



PEGASUS CLIENT PORTAL

USER GUIDE

Version 1.17

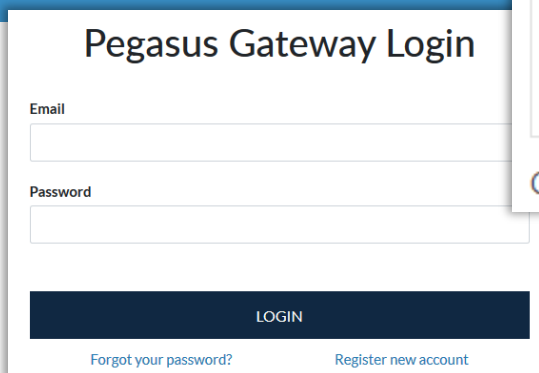
Login to the Client Portal

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>



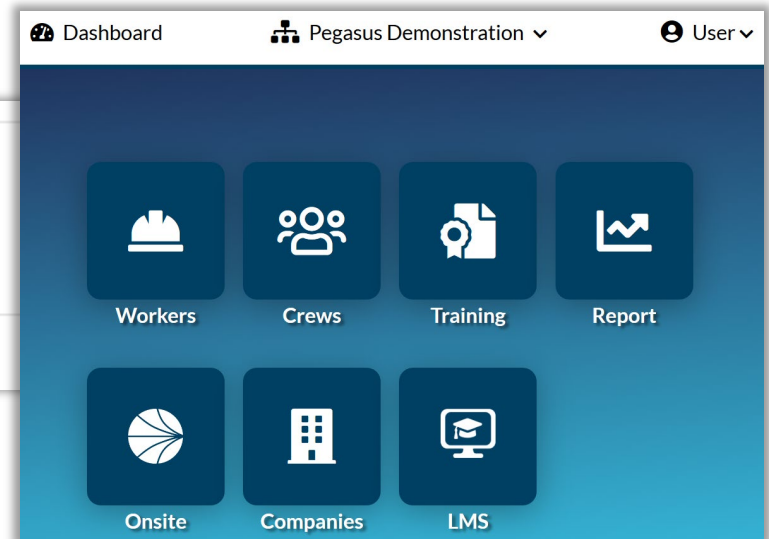
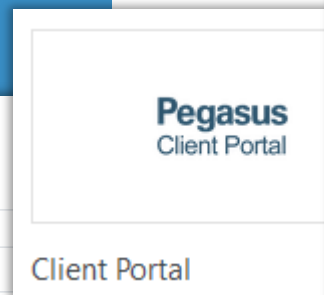
Pegasus Gateway Login

Email

Password

LOGIN

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



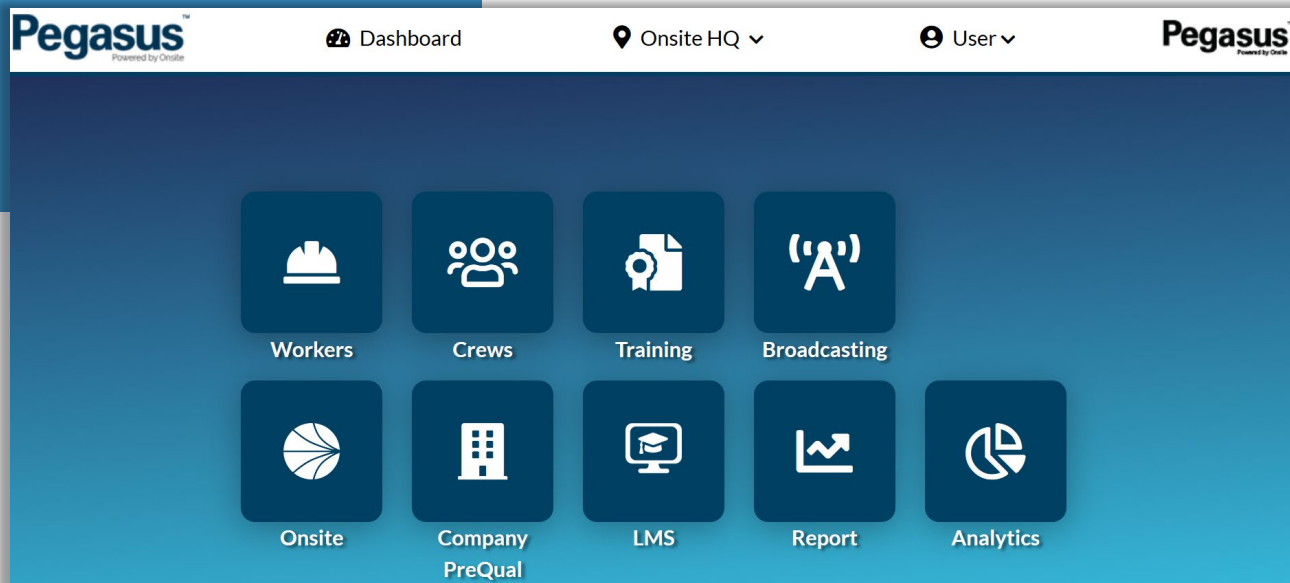
Login to the Client Portal – Notes on your access

