



# PEGASUS CLIENT PORTAL

USER GUIDE

Version 1.14

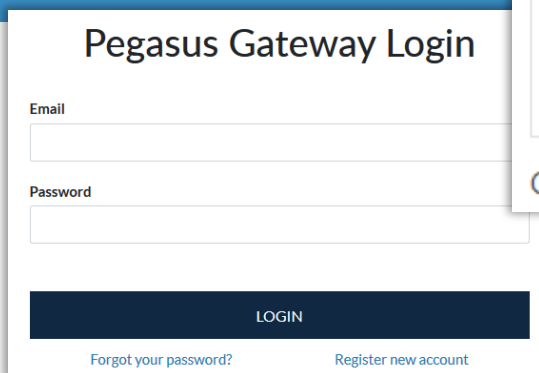
# Login to the Client Portal

Go to  
<https://login.poweredbyonsite.com>  
and log in with your Pegasus  
Gateway Account

Click on the Client Portal Tab

This will log you in to the Client  
Portal and give you access related to  
your Onsite Track Easy User Rights  
and Permissions

- This guide assumes you already have an existing Pegasus Gateway Login and you have a Site or Realm user account in Onsite Track Easy.
- It also assumes you have created you Onsite Track Easy Tile in the Pegasus Gateway and then have added the Pegasus Client Portal Tile.
- **Aim:** To allow Client Portal Users (Onsite Track Easy Administrators/ Super Users/Supervisors/Data Administrators) the ability to perform a number of functions in the Client Portal.
- **Benefit:** The Client Portal offers a more streamlined view and approach to manipulating Employee and Contractor data that's pulled from Onsite Track Easy.
- More information about the Pegasus Client Portal can be found at: <https://kb.pegasus.net.au/display/CA/Client+Portal>



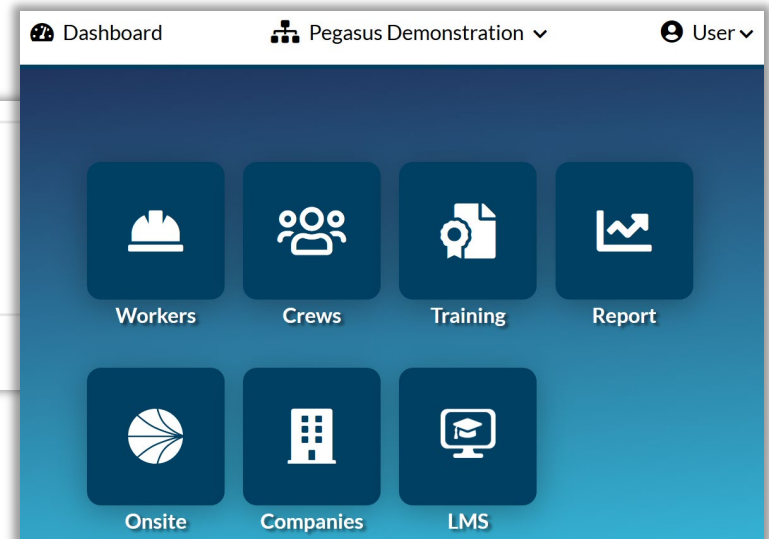
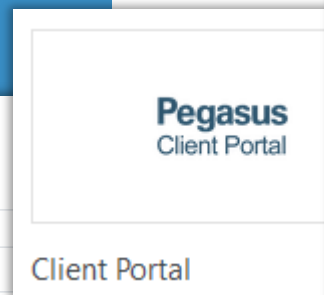
Pegasus Gateway Login

Email

Password

LOGIN

[Forgot your password?](#) [Register new account](#)



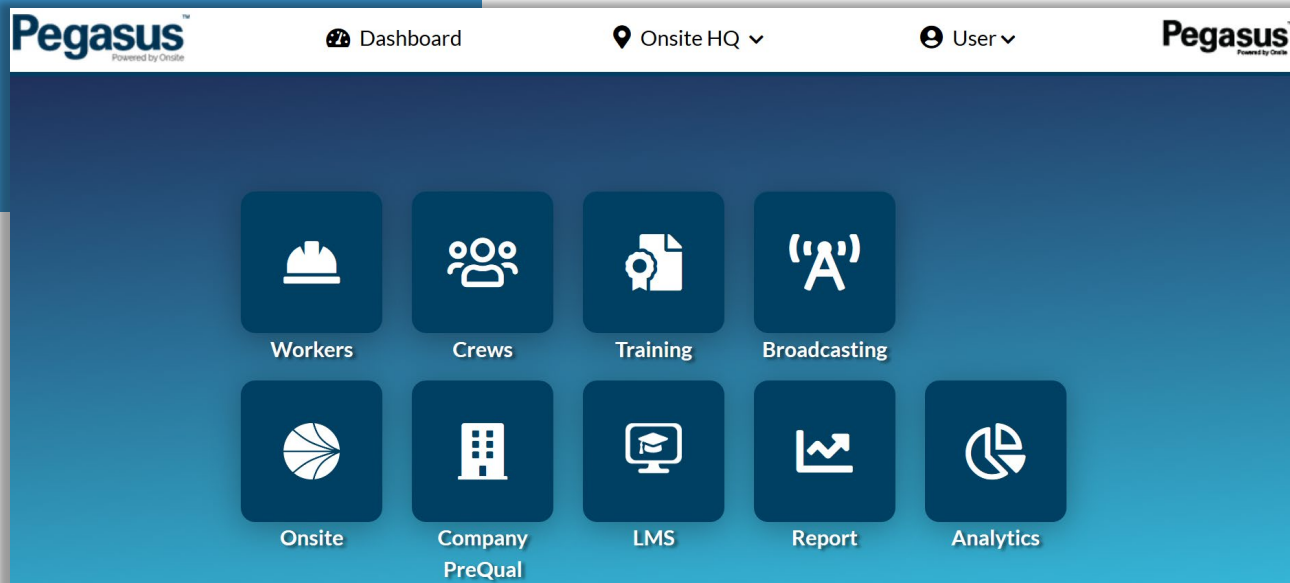
## ■ Login to the Client Portal – Notes on your access

The “User” dropdown arrow will display your currently logged in Onsite Track Easy Account.

Click on “Dashboard” to return to the Pegasus Gateway screen

Click the dropdown arrow on your site/realm to change to another location, if you have those permissions.

- The generic Pegasus Demonstration Realm and Site will be used throughout this documentation.
- The colour scheme you will see is the approved layout Pegasus has applied to your company.
- Some features are restricted depending upon your Onsite Track Easy User rights. You might not have the ability to edit or modify in some cases.
- Training, Report, Companies, LMS, Broadcasting and Analytics all require certain User Rights from Onsite Track Easy.



# Legend Page – Common Icons and Features



- This is the Edit Icon. Visible when you have permissions to edit.



- The Add Icon. Visible when you have permissions to add a component (e.g. Competency)



- The Bulk Add Icon. Visible when you have permissions. Used for adding people in bulk. (e.g bulk add people to a crew)

- The Colour Status icons represent Status on pages.

**GREEN** = Active and Valid  
**AMBER** = Expires withing 30 days  
**BLUE** = Pending Status  
**RED** = Expired

- Colour Status Icons are visible on multiple pages in the Client Portal, limited to Workers, Crews and Training Pages.

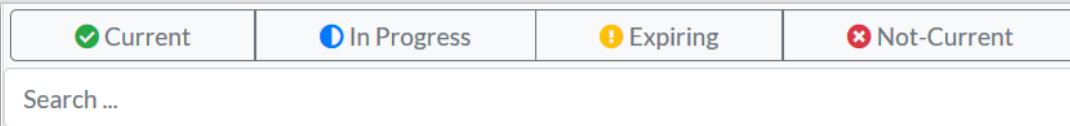
Crews	None	>
Sites	6	>
Roles	1	>
Competencies	2 3 1	>
Access Keys	3 5	>
Messages	None	>



- The Worker, Crews, Training, Report and Messages Tile Icons will launch the appropriate page in the Client Portal.

- The Onsite, Companies and LMS Tiles will open a page in a new browser window. As these are essentially separate items to the Client Portal, they will open the option in a new window but still retain you Onsite Track Easy user rights and permissions in that new browser window.

- Broadcasting and Analytics are additional tool only available after being enabled by your Pegasus Account Manager.



- The filter option appears on various pages. Click on each status icon to filter out unwanted Competencies, Roles, Access keys, to focus on the ones you need.

- The Search option allows you to type in letters or words to start filtering out unwanted items. Can be used in conjunction with the Status filter.





