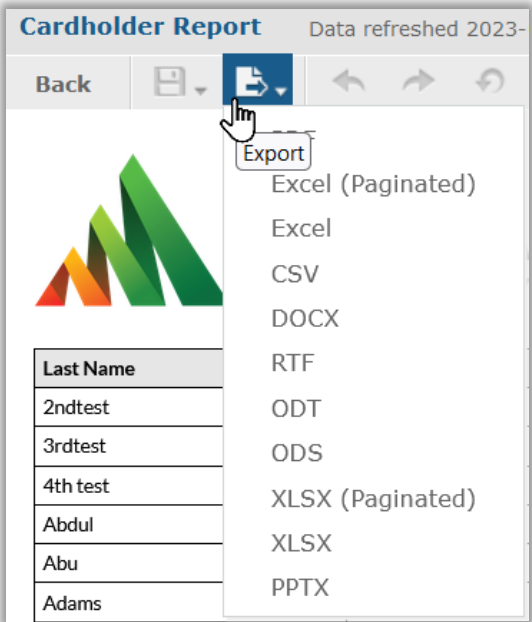
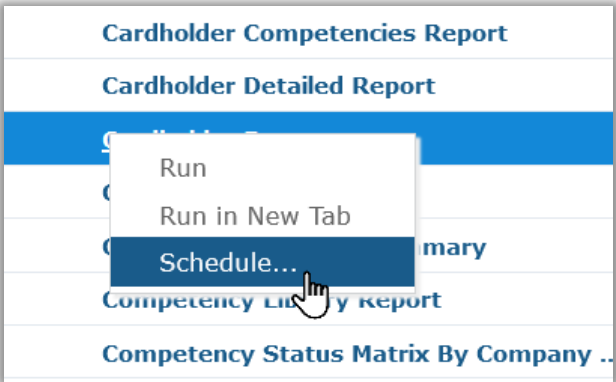
Each report can be manually run by clicking, or right clicked to schedule.

Each report can export into multiple formats for further investigation/filtering

Want to know more? Visit our Knowledgebase on reporting.  
<https://kb.pegasus.net.au/display/CA/Business+Intelligence+Reporting>

**Pegasus** Library View r\_GlobalcoTOP\_PRIVATE

| Library | Name                                          | Description                                                                | Type   |
|---------|-----------------------------------------------|----------------------------------------------------------------------------|--------|
|         | <b>Cardholder Audit History</b>               | Person Report - List of Cardholders and their audit history                | Report |
|         | <b>Cardholder Competencies By Crew Report</b> | Competency Report - List of cardholders and the competencies searchable... | Report |
|         | <b>Cardholder Competencies Report</b>         | Competency Report - List of cardholders and their competencies             | Report |
|         | <b>Cardholder Detailed Report</b>             | Person Report - List of person and contact details                         | Report |
|         | <b>Cardholder Report</b>                      | Person Report - List of Personal and Contractor details                    | Report |
|         | <b>Company Contacts</b>                       | Company Report - List of Companies per site, their contact and company ... | Report |
|         | <b>Company Role Count Summary</b>             | Summary of the count of cardholders for each company for each role, bro... | Report |





# Reports

## Cardholder Audit History

**Description:** Person Report – List of Cardholders and their audit history

**Components are:** Sites, Roles, Start Date, End Date, Compliant Status

**Report Returns:** Last Name , First Name, OnsiteID, Role, Audited, Compliant, Non Compliance Description, User

## Cardholder Competencies By Crew Report

**Description:** Competency Report - List of cardholders and the competencies searchable by crew

**Components are:** Site Name (if at Realm Level), Crew Name, Competencies, Companies, Competency Status.

**Report Returns:** Name, OnsiteID, Person type (emp/con), Default Company, Crew Name, Competency, Adder (competency location), Location, Competency Name, Status (current/non-current), Issued Date, Expiry Date, Appointed, Pending

## Cardholder Competencies Report

**Description:** Competency Report - List of cardholders and their competencies

**Components are:** Sites, Companies, Competencies, Competency Status, Person, Person types

**Report Returns:** Onsite ID, Name, Company Name, Adder, Competency Name, Status, Issues, Expiry, Appointment Status, Pending Status, Verified Doc, Reviewed By, Review Time, Comp Hours



# Reports

## Cardholder Competencies Report

**Description:** *Blank Description* – Report returns competencies for workers for companies selected

**Components are:** Sites, Companies

**Report Returns:** Onsite ID, Name, Company Name, Adder, Location, Competency Name, Status, Issued, Expiry, Pending Status