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)



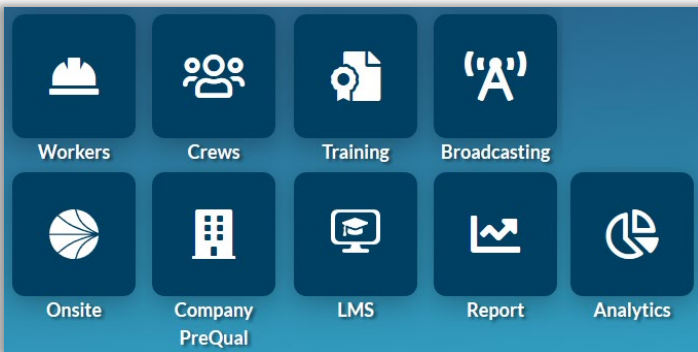
- The Bulk Add Icon. Visible when you have permissions. Used for adding people in bulk. (e.g bulk add people to a crew)

- The Colour Status icons represent Status on pages.

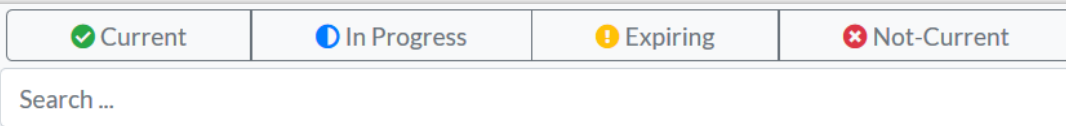
GREEN = Active and Valid
AMBER = Expires within 30 days
BLUE = Pending Status
RED = Expired

- 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

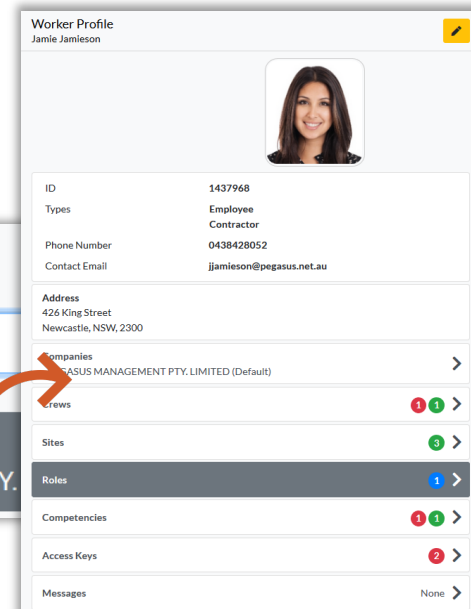
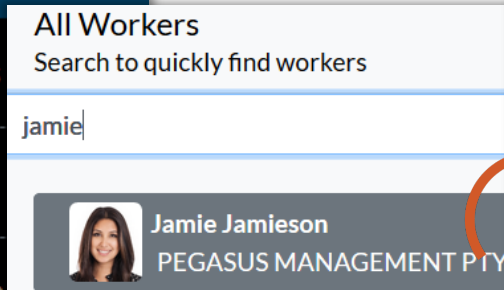
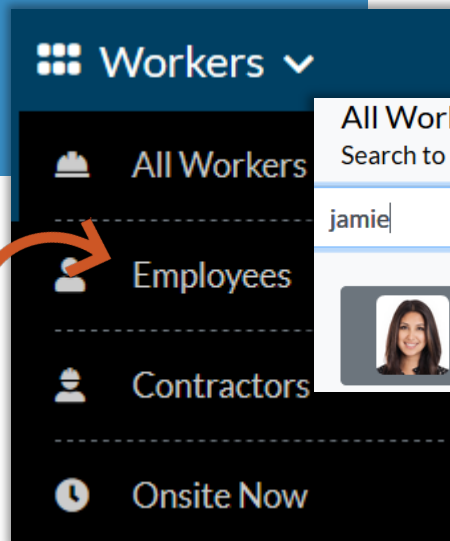
Enter the Worker Module

