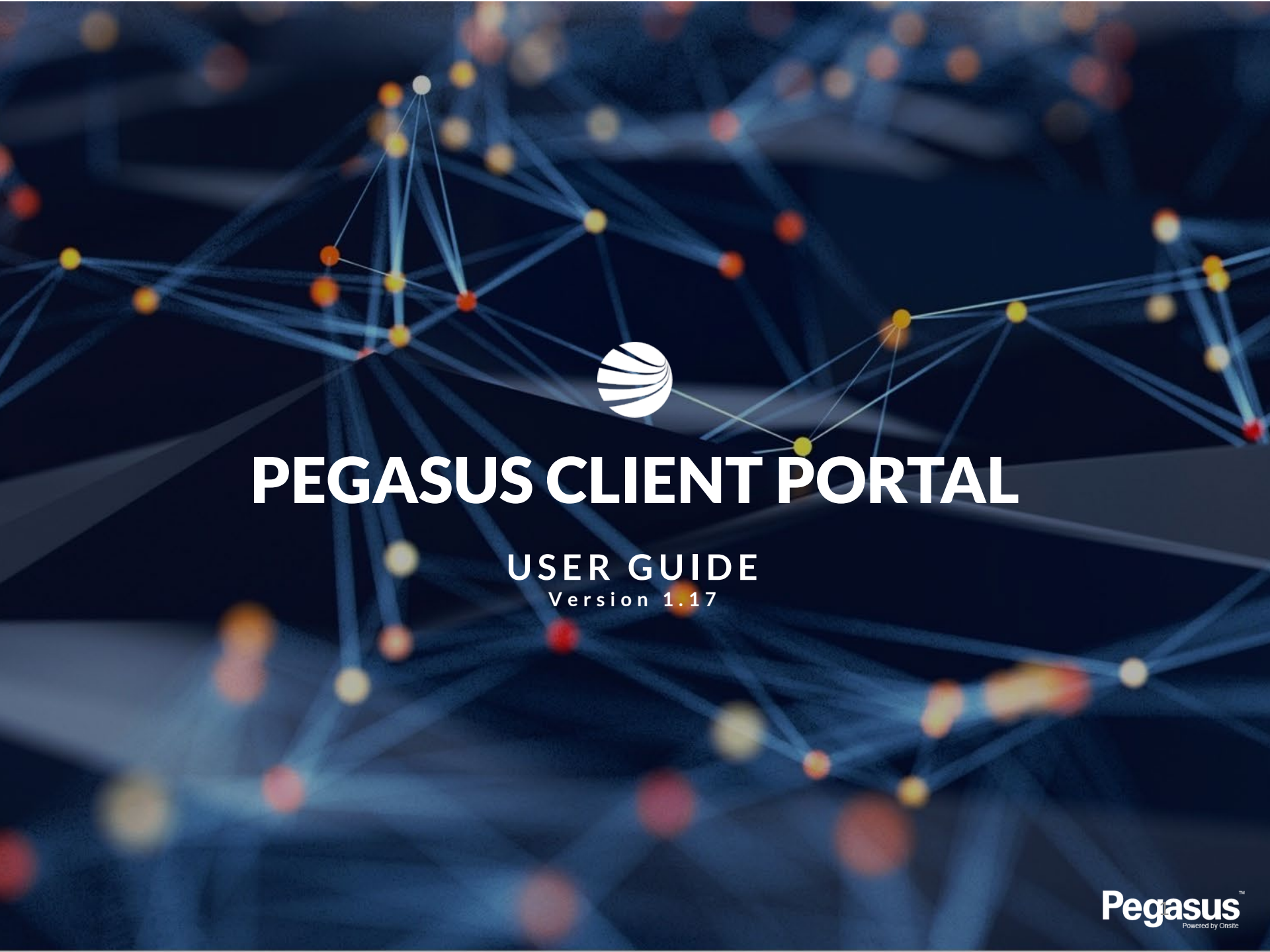

PEGASUS CLIENT PORTAL

USER GUIDE

Version 1.17

Pegasus™
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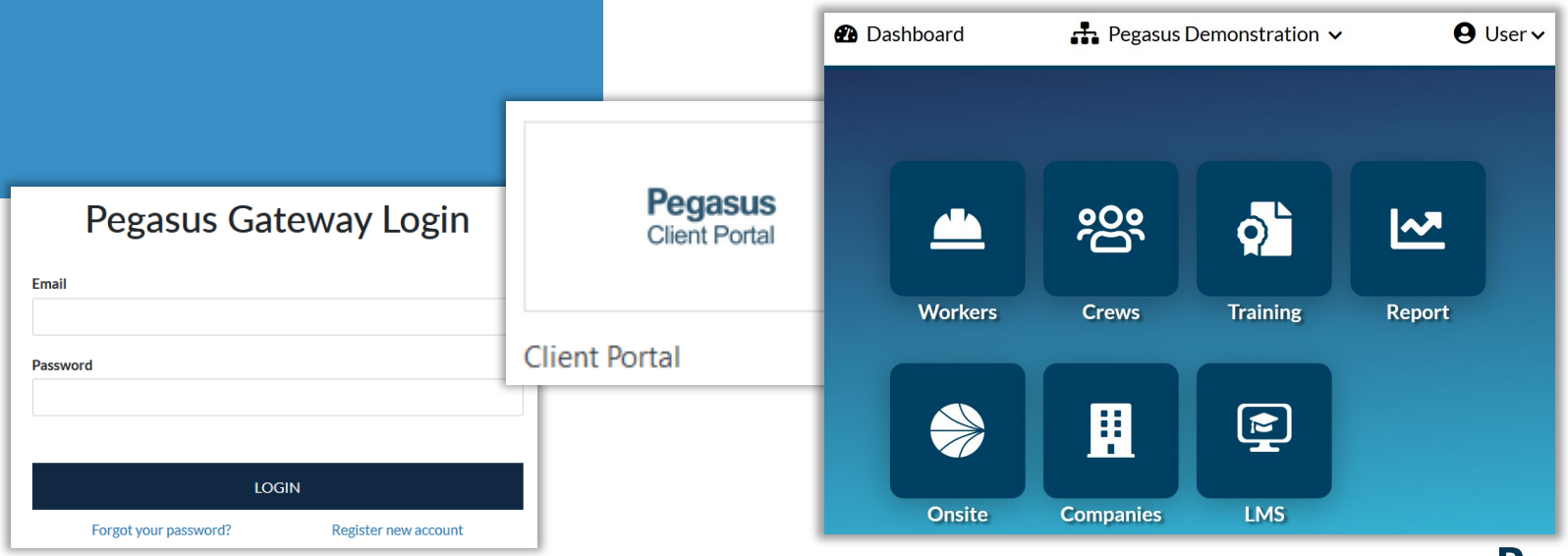
Login to the Client Portal

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



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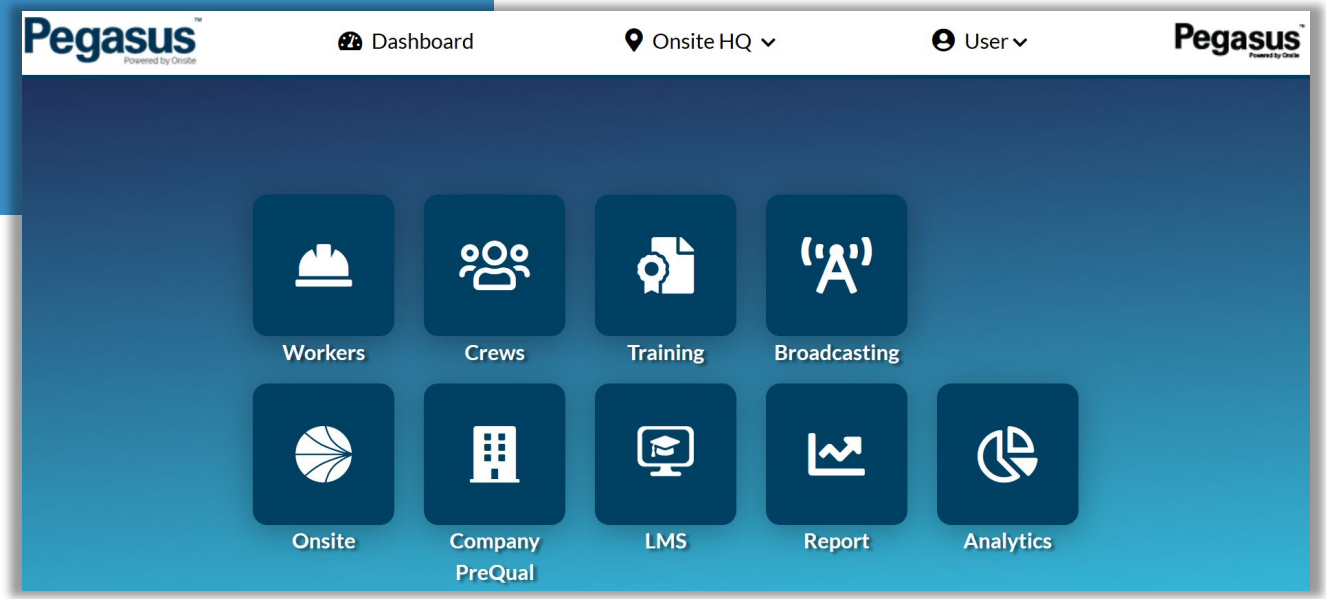
Login to the Client Portal – Notes on your access

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.



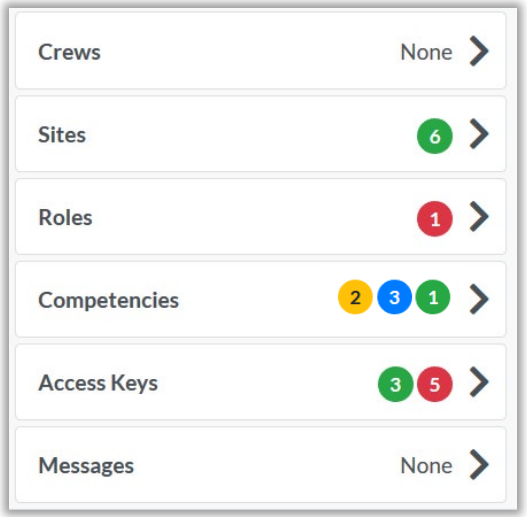
Legend Page – Common Icons and Features

- 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)

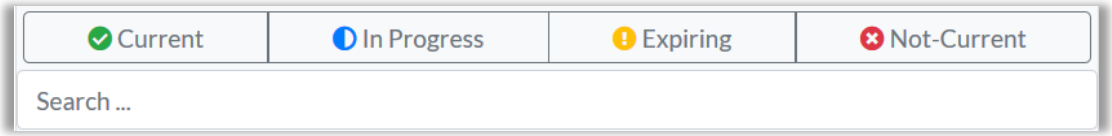
- The Colour Status icons represent Status on pages.

  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.



- 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

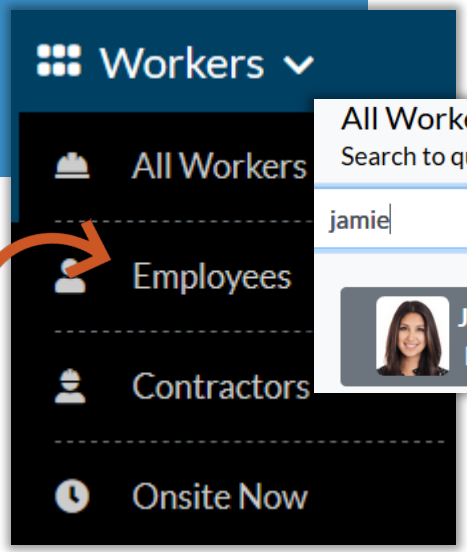
Enter the Worker Module

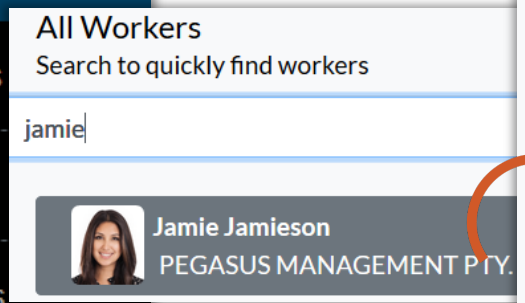
Select your Worker group from the listed options.

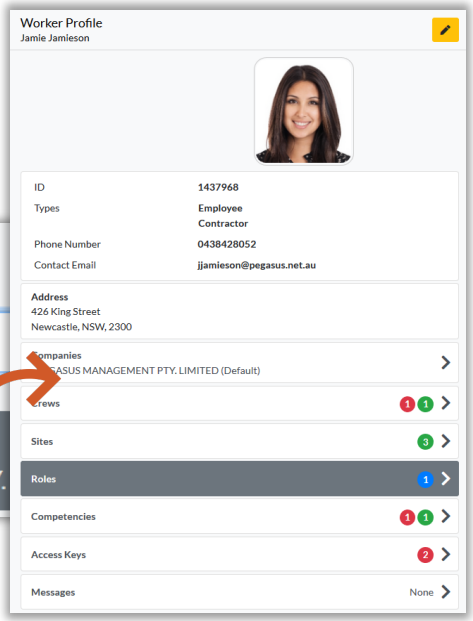
Search for Worker using notes on the right, or scroll with mouse through names defaulted to first name alphabetically.

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.







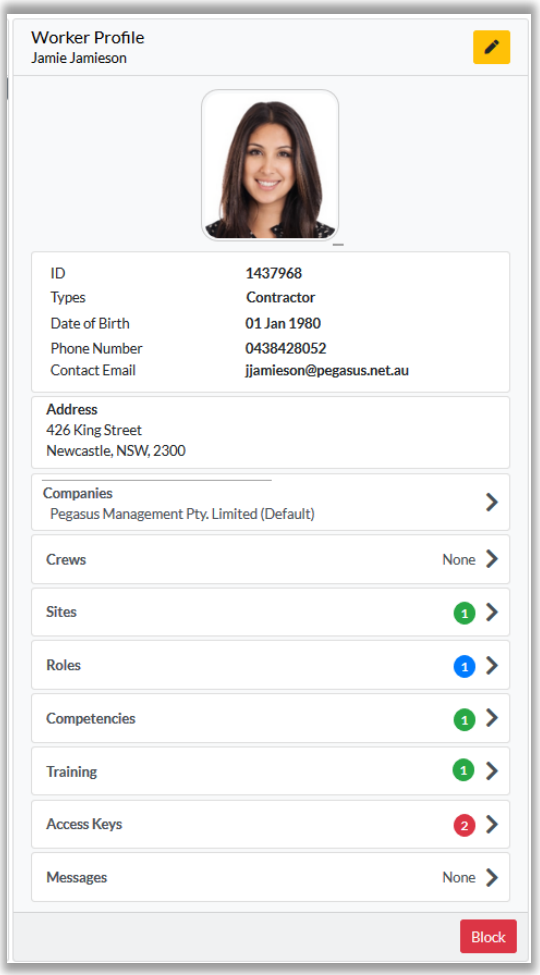
Viewing Worker Profiles – Standard View

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.



