



INDIVIDUAL WORKER PORTAL

USER GUIDE

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.

Pegasus
Powered by OnSite

Welcome to the Pegasus Portal

What is your role?

COMPANY ADMIN WORKER

Worker Portal

Complete *your* registration, add new roles to *your* account.

Onsite ID

Password

LOGIN

Register
Recover my password
Login with Pegasus Account

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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 orange “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.

Pegasus
Powered by Onsite

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



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

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

Dashboard / Employees / Manage Employees

Employees
Select an employee to view

ann

ADD NEW EMPLOYEE +

- Smith, Ann
- Smythe, Annelise

Smith, Ann ID# 3099668 Approved

DOB: 01/01/1980 Gender: Female
Phone: 0432112345 Email: [REDACTED]
Address 426 King Street, Newcastle, NSW 2300 AU

Subscription Valid until 11/06/2020 >

Work Roles 0 2 0 >

Invite Employee



LOGGING THE WORKER INTO THE PORTAL

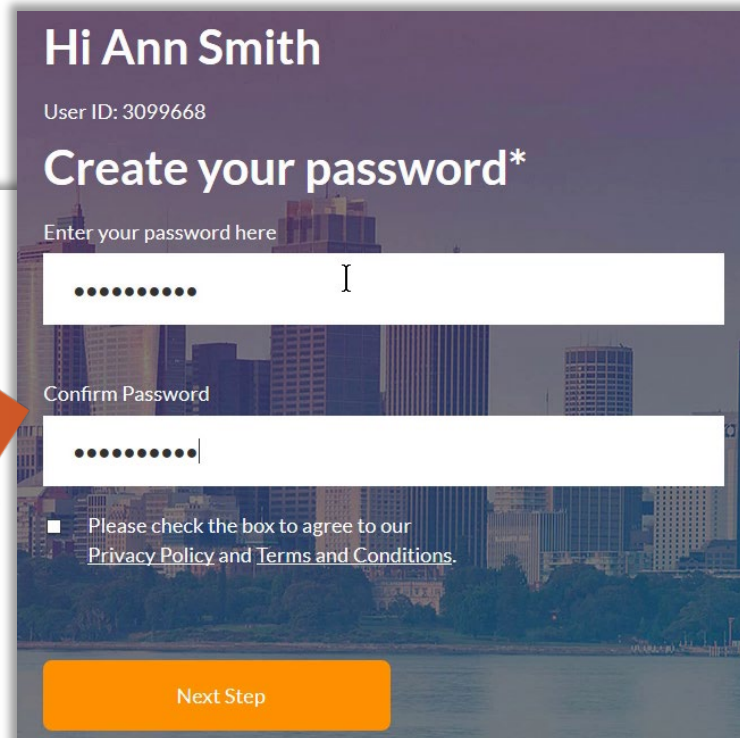
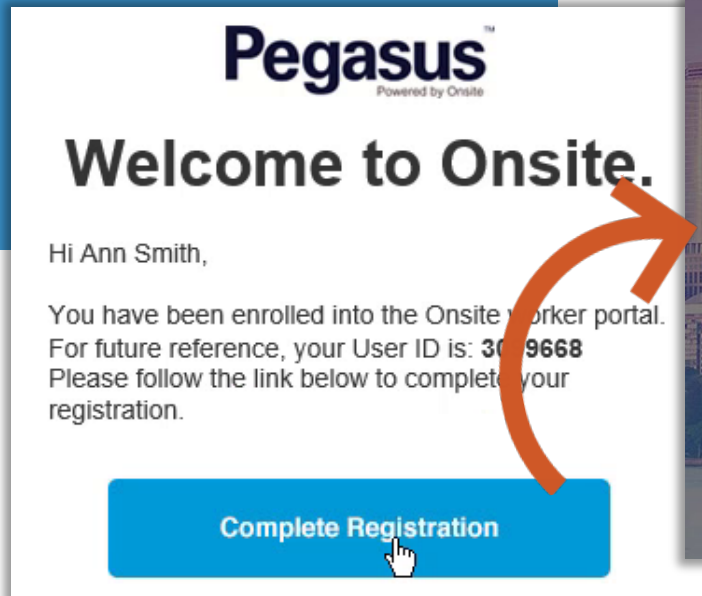
Logging Worker Into Portal



STEP 1

Worker is sent email.
Click Complete Registration to
be 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



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

Personal information

Complete filling in your personal information

First name*

Middle name

Last name*

Date of Birth

Next of kin

Relationship

First Name

Last Name

Phone Number

Email Address

Save

Submit Query

Pegasus

Home

My Profile

Ann Smith
ID# 3099668

My Contact Details [Edit Contact Details >](#)

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

My Current Roles 2 0 0 >

My Training 0 3 0 >

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Logout



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 not active or required in all Portals.
- Portal version shown here is for example purposes
- Some components shown are for demonstration purposes.

