



PEGASUS CLIENT PORTAL

USER GUIDE

Version 1.19

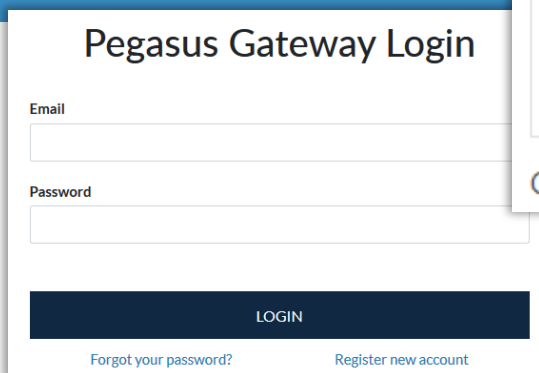
Login to the Client Portal

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>



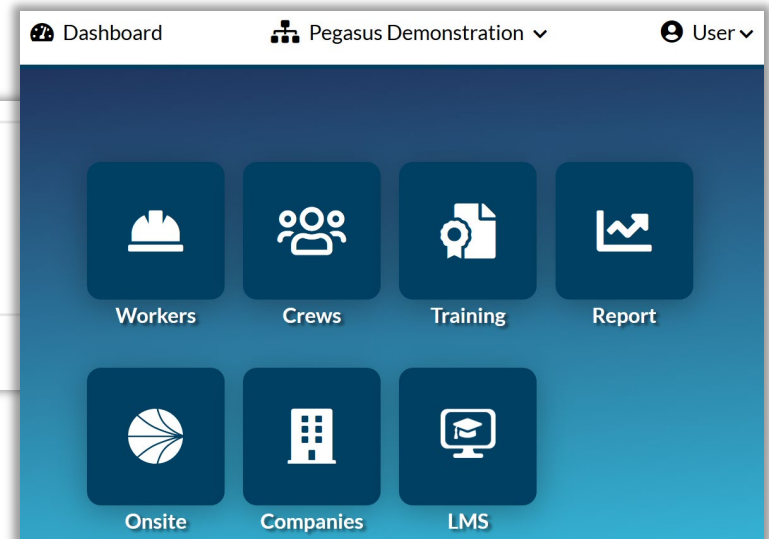
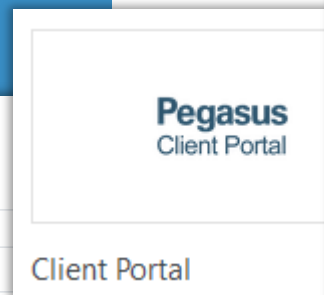
Pegasus Gateway Login

Email

Password

LOGIN

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



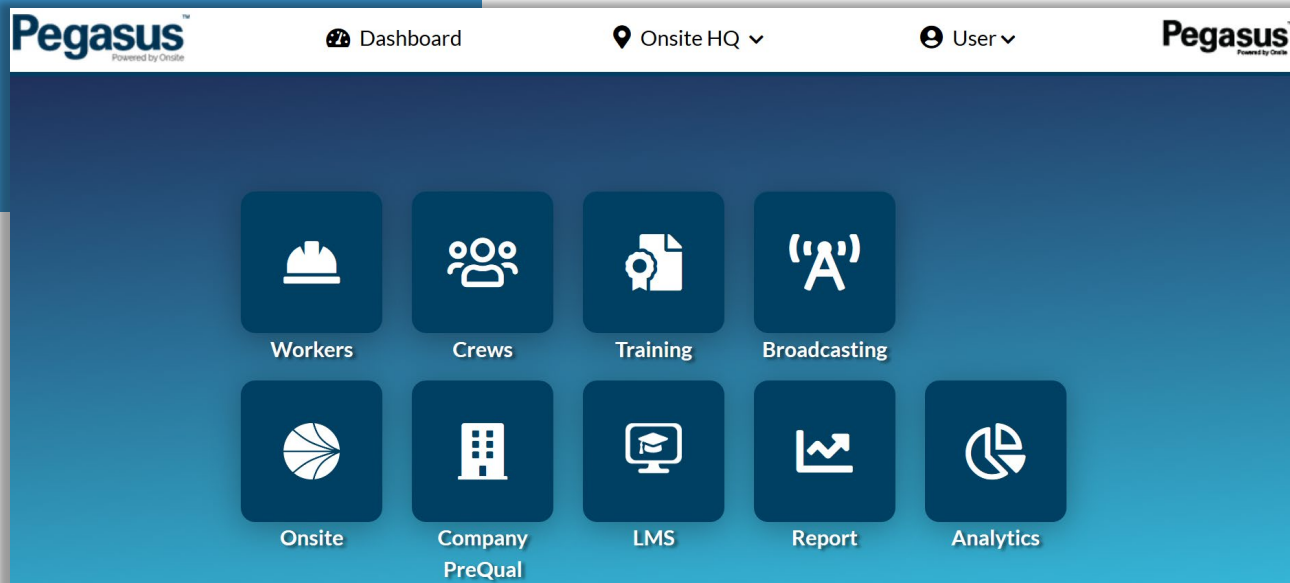
■ Login to the Client Portal – Notes on your access

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	>

- Down Arrow can change Realm/Site if you have access.