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). Below this is a 'Sites' list with three entries: Hilton Foods - Truganina, Pegasus Demonstration (highlighted), and Hilton Foods - Bunbury. The 'Worker's Site Company' section shows details for PEGASUS MANAGEMENT PTY. LIMITED (Default), including a location pin icon and a table of associated information: Person (Jamie Jamieson), Company (PEGASUS MANAGEMENT PTY. LIMITED), Site (Pegasus Demonstration), Association Date (2017-06-20), and Associated By (Kim Dundas). A 'Companies' section at the bottom left shows a list of companies for Jamie Jamieson, with PEGASUS MANAGEMENT PTY. LIMITED (Default) selected. Red arrows indicate the flow from the 'Companies' list to the 'Worker's Company' profile, and from the 'Sites' list to the 'Worker's Site Company' profile.

Worker's Company
PEGASUS MANAGEMENT PTY. LIMITED (Default)

Company Summary
Email: tnguyen@pegasus.net.au
Address: 426 King Street
Newcastle
NSW 2300

Employment Details
Training Email: jjamieson@pegasus.net.au
Employee Number: 1437968

Sites

- Hilton Foods - Truganina
- Pegasus Demonstration**
- Hilton Foods - Bunbury

Worker's Site Company
PEGASUS MANAGEMENT PTY. LIMITED (Default)

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

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

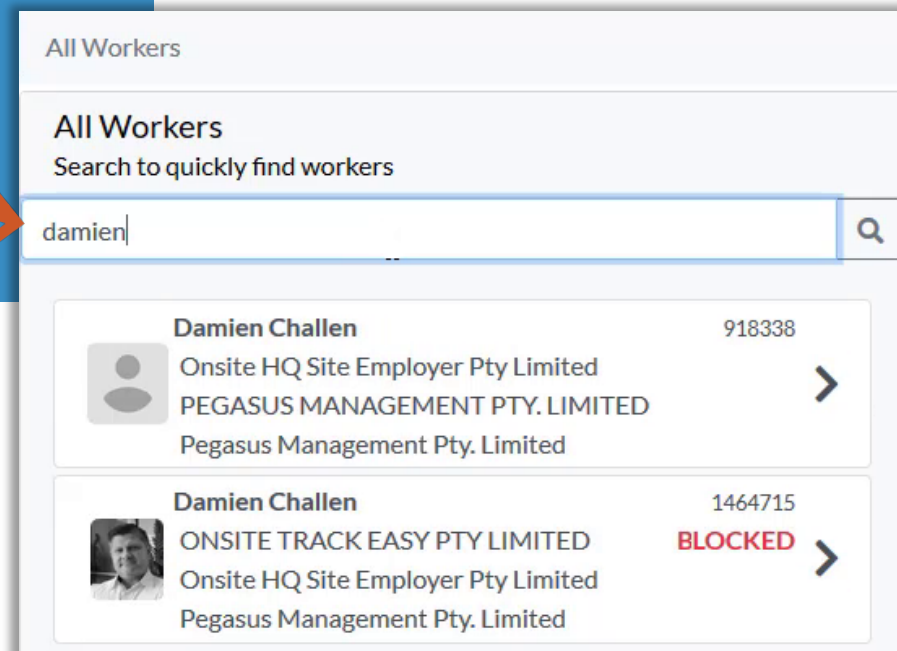
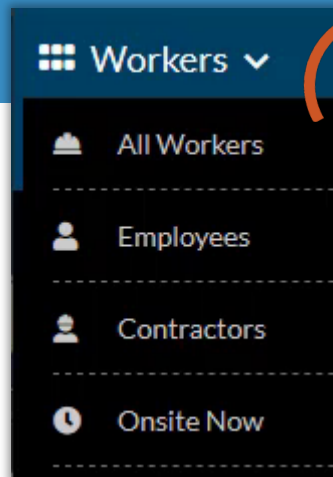
Viewing Blocked Worker Profile