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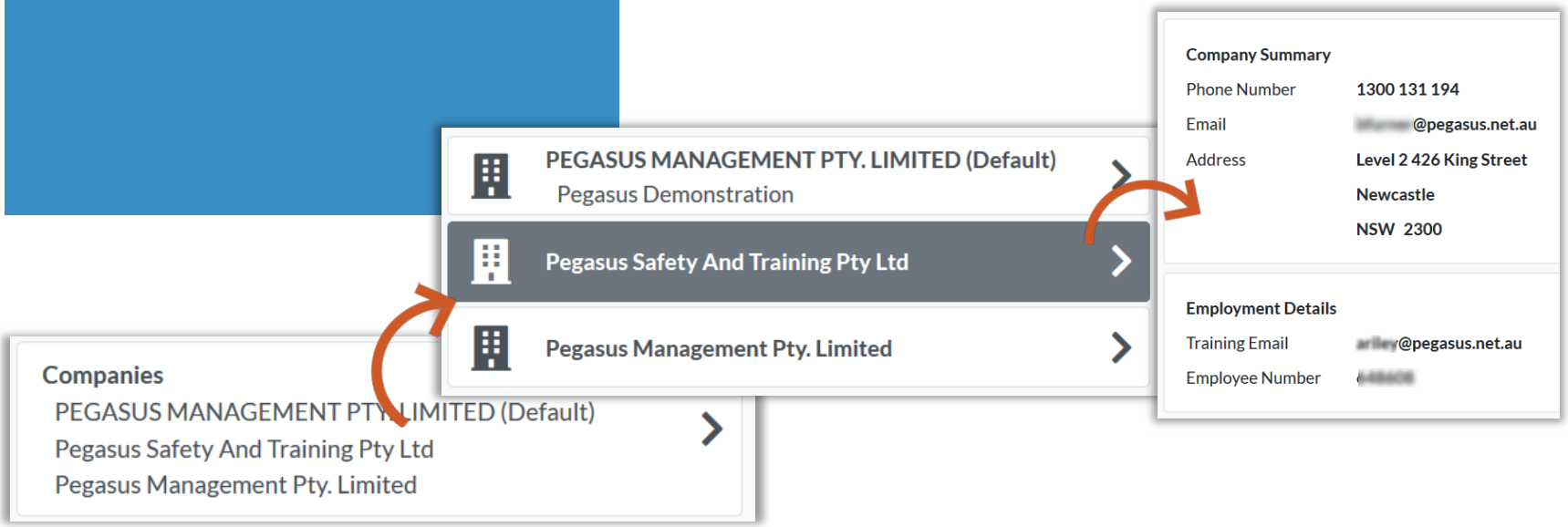
Viewing Worker Profiles – Companies Section

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.



Viewing Worker Profiles – Companies Section

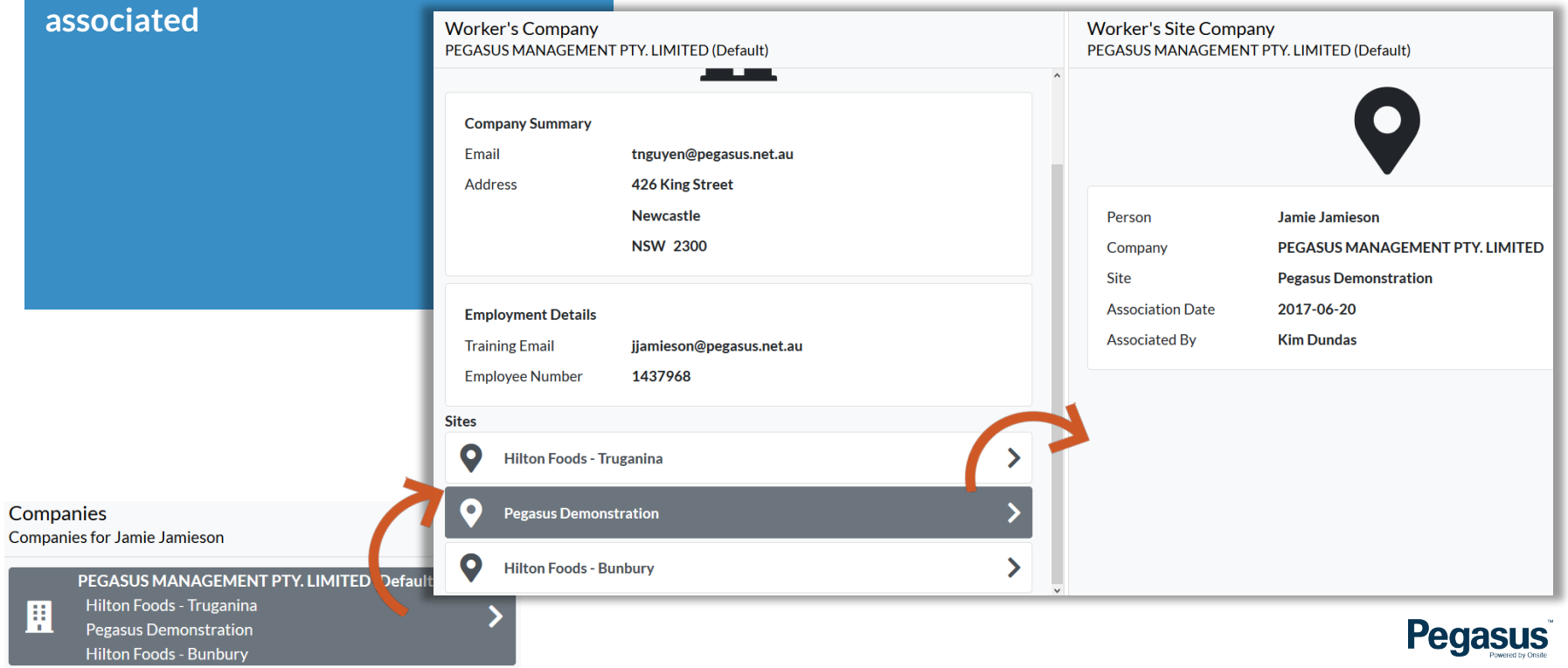
To view the sites this Worker is associated against that company:

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.

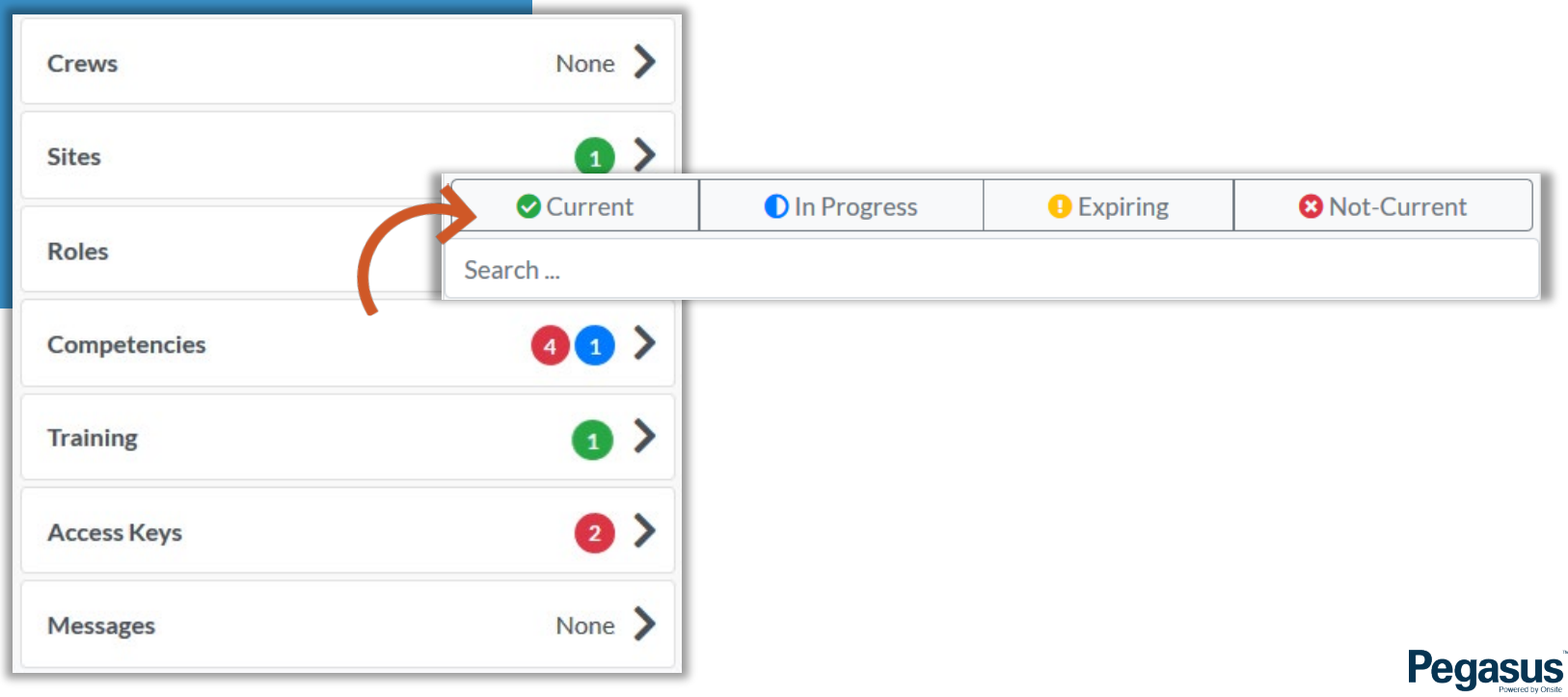


Viewing Worker Profiles – Crews, Sites, Roles, Competencies, Training, Access Keys and Messages

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.



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MANAGING BLOCKS ON
WORKERS

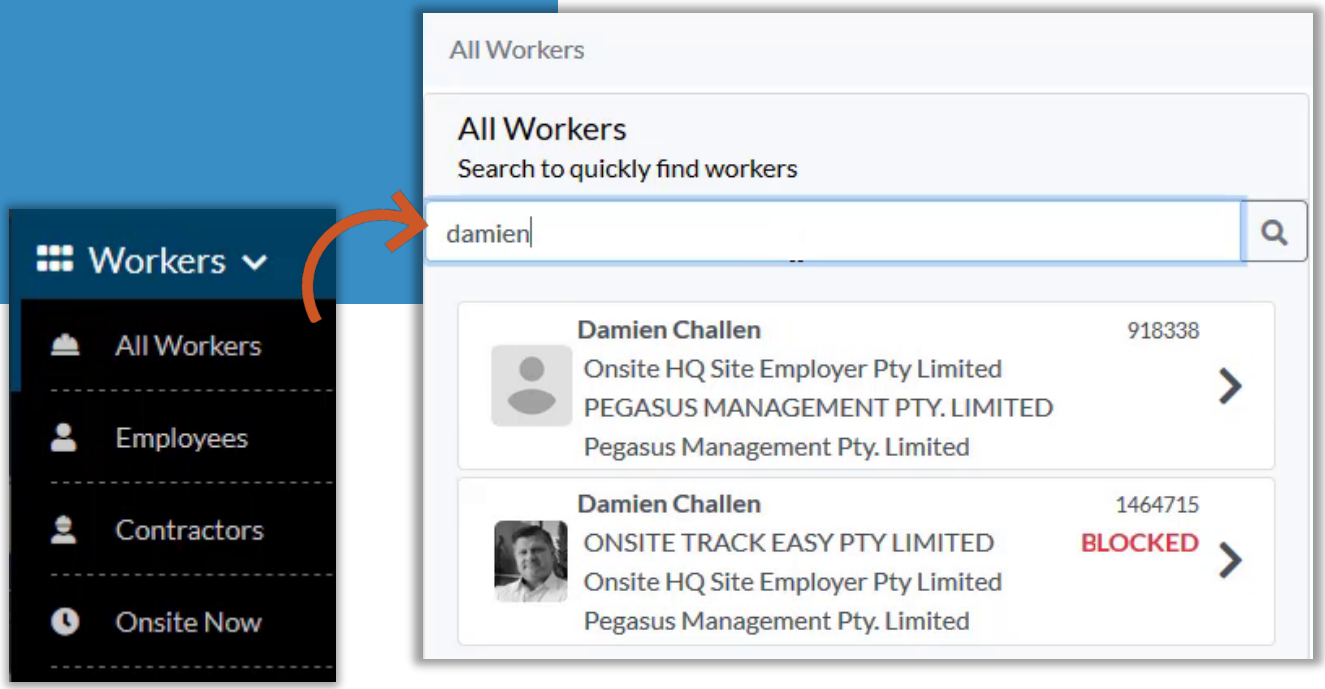
Viewing Blocked Worker Profile

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

Workers with a Site/Realm block with 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.



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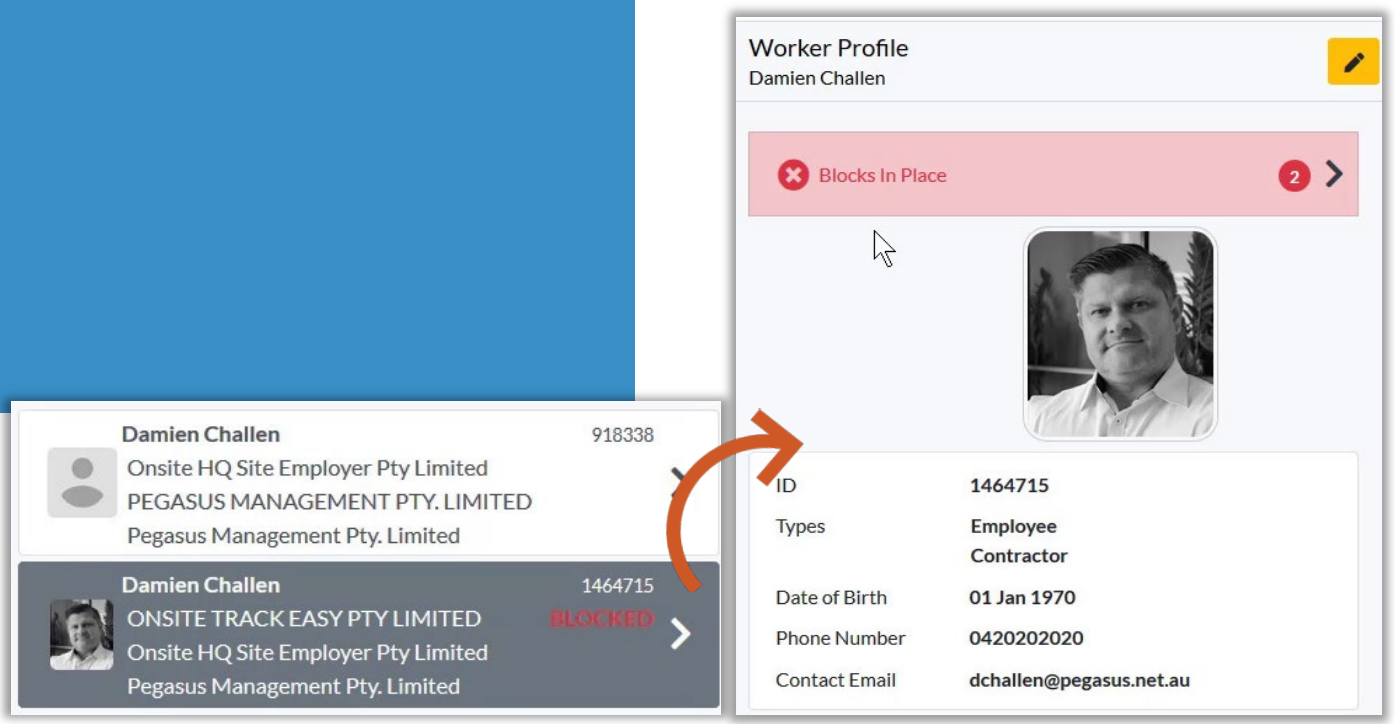
Viewing Blocked Worker Profile

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.



