INDIVIDUAL WORKER PORTAL

Login to the Contractor Roles Portal

Not all Portals use this feature

A list is available here

https://kb.pegasus.net.au/display/OCCS/Roles+Portal

- The Individual Worker Portal (IWP)is designed so that as a Company Administrator, you can Invite your workers to the portal. They can then manage their own:
  - Personal Information
  - Work Roles
  - Documents
  - Notifications

- Once Registered, IWP users can see their own stats for that Portal.

Login to the Contractor Roles Portal

Go to your relevant Worker Portal

Choose **Company Admin**

Enter your credentials

Click **"Login"**.

- The list of portals for Contractors can be found under the "FOR CONTRACTORS" link on the Pegasus.net.au webpage

- Login to the Company Admin Section requires a relevant Onsite Track Easy Username and Password with relevant User Rights of Can Manage Users Accounts rights.

- Not all functions can be performed by the Worker, as purchasing roles or relevant training is currently locked for administrators to complete for Workers. Company Administrators will still need to pay for purchases of Training or Subscriptions.

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Welcome to the Pegasus Portal

What is your role?

COMPANY ADMIN   WORKER

Company Admin Portal

Login to manage roles and competency checks for your company's *workers*.

Username

Password

LOGIN   Register
Recover my password
Login with Pegasus Account

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INVITE WORKERS

Invite Workers

- Company Administrators have the ability to Invite Employees. This is the process that will give them a username and password.

- They can then activate that account and start using their personalised portal.

- Muse be an Approved Onsite Track Easy Person (Shows Approved under ID#)

STEP 1

**Click "Manage Employees"
Search for Employee and Click on Name
On Right of screen, you will see option to Invite Employee.**

If previously invited, option will display Re-Invite/Reset Password
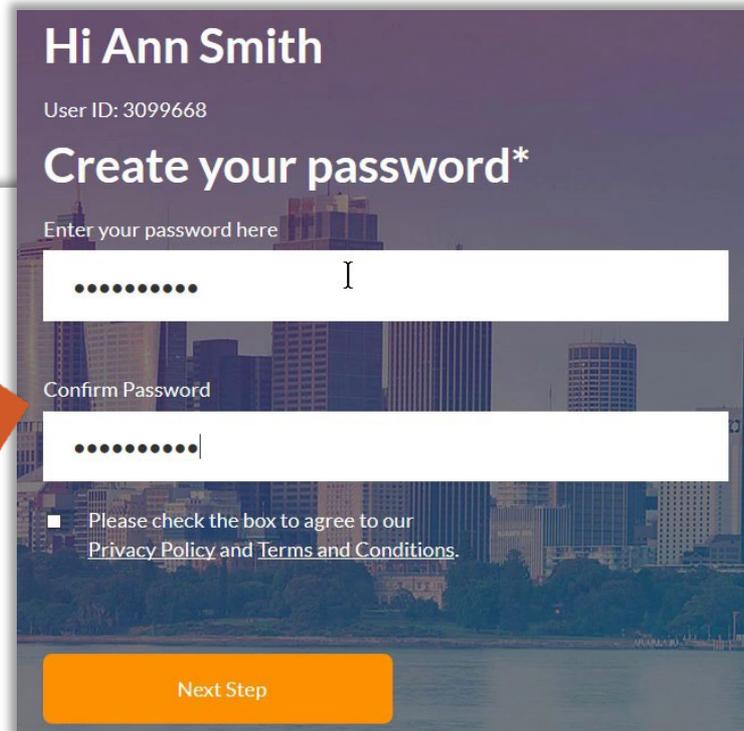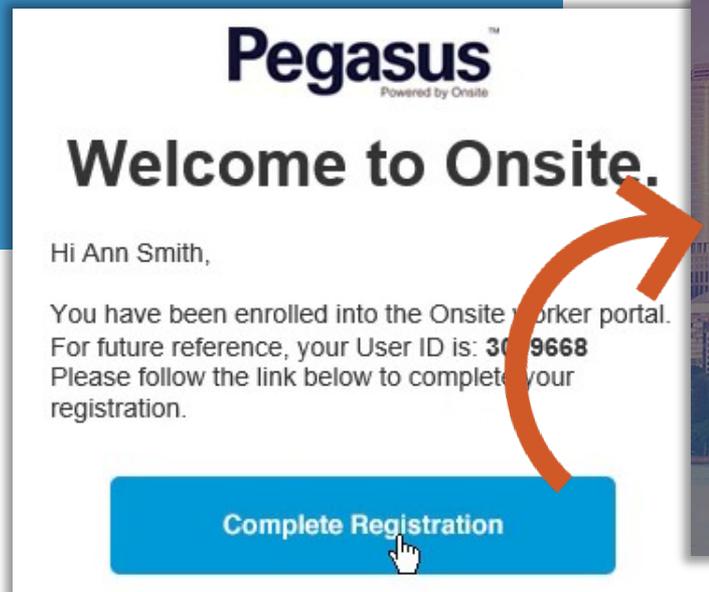
LOGGING THE WORKER INTO THE PORTAL