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.

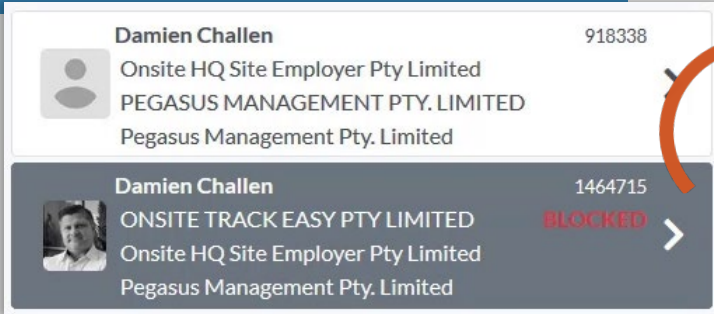


Viewing Blocked Worker Profile

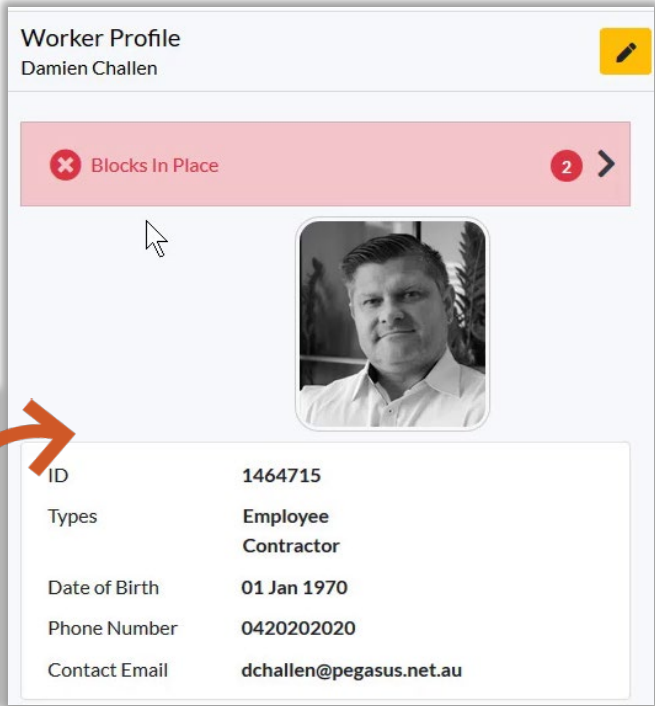
Number of applied blocks will show against the Workers Profile Page

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

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




A list of worker profiles. The top profile is for Damien Challen with ID 918338, employed by Onsite HQ Site Employer Pty Limited and Pegasus Management Pty. Limited. The bottom profile is also for Damien Challen with ID 1464715, marked as 'BLOCKED' in red, and employed by ONSITE TRACK EASY PTY LIMITED and Onsite HQ Site Employer Pty Limited. An orange arrow points from the 'BLOCKED' status to the main profile view.



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.