Viewing Blocked Worker Profile

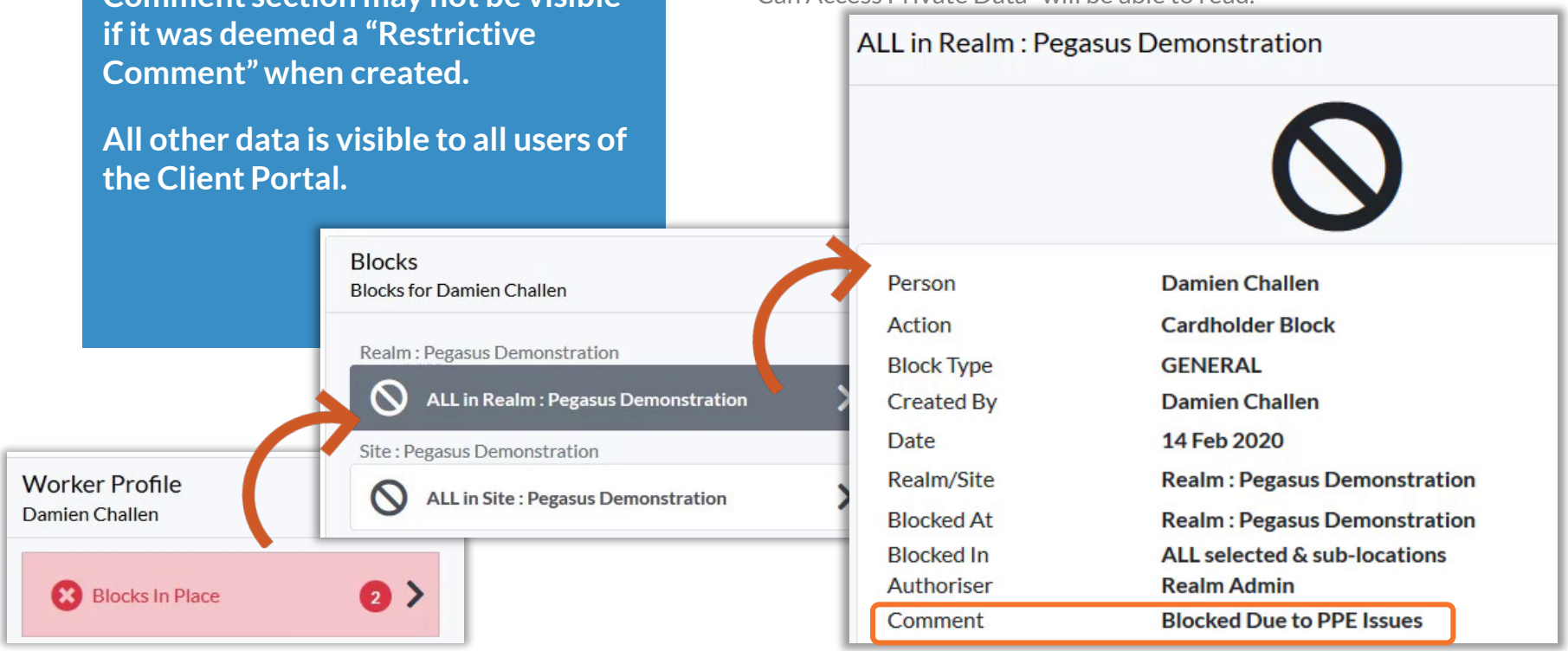
Listed Blocks will show at the Realm level, and then Site Blocks listed under there.

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.



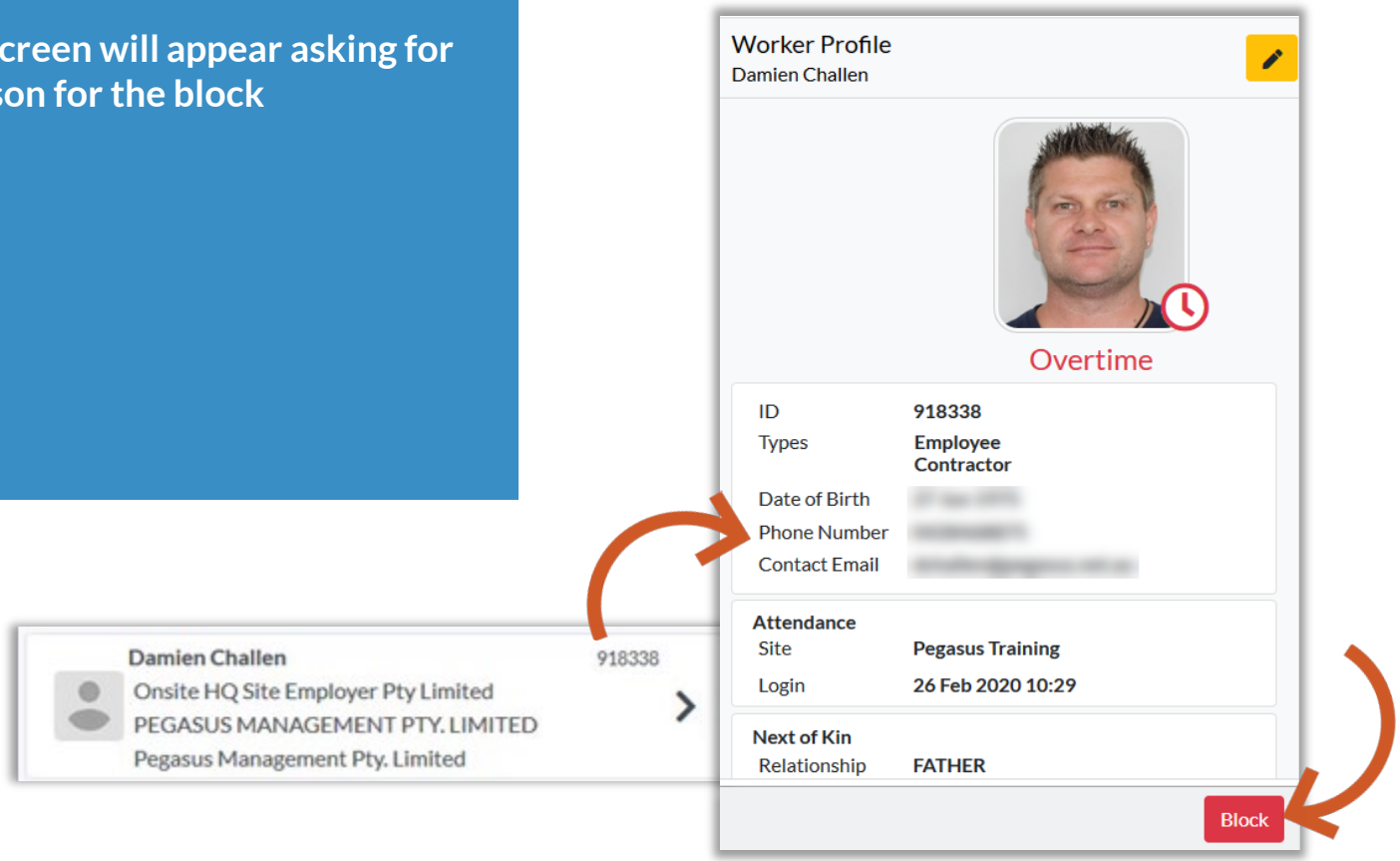
Blocking a Worker

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.



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.

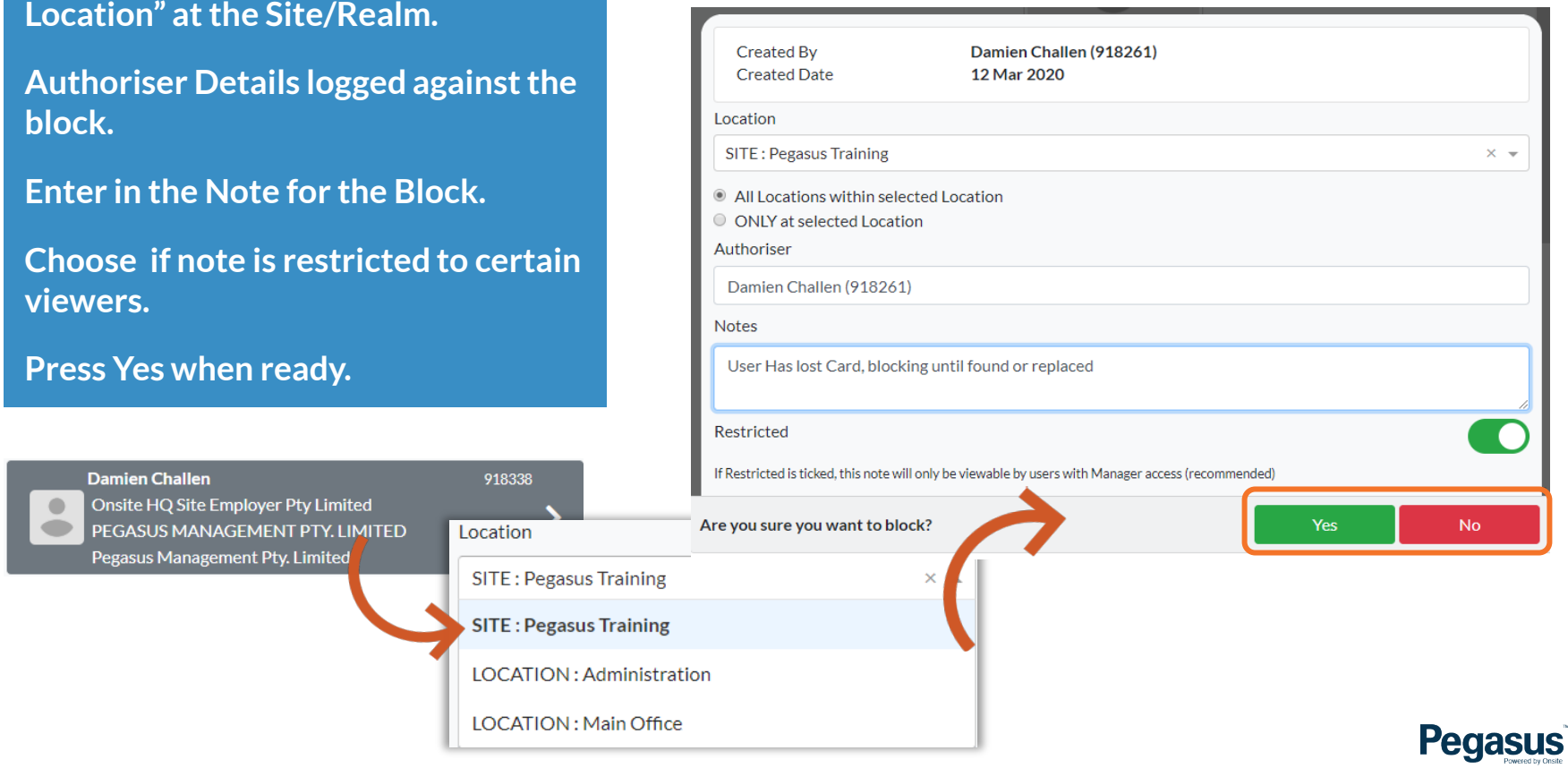
Authoriser Details logged against the block.

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.



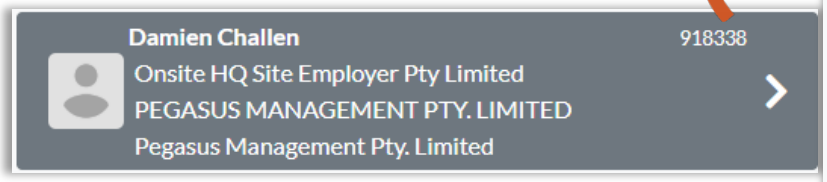
Blocking a Worker

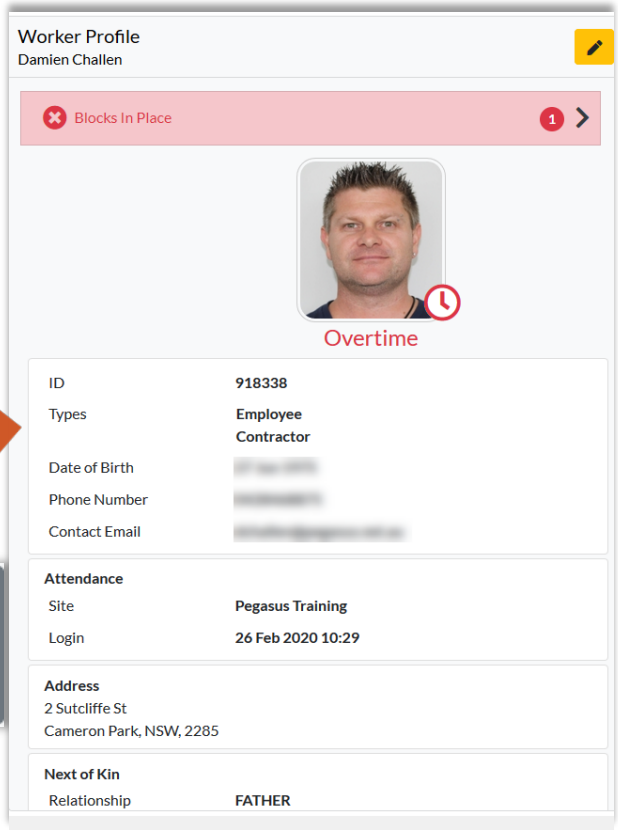
Worker is now Blocked.

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.