- User will open your Client Portal Profile and show current version

- Cog shows Batch Jobs Module for those with Bulk Add Permissions

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

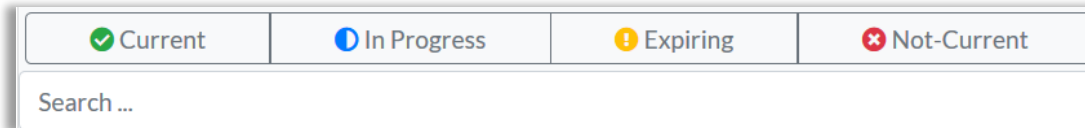
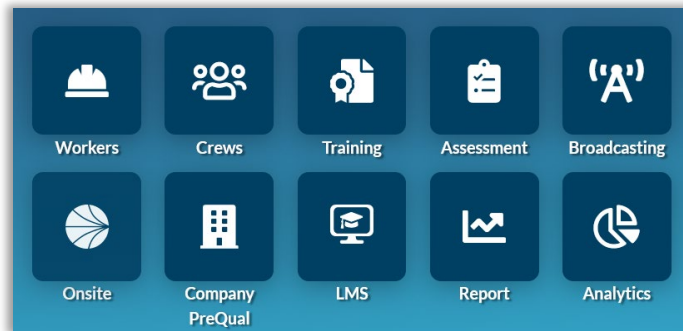
- The Onsite, Companies and LMS Tiles will open a page in a new browser window. These are separate items to the Client Portal and will open in a new window but use your Onsite Track Easy user rights and permissions.

- Assessments, Broadcasting and Analytics are additional tools 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.



- Dashboard Returns you to the Pegasus Gateway



- 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

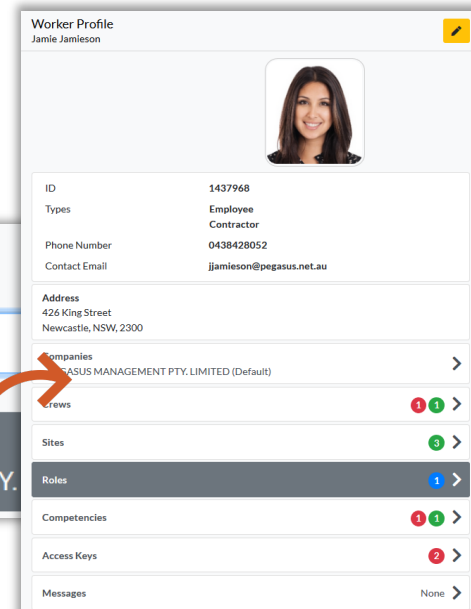
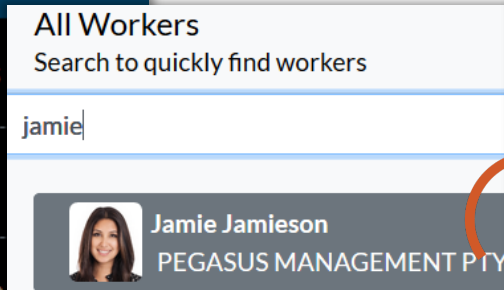
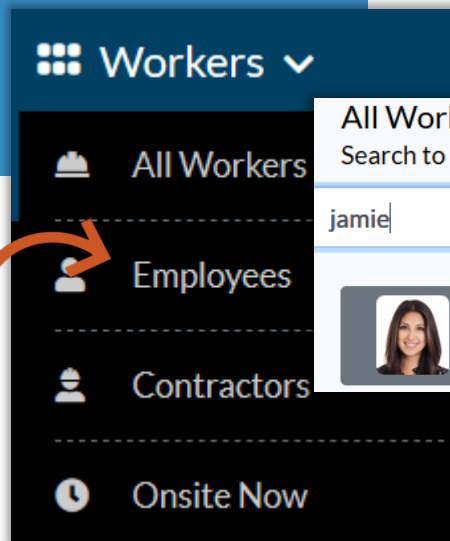
Enter the Worker Module

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 [redacted]@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 contact information and employment details. The 'Worker's Site Company' section shows details for the same company, including a location pin icon and a list of associated sites. A list of sites is shown at the bottom, with 'Pegasus Demonstration' highlighted. Red arrows indicate the flow from the site list to the company details and from the company details to the site details.