The screenshot displays the Pegasus Worker Portal interface. At the top left, the Pegasus logo is visible. A dark blue sidebar on the left contains navigation links for 'Home' and 'My Profile'. The main content area features a user profile for 'Ann Smith' with ID# 3099668, including a profile picture and a link to 'Edit Contact Details'. Below this is a 'My Contact Details' section with fields for Address (426 King Street, Newcastle, NSW 2300 AU), Phone (0432112345), and Email (dchallen@pegasus.net.au). There are also sections for 'My Current Roles' (2 active, 0 pending, 0 expired) and 'My Training' (0 active, 3 pending, 0 expired). On the right, a 'My Actions' section contains a 'Role Applications' card with a button to 'Click here to manage your roles'. The footer includes copyright information for 2019 Pegasus, powered by Onsite, and contact details for support (1300 131 194) and legal policies.

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 Asterisk 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.

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Home
My Profile

My Profile / Edit

Ann Smith
ID# 3099668

[Edit Contact Details >](#)

My 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 >

Personal Details
Edit Ann Smith's details

Person

Photo Upload
Upload

First Name * Ann

Middle Name Middle Name

Last Name * Smith

Back to My Profile SAVE & CLOSE

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Logout

Navigating the Portal



Training link will show available training for Worker

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

- Traffic Light Colour scheme shows Training that's Complete (green) Needing Completion (amber) or Expired (red).

The screenshot displays the Pegasus portal interface. On the left is a dark blue sidebar with navigation links: Home, My Profile, and Logout. The main content area is titled 'My Profile / My Training'. It features a user profile for Ann Smith (ID# 3099668) with a contact details section containing fields for Address, Phone, and Email. Below this are sections for 'My Current Roles' and 'My Training'. The 'My Training' section lists three courses: 'Rail General Safety Induction', 'Pegasus Site Familiarisation - Office Worker', and 'Pegasus Site Familiarisation - Manual Handling'. Each course has a traffic light indicator. An orange arrow points from a blue callout box to the 'Pegasus Site Familiarisation - Manual Handling' course, which has a green indicator.

My Training

- ▶ Rail General Safety Induction
- ▶ Pegasus Site Familiarisation - Office Worker
- ▶ Pegasus Site Familiarisation - Manual Handling

My Current Roles: 2 0 0 >

My Training: 0 3 0

My Training Opens Your Booked or Online Courses, if Relevant

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 role'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).

The screenshot shows the Pegasus portal interface for a user named Ann Smith (ID# 3099668). The interface includes a navigation menu with 'Home' and 'My Profile'. The main content area is titled 'Roles' and displays 'All roles for Ann Smith'. Under 'My Current Roles', there are two rows: 'My Current Roles' with a traffic light indicator (2 green, 0 amber, 0 red) and 'My Training' with a traffic light indicator (0 green, 3 amber, 0 red). A blue callout box with white text says 'These Are Demonstration Roles Waiting To Be Submitted'. A 'MANAGE ROLES' button is at the bottom. A search bar and a list of roles ('Office Worker' and 'Demonstration Role') are also visible. A question mark icon is present in the top right of the roles section.

Symbol key	
Status	
	Verified
	Awaiting submission
	Unfilled
	Expiring soon
	Expired
	Returned or rejected

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.

All roles for Ann Smith

Search

- Office Worker
- Demonstration Role

MANAGE ROLES

Competencies for Ann Smith
Role Office Worker

Search

Expand All | Collapse All

MANDATORY 3/3

- Identity.Govt Licence/Authority.Proof of Identity Expires: 20/05/2025
- Site.Familiarisation.Pegasus Internal Staff Expires: 21/06/2021
- Photo

Workers Can View Their Personal Competency Documents, Details and Download

Competency
Identity.Govt Licence/Authority.Proof of Identity

Business Rules

Select evidence for: Identity.Govt Licence/Authority.Proof of Identity

Download document (8.2 kb)

Extra information required:

Group * Licence.Govt Licence/Authority.Class C



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.

