PEGASUS CLIENT PORTAL

USER GUIDE
Version 1.32
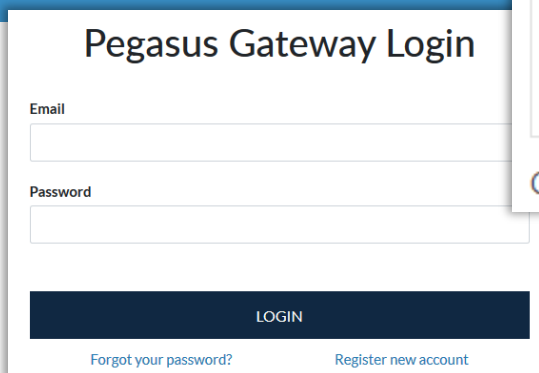
Pegasus™
Powered by Onsite

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.

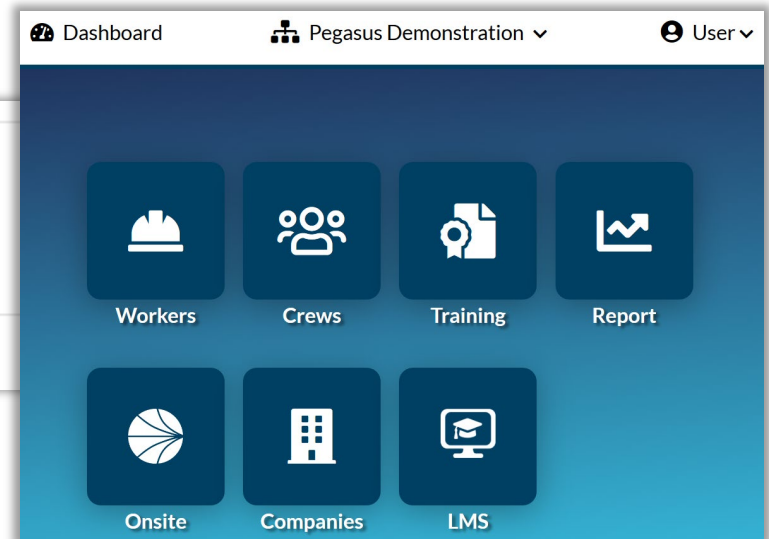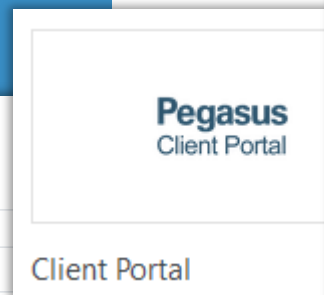- More information about the Pegasus Client Portal can be found at: https://kb.pegasus.net.au/display/CA/Client+Portal

Login to the Client Portal – Notes on your access

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

Click on "Dashboard" to return to the Pegasus Gateway screen

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

- The generic Pegasus Demonstration Realm and Site will be used throughout this documentation.

- The colour scheme you will see is the approved layout Pegasus has applied to your company.

- Some features are restricted depending upon your Onsite Track Easy User rights. You might not have the ability to edit or modify in some cases.

- Training, Report, Companies, LMS, Broadcasting and Analytics all require certain User Rights from Onsite Track Easy.
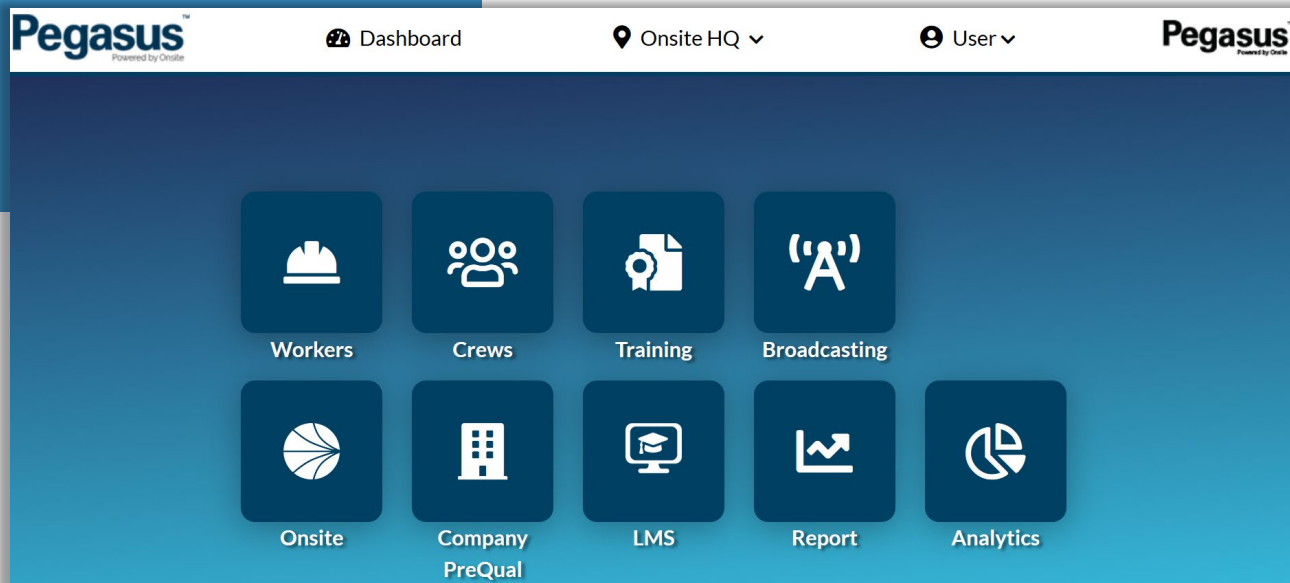
Legend Page – Common Icons and Features

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

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

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

- The Colour Status icons represent Status on pages.