Unblocking a Worker

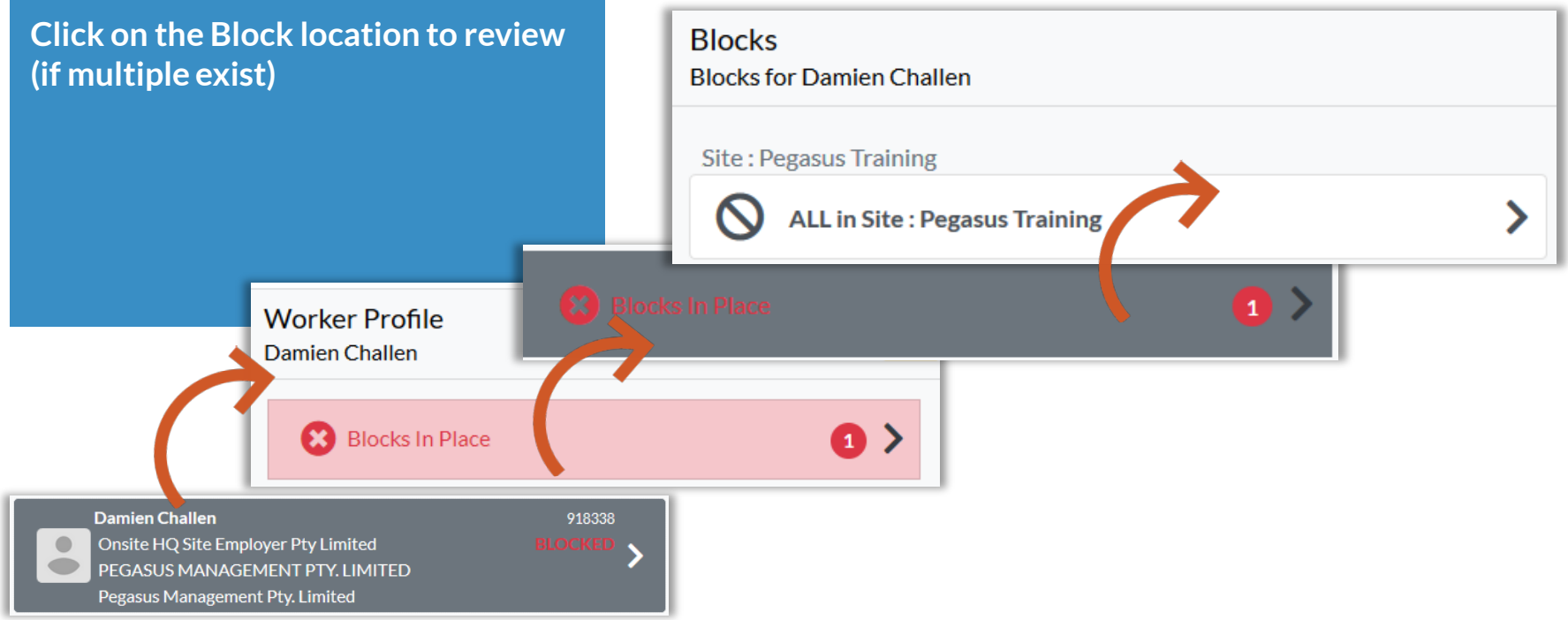
Worker is now Blocked.

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)



Unblocking a Worker

Click the Unblock button

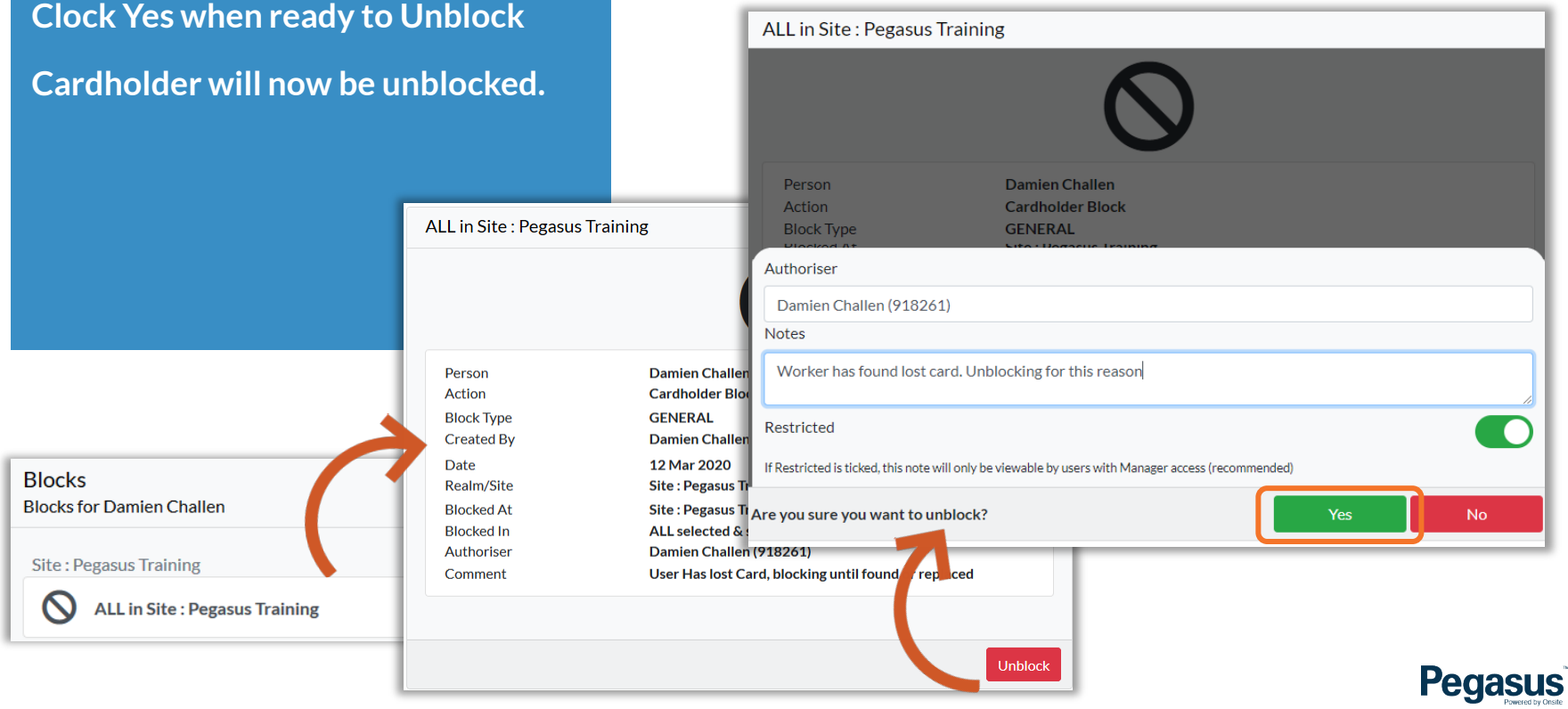
Supply a reason for the unblocking or editing of the block.

Authoriser Details logged against the block.

Clock 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.
- Unblocking will remove flag from cardholder profile and also remove from showing blocked in the Mobile App.



ONSITE NOW & EMERGENCY
EVACUATION

Viewing Worker Profiles – Onsite Now

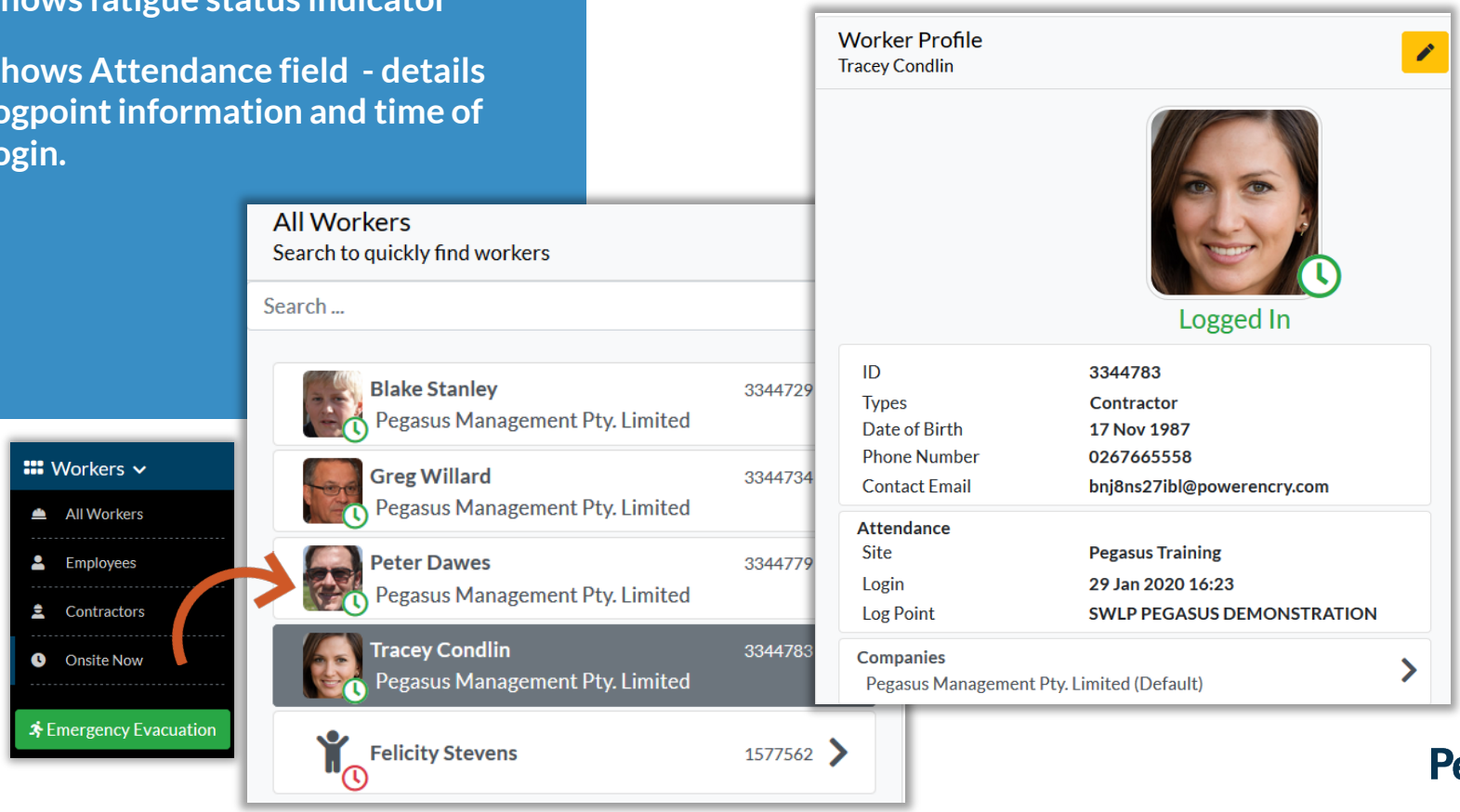
To view current Logged in Workers, click "Onsite Now"

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.

- Can click on Worker profile in Onsite Now to view that Workers Profile in Full
- If navigating workers onsite of Onsite Now, will also display Icon showing if they are currently logged in.



Viewing Worker Profiles – Onsite Now

A filter is available above the list of Workers Onsite Now.

Can use filter to show only those logged in - Under 12 Hour Fatigue Limit (Green)

Those in Warning State From 12 hours to 13hrs 59 Minutes (Amber)

Or Overstayers - Over 14 Hours (Red)

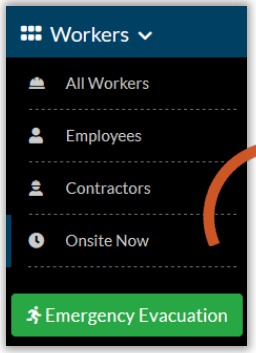
- If viewing an Onsite Now worker on another screen, it shows the same Status and Attendance fields while they are still logged in.

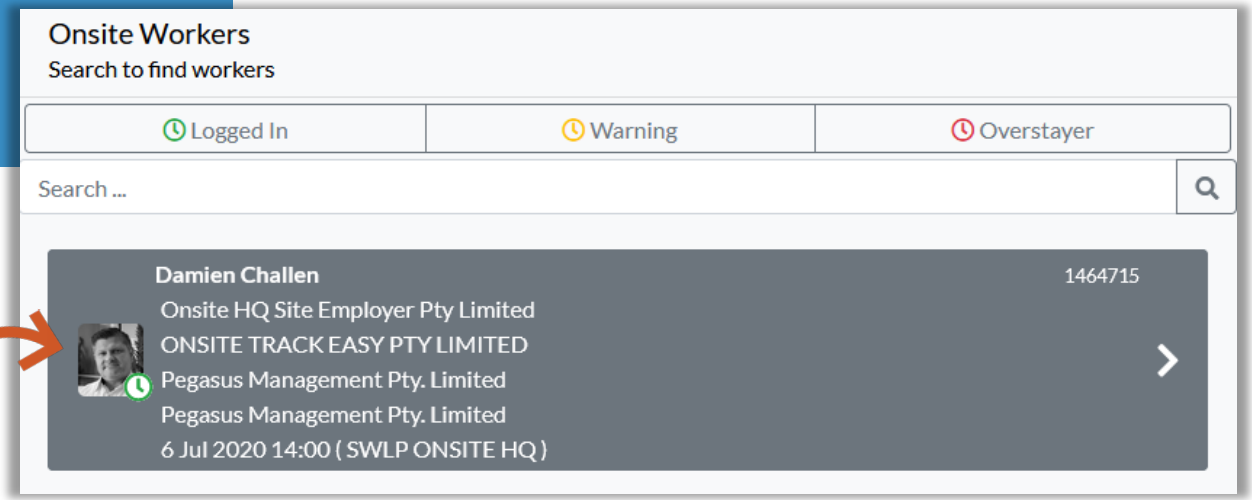
Green = Under Site Fatigue Limit

Amber = Approaching withing 2 hours of Site Fatigue Limit

Red = Over Site Fatigue Limit

- Typical Site Fatigue limit is set at 14 hours.
- Icon visible in other Worker screens while navigating Client Portal





Viewing Worker Profiles – Emergency Evacuation

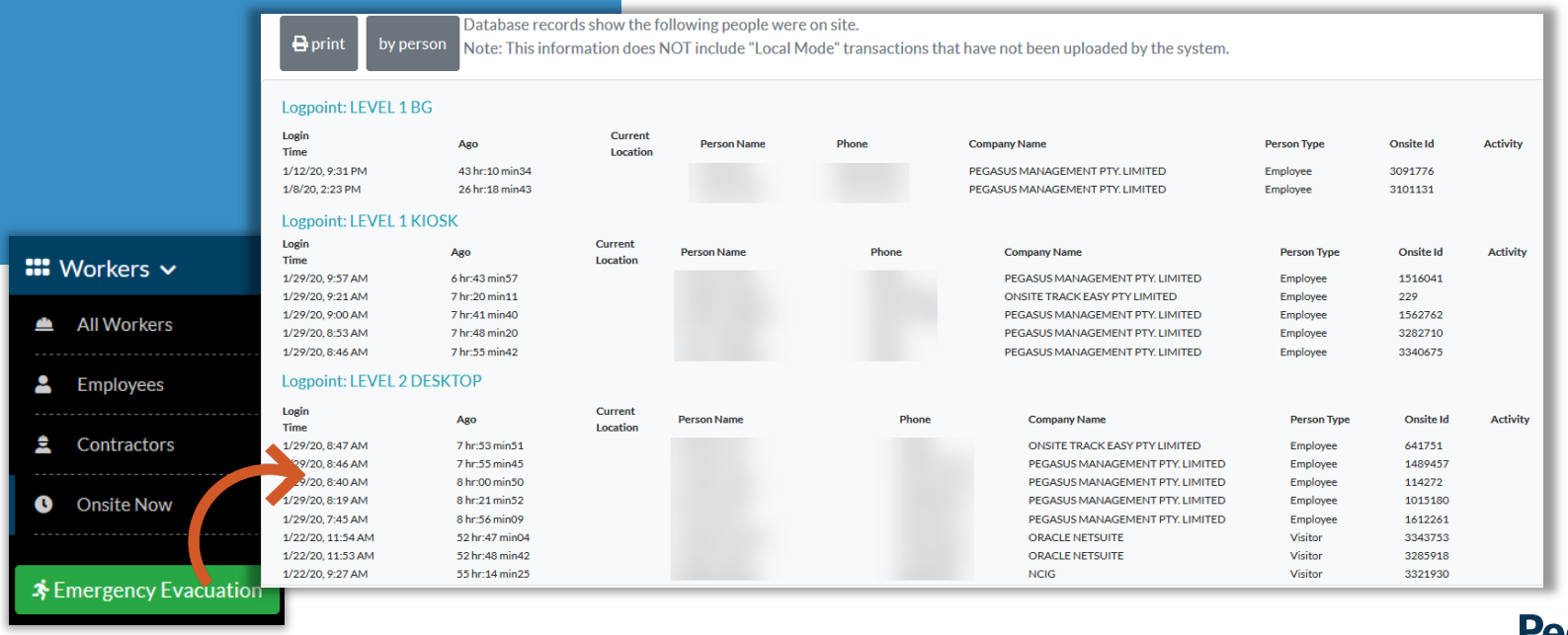
To view printable list of Workers currently at site, click Emergency Event