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# VIEWING WORKER PROFILES

# Viewing Worker Profiles

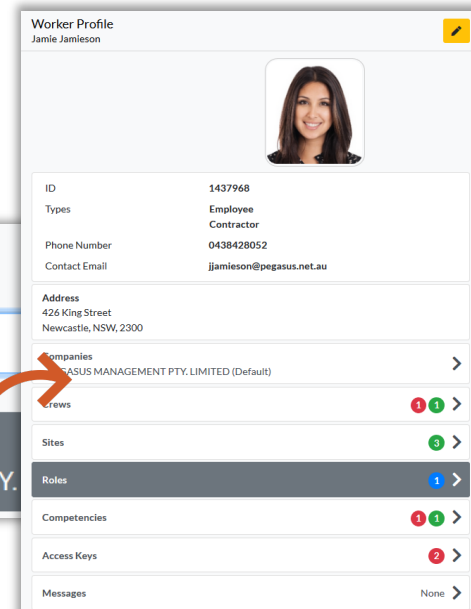
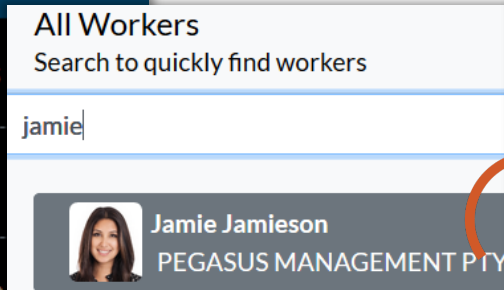
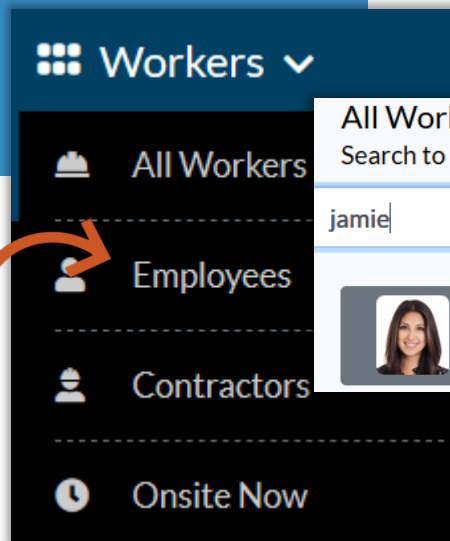
## Enter the Worker Module

Select your Worker group from the listed options.

Search for Worker using notes on the right, or scroll with mouse through names defaulted to first name alphabetically.

Click on their name to view their profile

- Can search for workers through the All Workers, Employees or Contractor option. Onsite Now can also be used, but will only show currently logged in to site Workers
- Searching for workers can be done by:
  - First Name and/or Last Name
  - Company Name
  - ID Number
  - Combination of Name and Company Name (e.g Phil Electrical )
- Click Edit icon in top right to change worker details, if you have those user permissions.



# Viewing Worker Profiles – Standard View

Viewing a Workers profile is standard.

Depending upon Workers configuration at your Site/Realm, different status will show against each item.

Can Edit Worker Personal Data and Block worker from this screen, if your account has relevant permissions.

- Every user has access to view worker profiles. Those with user right “Can access Private Data” will see extra information.

Worker Profile  
Jamie Jamieson

ID	1437968
Types	Contractor
Date of Birth	01 Jan 1980
Phone Number	0438428052
Contact Email	jjamieson@pegasus.net.au

**Address**  
426 King Street  
Newcastle, NSW, 2300

**Companies**  
Pegasus Management Pty. Limited (Default) >

**Crews** None >

**Sites** 1 >

**Roles** 1 >

**Competencies** 1 >

**Training** 1 >

**Access Keys** 2 >

**Messages** None >

[Block](#)



# Viewing Worker Profiles – Companies Section

Click on their Companies section under their profile

Click on the company you wish to view

Contact details for that company will be listed

- Workers can be employed by multiple companies
- One company is designated as the default, which is the one listed against when the sign into a logpoint/turnstile at sites.
- Changing the default company is currently still completed in Onsite Track Easy under the workers profile page.

**Companies**

- PEGASUS MANAGEMENT PTY. LIMITED (Default) >
- Pegasus Safety And Training Pty Ltd >
- Pegasus Management Pty. Limited >

**Company Summary**

Phone Number	1300 131 194
Email	*****@pegasus.net.au
Address	Level 2 426 King Street Newcastle NSW 2300

**Employment Details**

Training Email	ariley@pegasus.net.au
Employee Number	648808

# Viewing Worker Profiles – Companies Section

To view the sites this Worker is associated against that company:

Click on the Company

Scroll to bottom of page to list associated sites

Click on relevant site to see date associated

- Workers can be employed by multiple companies
- One company is designated as the default, which is the one listed against when the sign into a logpoint/turnstile at sites.

The screenshot displays the 'Worker's Company' and 'Worker's Site Company' sections. The 'Worker's Company' section shows details for PEGASUS MANAGEMENT PTY. LIMITED (Default), including a company summary with email (tnguyen@pegasus.net.au) and address (426 King Street, Newcastle, NSW 2300), and employment details with training email (jjamieson@pegasus.net.au) and employee number (1437968). The 'Worker's Site Company' section shows details for PEGASUS MANAGEMENT PTY. LIMITED (Default), including a location pin icon and a table of associated sites.

Person	Jamie Jamieson
Company	PEGASUS MANAGEMENT PTY. LIMITED
Site	Pegasus Demonstration
Association Date	2017-06-20
Associated By	Kim Dundas

The 'Sites' section lists three sites: Hilton Foods - Truganina, Pegasus Demonstration (highlighted), and Hilton Foods - Bunbury. Red arrows indicate the flow from the 'Companies' list to the 'Worker's Company' details, and from the 'Pegasus Demonstration' site to the 'Worker's Site Company' details.

**Companies**  
Companies for Jamie Jamieson

- PEGASUS MANAGEMENT PTY. LIMITED (Default)
- Hilton Foods - Truganina
- Pegasus Demonstration
- Hilton Foods - Bunbury

# Viewing Worker Profiles – Crews, Sites, Roles, Competencies, Training, Access Keys and Messages

To view items of a workers profile, click on each Tab to expand it to the right to view more.

All Tabs view the same, Can see what items, according to Traffic Light Status system, what need immediate attention.

- All levels of user access will be able to see status. So even those with just Viewer Access in the system.
- Most Tabs will open to screen where you can search for a named item or filter out the results using the header colour icons.
- Access to manipulate data in each Tab section relates once again to your user access in Onsite Track Easy.

The screenshot shows a vertical list of navigation tabs on the left and a horizontal status filter overlay on the right. The tabs are: Crews (None), Sites (1), Roles, Competencies (4, 1), Training (1), Access Keys (2), and Messages (None). The status filter overlay includes four categories: Current (green checkmark), In Progress (blue circle), Expiring (yellow exclamation mark), and Not-Current (red X). Below the filter is a search bar labeled 'Search ...'. An orange arrow points from the 'Roles' tab to the 'Current' status filter.

Tab	Count
Crews	None
Sites	1
Roles	-
Competencies	4 (red), 1 (blue)
Training	1 (green)
Access Keys	2 (red)
Messages	None

Status	Icon
Current	Green checkmark
In Progress	Blue circle
Expiring	Yellow exclamation mark
Not-Current	Red X



# **MANAGING BLOCKS ON WORKERS**



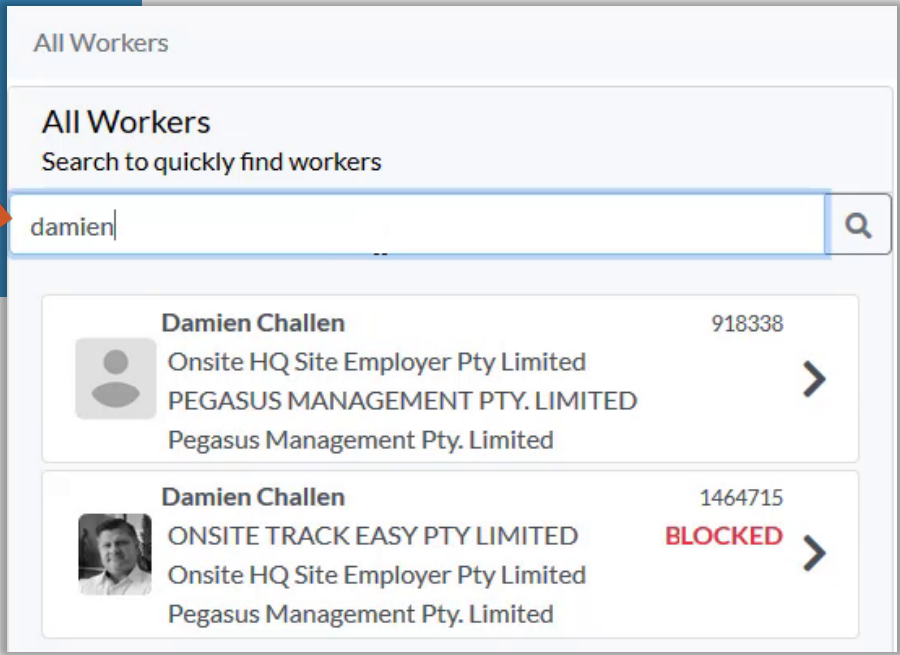
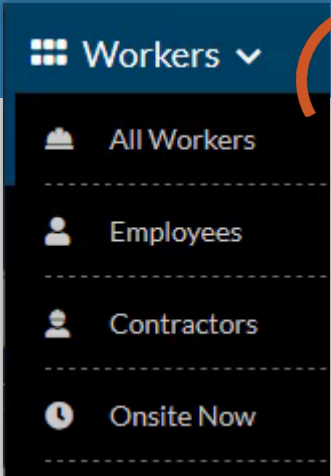
# Viewing Blocked Worker Profile

In the Workers Module, Search for your Worker or scroll to view all Workers alphabetically by first name

Workers with a Site/Realm block will have the “BLOCKED” text next to their profile.