Logging Worker Into Portal

STEP 1

Worker is sent email.
Click Complete Registration to eb taken to portal screen to manage their password.

- An email is sent to the registered workers Email Address.

- They can then activate that account and start using their personalised portal.

- Worker clicks link to create Password for their login.

- Login ID is their Onsite Track Easy Number

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Welcome to Onsite.

Hi Ann Smith,

You have been enrolled into the Onsite worker portal. For future reference, your User ID is: 30 9668 Please follow the link below to complete your registration.

Complete Registration

Hi Ann Smith

User ID: 3099668

Create your password*

Enter your password here

●●●●●●●●●

Confirm Password

●●●●●●●●●

☐ Please check the box to agree to our
Privacy Policy and Terms and Conditions.

Next Step

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Logging Worker Into Portal

STEP 2

Worker scrolls to bottom of page and press Submit Query

Now logged into Portal.

- Complete Personal Information, choosing to edit if required
- Once Submitted will then open Portal for the Worker
- Worker is successfully logged into Individual Worker Portal

NAVIGATING THE PORTAL

Navigating the Portal

Worker scrolls to bottom of page and press Submit Query

Now logged into Portal.

- Every Individual Worker Portal has different colour scheme and potential settings, tailored to the Portal Owner.

- Training may not be active or required in all Portals.

- Portal version shown here is for example purposes

- Some components shown are for demonstration purposes.

Navigating the Portal

Workers can edit their personal details

Click "Edit Contact Details"

Move through and edit required details and then press "Save and Close"

- Some data is mandatory. Indicated by an Asterix in the field next to it.

- After saving, details are instantly changed in system.

- If not done in the portal, your Company Administrator can do this for you.

Navigating the Portal

Training link will show available training for Worker

Click on training link on right to load that training course to complete.

- The portal uses a Traffic Light Colour scheme to show Roles and Training that's Complete(green) Needing Completion (amber) or Expired(red).

Navigating the Portal

Roles that have been applied for are listed here.

Click on a role to see the current status, or click the Questions Mark ? To view that roles' s status

- Workers can apply for roles in this portal.

- Roles are restricted to this Companies Portal. Can only search for the roles this Portal has available.

- Traffic Light Colour scheme shows Roles that's Complete (green) have Expiring Competencies (amber) or Expired (red).