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



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ASSIGNING COMPETENCIES

Assigning Competencies to a Worker

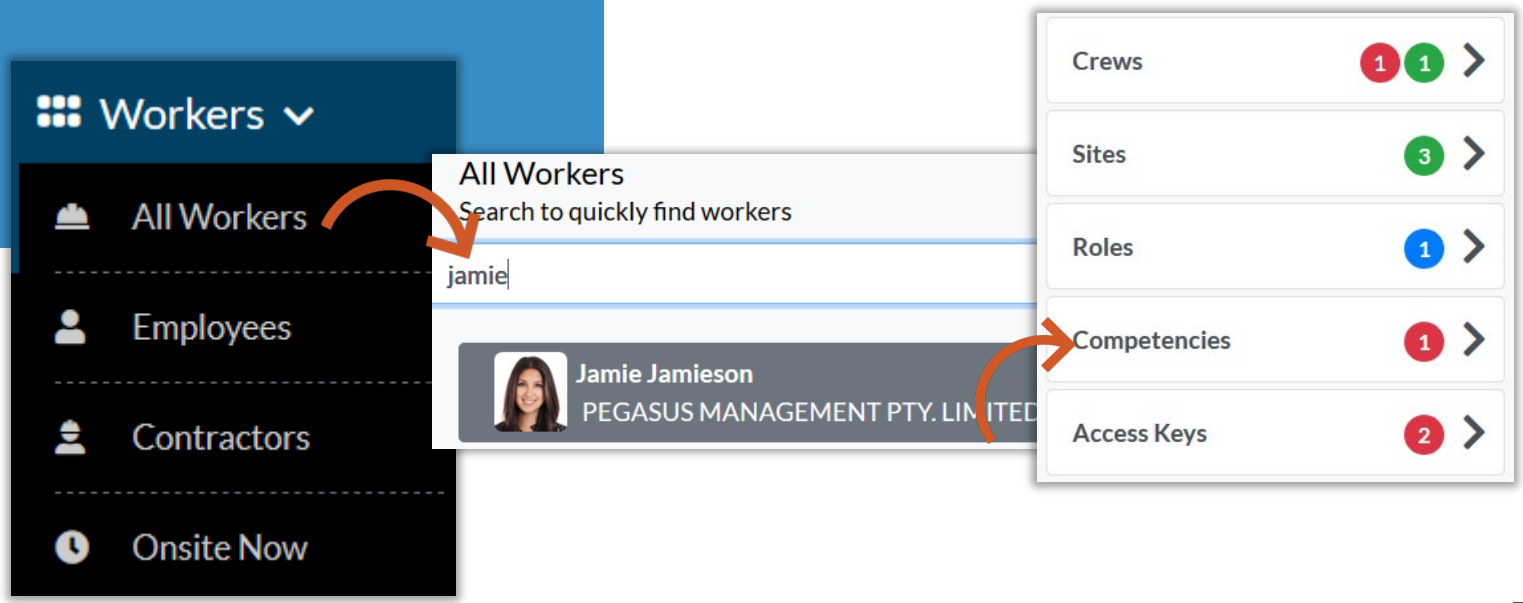
Enter the Worker Module

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)



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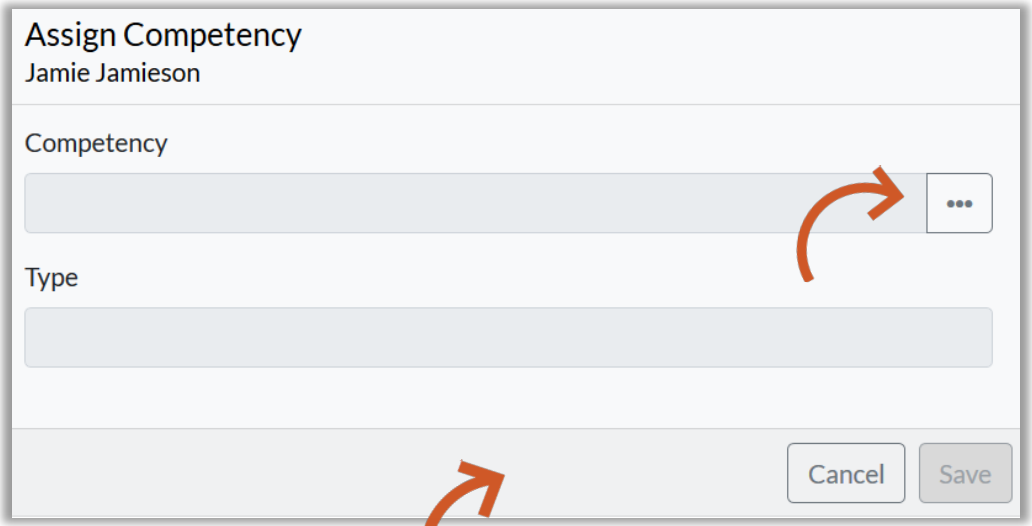
Assigning Competencies to a Worker

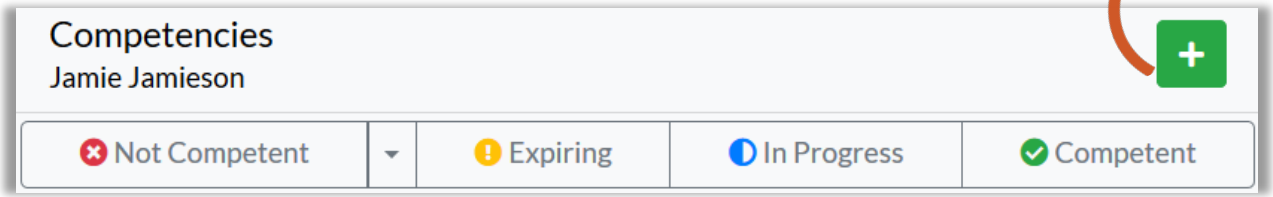
Click on the “PLUS” icon to add a competency

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.





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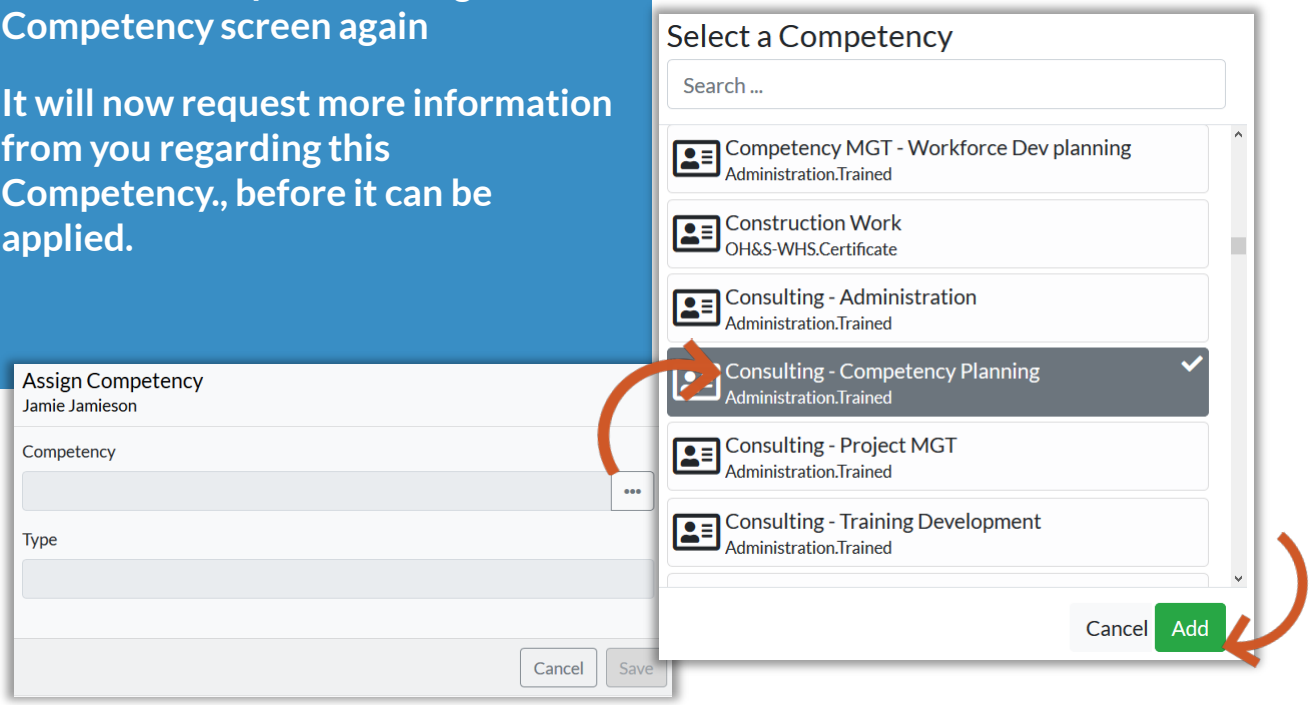
Assigning Competencies to a Worker

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.



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Assigning Competencies to a Worker

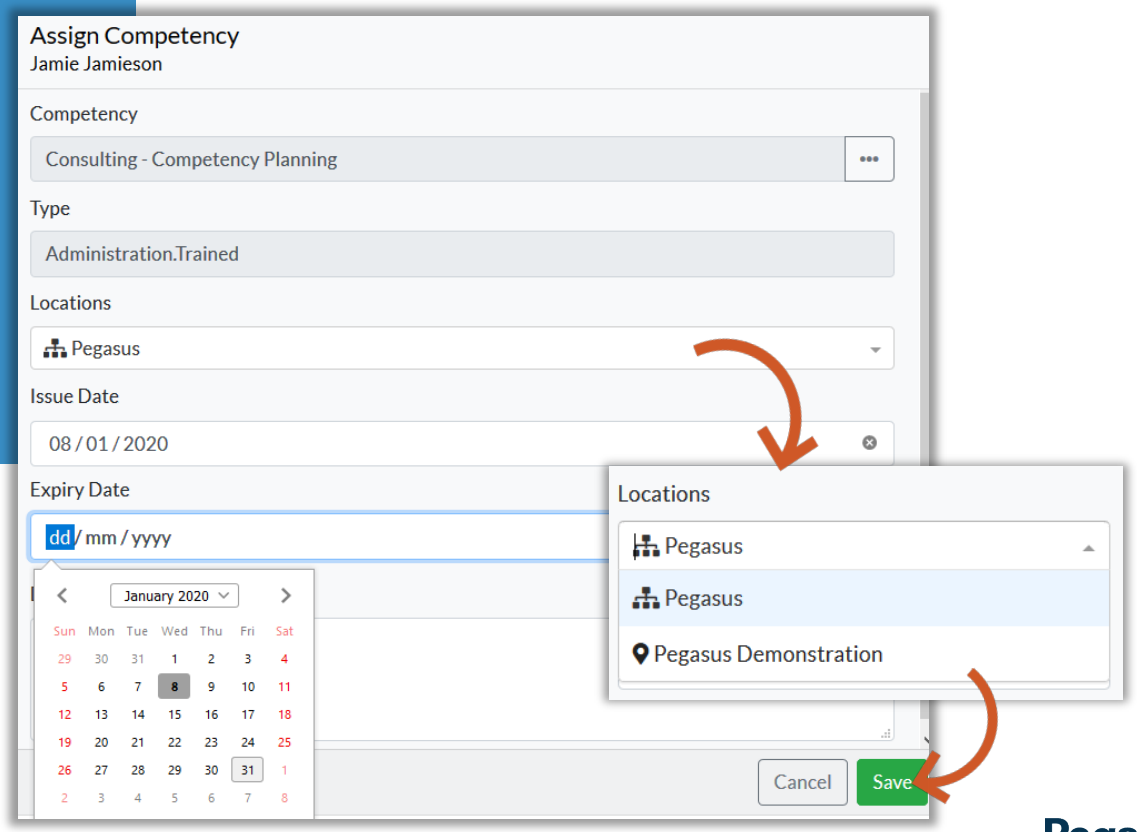
Competency Name will be listed next to (…)

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



Assigning Competencies to a Worker

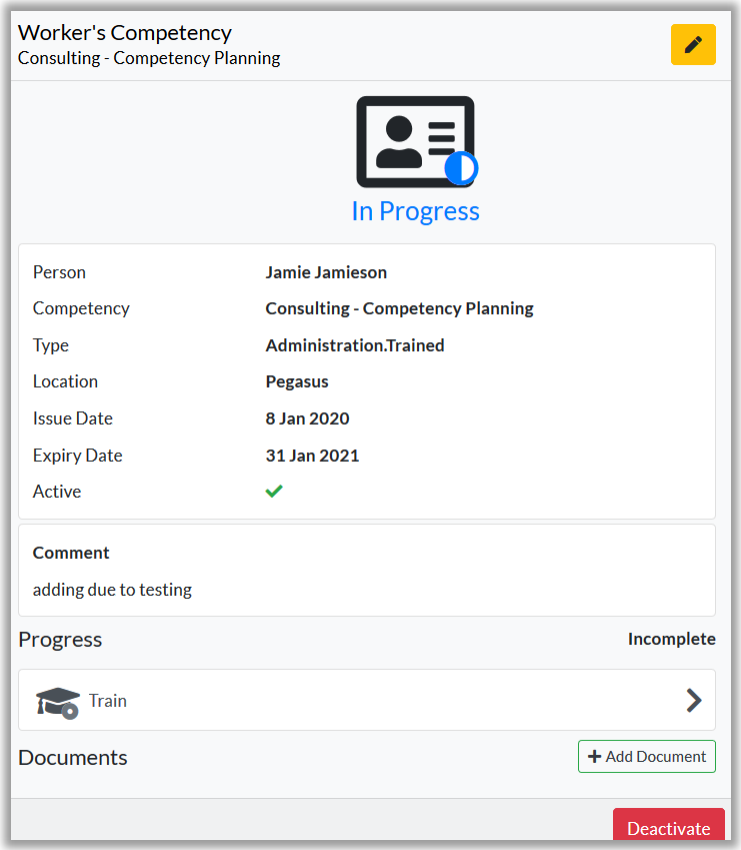
Once saved, Competency now stored against worker profile

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.