The screenshot illustrates the process of viewing a blocked worker's profile. It shows a worker profile for Damien Challen with a 'Blocks In Place' notification (2 blocks). A 'Blocks' panel lists two blocks: 'ALL in Realm : Pegasus Demonstration' and 'ALL in Site : Pegasus Demonstration'. An arrow points from the 'ALL in Realm' block to a detailed view window.

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 mobile application interface. On the left is a list item for a worker named Damien Challen. On the right is a detailed view of his worker profile. An orange arrow points from the list item to the profile, and another orange arrow points from the profile to a red 'Block' button at the bottom right.

Worker Profile
Damien Challen

Overtime

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

Attendance

Site	Pegasus Training
Login	26 Feb 2020 10:29

Next of Kin

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

Block

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

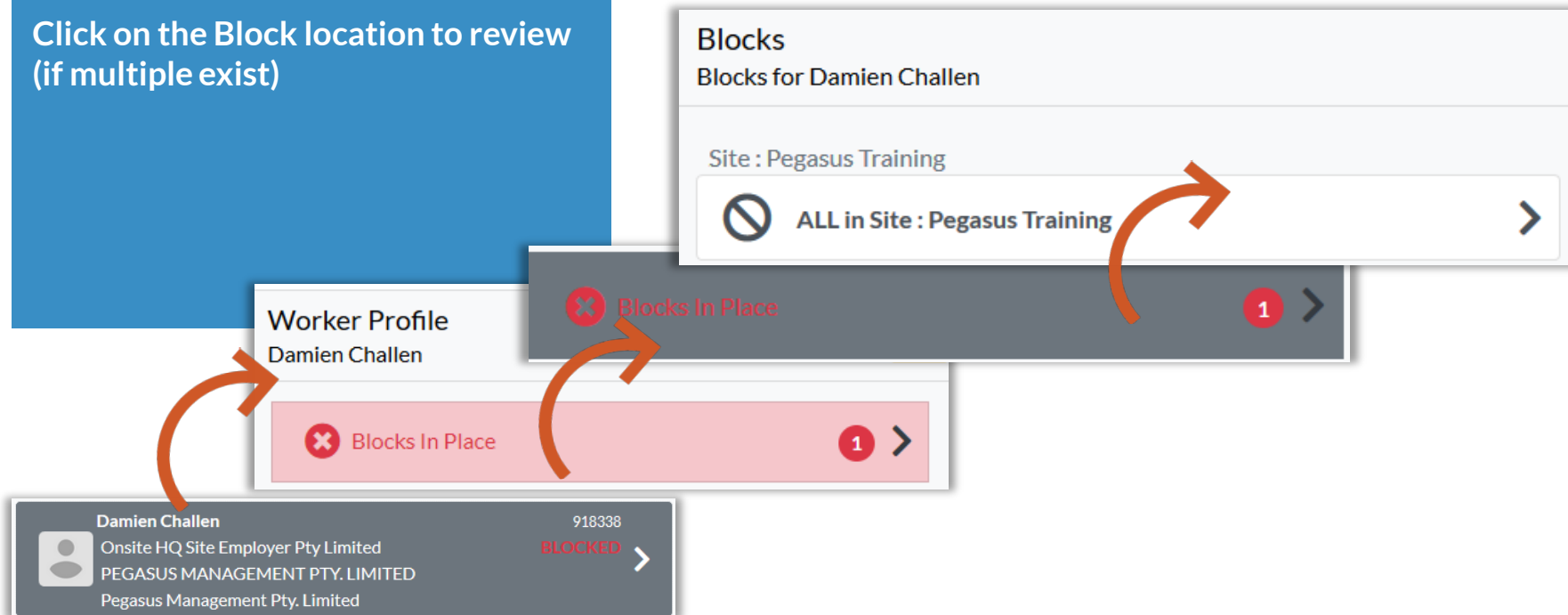
Worker is now Blocked.

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

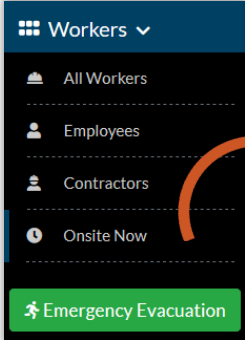
To view current Logged in Workers, click “Onsite Now”

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.