Click on the Worker

- A Blocked Worker will be denied access to log into sites at a Logpoints. An alert will be sent to listed contacts if Blocked Worker attempts site access at a logpoint.
- All users of the Client Portal can see any Blocks a Worker has.
- Blocks are also reflected in the Mobile App.

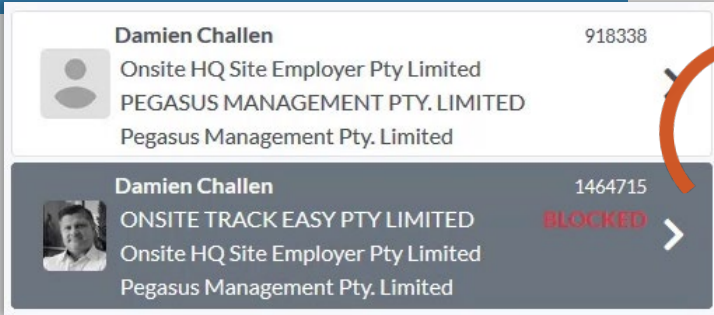



# Viewing Blocked Worker Profile

Number of applied blocks will show against the Workers Profile Page

Click on the Red shaded “Blocks in Place” section to see the details


- Blocks do not stop the ability to view a Workers Profile.

	<b>Damien Challen</b> Onsite HQ Site Employer Pty Limited PEGASUS MANAGEMENT PTY. LIMITED Pegasus Management Pty. Limited	918338
	<b>Damien Challen</b> ONSITE TRACK EASY PTY LIMITED Onsite HQ Site Employer Pty Limited Pegasus Management Pty. Limited	1464715 <b>BLOCKED</b>

### Worker Profile

Damien Challen

**Blocks In Place** 2



ID	1464715
Types	Employee Contractor
Date of Birth	01 Jan 1970
Phone Number	0420202020
Contact Email	dchallen@pegasus.net.au

# Viewing Blocked Worker Profile

Listed Blocks will show at the Realm level, and then Site Blocks listed under there.

Click on the Block you wish to read more about.

Comment section may not be visible if it was deemed a "Restrictive Comment" when created.

All other data is visible to all users of the Client Portal.

- Workers can be Blocked at the Realm, Site or at a particular Location.
- Site Alerts can be configured to alert specific email addresses if a Blocked Worker is attempting to log into an Access Point (Boomgate/Turnstile/Logpoint/Kiosk/Tablet) where they are Blocked.
- Restricted Comments can be added so only those with user right "Can Access Private Data" will be able to read.

**Blocks**  
Blocks for Damien Challen

Realm : Pegasus Demonstration

- ALL in Realm : Pegasus Demonstration

Site : Pegasus Demonstration

- ALL in Site : Pegasus Demonstration

**Worker Profile**  
Damien Challen

**Blocks In Place** 2

**ALL in Realm : Pegasus Demonstration**

Person	Damien Challen
Action	Cardholder Block
Block Type	GENERAL
Created By	Damien Challen
Date	14 Feb 2020
Realm/Site	Realm : Pegasus Demonstration
Blocked At	Realm : Pegasus Demonstration
Blocked In	ALL selected & sub-locations
Authoriser	Realm Admin
Comment	Blocked Due to PPE Issues

# Blocking a Worker


Click on the Worker profile you wish to Block

Click the “Block” button at the bottom right of the profile

A new screen will appear asking for the reason for the block

- Only users with the right “Can Block Cardholders” are able to use this feature.

The image shows a user interface for blocking a worker. On the left is a list item for Damien Challen, ID 918338, with a right-pointing arrow. An orange arrow points from this list item to a larger 'Worker Profile' view on the right. The profile view includes a photo of Damien Challen with a red clock icon and the word 'Overtime' below it. Below the photo is a table of personal details, followed by an 'Attendance' section, and a 'Next of Kin' section. At the bottom right of the profile view is a red 'Block' button. A second orange arrow points from the 'Block' button back to the list item.

Worker Profile	
Damien Challen	
	
<b>Overtime</b>	
ID	918338
Types	Employee Contractor
Date of Birth	[Redacted]
Phone Number	[Redacted]
Contact Email	[Redacted]
<b>Attendance</b>	
Site	Pegasus Training
Login	26 Feb 2020 10:29
<b>Next of Kin</b>	
Relationship	FATHER
<b>Block</b>	



# Blocking a Worker

Click on the Dropdown Arrow and select the Location, if applicable, where the Block will occur.

If no location chosen, default will be “All Locations within selected Location” at the Site/Realm.

Authoriser Details logged against the block.

Enter in the Note for the Block.

Choose if note is restricted to certain viewers.

Press Yes when ready.

- Restricted Comments can be added so only those with user right “Can Access Private Data” will be able to read.
- Workers can be Blocked at the Realm, Site or at a particular Location.
- A Note must be given. It is recorded then as an Admin note in the Onsite Track Easy system.

**Damien Challen** 918338  
Onsite HQ Site Employer Pty Limited  
PEGASUS MANAGEMENT PTY. LIMITED  
Pegasus Management Pty. Limited

Location

- SITE : Pegasus Training
- SITE : Pegasus Training**
- LOCATION : Administration
- LOCATION : Main Office

Created By **Damien Challen (918261)**  
Created Date **12 Mar 2020**

Location  
SITE : Pegasus Training

All Locations within selected Location  
 ONLY at selected Location

Authoriser  
Damien Challen (918261)

Notes  
User Has lost Card, blocking until found or replaced

Restricted

If Restricted is ticked, this note will only be viewable by users with Manager access (recommended)

Are you sure you want to block?

# Blocking a Worker

Worker is now Blocked.

View the worker profile and you will see the block listed against their profile


Click on the “Block in place” to review as mentioned in previous slides.

- Blocks are only relevant to your Site/Realm. Cannot see blocks from other Clients.

**Damien Challen** 918338  
Onsite HQ Site Employer Pty Limited  
PEGASUS MANAGEMENT PTY. LIMITED  
Pegasus Management Pty. Limited