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Assigning Competencies to a Worker – Changing Progress

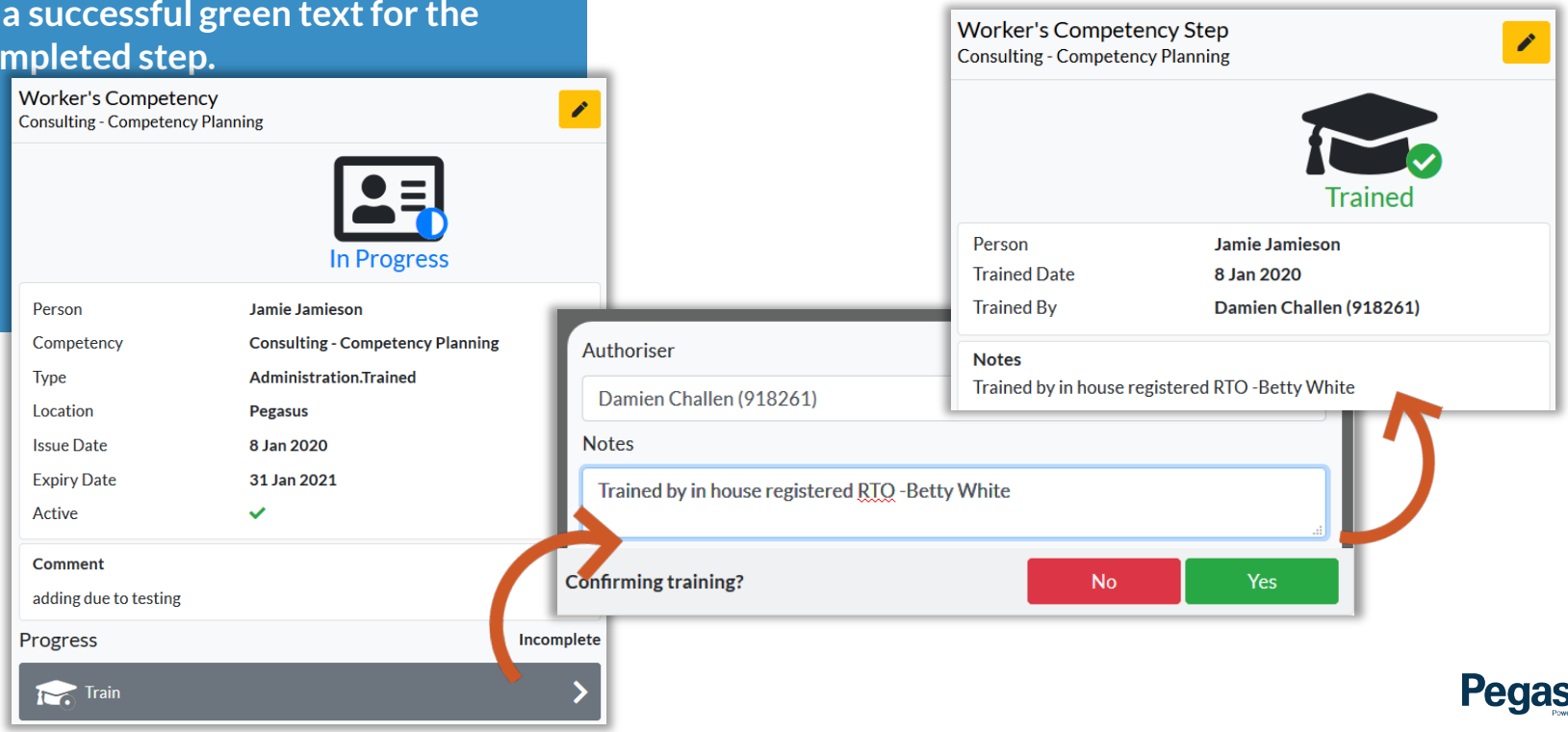
View Progress Section

Click on Incomplete Action required

Compete 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



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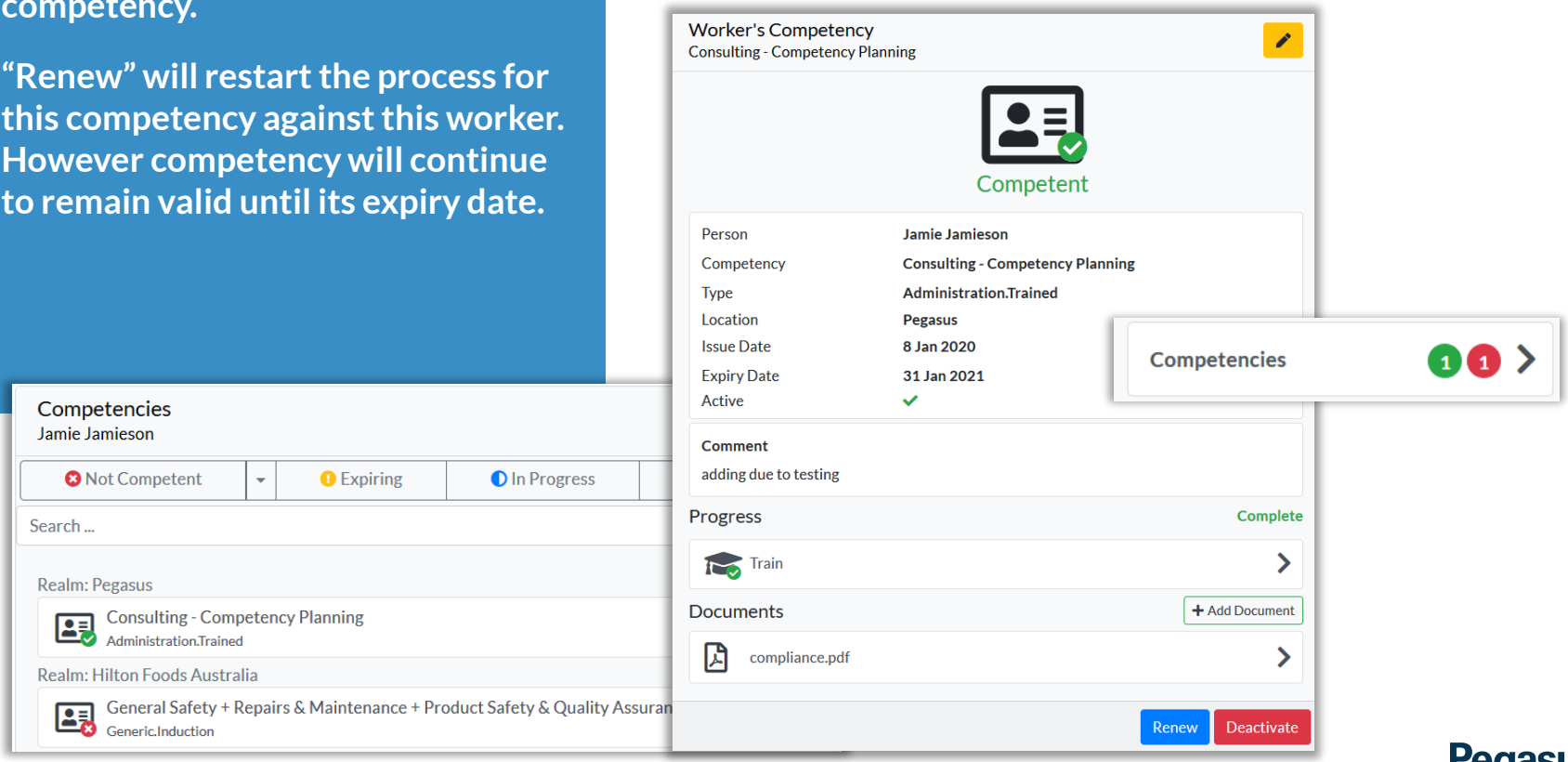
Assigning Competencies to a Worker – Completed Steps

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”



Assigning Competencies to a Worker – Adding a Document

Click “+Add Document”

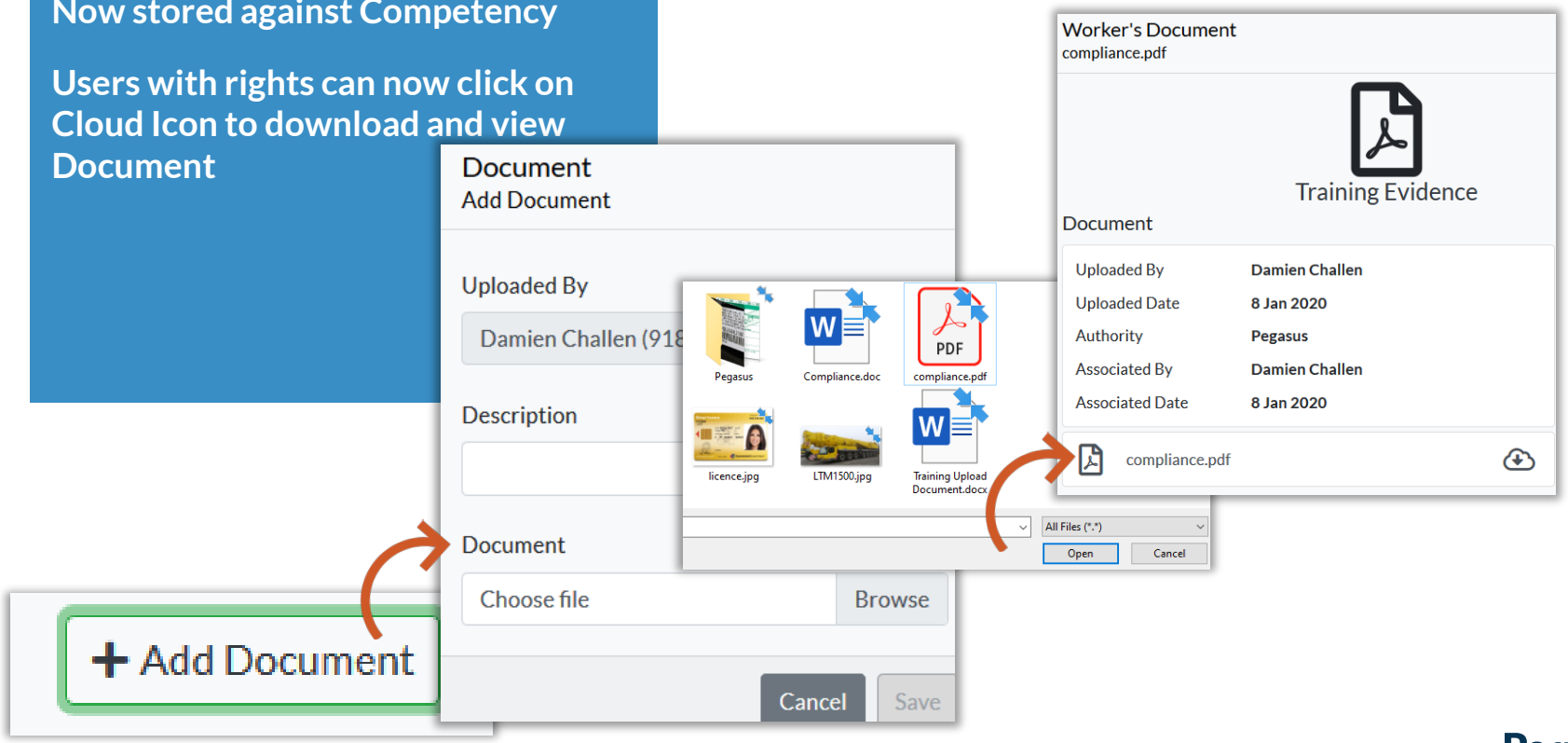
Click “Browse”

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”



ADDING ROLES

Assigning Roles to a Worker

Roles should NOT be assigned in the Client Portal.

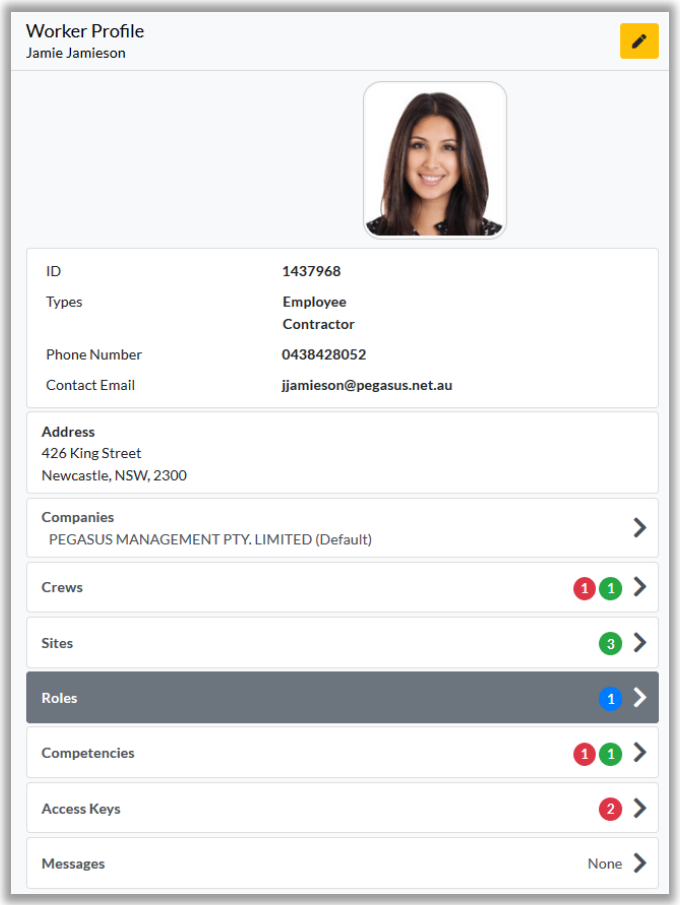
Appling Roles here will not assign online training events, which will make the role unable to be completed for the worker.