- 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.



All Workers
Search to quickly find workers

Search ...

	Blake Stanley Pegasus Management Pty. Limited	3344729
	Greg Willard Pegasus Management Pty. Limited	3344734
	Peter Dawes Pegasus Management Pty. Limited	3344779
	Tracey Condlin Pegasus Management Pty. Limited	3344783

Worker Profile
Tracey Condlin

Logged In

ID	3344783
Types	Contractor
Date of Birth	17 Nov 1987
Phone Number	0267665558
Contact Email	bnj8ns27ibl@powerency.com

Attendance	
Site	Pegasus Training
Login	29 Jan 2020 16:23
Log Point	SWLP PEGASUS DEMONSTRATION

Companies	
Pegasus Management Pty. Limited (Default)	

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

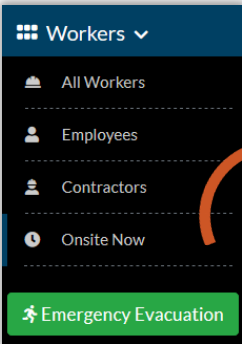


Amber = Approaching withing 2 hours of Site Fatigue Limit



Red = Over Site Fatigue Limit

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




Onsite Workers
Search to find workers

🕒 Logged In ⚠ Warning 🛑 Overstayer

Search ... 🔍

Damien Challen 1464715

Onsite HQ Site Employer Pty Limited
ONSITE TRACK EASY PTY LIMITED

 Pegasus Management Pty. Limited
Pegasus Management Pty. Limited
6 Jul 2020 14:00 (SWLP ONSITE HQ)

>

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 shows the 'Workers' 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 dropdown menu is open, showing a search result for 'Jamie Jamieson' from 'PEGASUS MANAGEMENT PTY. LIMITED'. Another orange arrow points from this result to a secondary menu on the right. This menu lists various categories with counts and right-pointing arrows: 'Crews' (1 in red, 1 in green), 'Sites' (3 in green), 'Roles' (1 in blue), 'Competencies' (1 in red), and 'Access Keys' (2 in red).

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

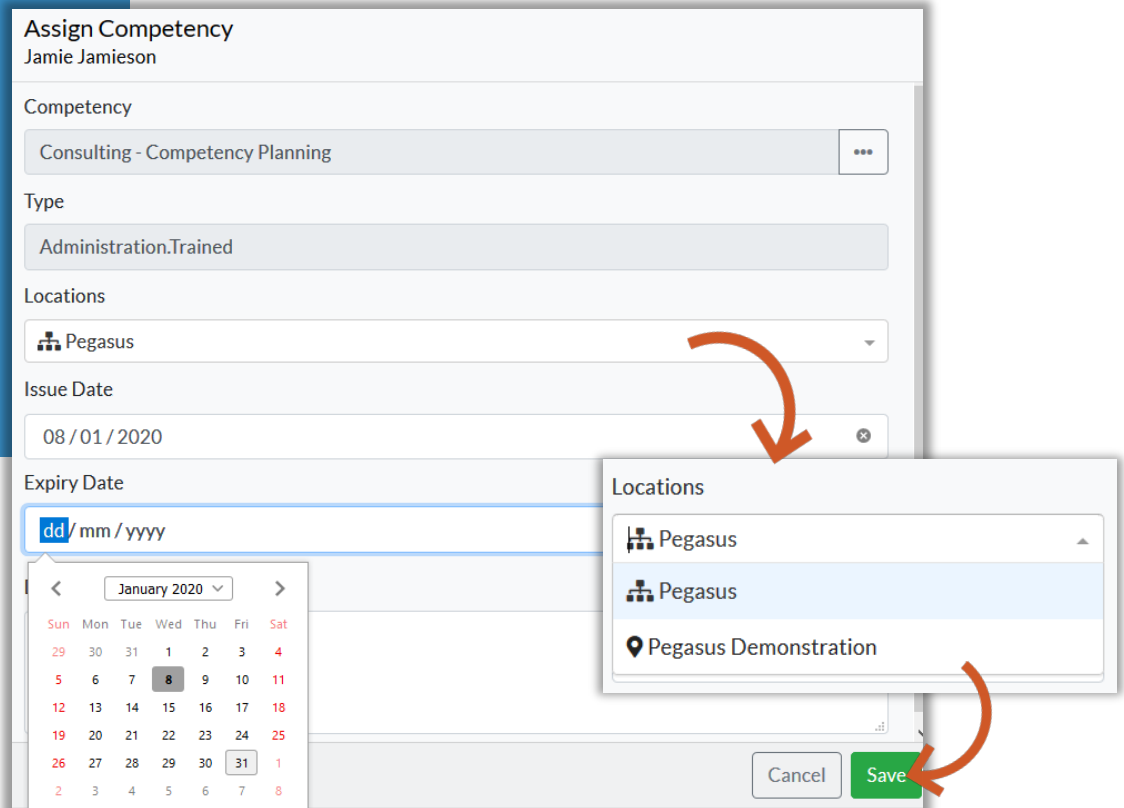
If required, Location of Competency might also need to be chosen.