Worker Profile  
Damien Challen

**Blocks In Place** 1



Overtime

ID	918338
Types	Employee Contractor
Date of Birth	
Phone Number	
Contact Email	

**Attendance**

Site	Pegasus Training
Login	26 Feb 2020 10:29

**Address**

2 Sutcliffe St  
Cameron Park, NSW, 2285

**Next of Kin**

Relationship	FATHER
--------------	--------

# Unblocking a Worker

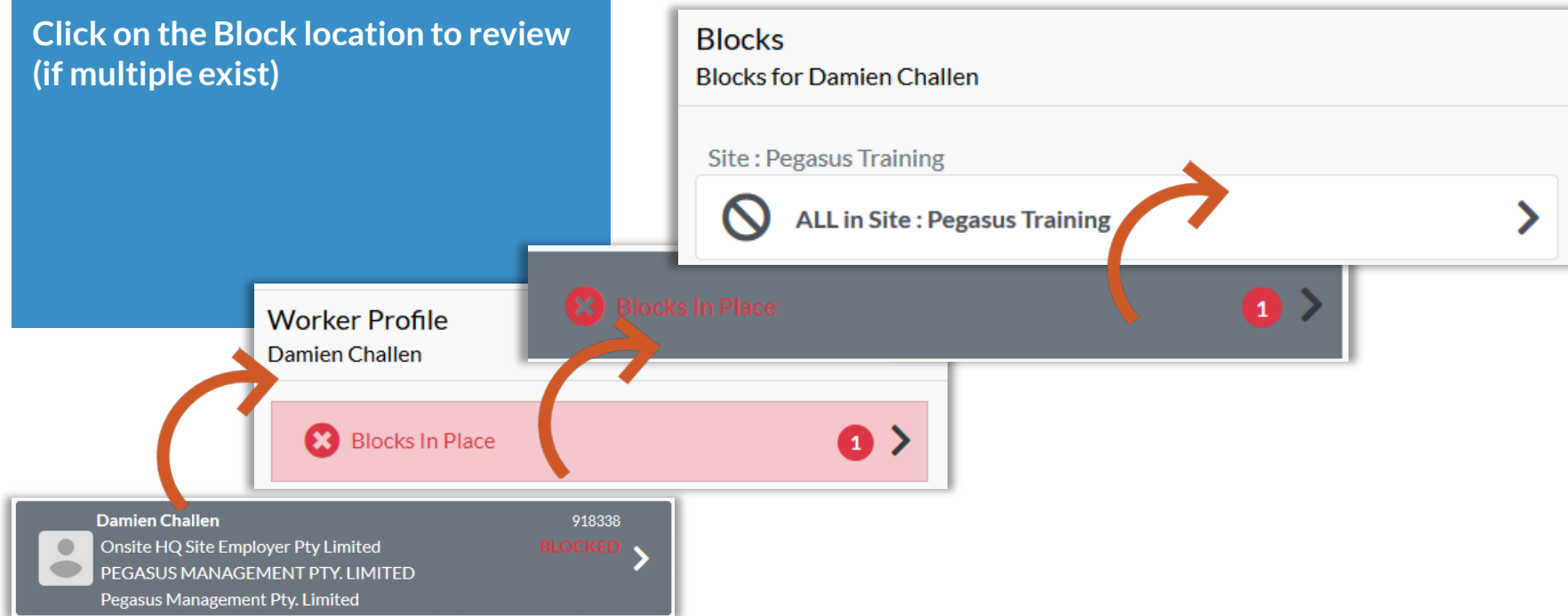
Worker is now Blocked.

View the worker profile and you will see the block listed against their profile

Click on the “Block in place” to review

Click on the Block location to review (if multiple exist)

- Blocks are only relevant to your Site/Realm. Cannot see blocks from other Clients.
- Realm level blocks will also show against a worker at all sites under that Realm
- Site blocks will only show when looking at the relevant site in the Client Portal. (unless looking at the Realm Level view)



# Unlocking a Worker

Click the Unblock button

Supply a reason for the unblocking or editing of the block.

Authoriser Details logged against the block.


Click Yes when ready to Unblock

Cardholder will now be unblocked.

- Blocks can be edited to make note unrestricted if necessary. Must be done by user with those permissions.
- Unblock note is stored in Onsite Track Easy system as an Admin Note.
- Unlocking will remove flag from cardholder profile and also remove from showing blocked in the Mobile App.

**Blocks**  
Blocks for Damien Challen

Site : Pegasus Training


 ALL in Site : Pegasus Training

ALL in Site : Pegasus Training

Person	Damien Challen
Action	Cardholder Block
Block Type	GENERAL
Created By	Damien Challen
Date	12 Mar 2020
Realm/Site	Site : Pegasus Training
Blocked At	Site : Pegasus Training
Blocked In	ALL selected & blocked
Authoriser	Damien Challen (918261)
Comment	User Has lost Card, blocking until found or replaced

**Unblock**

ALL in Site : Pegasus Training



Person: Damien Challen  
Action: Cardholder Block  
Block Type: GENERAL  
Created By: Damien Challen

Authoriser: Damien Challen (918261)

Notes: Worker has found lost card. Unblocking for this reason

Restricted:

If Restricted is ticked, this note will only be viewable by users with Manager access (recommended)

Are you sure you want to unblock?

**Yes** **No**





# **ONSITE NOW & EMERGENCY EVACUATION**

# Viewing Worker Profiles – Onsite Now

To view current Logged in Workers, click “OnSite Now”


Lists all workers logged in at site. Employees, Contractors and Visitors

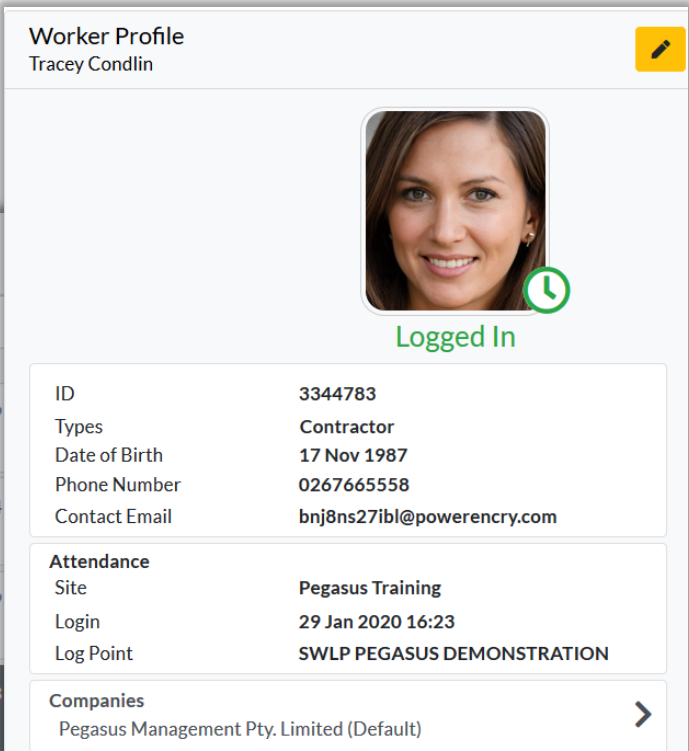
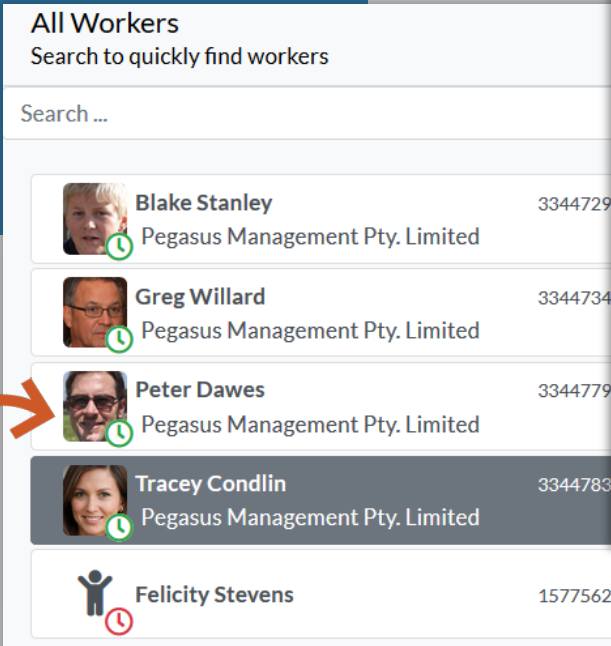
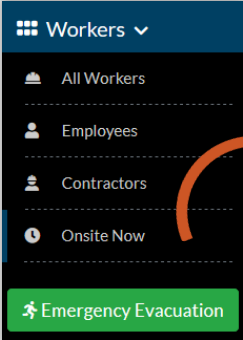
Shows fatigue status indicator

Shows Attendance field - details logpoint information and time of login.

- If viewing an Onsite Now worker on another screen, it shows the same Status and Attendance fields while they are still logged in.