My Actions
Pending actions and add/modify your roles

Role Applications

→ Click here to manage your roles

Close

Add New Roles

Search

Delivery Personnel

Electrician ✓

ADD 1 ROLES

Adding a Role in the Portal



Click on the Role to Manage

List of Competency requirements will appear

Click on relevant competency to view business rules and upload file

- 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. 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

The screenshot illustrates the user interface for adding a role and managing its competencies. It is divided into three main sections:

- Roles / Competencies:** A list titled "All roles for Ann Smith" with a search bar. The "Electrician" role is selected and highlighted in yellow. Other roles include "Forklift Operator", "Office Worker", and "Demonstration Role", each with a green checkmark.
- Competencies for Ann Smith:** A detailed view for the "Role Electrician" with a search bar. It lists several competencies, with "MANDATORY" ones highlighted in red. The "MANDATORY" list includes:
 - Electrical.Licence.Electrical Licence (highlighted with an orange arrow)
 - Site.Familiarisation.Pegasus Contractors
 - Training & Assessment.Certificate.Terminals Corporate Induction
 - Identity.Govt Licence/Authority.Proof of Identity Expires: 20/05/2025
 - Photo
- Competency Detail:** A modal window for "Electrical.Licence.Electrical Licence" with a "Business Rules" button. Below it, the text "Select evidence for: Electrical.Licence.Electrical Licence" is followed by a prominent orange button labeled "Select or Upload Document". A "Save & Next" button is located at the bottom right of this modal.

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.

The screenshot displays the 'Competency' selection screen for 'Electrical.Licence.Electrical Licence'. It features a 'Business Rules' tab and a 'Select or Upload Document' button. Below this is a 'Document Library' section with 'Allowed file types: PDF, DOC, JPG, JPEG, XLS, T...' and 'Edit' and 'Select None' buttons. A grid of document thumbnails is shown, including 'Driver Licen...', 'CONTRACTOR LICEN...', and 'PLAZA 1 ST 2010 NSW'. A red box highlights a document on 'Page 2'. An orange arrow points from this document to the 'Select or Upload Document' button. Another orange arrow points from the 'Select or Upload Document' button to the 'Save & Next' button in the 'Extra information required' section. This section includes fields for 'Issue Date' and 'Expiry Date' (both with red asterisks and calendar icons) and a 'Comments' field. At the bottom, there are 'Cancel Save' and 'Save & Next' buttons. The bottom navigation bar shows 'Upload new document' and 'Select 1 document' with a checkmark.



DELETING A ROLE

Deleting a Role in the Portal

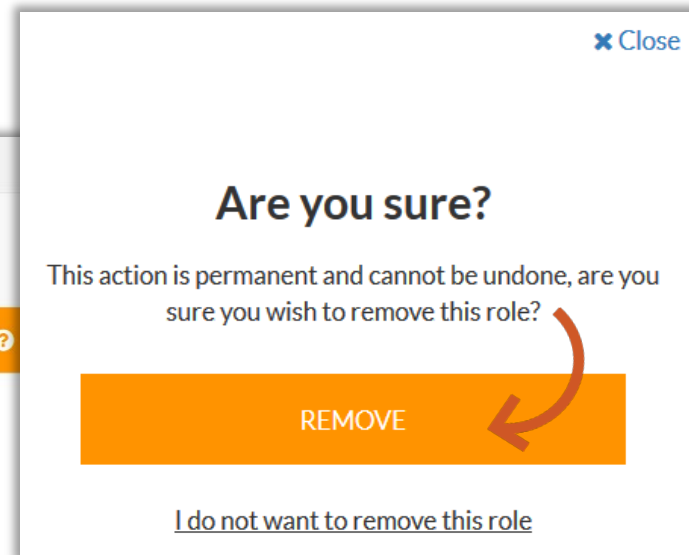
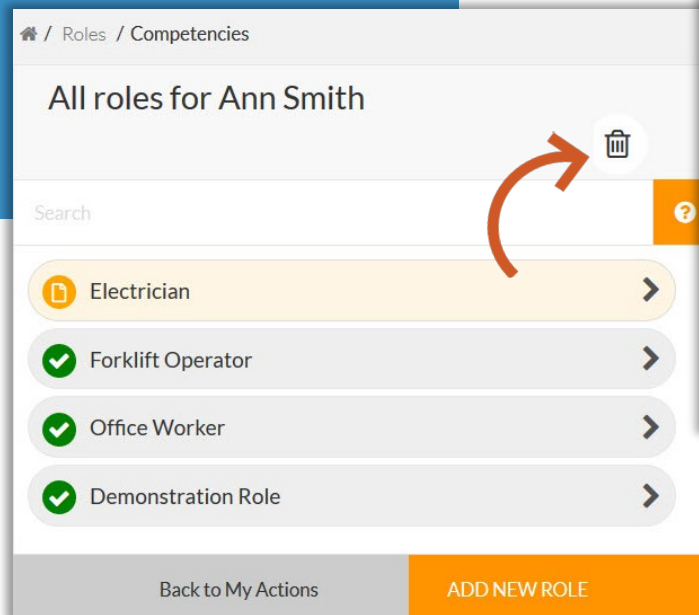


Click on Role you wish to delete

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.
- Role can be added again at any time, if 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.
- You can cancel out of this action if started accidentally by clicking "I do not want to remove this role"





FOR ANY QUESTIONS OR ASSISTANCE PLEASE CALL

1300 131 194

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