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 and a blue instruction box on the left. The instruction box contains the following steps: "Click '+Add Document'", "Click 'Browse'", "Click 'Open' to attach document to competency", "Now stored against Competency", and "Users with rights can now click on Cloud Icon to download and view Document".

The main workflow windows are:

- Document Add Document:** A form with fields for "Uploaded By" (Damien Challen (918...)), "Description", and "Document". The "Document" field has a "Choose file" button and a "Browse" button. At the bottom are "Cancel" and "Save" buttons.
- File Selection Dialog:** A window showing a list of files: Pegasus, Compliance.doc, compliance.pdf, licence.jpg, LTM1500.jpg, and Training Upload Document.docx. The "compliance.pdf" file is highlighted with a red border.
- File Explorer:** A window showing the selected file "compliance.pdf" with "Open" and "Cancel" buttons.
- Worker's Document:** A detail 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 with a download arrow is visible at the bottom right.

A green box with a white plus sign and the text "+ Add Document" is shown at the bottom left, with an orange arrow pointing to the "Add Document" button 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

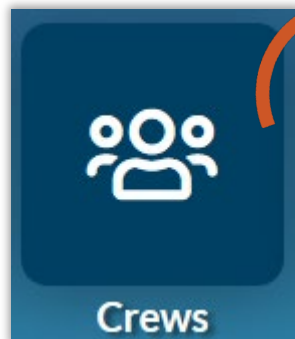
Managing Crews - Viewing

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 this 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 +		
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.

Site: Pegasus Training


	Blue Mountains Room Crew	1	>
	Marketing Crew	4	>
	Project Crew	1 of 2	>

Crew Profile 

Marketing Crew


Active

Crew	Marketing Crew
Site	Pegasus Training
Location	Pegasus Training
Min Members	0

Members  4 >

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 ...

	Marko Stefanovic PEGASUS MANAGEMENT PTY. LIMITED	1437971	>
	Sarah Patel PEGASUS MANAGEMENT PTY. LIMITED	1437972	>
	Damien Challen Onsite HQ Site Employer Pty Limited PEGASUS MANAGEMENT PTY. LIMITED Pegasus Management Pty. Limited	918338	>
	Aaron Robinson 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 for Damien Challen is shown on the right, including his photo, name, and various attributes like Crew, Worker, Person Id, Site, Leader, and Default Crew. The 'Leader' attribute is marked with a green checkmark. At the bottom of the profile, there are buttons for 'Make Default', 'Not Leader', and 'Remove'.