 Red = Over Site Fatigue Limit

 Green = Under Site Fatigue Limit  
Currently cannot log people out of site from Client Portal – Use Onsite Track Easy



# Viewing Worker Profiles – Emergency Evacuation

To view printable list of Workers currently at site, click Emergency Event

Can filter by Person

Can Print Results

Click “Company Icon” to return to Console in Client Portal

- Feature does NOT work at the Realm. Must be at a site level to view Onsite Now and Emergency Evacuation modules
- If active, Activities and Crew fields will show those details of cardholders
- Default view is to list my Logpoint and then from earliest to oldest logins

Workers ▾

- All Workers
- Employees
- Contractors
- Onsite Now
- Emergency Evacuation

Database records show the following people were on site.  
Note: This information does NOT include "Local Mode" transactions that have not been uploaded by the system.

print by person

Logpoint: LEVEL 1 BG

Login Time	Ago	Current Location	Person Name	Phone	Company Name	Person Type	Onsite Id	Activity
1/12/20, 9:31 PM	43 hr:10 min34				PEGASUS MANAGEMENT PTY. LIMITED	Employee	3091776	
1/8/20, 2:23 PM	26 hr:18 min43				PEGASUS MANAGEMENT PTY. LIMITED	Employee	3101131	

Logpoint: LEVEL 1 KIOSK

Login Time	Ago	Current Location	Person Name	Phone	Company Name	Person Type	Onsite Id	Activity
1/29/20, 9:57 AM	6 hr:43 min57				PEGASUS MANAGEMENT PTY. LIMITED	Employee	1516041	
1/29/20, 9:21 AM	7 hr:20 min11				ONSITE TRACK EASY PTY LIMITED	Employee	229	
1/29/20, 9:00 AM	7 hr:41 min40				PEGASUS MANAGEMENT PTY. LIMITED	Employee	1562762	
1/29/20, 8:53 AM	7 hr:48 min20				PEGASUS MANAGEMENT PTY. LIMITED	Employee	3282710	
1/29/20, 8:46 AM	7 hr:55 min42				PEGASUS MANAGEMENT PTY. LIMITED	Employee	3340675	

Logpoint: LEVEL 2 DESKTOP

Login Time	Ago	Current Location	Person Name	Phone	Company Name	Person Type	Onsite Id	Activity
1/29/20, 8:47 AM	7 hr:53 min51				ONSITE TRACK EASY PTY LIMITED	Employee	641751	
1/29/20, 8:46 AM	7 hr:55 min45				PEGASUS MANAGEMENT PTY. LIMITED	Employee	1489457	
1/29/20, 8:40 AM	8 hr:00 min50				PEGASUS MANAGEMENT PTY. LIMITED	Employee	114272	
1/29/20, 8:19 AM	8 hr:21 min52				PEGASUS MANAGEMENT PTY. LIMITED	Employee	1015180	
1/29/20, 7:45 AM	8 hr:56 min09				PEGASUS MANAGEMENT PTY. LIMITED	Employee	1612261	
1/22/20, 11:54 AM	52 hr:47 min04				ORACLE NETSUITE	Visitor	3343753	
1/22/20, 11:53 AM	52 hr:48 min42				ORACLE NETSUITE	Visitor	3285918	
1/22/20, 9:27 AM	55 hr:14 min25				NCIG	Visitor	3321930	



# ASSIGNING COMPETENCIES



# Assigning Competencies to a Worker

Enter the Worker Module

Search for your worker

Click on their name to view their profile

Scroll down and click on the Competencies Tab

- *Note: This step assumes you have permission to add competencies and these actions are being performed at the Site level.*
- Can search for workers through the All Workers, Employees or Contractor option. Onsite Now can also be used, but will only show currently logged in to site Workers
- Searching for workers can be done by:
  - First Name and/or Last Name
  - Company Name
  - ID Number
  - Combination of Name and Company Name (e.g Phil Electrical )

The screenshot illustrates the software interface for assigning competencies to a worker. On the left, a dark blue sidebar contains a 'Workers' dropdown menu with options: 'All Workers', 'Employees', 'Contractors', and 'Onsite Now'. An orange arrow points from 'All Workers' to a search bar. The search bar contains the text 'jamie' and a search icon. Below the search bar, a worker profile card is displayed for 'Jamie Jamieson' at 'PEGASUS MANAGEMENT PTY. LIMITED'. An orange arrow points from this profile card to a right-hand panel. This panel is a vertical list of tabs: 'Crews' (1 red, 1 green), 'Sites' (3 green), 'Roles' (1 blue), 'Competencies' (1 red), and 'Access Keys' (2 red). The 'Competencies' tab is highlighted with an orange arrow, indicating the next step in the process.

# Assigning Competencies to a Worker

Click on the “PLUS” icon to add a competency

This will open the Assign Competency page

After a slight delay, it will then bring up the list of Site Competencies

If it doesn't, you can click on the ellipsis “...” to open the list of all competencies that can be applied to your desired worker.

Assign Competency  
Jamie Jamieson

Competency

Type

Cancel Save

Competencies  
Jamie Jamieson

Not Competent Expiring In Progress Competent

# Assigning Competencies to a Worker

Click on the required Competency you wish to add to the Workers profile

It will then be highlighted, now click "Add"

This will then open the Assign Competency screen again

It will now request more information from you regarding this Competency., before it can be applied.

Assign Competency  
Jamie Jamieson

Competency

Type

Cancel Save

Select a Competency

Search ...

- Competency MGT - Workforce Dev planning  
Administration.Trained
- Construction Work  
OH&S-WHS.Certificate
- Consulting - Administration  
Administration.Trained
- Consulting - Competency Planning** ✓  
Administration.Trained
- Consulting - Project MGT  
Administration.Trained
- Consulting - Training Development  
Administration.Trained

Cancel Add

# Assigning Competencies to a Worker



Competency Name will be listed next to (...)

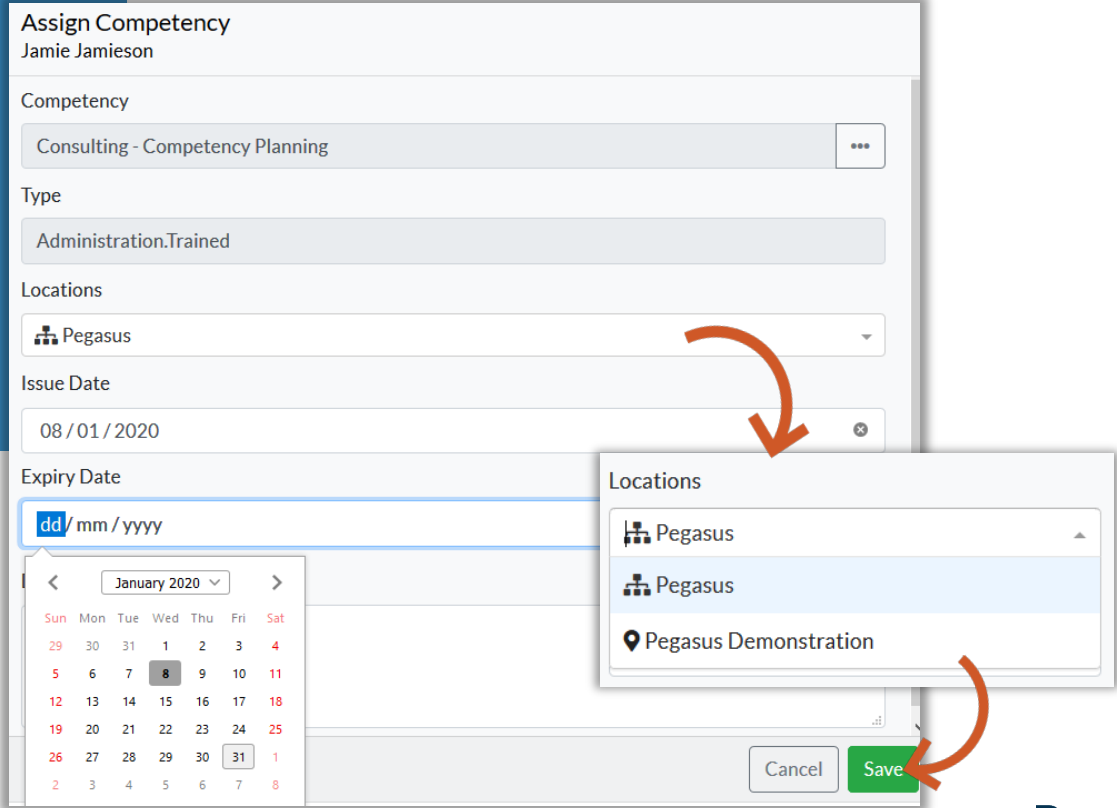
Complete any required items on this screen. Depending upon Competency requirements, some mandatory information might be required E.g. Issue Date, Expiry Dates or Description Information

If required, Location of Competency might also need to be chosen.

Click "Save" when completed.

- Locations will change depending upon your account and rights.

-  - Icon denotes a REALM location
-  - Icon denotes a SITE Location



Assign Competency  
Jamie Jamieson

Competency  
Consulting - Competency Planning

Type  
Administration.Trained

Locations  
Pegasus

Issue Date  
08/01/2020

Expiry Date  
dd/mm/yyyy

January 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Locations  
Pegasus  
Pegasus  
Pegasus Demonstration

Cancel Save

# Assigning Competencies to a Worker


Once saved, Competency now stored against worker profile

Option to re-edit if mistakes made can be done by clicking “Edit” icon


Option to add document evidence against Competency can be done by clicking “+ Add Document” icon

Option to “Deactivate” this competency can be done if required.

- Depending upon the Competency, some additional steps might be required such as Permit to Train, Train, Assess, Authorise or Appoint. Each will need to be signed off before Competency is Complete.
- Competency will sit as “In Progress” until all progress steps performed.