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

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

Sites	
	Hilton Foods - Truganina >
	Pegasus Demonstration >
	Hilton Foods - Bunbury >

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 tabs for a worker profile: Crews, Sites, Roles, Competencies, Training, Access Keys, and Messages. Each tab has a status indicator and a right-pointing arrow. An orange arrow points from the 'Roles' tab to a floating status filter overlay. The overlay contains four status 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 ...'.

Tab	Status	Count
Crews	None	0
Sites	Current	1
Roles	Current	0
Competencies	Current (4), In Progress (1)	4, 1
Training	Current	1
Access Keys	Not-Current	2
Messages	None	0



MANAGING BLOCKS ON WORKERS

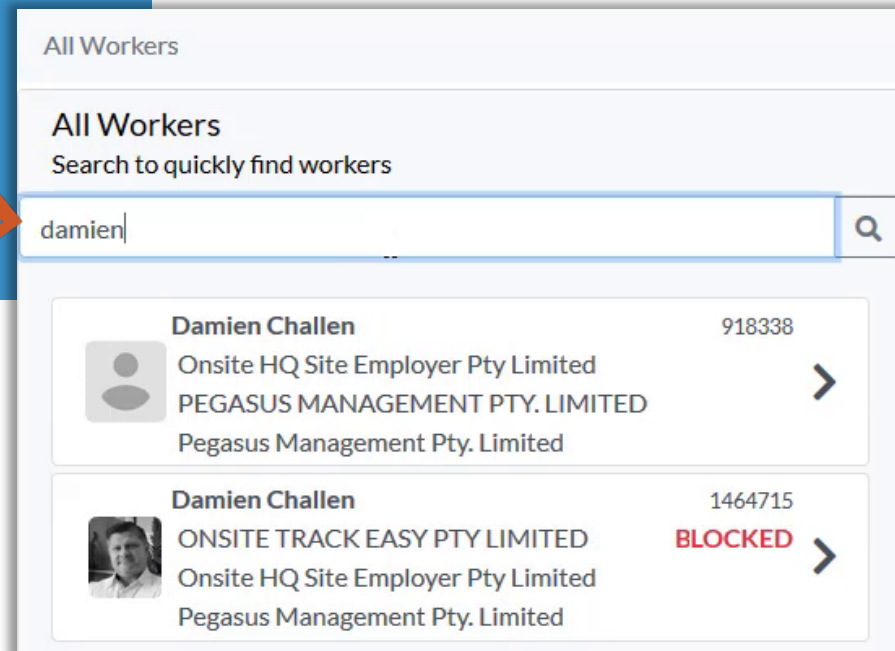
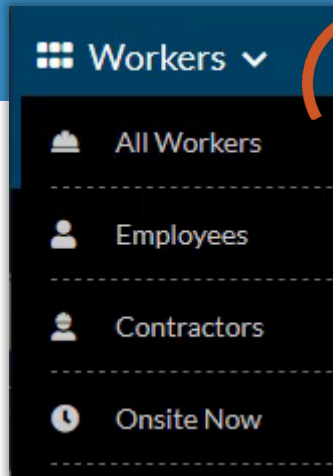
Viewing Blocked Worker Profile

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.

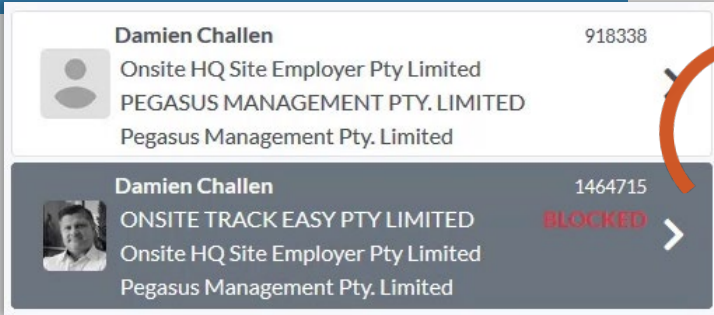


Viewing Blocked Worker Profile

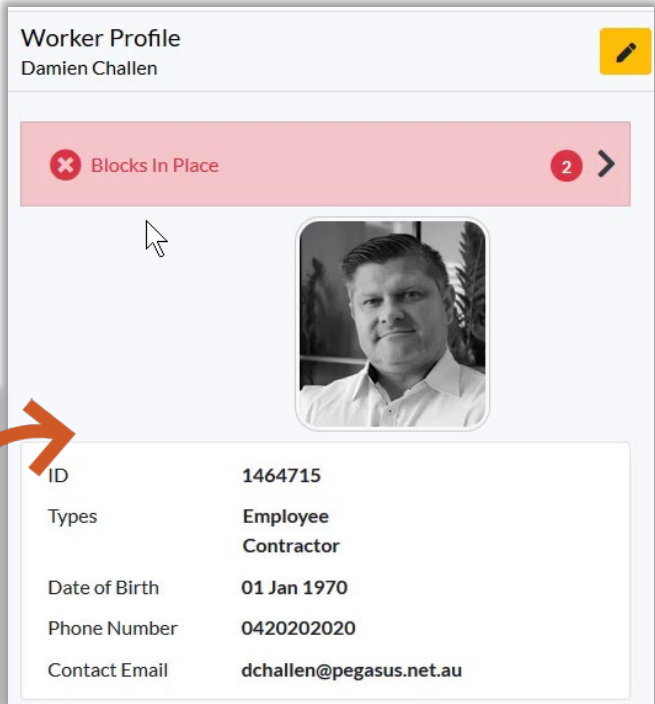
Number of applied blocks will show against the Workers Profile Page