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



RENEWING AN EXPIRED COMPETENCY

Expired/Expiring Competency – Renewing

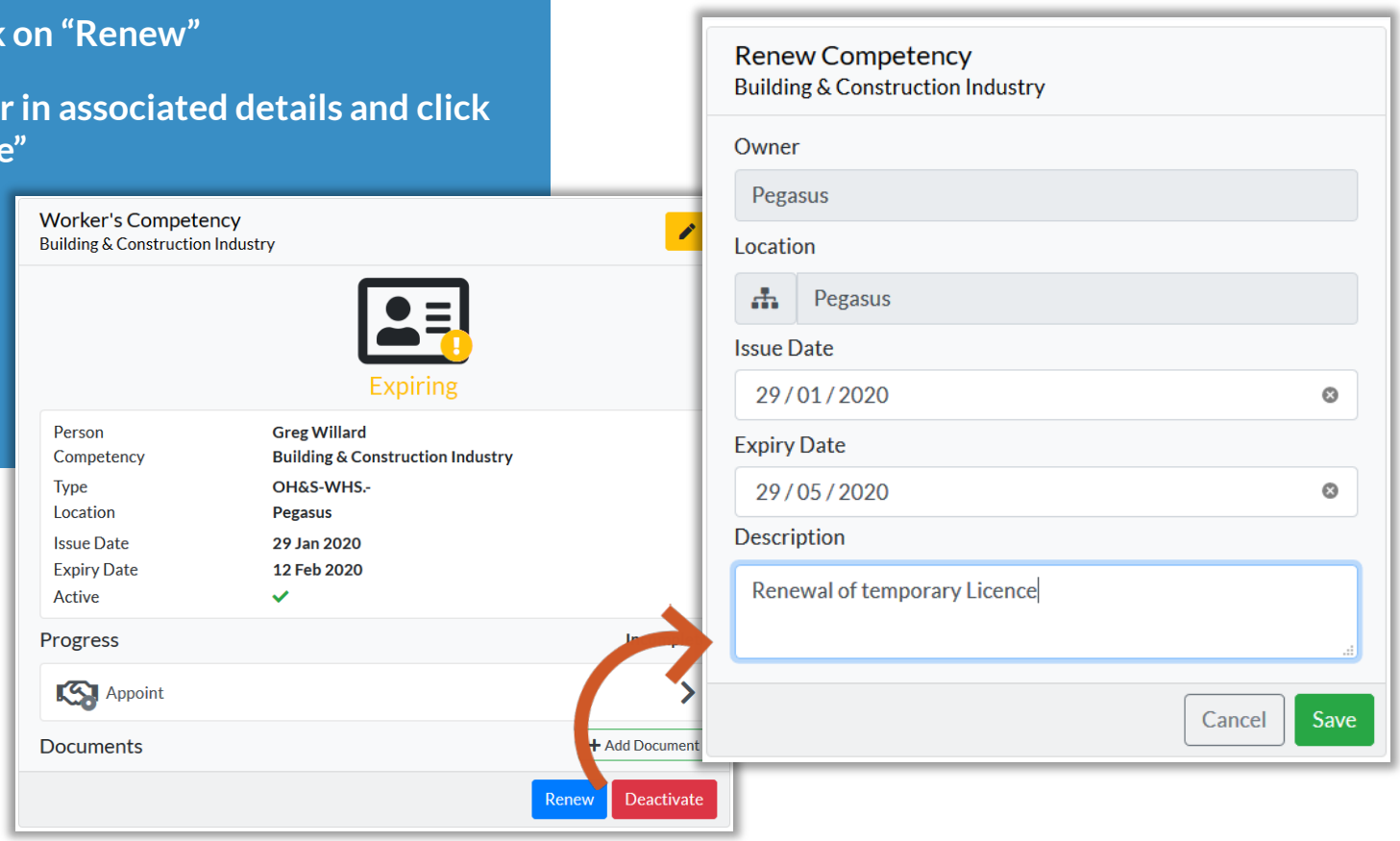
Same process as viewing a Worker's competencies

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"



MANAGING CREWS

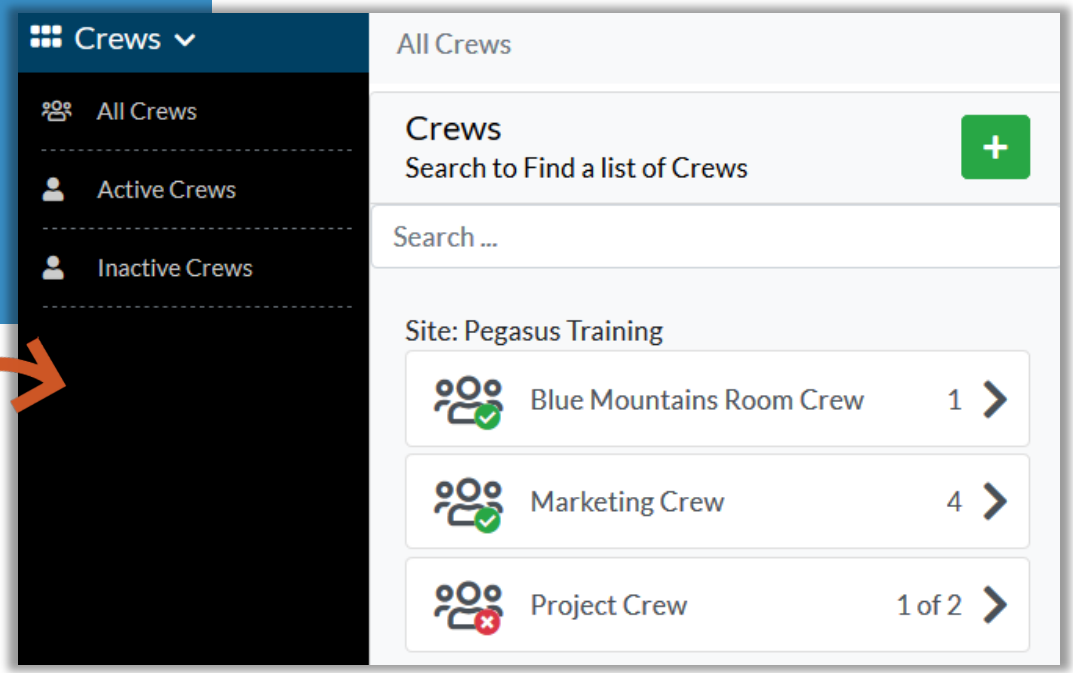
Managing Crews - Viewing

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.



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Managing Crews - Viewing

Click on the Crew you wish to view

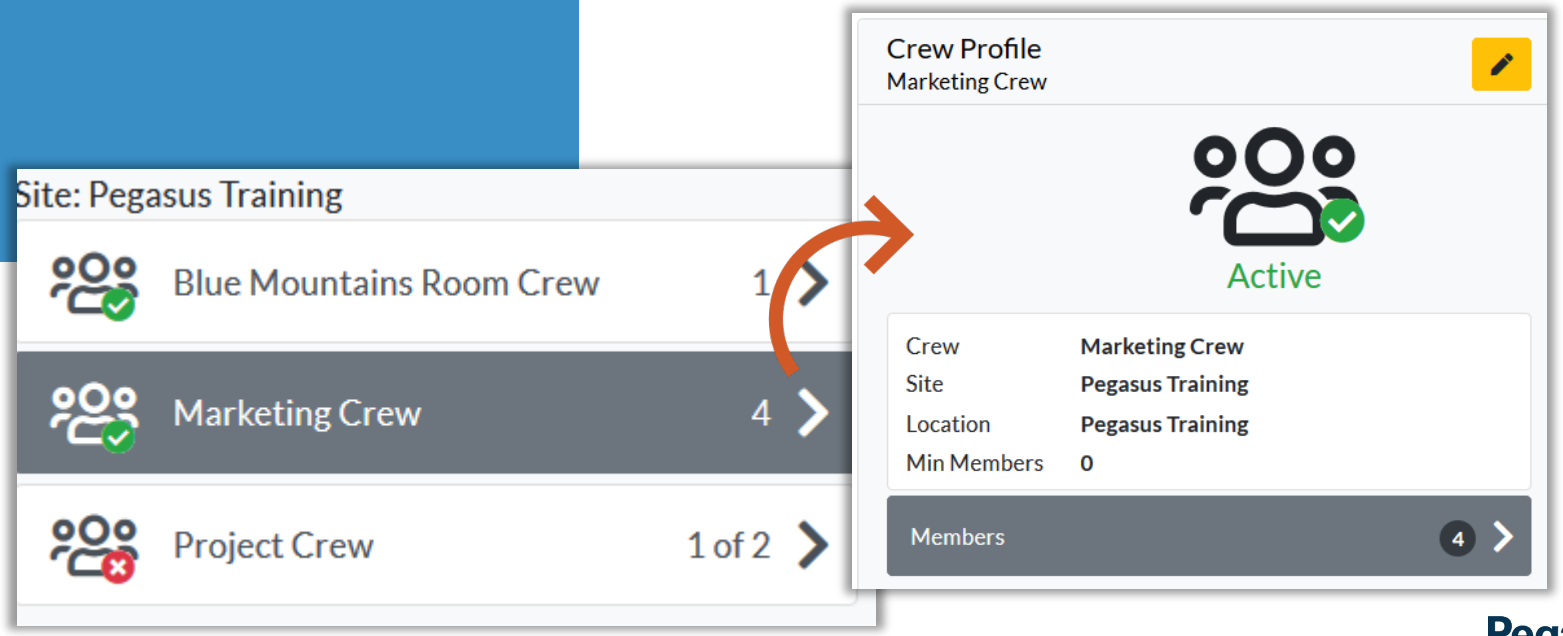
Will show Crew Details.

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.



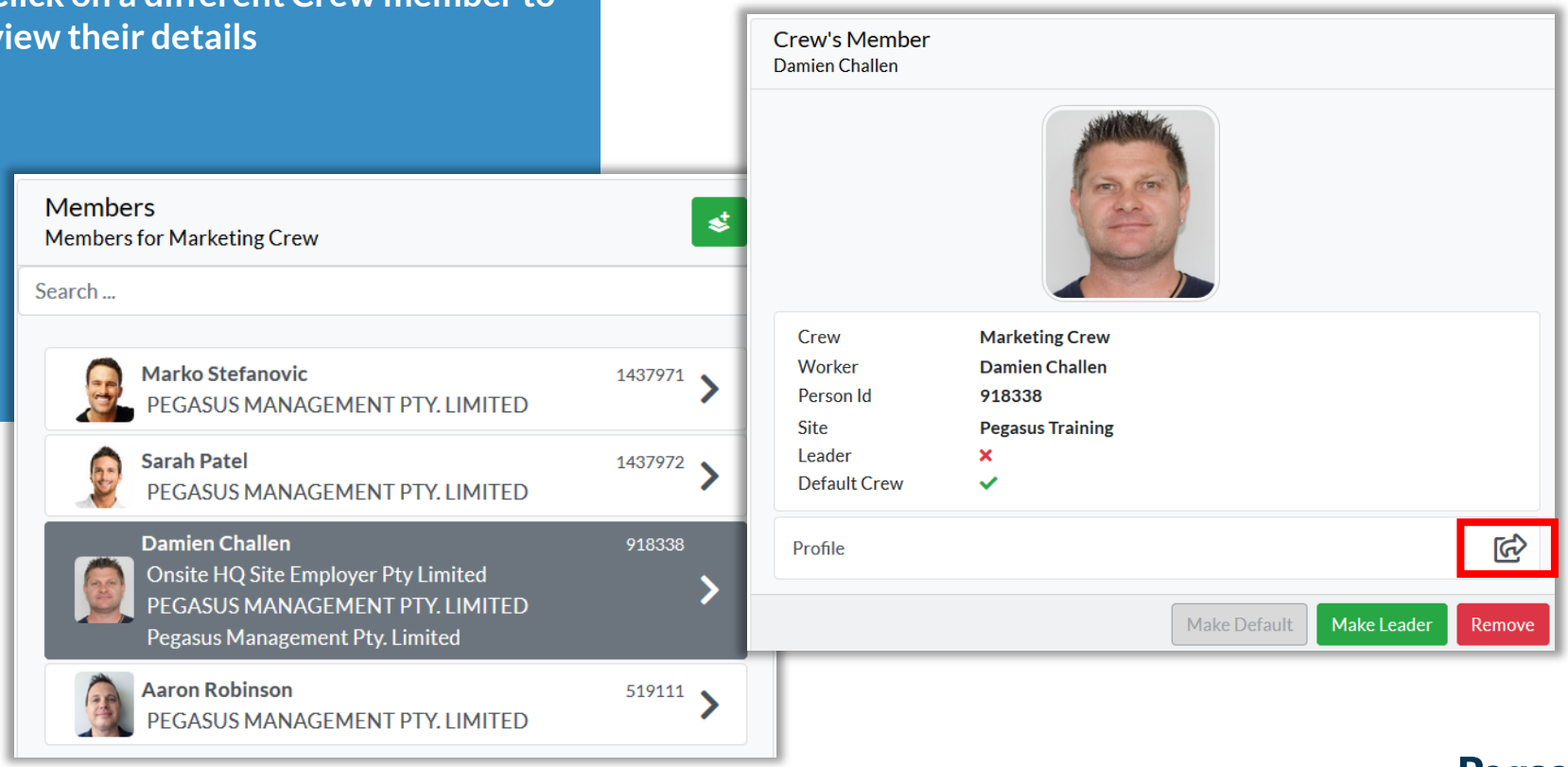
Managing Crews - Viewing

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

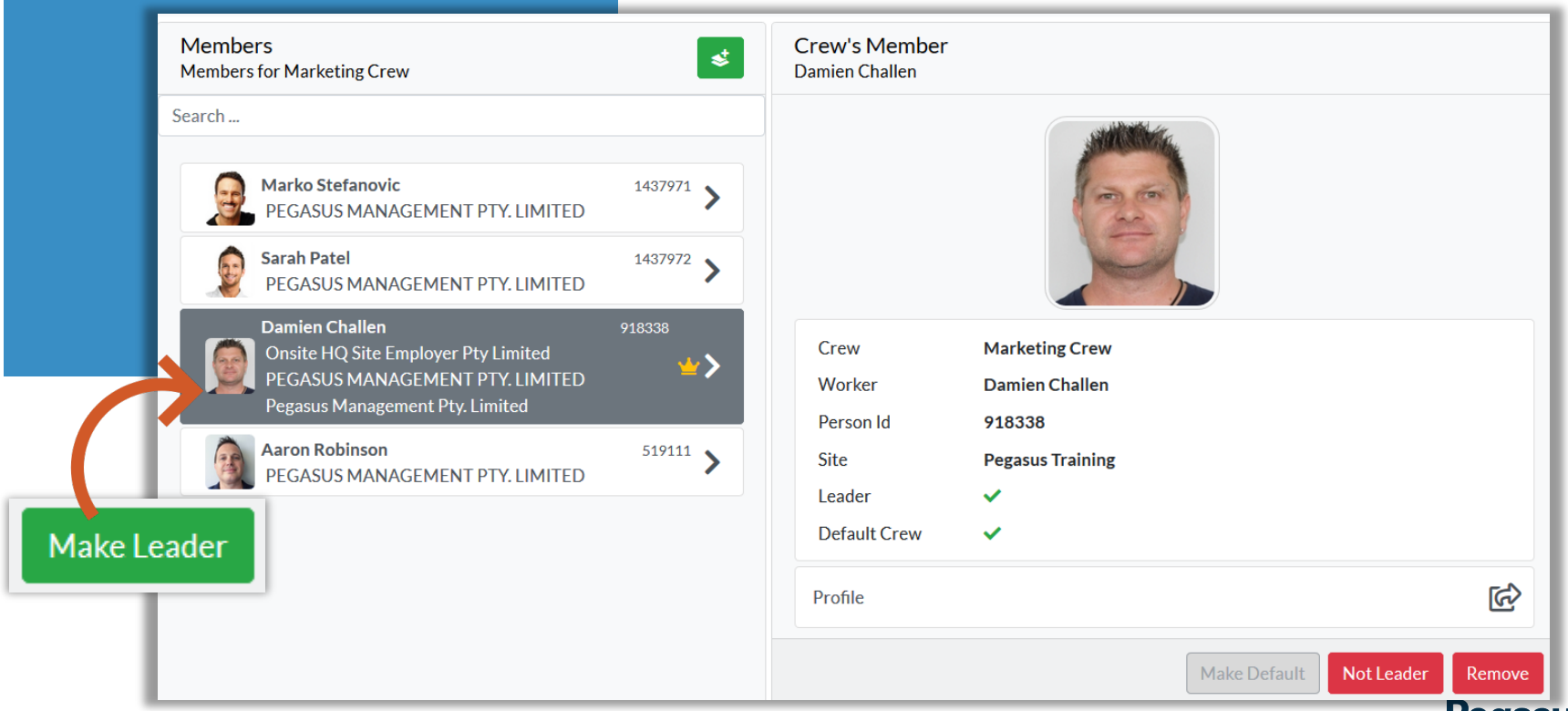


Managing Crews - Viewing

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.