Worker's Competency 


Consulting - Competency Planning

  
**In Progress**

Person	Jamie Jamieson
Competency	Consulting - Competency Planning
Type	Administration.Trained
Location	Pegasus
Issue Date	8 Jan 2020
Expiry Date	31 Jan 2021
Active	✓

**Comment**  
adding due to testing

**Progress** Incomplete

 Train >

**Documents** [+ Add Document](#)

[Deactivate](#)

# Assigning Competencies to a Worker – Changing Progress

## View Progress Section


Click on Incomplete Action required

Complete the action screens prompted, entering in notes where required.

Step will change from “In Progress” to a successful green text for the completed step.

- Additional steps might be required to change progress of a competency from “In Progress” to “Competent”
- Each step completed will have information added as to who completed that step. In example below, Damien Challen is recording that Betty White did the training, but his name is recorded against this competency process step.
- Green “Trained” text indicates Progress step successfully completed


Worker's Competency  
Consulting - Competency Planning

  
In Progress

Person	Jamie Jamieson
Competency	Consulting - Competency Planning
Type	Administration.Trained
Location	Pegasus
Issue Date	8 Jan 2020
Expiry Date	31 Jan 2021
Active	✓

Comment  
adding due to testing

Progress Incomplete


 Train >

Authoriser  
Damien Challen (918261)

Notes  
Trained by in house registered RTO -Betty White

Confirming training?

Worker's Competency Step  
Consulting - Competency Planning

  
Trained

Person	Jamie Jamieson
Trained Date	8 Jan 2020
Trained By	Damien Challen (918261)

Notes  
Trained by in house registered RTO -Betty White



# Assigning Competencies to a Worker – Completed Steps

Once all progress steps completed, competency will show in green text as Competent

Will be visible against Worker profile as Green icon showing valid competency.

“Renew” will restart the process for this competency against this worker. However competency will continue to remain valid until its expiry date.

- Competency will also show in Onsite Track Easy against that workers profile, with data and notes matching what was entered while approving this competency.
- Document attachments, if any, can now also be viewed by approved editors and viewers.
- User Permissions to View Documents are “Can Download Files”

Competencies  
Jamie Jamieson

Not Competent Expiring In Progress

Search ...

Realm: Pegasus

- Consulting - Competency Planning  
Administration.Trained

Realm: Hilton Foods Australia

- General Safety + Repairs & Maintenance + Product Safety & Quality Assurance  
Generic.Induction

Worker's Competency  
Consulting - Competency Planning

Competent

Person	Jamie Jamieson
Competency	Consulting - Competency Planning
Type	Administration.Trained
Location	Pegasus
Issue Date	8 Jan 2020
Expiry Date	31 Jan 2021
Active	✓

Comment  
adding due to testing

Progress Complete

- Train

Documents + Add Document

- compliance.pdf

Renew Deactivate

Competencies 1 1 >

# Assigning Competencies to a Worker – Adding a Document

Click “+Add Document”

Click “Browse”

Click “Open” to attach document to competency

Now stored against Competency

Users with rights can now click on Cloud Icon to download and view Document

- Document uploads limited to pdf, doc, docx, xls, xlsx, txt, jpg or jpeg file types
- Executable or zip/compressed files can not be attached.
- User Permissions to Add Documents are “Can Upload Files”.
- User Permissions to View Documents are “Can Download Files”

The composite image illustrates the process of adding a document to a worker's profile. It features several overlapping windows:

- Document Add Document:** A form with fields for 'Uploaded By' (Damien Challen), 'Description', and 'Document'. A 'Browse' button is visible.
- File Selection Dialog:** A window showing a grid of files including 'Pegasus', 'Compliance.doc', 'compliance.pdf', 'licence.jpg', 'LTM1500.jpg', and 'Training Upload Document.docx'. The 'compliance.pdf' file is highlighted with a red box.
- Worker's Document:** A view for 'compliance.pdf' showing a PDF icon, the title 'Training Evidence', and metadata: 'Uploaded By: Damien Challen', 'Uploaded Date: 8 Jan 2020', 'Authority: Pegasus', 'Associated By: Damien Challen', and 'Associated Date: 8 Jan 2020'. A cloud icon is present at the bottom right.
- + Add Document:** A button with a plus sign and the text '+ Add Document' is highlighted with a green border and a red arrow pointing to the 'Document' field in the 'Document Add Document' form.



**ADDING ROLES**

# Assigning Roles to a Worker

Roles should NOT be assigned in the Client Portal.

Applying Roles here will not assign online training events, which will make the role unable to be completed for the worker.


Always apply for Roles in the Roles Portal (also called worker portal)

This ensures the correct training is assigned to worker and they are emailed any training enrolments.

You can however use this page to view the status of roles against a workers profile.

- If unsure of Roles Portal website, check the client page on <https://www.Pegasus.net.au/contractors> for a link on the relevant client page.
- More information on roles portal here <https://kb.pegasus.net.au/display/CA/Roles+Portal>

Worker Profile  
Jamie Jamieson



ID	1437968
Types	Employee Contractor
Phone Number	0438428052
Contact Email	jjamieson@pegasus.net.au

Address  
426 King Street  
Newcastle, NSW, 2300

Companies  
PEGASUS MANAGEMENT PTY. LIMITED (Default) >

Crews 1 1 >

Sites 3 >

**Roles 1 >**

Competencies 1 1 >

Access Keys 2 >

Messages None >



# **RENEWING AN EXPIRED COMPETENCY**



# Expired/Expiring Competency – Renewing

Same process as viewing a Worker's competencies


Click on Competency under Worker Profile

Click on "Renew"

Enter in associated details and click "Save"


- Competency requirements are different for clients and the particular competency.
- Some might have additional steps, as listed in this guide, that are required before competency is "Complete"

Worker's Competency  
Building & Construction Industry

  
Expiring

Person	Greg Willard
Competency	Building & Construction Industry
Type	OH&S-WHS-
Location	Pegasus
Issue Date	29 Jan 2020
Expiry Date	12 Feb 2020
Active	✓

Progress

 Appoint


Documents

+ Add Document

Renew Deactivate

Renew Competency  
Building & Construction Industry

Owner  
Pegasus

Location  
 Pegasus

Issue Date  
29/01/2020

Expiry Date  
29/05/2020

Description  
Renewal of temporary Licence

Cancel Save





# MANAGING CREWS

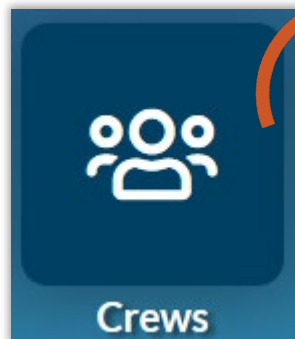
# Managing Crews - Viewing

Click the “Crews” module icon

Current Active and Inactive Crews are listed

Click on a relevant Crew to view its Members

- Note: This step assumes you have user rights permission “Can Manage Crews”.
- Crews can be managed from a Site or Realm level in the Client Portal
- Workers can be members of multiple crews at a site
- Crews are incorporated into reports such as Onsite Now by Crew, Expiring Competencies by Crew. These focus just on the team members you wish to manage.

A screenshot of a software interface for managing crews. On the left is a dark sidebar with a "Crews" header and three menu items: "All Crews", "Active Crews", and "Inactive Crews". An orange arrow points from the "Crews" icon in the previous image to the sidebar. The main content area is titled "All Crews" and contains a search bar, a green "+" button, and a list of crews for the site "Pegasus Training".

All Crews		
Crews <span style="float: right;">+</span>		
Search to Find a list of Crews		
Search ...		
Site: Pegasus Training		
	Blue Mountains Room Crew	1 >
	Marketing Crew	4 >
	Project Crew	1 of 2 >

# Managing Crews - Viewing

Click on the Crew you wish to view

Will show Crew Details.

Ability to Edit Crew Name or Make Inactive is a user permission.

Can still view Crews otherwise.

Click "Members" to continue

- Inactive crews can still be managed and viewed, but will not appear on reports unless made active
- Can use to build up crews for particular events (e.g. shutdown) and then make inactive once event is no longer operational
- Can use crews to create specific groups that other users of the portal can reference. E.g. Fire Wardens, First Aid Officers, Payroll, Receptionists etc.

The screenshot displays the 'Crews' management interface. On the left, a list of crews is shown under the site 'Pegasus Training':

- Blue Mountains Room Crew (1 member, active)
- Marketing Crew (4 members, active)
- Project Crew (1 of 2 members, inactive)

An orange arrow points from the 'Marketing Crew' entry to a detailed 'Crew Profile' window on the right. The profile for 'Marketing Crew' includes:

- Site: Pegasus Training
- Location: Pegasus Training
- Min Members: 0
- Status: Active

At the bottom of the profile window, there is a 'Members' button with a count of 4 and a right-pointing arrow.