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 entry is for Damien Challen with ID 918338, employed by Onsite HQ Site Employer Pty Limited and Pegasus Management Pty. Limited. The bottom entry 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 blocks for Damien Challen, including one at the 'ALL in Realm : Pegasus Demonstration' level. An arrow points to a detailed view of this block, which includes a 'no' symbol and the following details:

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 worker profile for Damien Challen. The profile includes a photo with a red clock icon and the text "Overtime". Below the photo is a table of personal details, followed by an attendance record and next of kin information. A red "Block" button is located at the bottom right of the profile card. An arrow points from a list item below to the profile, and another arrow points from the "Block" button to the list item.

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	

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

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

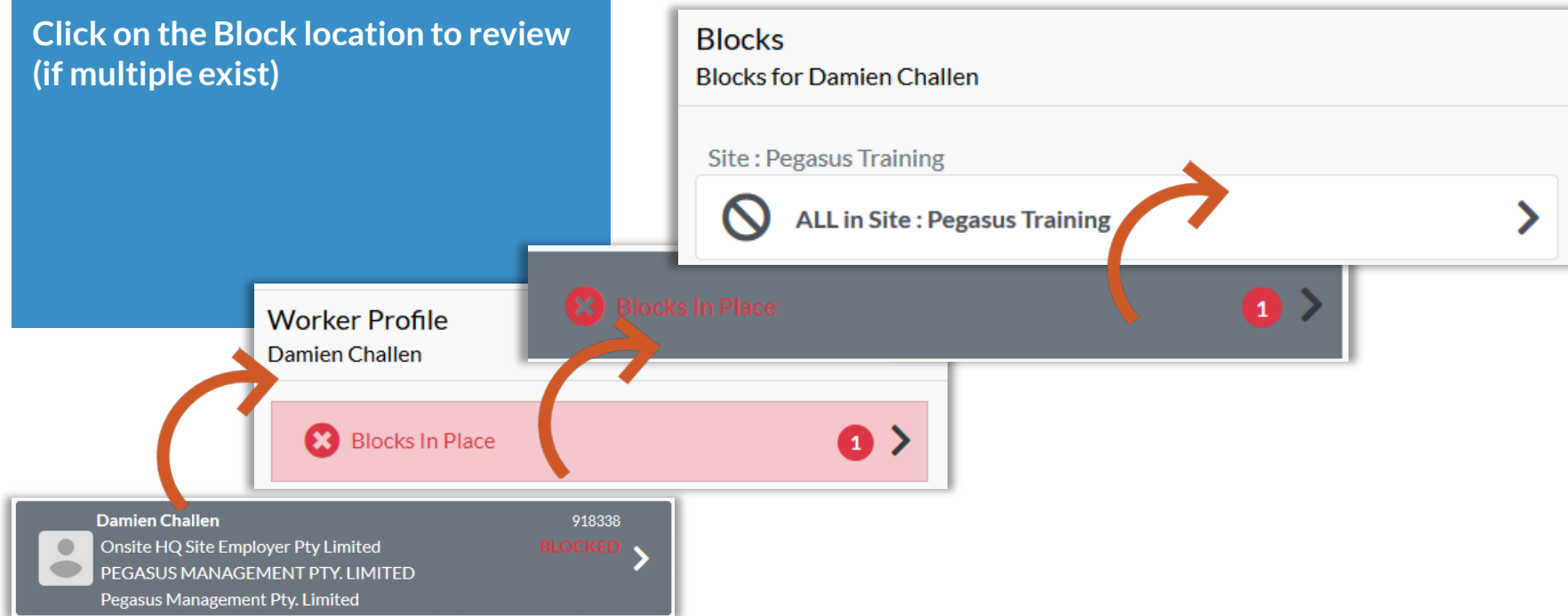
Worker is now Blocked.

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 at
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?