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

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:

Name	Company	Phone	Status
Jane Saraqara	PEGASUS MANAGEMENT PTY. LIMITED	3226317	Not added
Jane Smith	PEGASUS MANAGEMENT PTY. LIMITED	3284265	Added (checkmark)
Amanda Fuller	Pegasus Management Pty. Limited	3344725	Added (checkmark)
Blake Stanley	Pegasus Management Pty. Limited	3344729	Added (checkmark)
Carol Turner	Pegasus Management Pty. Limited	3344733	Not added
Judith Marble	Pegasus Management Pty. Limited	3344746	Not added

Members List:

Name	Company	Phone	Status
Marko Stefanovic	PEGASUS MANAGEMENT PTY. LIMITED	1437971	Not added
Sarah Patel	PEGASUS MANAGEMENT PTY. LIMITED	1437972	Added (crown icon)
Damien Challen	Onsite HQ Site Employer Pty Limited PEGASUS MANAGEMENT PTY. LIMITED	918338	Added (crown icon)
Aaron Robinson	PEGASUS MANAGEMENT PTY. LIMITED	519111	Added (crown icon)
Blake Stanley	Pegasus Management Pty. Limited	3344729	Not added
Amanda Fuller	Pegasus Management Pty. Limited	3344725	Not added
Jane Smith	PEGASUS MANAGEMENT PTY. LIMITED	3284265	Not added

Arrows indicate the flow of information: from the "Add" button in the dialog to the "Add" button in the main interface, and from the selected members in the dialog to the "Members" 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

Active Crews / New

Crews
Search to Find a list of Crews

Search ...

Site: Pegasus Training

 Blue Mountains Room Crew	1 >
 Marketing Crew	4 >

Crew
Add New Crew

Name
Payroll Team


Locations
Administration

Min Members
0

Active

Cancel Save

Crew Profile
Payroll Team


Active

Crew	Payroll Team
Site	Pegasus Training
Location	Administration
Min Members	0

Members 0 >



OPTIONAL TOOLS

Optional Tools – Report

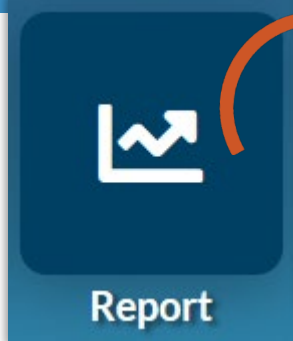
Report loads Business Intelligence Reports in a New Browser Tab

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.

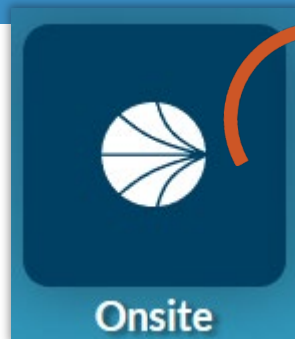
Name	Description
Cardholder Audit History	Person Report - List of Cardholders and their audit history
Cardholder Block Report	
Cardholder Competencies By Crew Report	Competency Report - List of cardholders and the competencies searchable by crew
Cardholder Competencies Report	Competency Report - List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



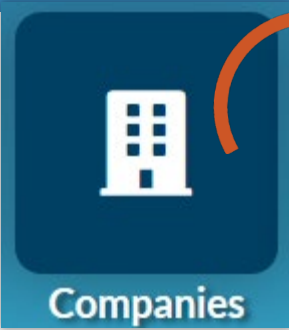
A screenshot of the Onsite Track Easy web application interface. The header is green with the "onsite track easy" logo on the left and "Pegasus Training site" on the right. Below the header is a dark blue navigation bar with white text for "home", "person", "company", "compliance", "training", "safety", "report", "setup", "help", and "system". The main content area is white. On the left, there is a "session details" sidebar with fields for "Session tag: 8046", "app5", "U: Damien Challen", "R: Editor", "C: U0 A10 (rep: site)", "L: Pegasus Training", and "Wed 29 Jan 2020 16:56". There are "change" and "emergency evacuation report" buttons in the sidebar. The main content area displays "Welcome to Pegasus Training" and "timezone: Australia/NSW". Below this is a "Pending Data / Incomplete Actions" section with a "show" button. The "Latest Version 2.170.9" section lists "New Features" such as "Multiple Companies", "Default Companies", "End Employment", and "Company Relationship Notifications".

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>

Organisations

Facilities

Reports

Logout

Associated Organisations

Search Organisation Filter by category All Compliant Non-Compliant

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