# Managing Crews - Viewing

Can search/filter workers out by Name or Company





Click on Crew Member to view more details

Click on a different Crew member to view their details


- Pressing Red Box Icon will change from Crew Module back to Worker Module.
- Make Leader is an optional item

**Members**  
Members for Marketing Crew


Search ...

	<b>Marko Stefanovic</b> PEGASUS MANAGEMENT PTY. LIMITED	1437971	>
	<b>Sarah Patel</b> PEGASUS MANAGEMENT PTY. LIMITED	1437972	>
	<b>Damien Challen</b> Onsite HQ Site Employer Pty Limited PEGASUS MANAGEMENT PTY. LIMITED Pegasus Management Pty. Limited	918338	>
	<b>Aaron Robinson</b> PEGASUS MANAGEMENT PTY. LIMITED	519111	>

**Crew's Member**  
Damien Challen



Crew	Marketing Crew
Worker	Damien Challen
Person Id	918338
Site	Pegasus Training
Leader	✗
Default Crew	✓

Profile 

Make Default Make Leader Remove

# Managing Crews - Viewing

Clicking “Make Leader” will place Crown icon next to Worker in crew list and flag under their profile.

Can be removed under worker profile if no longer Leader

- Can make Multiple People Crew Leaders, and all will have crown icon .
- Worker can also be removed from this screen.

The screenshot displays the 'Members' section for a 'Marketing Crew'. A list of members is shown, including Marko Stefanovic, Sarah Patel, Damien Challen, and Aaron Robinson. Damien Challen is highlighted, and a green 'Make Leader' button is shown with an arrow pointing to his profile. The profile details for Damien Challen are shown on the right, including his photo, crew name, worker name, person ID, site, and status as a leader and default crew member. At the bottom of the profile, there are buttons for 'Make Default', 'Not Leader', and 'Remove'.

Members	Crew's Member
<b>Members for Marketing Crew</b>	<b>Damien Challen</b>
Search ...	
<b>Marko Stefanovic</b> PEGASUS MANAGEMENT PTY. LIMITED 1437971	<b>Crew</b> Marketing Crew
<b>Sarah Patel</b> PEGASUS MANAGEMENT PTY. LIMITED 1437972	<b>Worker</b> Damien Challen
<b>Damien Challen</b> Onsite HQ Site Employer Pty Limited PEGASUS MANAGEMENT PTY. LIMITED Pegasus Management Pty. Limited 918338	<b>Person Id</b> 918338
<b>Aaron Robinson</b> PEGASUS MANAGEMENT PTY. LIMITED 519111	<b>Site</b> Pegasus Training
	<b>Leader</b> ✓
	<b>Default Crew</b> ✓
	<b>Profile</b>
	<b>Make Default</b> <b>Not Leader</b> <b>Remove</b>

# Managing Crews – Adding Members

Clicking “Add” icon allows adding multiple workers at once to Crew.

Can search as before and filter by name, company to get desired workers

Click on each worker you wish to add at once and apply with “Add”

- Added people are instantly visible in crew.
- Icon to add people to crew is not visible if user rights do not allow.

The image shows two screenshots from a software interface. On the left is a dialog box titled "Add Members To Crew" with a search bar and a list of workers. On the right is a "Members" list for a "Marketing Crew".

**Add Members To Crew Dialog:**

- Search bar: Search ...
- Jane Saraqara (3226317) PEGASUS MANAGEMENT PTY. LIMITED (dchallen@pegasus.net.au)
- Jane Smith (3284265) PEGASUS MANAGEMENT PTY. LIMITED ✓
- Amanda Fuller (3344725) Pegasus Management Pty. Limited ✓
- Blake Stanley (3344729) Pegasus Management Pty. Limited ✓
- Carol Turner (3344733) Pegasus Management Pty. Limited (dchallen@pegasus.net.au)
- Judith Marble (3344746) Pegasus Management Pty. Limited (or9f0o1fsb@classesmail.com)
- Buttons: Cancel, Add

**Members List (Marketing Crew):**

- Search bar: Search ...
- Marko Stefanovic (1437971) PEGASUS MANAGEMENT PTY. LIMITED
- Sarah Patel (1437972) PEGASUS MANAGEMENT PTY. LIMITED (Crown icon)
- Damien Challen (918338) Onsite HQ Site Employer Pty Limited PEGASUS MANAGEMENT PTY. LIMITED (Crown icon)
- Aaron Robinson (519111) PEGASUS MANAGEMENT PTY. LIMITED (Crown icon)
- Blake Stanley (3344729) Pegasus Management Pty. Limited
- Amanda Fuller (3344725) Pegasus Management Pty. Limited
- Jane Smith (3284265) PEGASUS MANAGEMENT PTY. LIMITED

Orange arrows indicate the flow from the "Add" button in the dialog to the "Add" icon in the "Members" list, and from the selected workers in the dialog to the corresponding members in the list.



# Managing Crews – Creating New

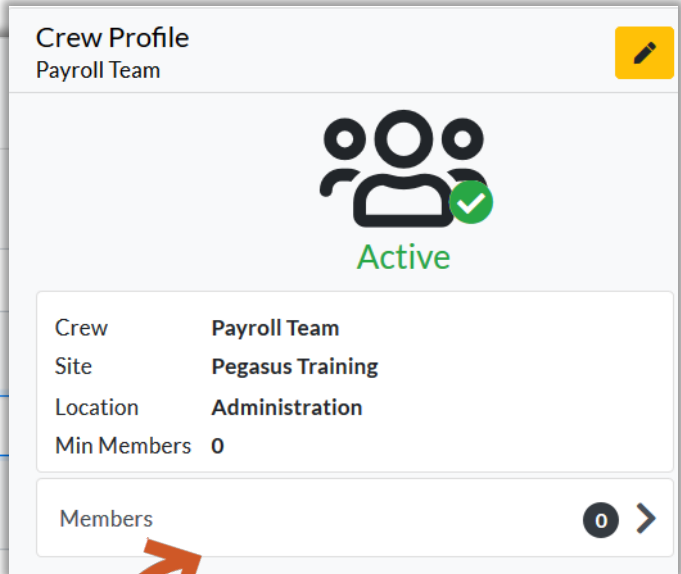
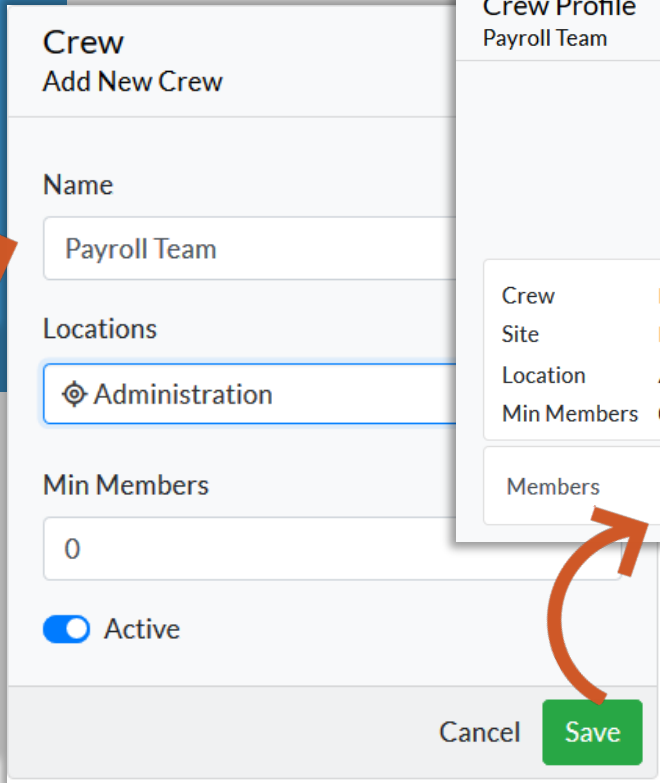
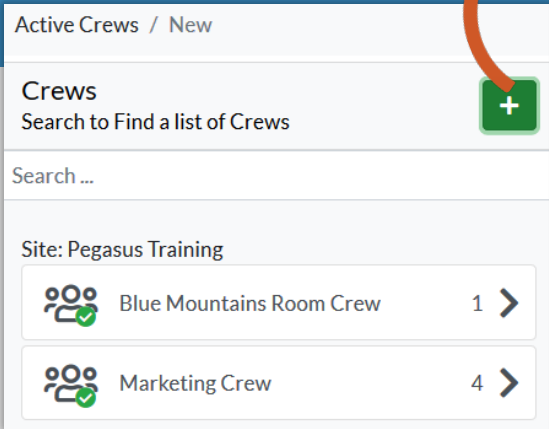
Under Active or Inactive Crew screen, click “+” to create a new crew

Enter Name for Crew, determine minimum members if needed (optional)

Click Active or Inactive status

Click “Save” to create this Crew

- Crews can be Inactive and members still added to them.
- No limit on Minimum Members
- No Limit on number of crews created





# OPTIONAL TOOLS

# Optional Tools – Report

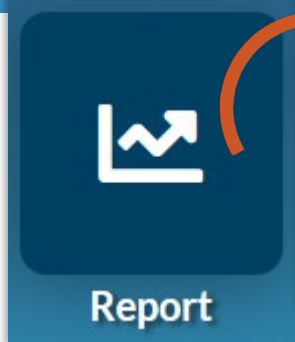
Report loads Business Intelligence Reports in a New Browser Tab

Access is available to all Client Portal Users

Reports can be run or scheduled as necessary.