ONSITE NOW & EMERGENCY EVACUATION

Viewing Worker Profiles – Onsite Now

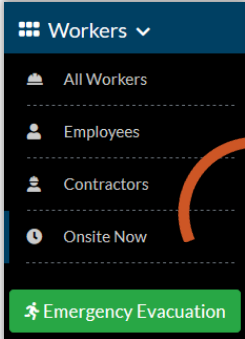
To view current Logged in Workers, click “Onsite Now”

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

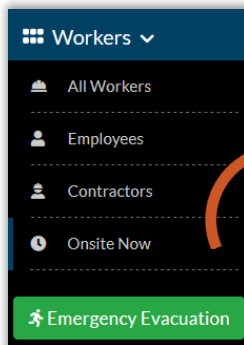


Amber = Approaching withing 2 hours of Site Fatigue Limit



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 process of assigning competencies to a worker. It shows the 'Workers' module with a search bar containing 'jamie'. The search results list 'All Workers' and a specific worker profile for 'Jamie Jamieson' at 'PEGASUS MANAGEMENT PTY. LIMITED'. The 'Competencies' tab is highlighted in the worker's profile, and a sidebar menu on the right shows the 'Competencies' tab selected, with a red circle indicating the number of competencies assigned (1).

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 image illustrates the process of adding a document to a worker's profile. It features several overlapping windows and a blue instruction box.

- Instruction Box (Blue):** Contains the following steps:
 - 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 Add Document Form:** A form with fields for:
 - Uploaded By: Damien Challen (918...)
 - Description: (Empty text box)
 - Document: (Choose file / Browse)
 - Buttons: Cancel, Save
- File Selection Dialog:** Shows 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 and a red arrow pointing to the 'Open' button.
- Worker's Document View:** Shows the document 'compliance.pdf' with a PDF icon and the title 'Training Evidence'. Below the icon, it lists:
 - Document: compliance.pdf
 - Uploaded By: Damien Challen
 - Uploaded Date: 8 Jan 2020
 - Authority: Pegasus
 - Associated By: Damien Challen
 - Associated Date: 8 Jan 2020A cloud icon with a download arrow is visible at the bottom right of the document view.



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 Complete, Incomplete, and Inactive Crews are listed

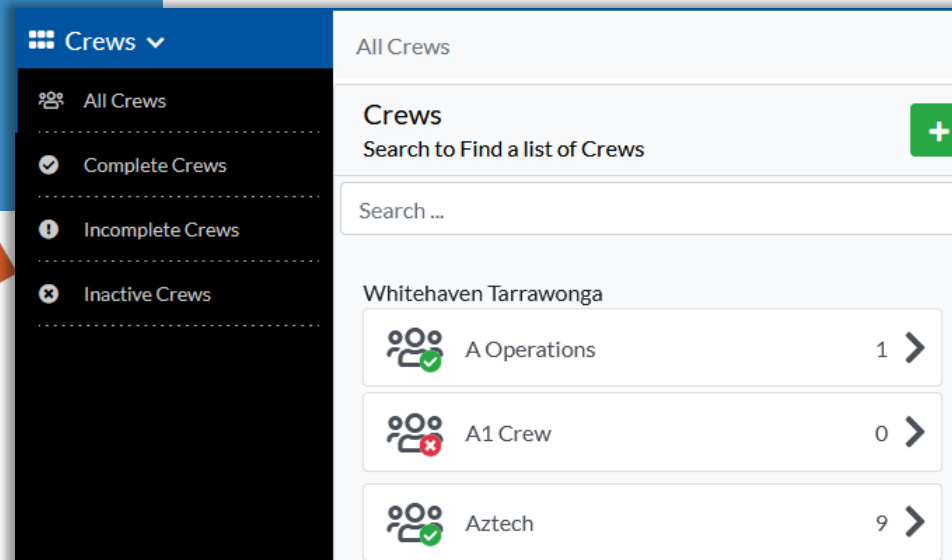
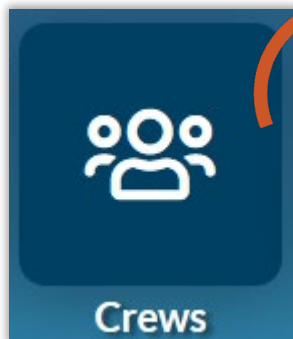
Click on a relevant Crew to view its Members

Active Crew = In Use

Inactive Crew = Disabled/not for reporting

Incomplete Crew = Has not met crew minimum 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.



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 'Pegasus Training' interface. On the left, a list of crews is shown:

- Blue Mountains Room Crew (2 members)
- JF Crew (11 of 1 members)
- Marketing Crew (5 members) - This crew is highlighted in grey, and an orange arrow points from it to the detailed view on the right.
- Payroll Team (0 members)

The detailed view on the right is titled 'Crew Profile Marketing Crew' and includes a yellow edit icon in the top right corner. It features a large icon of three people with a green checkmark and the word 'Complete' below it. A table of details is shown below:

Crew	Marketing Crew
Site	Pegasus Training
Location	Pegasus Training
Min Members	0
Is Complete	✓
Is Active	✓

At the bottom of the detailed view, there is a 'Members' button with a count of 5 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 ...