## Cardholder Competencies Rejected Files Report

**Description:** List of verified documents which have been rejected

**Components are:** Start Date, End Date, Sites

**Report Returns:** Onsite ID, Name, Competency Name, Rejected On, Rejected By, Rejected Reason, Company Name, Company Phone, Company Email, Submitted By

## Cardholder Detailed Report

**Description:** Person Report – List of person and contact details

**Components are:** Site, Person Types

**Report Returns:** Last Name, First Name, Middle Name, Gender, Person Type, Dob, Onsite ID, Legacy ID, Drivers Licence, Licence Exp, Licence State, Company ID, Company Name, Assoc. Date, Address, Town, State, Post Code, Country, Email, Phone, Phone 2, External ID, Subscription status



# Reports

## Cardholder Report

**Description:** Person Report – List of personal and Contractor details

**Components are:** Site, Person Types, *optional (include in active, show prox id, show desfire id)*

**Report Returns:** Last Name, First Name, Middle Name, Onsite ID, Person, DOB, Photo, Pending, Active, User, Subscription, Expiry Date, Address, Town, State, Postcode, Country, Phone 1, Phone 2, Email 1, Email 2, Company Name, Co. Address, Co. Town, Co. State, Co. Postcode, Co. country, Co. Phone, Co. Email, Co. ABN, Prox Group, Prox ID, Desfire ID, Legacy ID, USI, Badge ID, Last Login, Login Location, Last Record Update, Last Comp. Update

## Company Contacts

**Description:** Company Report – List of Companies per site, their contact and company details

**Components are:** Site, Company Group

**Report Returns:** Company ID, Company Name, ABN, Postal Address, Delivery Address, Phone, Fax, Email, Contact, Group

## Competency Library Report

**Description:** Listing of all competencies and their attributes

**Components are:** Site

**Report Returns:** CompetencyID, Location, Competency Name, Cost, Duration, Unit, TM Duration, TM Uni, Permit To Train, Train, Asses, Authorise, Appoint, Verified Doc, Hours, Private File, Active



# Reports

## **Competency Status Matrix By Company Report**

Description: Company Report – List of Competencies for Person in Matrix Format

Components are: Sites, Companies, Competencies

Report Returns: Onsite ID, Name, Company, Competencies in Vertical format with status against it marked (Current, Not Assigned or Expired, Pending or Expires in 1,2 or 3 months). Scrolling page will keep competencies visible up top, and names and statuses scrolling.

## **Competency Status Matrix Report**

Description: Competency Report – List of Competencies by Site and Crew

Components are: Sites, Crews, Companies, Competencies

Report Returns: Crew Name, Crew Member Name, Crew Member Company, Competency Listed Vertically with Competency status against it marked (Current, Not Assigned or Expired, Pending or Expires in 1,2 or 3 months). Scrolling page will keep competencies visible up top, and names and statuses scrolling.

## **Complete Competency Assignment Report**

Description: Listing of all competency assignments and the assignment steps

Components are: Sites, Competencies, Crews, Competency Status

Report Returns: Onsite IF, Person Type, Name, Competency ID, DOB, HomeSiteName, Company Name, Crew Name, Competency Name, Adder, Location, PTMandatory, Permit to Train details, Trained Details, Assessed Details, Authorised Details, Appointed Details, Issue Date, Expiry Date, Status, Competency Assignment Date, Period of Currency, Legacy ID, Competency Status(Current/expiring), Last Upated Time



# Reports

## Expired Competencies Report

Description: Competencies Report - List of expired competencies

Components are: Sites, Competencies, Include Inactive/Unassociated, Companies

Report Returns: Name, Onsite ID, Company, Adder (Realm/Site ), Competency Location, Competency Name, Expiry Date Training Time

## Expiring Competencies Report

Description: List all cardholders who competencies expire within the given period

Components are: Start Date, End Date, Sites, Competencies, Crews, Include Inactive, Site Access Key Only, Companies

Report Returns: Person Name, OnsiteID, Company, Crew, Adder (Realm/Site), Competency Location, Expiry Date, Training Hours, Months (Traffic Light Colour Coded)

## Onsite Hours Report

Description: Hours Report – Provide the total hours for each person with a calculation of total hours for each company. Contains additional fields.