Multiple can be sent the same report on a schedule via email.

- Additional information on Scheduling and managing reports is listed here:  
<https://kb.pegasus.net.au/display/CA/Business+Intelligence+Reporting>
- Video guides and Cheat sheets are accessible on that page



The screenshot shows the Pegasus Library interface. At the top, there is a blue header with the Pegasus logo and a home icon next to the word "Library". Below the header is a search bar with the word "Library" and a magnifying glass icon. The main content is a table with two columns: "Name" and "Description". The table lists various reports, with an orange arrow pointing from the "Report" icon to the "Cardholder Competency Assignment Audit" row.

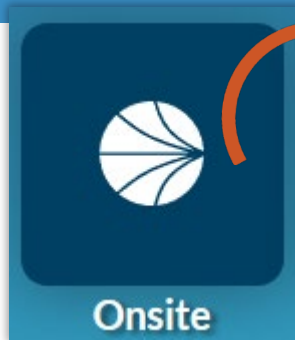
Name	Description
<b>Cardholder Audit History</b>	Person Report - List of Cardholders and their audit history
<b>Cardholder Block Report</b>	
<b>Cardholder Competencies By Crew Report</b>	Competency Report - List of cardholders and the competencies searchable by crew
<b>Cardholder Competencies Report</b>	Competency Report - List of cardholders and their competencies
<b>Cardholder Competency Assignment Audit</b>	Competency Report - List of cardholders and their competencies and competency steps assigned aud...
<b>Cardholder Contact Details</b>	Person Reports - List of cardholder contact details displayed by site selected
<b>Cardholder Detailed Report</b>	Person Report - List of person and contact details
<b>Cardholder Report</b>	Person Report - List of Personal and Contractor details
<b>Cardholder Without Competency</b>	Competency Report - List of Cardholders without a selected competency
<b>Company Cert Key Status By Site</b>	Company Report - List all companies associated with a site and the current status of their cert keys.
<b>Company Compliance</b>	Company Report - High level summary of contracting company subscriptions (s)
<b>Company Contacts</b>	Company Report - List of Companies per site, their contact and company details

# Optional Tools – Onsite

Under Onsite – Will open in new tab an instance of Onsite Track Easy, relevant to your user permissions.

Changes made in Client Portal or if made in Onsite Track Easy, are instantly synced between the two.

- Onsite contains features still not implemented in Client Portal.
- Logpoint Configuration, Safety Selections, creating new Roles and Competencies; are all items still created presently in Onsite Track Easy and are not implemented in the Client Portal.
- If you can not find the tool you need, enter Onsite Track Easy. Changes made will be reflected in the Client Portal. E.g. logging an overstay out of onsite will reflect in the Onsite Now in Client Portal.

A screenshot of the Onsite Track Easy web application interface. The header shows the "onsite track easy" logo and "Pegasus Training site". A navigation menu includes "home", "person", "company", "compliance", "training", "safety", "report", "setup", "help", and "system". The main content area displays "Welcome to Pegasus Training" and "timezone: Australia/NSW". There are tabs for "general" and "charts", with "Latest loginout" on the right. A red banner indicates "Pending Data / Incomplete Actions" with a "show" button. Below this, it states "Latest Version 2.170.9" and lists "New Features":

- **Multiple Companies**: Cardholders may now work for more than one company.
- **Default Companies**: Cardholders have a site default company for external systems that are not yet multiple-company aware.
- **End Employment**: When employees leave your company you can now end their employment instead of having to inactivate them.
- **Company Relationship Notifications**: Notification emails are now sent when new company relationships are created.

The left sidebar shows session details for "Pegasus Training" with a "change" button and an "emergency evacuation report" button.

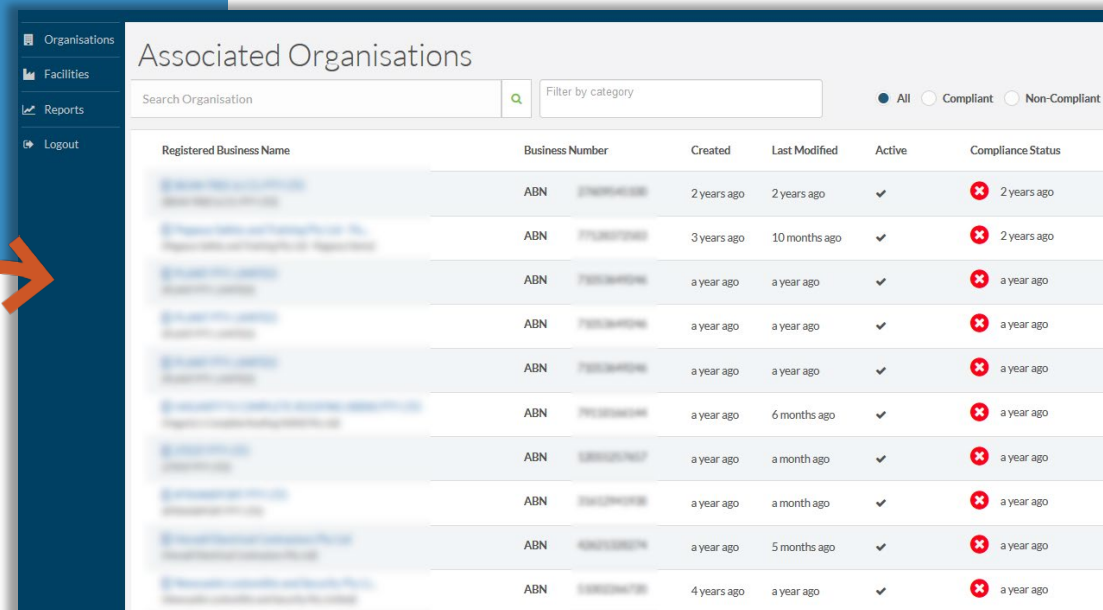
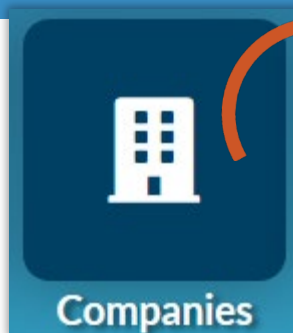
# Optional Tools – Companies

Companies icon will load in a new browser window, the Company Compliance Client Access View

Access available to all Client Portal Users, locked to your Company Scope.

Reports from this Scope are available to Admins with login permissions.

- Show Complaint and Non-Compliant companies
- Able to view status, subscriptions, compliance documentation and expiry dates
- More information available at this site which contains User Guides and Videos available:  
<https://kb.pegasus.net.au/display/CA/Company+Pre-Qualification+Portal>



Registered Business Name	Business Number	Created	Last Modified	Active	Compliance Status
[Blurred]	ABN 7700041000	2 years ago	2 years ago	✓	✗ 2 years ago
[Blurred]	ABN 7700041000	3 years ago	10 months ago	✓	✗ 2 years ago
[Blurred]	ABN 7700041000	a year ago	a year ago	✓	✗ a year ago
[Blurred]	ABN 7700041000	a year ago	a year ago	✓	✗ a year ago
[Blurred]	ABN 7700041000	a year ago	a year ago	✓	✗ a year ago
[Blurred]	ABN 7700041000	a year ago	6 months ago	✓	✗ a year ago
[Blurred]	ABN 1000000000	a year ago	a month ago	✓	✗ a year ago
[Blurred]	ABN 1000000000	a year ago	a month ago	✓	✗ a year ago
[Blurred]	ABN 1000000000	a year ago	5 months ago	✓	✗ a year ago
[Blurred]	ABN 1000000000	4 years ago	a year ago	✓	✗ a year ago





FOR QUESTIONS OR ASSISTANCE, PLEASE CALL

**1300 131 194**

OR EMAIL [support@onsitetrackeasy.com.au](mailto:support@onsitetrackeasy.com.au)