	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 shows he is a worker in the Marketing Crew, with a person ID of 918338, working at Pegasus Training. He is currently a leader (indicated by a green checkmark) and is the default crew member (also indicated by a green checkmark). At the bottom of the profile, there are buttons for 'Make Default', 'Not Leader', and 'Remove'.

Member Name	Company	Person ID	Leader
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	

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

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 (Marketing Crew):

Name	Company	Phone	Status
Marko Stefanovic	PEGASUS MANAGEMENT PTY. LIMITED	1437971	Not added
Sarah Patel	PEGASUS MANAGEMENT PTY. LIMITED	1437972	Added (crown)
Damien Challen	Onsite HQ Site Employer Pty Limited PEGASUS MANAGEMENT PTY. LIMITED	918338	Added (crown)
Aaron Robinson	PEGASUS MANAGEMENT PTY. LIMITED	519111	Added (crown)
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

Orange arrows indicate the flow of information: from the "Add" button in the dialog to the "Add" button in the members list, and from the "Add" button in the dialog to the members list.

Managing Crews – Creating New

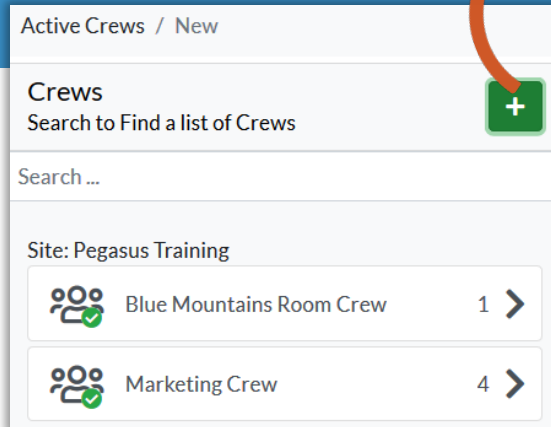
Under Active or Inactive Crew screen, click “+” to create a new crew

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



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 – Batch Job Module

When choosing to add a Crew or person type to a Training or Assessment event, you click the Bulk Add Icon.



Once chosen, the “Select All” option will appear.

Clicking this will select all workers from the group and then you can “Add” them all in one go.

A new screen will prompt.

- If you have relevant Manage Classroom/Online Onsite Track Easy permissions, you will see the Batch Cog Icon on the top toolbar.
- The Batch Job Module is hidden from view until the icon is clicked.



Add Attendee(s) to Training

Search ...

Marketing Crew

Any Types

	Adam Boyle Pegasus 24 Seven Excavations ONSITE TRACK EASY PTY LIMITED Pegasus Management Pty. Limited aboyle@pegasus.net.au	41437
	Damien Challen Pegasus ONSITE TRACK EASY PTY LIMITED Onsite HQ Site Employer Pty Limited dchallen@pegasus.net.au	918338
	Jane Smith Pegasus ivojdanoski@pegasus.net.au	3284265
	Marko Stefanovic Pegasus hpatel@pegasus.net.au	1437971
	Sarah Patel Pegasus jennifer.miller@lendlease.com	1437972

Select All Cancel Add

Add Attendee(s) to Training

Search ...

Marketing Crew

Any Types

	Adam Boyle Pegasus 24 Seven Excavations ONSITE TRACK EASY PTY LIMITED Pegasus Management Pty. Limited aboyle@pegasus.net.au	41437	✓
	Damien Challen Pegasus ONSITE TRACK EASY PTY LIMITED Onsite HQ Site Employer Pty Limited dchallen@pegasus.net.au	918338	✓
	Jane Smith Pegasus ivojdanoski@pegasus.net.au	3284265	✓
	Marko Stefanovic Pegasus hpatel@pegasus.net.au	1437971	✓
	Sarah Patel Pegasus jennifer.miller@lendlease.com	1437972	✓

Select All Cancel Add

- ✓ Can Manage Classroom Training
- ✓ Can Manage Online Training

Optional Tools – Batch Job Module

Prompts before confirming will happen whenever a batch event occurs showing possible outcome.

Once batch started, you can view progress. You can not make changes

Batch status will change over time and progress bar will be visible.

- If when bulk adding, people are already in the event they will be added to, it won't add them a second time.
- No email notifications are sent out. The Batch progress is where you will see the outcome.
- Once complete, the relevant actions will take place (emails to attendees for example).

The screenshot shows the Pegasus interface with a 'Warning' dialog box overlaid on the 'All Batches' table. The dialog box contains the following text:

Warning

You are about to add 5 workers to training.