Symbol key

	Status
✓	Verified
📄	Awaiting submission
📄	Unfilled
❗	Expiring soon
📄	Expired
✖	Returned or rejected

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- Home
- My Profile

/ Roles

Ann Smith
ID# 3099668

My Contact Details   Edit Contact Details ›

Address:	426 King Street, Newcastle, NSW 2300 AU
Phone:	0432112345
Email:	dchallen@pegasus.net.au

My Current Roles   2 0 0 ›

My Training   0 3 0 ›

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Logout

All roles for Ann Smith

Search

- Office Worker ›
- Demonstration Role ›

These Are Demonstration Roles Waiting To Be Submitted

MANAGE ROLES

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Navigating the Portal

Workers can click on relevant Role to View

Click on the relevant Competencies and view its details

Can View or Download uploaded Document (if applicable)

- Some Roles can contain multiple mandatory and optional competencies

- Worker can view each competency that is verified and download that document as its against their personal file

- Can renew document if its in the renewal period

- Can view business rules to see what Client Company requirements are for that competency.

ADDING A ROLE
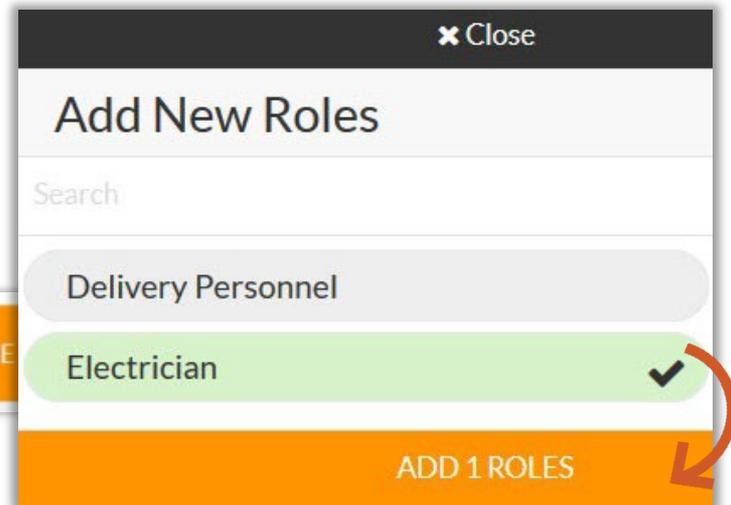
Adding a Role in the Portal

Under My Action on Home Page, Click "manage your roles"

Click "ADD NEW ROLE" at bottom of screen

Search/Scroll to find required role
Click Role(s) to highlight
Click "ADD ROLES" at bottom of portal.

- Roles to be chosen change between the Different Client Portals.

- Roles can also have different competency requirements between different client portals even if the Role is the same name. This is due to client business rules and requirements.

- Roles on display are only for the Portal you are logged into.

✖ Close

Add New Roles

Search

Delivery Personnel

Electrician   ✔

ADD 1 ROLES

My Actions
Pending actions and add/modify your roles

Role Applications

➜ Click here to manage your roles

ADD NEW ROLE

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Adding a Role in the Portal

- Roles have competencies that need to be verified by Pegasus in order for the Role to be valid.

- Mandatory competencies MUST be complete in order for Role to be complete.

- Optional Competencies help Clients with reporting and identifying worker skills, so upload if you have those competencies. This Might form part of another Role, so uploading now will save time if applying for other Roles later.

- Business Rules list the expected file upload requirements

Click on the Role to Manage

List of Competency requirements will appear

Click on relevant competency to view business rules and upload file

Competencies for Ann Smith
Role Electrician

Search

MANDATORY

- Electrical.Licence.Electrical Licence
- Site.Familiarisation.Pegasus Contractors
- Training & Assessment.Certificate.Terminals Corporate Induction
- Identity.Govt Licence/Authority.Proof of Identity
  Expires: 20/05/2025
- Photo

Back to Roles

All roles for Ann Smith

Search

- Electrician
- Forklift Operator
- Office Worker
- Demonstration Role

Back to My Actions

Competency
Electrical.Licence.Electrical Licence

Business Rules

Select evidence for: **Electrical.Licence.Electrical Licence**

Select or Upload Document

Save & Next

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Adding a Role in the Portal

Click "Select or Upload Document"
Upload file or chose from previously uploaded files
Press "Select Document"
Complete details
Press "Save & Next"

- File uploads requirements are listed on Document Library Page

- Once a file has been uploaded, will be stored in library for future use on all portals

- Some Extra Information is mandatory for the competency to be filled out. Indicated by a red Asterix

- Continue until all Competencies are completed and then a SUBMIT button will appear and submit role to Pegasus for Verification of documents.