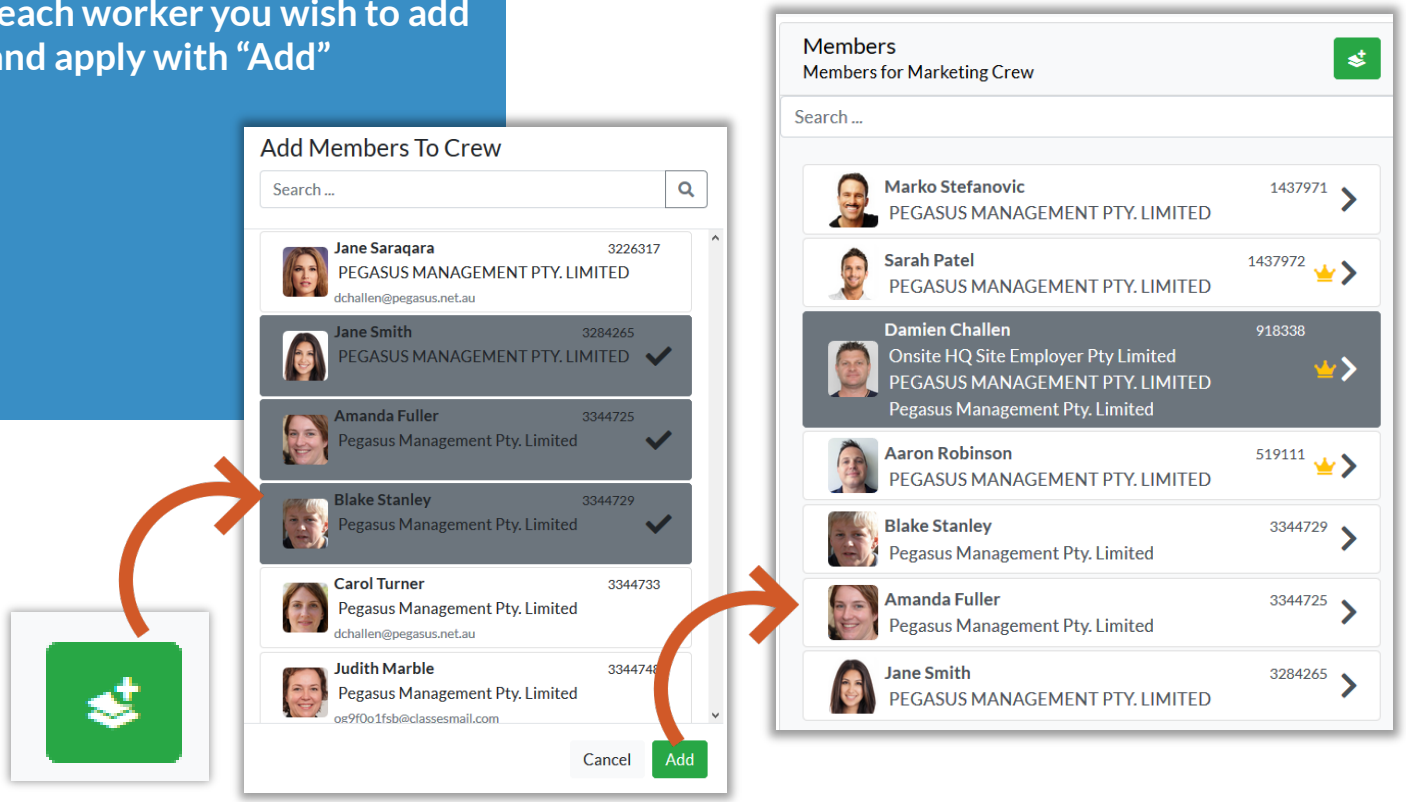
Managing Crews – Adding Members

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

Can search as before and filter by name, company to get desires 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.



Managing Crews – Creating New

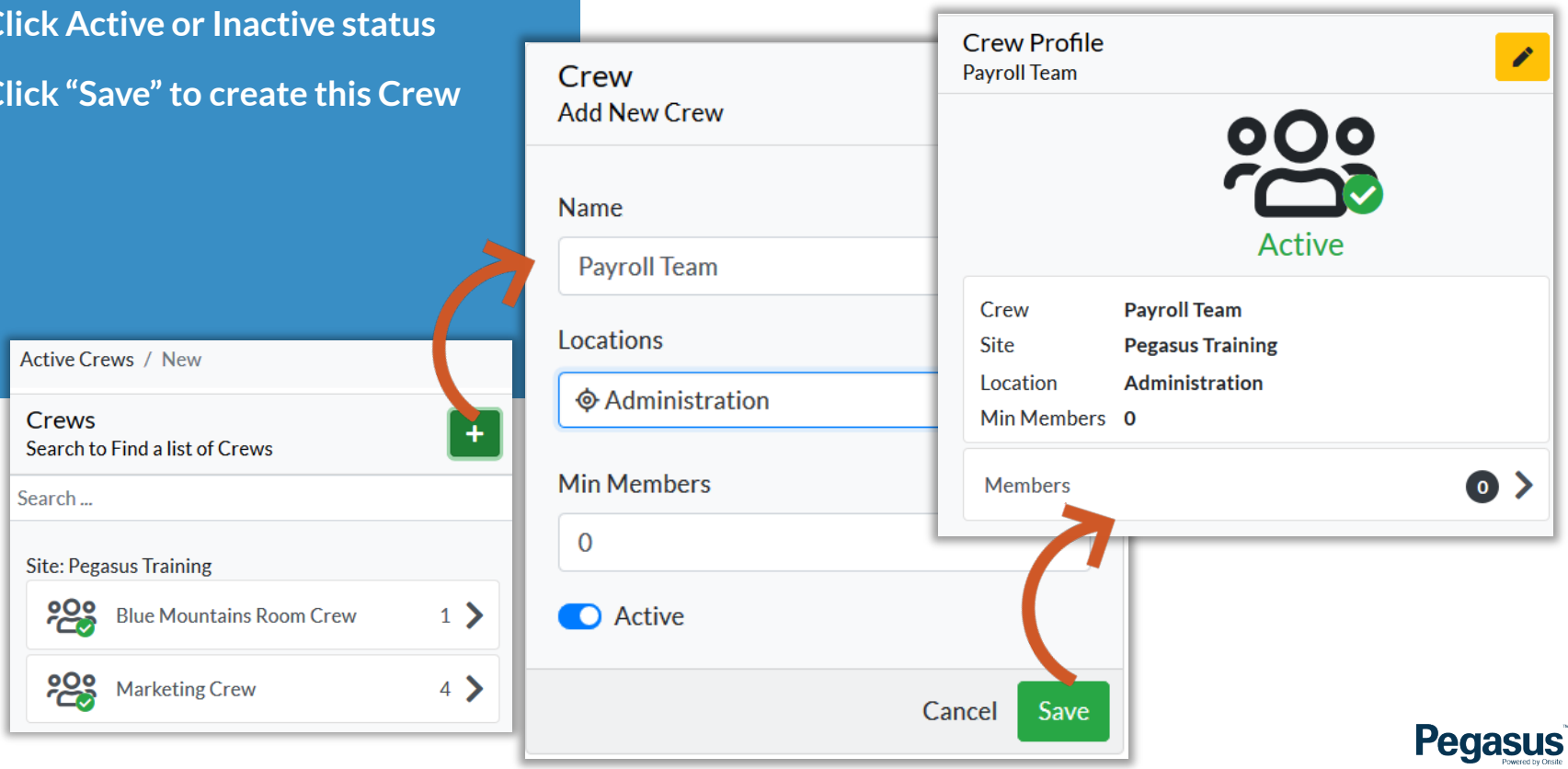
Under Active or Inactive Crew screen, click "+" to create a new crew

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

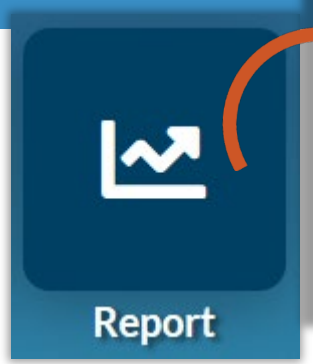
Report loads Business Intelligence Reports in a New Browser Tab

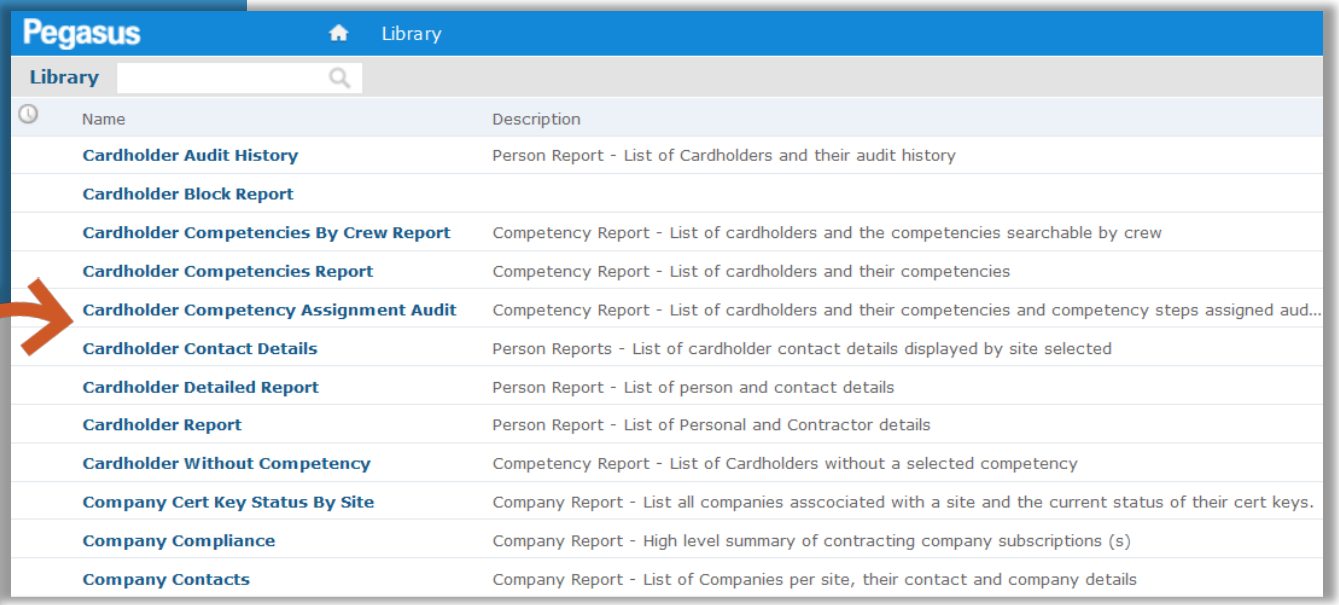
Access is available to all Client Portal Users

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





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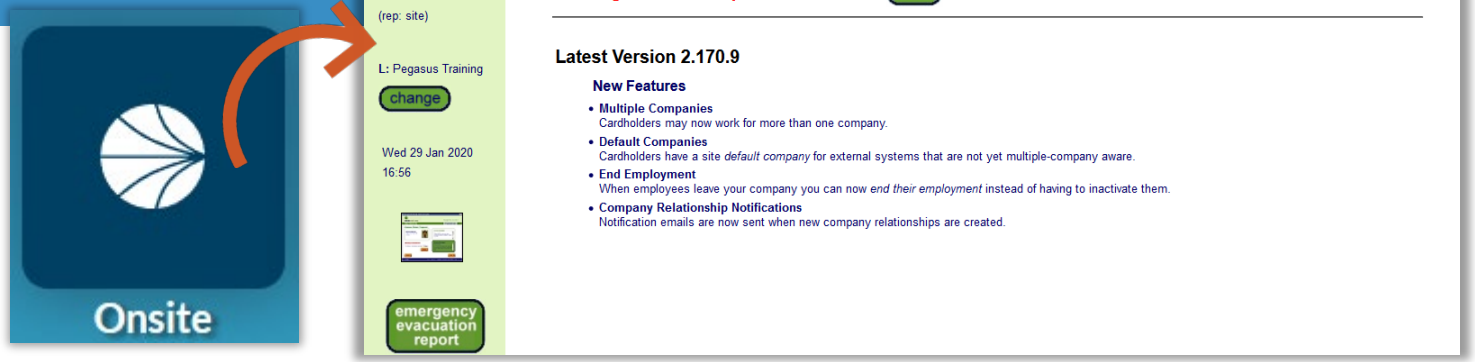
Optional Tools – Onsite

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 overstayer out of onsite will reflect in the Onsite Now in Client Portal.



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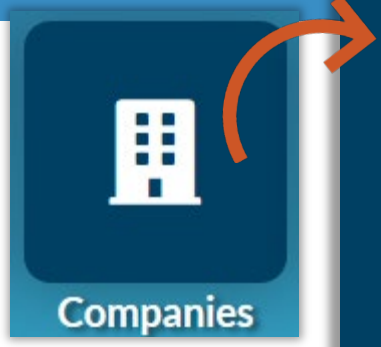
Optional Tools – Companies

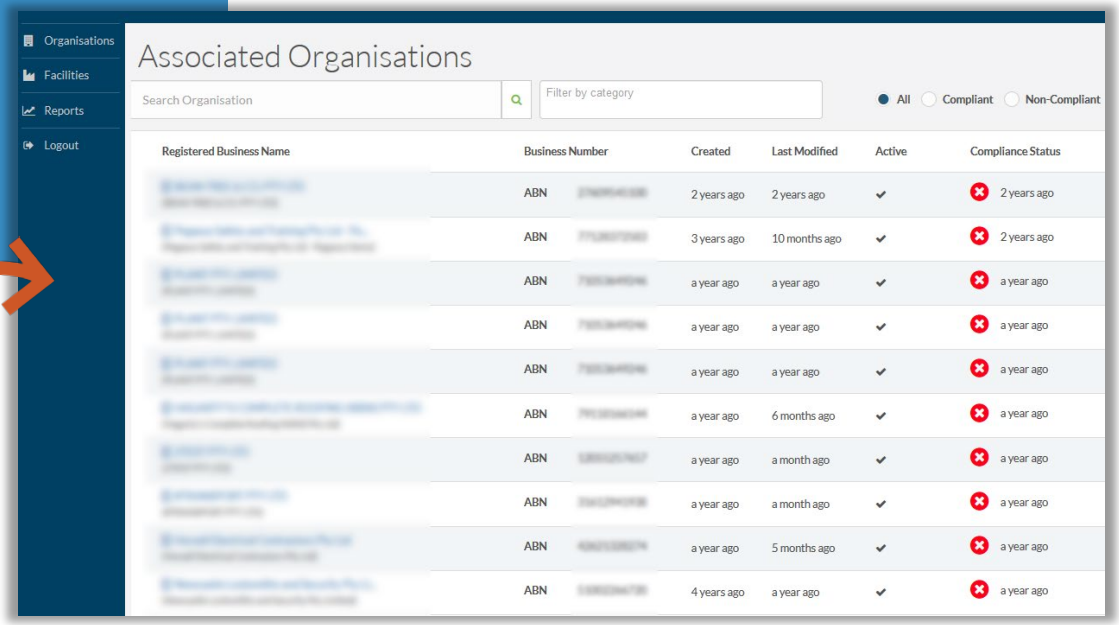
Companies icon will load in a new browser window, the Company Compliance Client Access View

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





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FOR QUESTIONS OR ASSISTANCE, PLEASE CALL

1300 131 194

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

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