Processing may take some time. Progress of batches can be monitored where you see

Are you sure? Yes No

The 'All Batches' table contains the following data:

#	Status	Description	Progress	Created	Creator
113	COMPLETED	TRAINING_BULK_ADD - Whitehaven Coal Open Cut Induction Classroom	24 / 24	27 Jul 2020 17:50	Rebecca
112	COMPLETED	TRAINING_BULK_ADD - Test Bec (Classroom)	24 / 24	27 Jul 2020 17:02	Arash
107	COMPLETED	TRAINING_BULK_ADD - Test Bec (Classroom)	25 / 25	27 Jul 2020 11:43	Rebecca
	COMPLETED	TRAINING_BULK_ADD - Test Bec (Online)	1 / 1	24 Jul 2020 16:02	Rebecca
	IN_PROGRESS	TRAINING_BULK_ADD - Demonstration Course	0 / 0	24 Jul 2020 10:15	Think
114	IN_PROGRESS	TRAINING_BULK_ADD - Integrity Training		29 Jul 2020 15:37	Damien

Optional Tools – Batch Job Module

You can select option to choose your view of any batches listed

You can not interact or modify.



But you can view status.

- Batches have three status
- Awaiting = Batch is yet to start processing. Visible if someone started a batch, or a large job has been just chosen to run. If you view these section after you just actioned a large batch, you will see this then.
- Processing = Batch is currently being processed
- Processed = Batch is finished and you can see status of outcome.
- For failed items in a batch, can re-run the same process against those individuals, to try again for success.


Batches
Search to Find a list of Batches

Search...

Realm : Pegasus Demonstration





 Test Bec (Online) Rebecca	2 days ago	>
 Test Bec (Online) Rebecca	2 days ago	>

Batch Profile
Test Bec (Online)


Completed

Created By **Rebecca**
Site **Realm: Pegasus Demonstration**
Created **28 Aug 2020**

Batch Items **21** >

	✓ Stephen Newman	2
	✓ Peter Eason	222
	✓ Phil Charley	32972
	✓ Transaction SWLP	897374

Optional Tools – Report

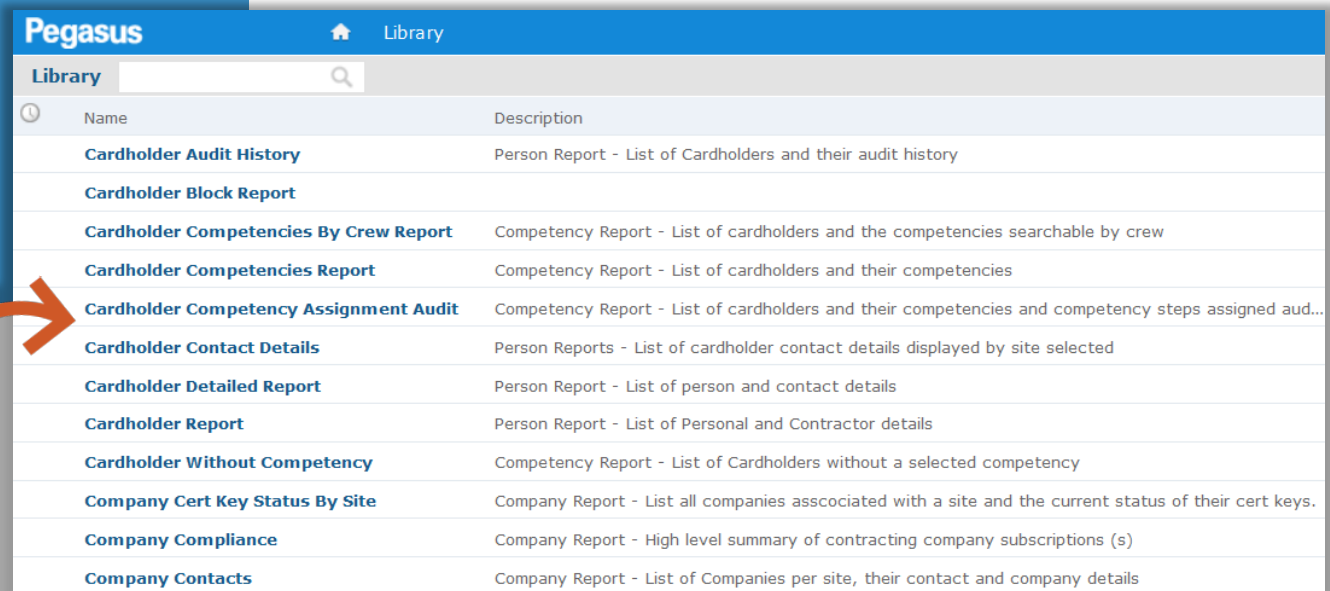
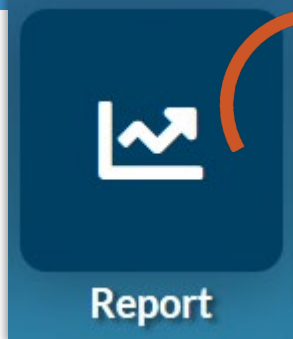
Report loads Business Intelligence Reports in a New Browser Tab

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, including "Cardholder Audit History", "Cardholder Block Report", "Cardholder Competencies By Crew Report", "Cardholder Competencies Report", "Cardholder Competency Assignment Audit", "Cardholder Contact Details", "Cardholder Detailed Report", "Cardholder Report", "Cardholder Without Competency", "Company Cert Key Status By Site", "Company Compliance", and "Company Contacts". An orange arrow points from the "Report" icon in the previous block to the "Cardholder Competency Assignment Audit" row in the table.