DELETING A ROLE
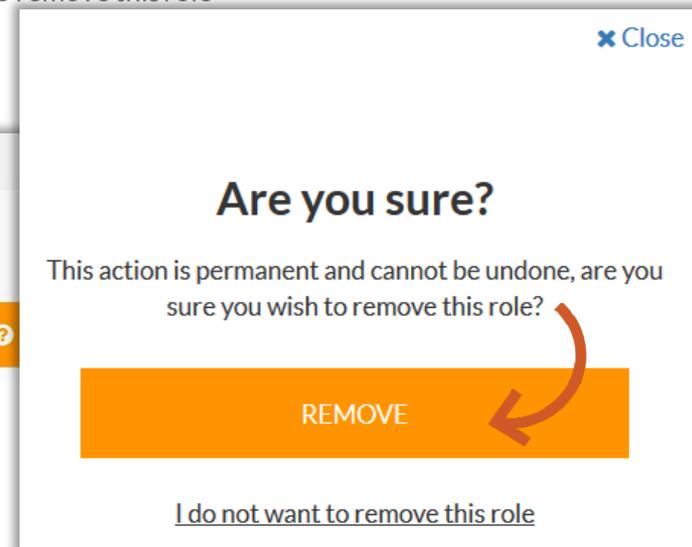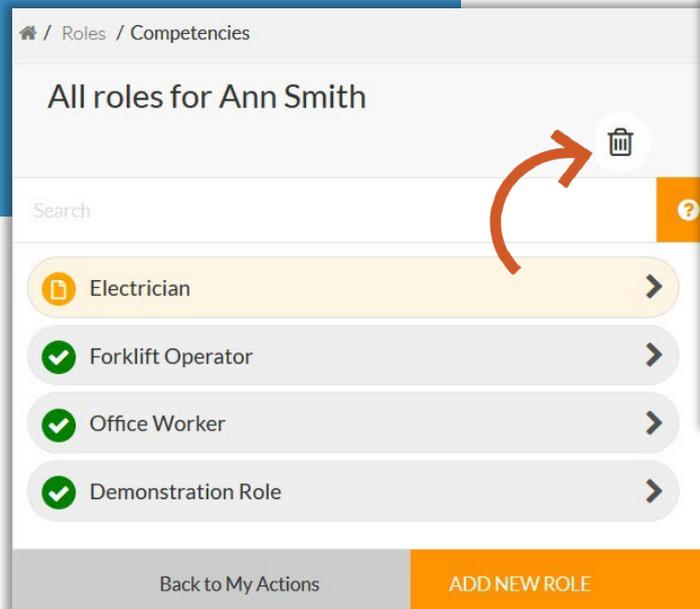
Deleting a Role in the Portal

Click on Role you wish to delete

Trash Can icon will appear on list of role screen up top

Click REMOVE to delete the Role that's no longer required

- Roles Can be deleted by Workers. Whether accidentally added or no longer needed/compliant. But its not mandatory to remove them.

- A Role can be added again at any time, if a wrong one was deleted for example.

- If you already have all the require competencies for a Role, it will automatically be valid and a Green Tick awarded to the Role, when you add it.

- You can cancel out of this action if started accidentally by clicking "I do not want to remove this role"

/ Roles / Competencies

All roles for Ann Smith

Search

- Electrician
- Forklift Operator
- Office Worker
- Demonstration Role

Back to My Actions | ADD NEW ROLE

✖ Close

Are you sure?

This action is permanent and cannot be undone, are you sure you wish to remove this role?

REMOVE

I do not want to remove this role

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FOR ANY QUESTIONS OR ASSISTANCE PLEASE CALL

1300 131 194

OR EMAIL **support@onsitetrackeasy.com.au**

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