Components are: Sites, Logpoints, Start Date, End Date, Range from (minutes), range to (hours), Person Type, Companies, Person

Report Returns: Company, Name OnsiteID, Person Type, Location, Crew, Activity, Forced, Date, In Time, Logpoint In, Date Out, Out Time, Logpoint Out, Hours, Overstayer Status, Site Contact, Legacy ID, Period Start ID, Last Updated Time





# Reports

## Onsite User Access Report

Description: User Report – List of Site Users with Permissions

Components are: Site

Report Returns: Table Format. Onsite ID & Name on left, All Onsite permissions Across top. Status marked true/false for each column item. Scrolling keeps permission at top.

## Onsite Hours Summary report

Description: Hours Report – Summary of hours per person between two selected dates

Components are: Sites, Logpoints, Start Date, End Date, Range from (minutes), range to (hours), Person Type, Companies, Person.

Report Returns: Company, Name, OnsiteID, Person Type, Crew Name, Gender, Total Hours, Visits, Avg Shift time, Total hours, Total Time, Total Visits, Total Avg Shift Time

## Onsite Now Report

Description: Hours Report – List persons currently on site

Components are: Sites, Logpoints, Companies, Person Types, Activities, Crew, Show Overstayers, Include Mobile Logins

Report Returns: Time In, Site, Login Location, Logout Location, Hours, Last Move Time, Last Move Logpoint, Fatigue Hour Limit, Overstayer status, Name, OnsiteID, Person Type, Contact Number, Company, Site Contact, Crew Activity.



# Reports

## Person Role Status Report

Description: Show the current status of each person for each selected Role

Components are: Sites, Roles, Role Status, Non-Blocked Cardholders, Non-Suspended Roles, Active Cardholders, Companies, Display DOB

Report Returns: OnsiteID, Name, DOB, Company Name, Role, Role ID, Status, Role Expiry, Subscription Expiry, Active Status, Assignment ID

## Portal Role Structure Matrix

Description: Person report – List individual role requirement(s) with Matrix Layout

Components are: Select Active Roles, Role

Report Returns: Competency List on Left, Role name on Top. Role showing status of ( Mandatory/Non-Mandatory/ NA ) under each competency for role. Scrolling down shows competencies status for the role.

## Role Competency Person Matrix

Description: Person Report – Matrix report grouped by role and displaying the current status for each person in the selected crew(s)

Components are: Sites, Crews, Crew Roles, Mandatory Requirements, Competencies, Competency Status, Person, Role Status, Companies

Report Returns: Left shows Onsite ID, Name, Crew, Role Name, Role Status and columns for each Competency. Status for competencies are Current, Expires in 1,2,3, Expired, Pending, No Competency.



# Reports

## **Role Competency Status Summary**

Description: Summary count of persons for each status for each role and competency(s)

Components are: Sites, Crews, Crew Roles, Mandatory Requirements, Competencies

Report Returns: Site Name, Crew Name, Role Competency, Number of persons for each status (Current, Expires in 1, 2 or 3 months, Expired, Pending, No Competency assigned.)

## **Role Person Competency Status**

Description: Competency Report – Status for each competencies within a role(s)

Components are: Sites, Crews, Crew Roles, Mandatory Requirements, Competencies, Role Status, Companies

Report Returns: OnsiteID, Mandatory, Site Name, Crew Name, Role, Name, Competency, Expiry Date, Competency Status (current, expiring in 1,2,3, expired, not applicable )

## **Site Access Keys Report**

Description: Report detailing site access keys, the people who are associated with the keys and the competencies

Components are: Sites, Person Type, Companies

Report Returns: Company, Cardholder, Person Type, OnsiteID, Access Key Name, Location, Competencies, Current Status, Watermark, Active, Created Date.



# Reports

## Worker Role Matrix

Description: **Blank Description** – Report will return the status of that role, showing the competency status in column format.

Components are: Site, Companies, Role (choose one)

Report Returns: OnsiteID, Name, Role Name, Status (current/in progress/expired), Location on left. Top shows competencies of Role and marches each competency off for that worker with (Current, Expires in 1,2,3 months, Expired, Pending or No Competency)

## Training Events Listing

Description: List of Suppliers, associated workers and their compliance status to enter site

Components are: Sites, Worker Compliance Status

Report Returns: Supplier Name, Supplier Billing ID, Worker ID, Name, Worker SAP ID, Site Access Key, Compliance Status, Competencies Met, Competencies Required, Competencies Obtained, Compliance Score, Expiration Date, OnsiteID