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 features the "onsite track easy" logo on the left and "Pegasus Training site" on the right. A navigation menu below the header includes links for home, person, company, compliance, training, safety, report, setup, help, and system. The main content area is titled "Welcome to Pegasus Training" and includes a "timezone: Australia/NSW" indicator. There are tabs for "general" and "charts", with "Latest loginout" text on the right. A red heading "Pending Data / Incomplete Actions" is followed by a "show" button. Below this, the "Latest Version 2.170.9" is displayed, followed by a "New Features" section with bullet points: "Multiple Companies", "Default Companies", "End Employment", and "Company Relationship Notifications". A sidebar on the left shows session details for user "Damien Challen" and a "change" button. At the bottom of the sidebar is an "emergency evacuation report" button.

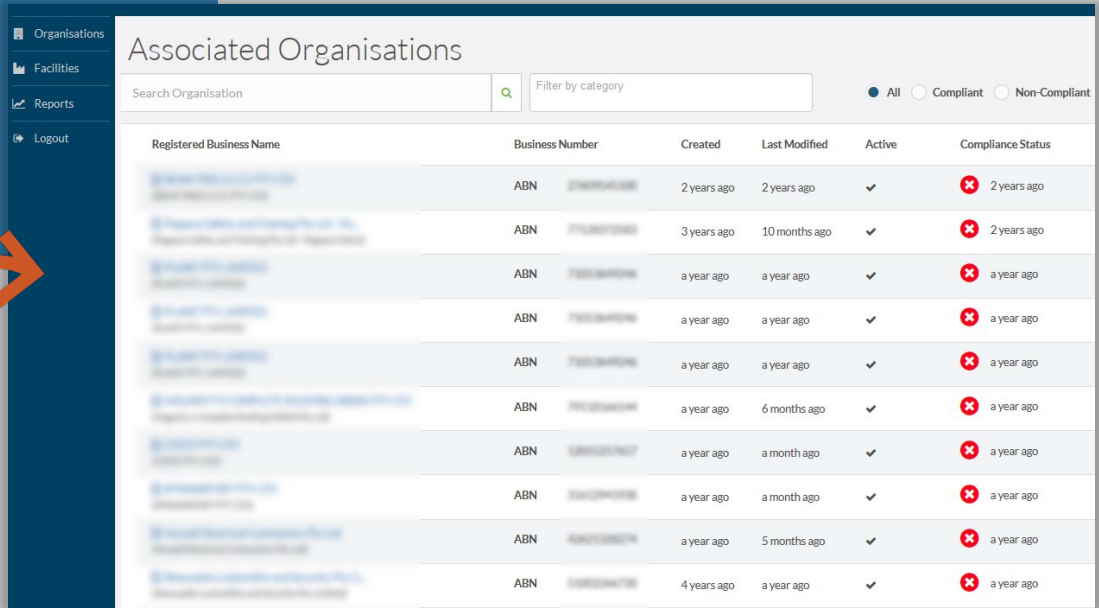
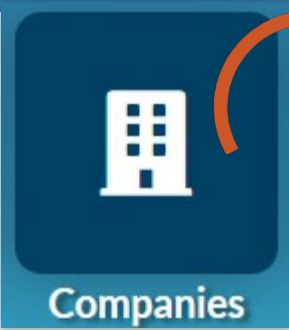
Optional Tools – Companies

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
[Redacted]	ABN 123456789	2 years ago	2 years ago	✓	✗ 2 years ago
[Redacted]	ABN 987654321	3 years ago	10 months ago	✓	✗ 2 years ago
[Redacted]	ABN 765432109	a year ago	a year ago	✓	✗ a year ago
[Redacted]	ABN 543210987	a year ago	a year ago	✓	✗ a year ago
[Redacted]	ABN 321098765	a year ago	a year ago	✓	✗ a year ago
[Redacted]	ABN 109876543	a year ago	6 months ago	✓	✗ a year ago
[Redacted]	ABN 987654321	a year ago	a month ago	✓	✗ a year ago
[Redacted]	ABN 876543210	a year ago	a month ago	✓	✗ a year ago
[Redacted]	ABN 765432109	a year ago	5 months ago	✓	✗ a year ago
[Redacted]	ABN 654321098	4 years ago	a year ago	✓	✗ a year ago



FOR QUESTIONS OR ASSISTANCE, PLEASE CALL

1300 131 194

OR EMAIL support@onsitetrackeasy.com.au