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

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

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

🖥 Dashboard | 🔗 Pegasus Demonstration ▾ | 👤 User ⌄ | ⚙

- Dashboard Returns you to the Pegasus Gateway

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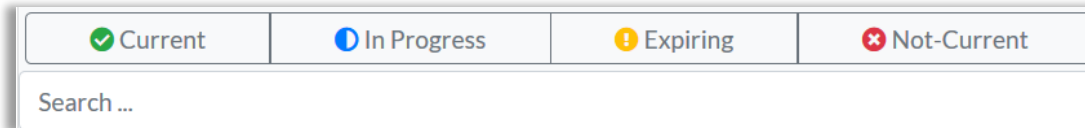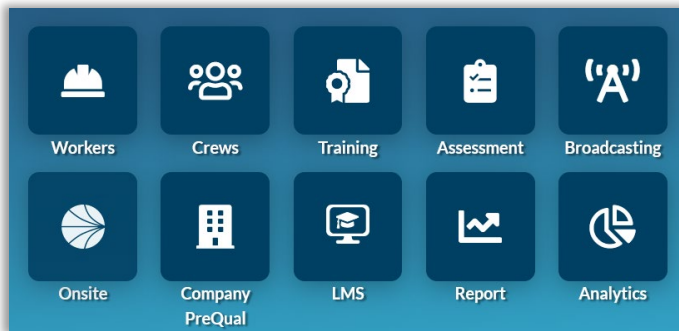
- The Onsite, Companies and LMS Tiles will open a page in a new browser window. These are separate items to the Client Portal and will open in a new window but use your Onsite Track Easy user rights and permissions.

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

Tiles: Workers | Crews | Training | Assessment | Broadcasting | Onsite | Company PreQual | LMS | Report | Analytics

✔ Current	◑ In Progress	❗ Expiring	✖ Not-Current

Search …

- 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

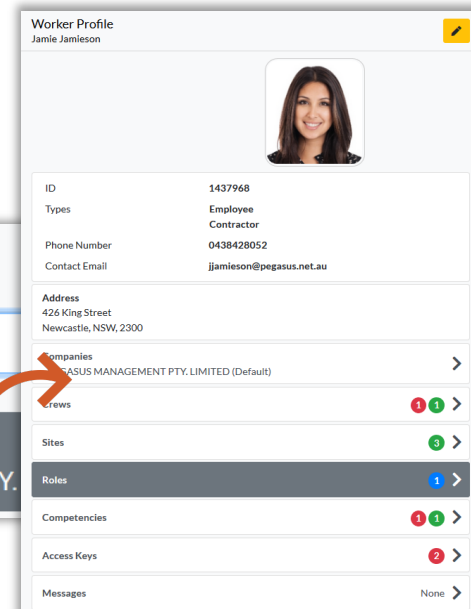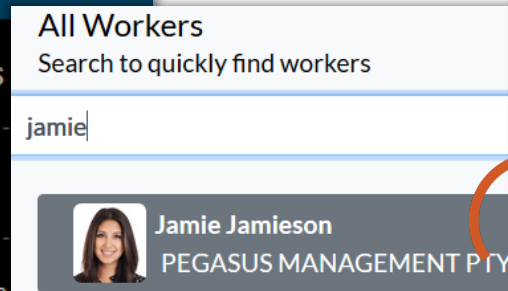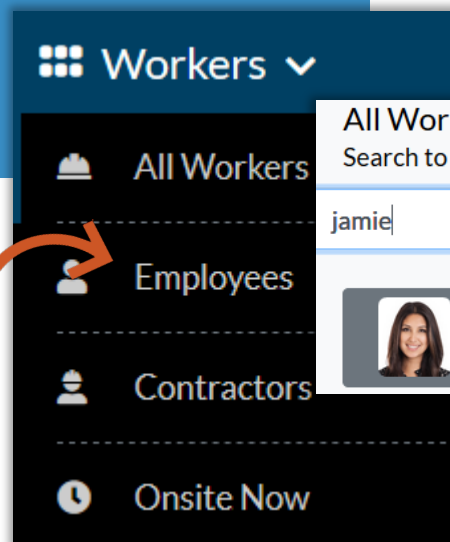# Viewing Worker Profiles

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.

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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.

USI – Can be added/modified

Card Subscriptions – shows current status for the worker only.

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

- Not all worker "sections" will have a status, it will depend upon what is enabled at site. Some sites are not using Assessments or Messages.

Worker Profile
Jamie Jamieson

ID	1437968
Types	Contractor
Date of Birth	01 Jan 1980
Phone Number	0412345678
Contact Email	webinartraining@pegasus.net.au
Unique Student Identifier (USI)	

Address
426 King Street
Newcastle, NSW, 2300

Companies
Pegasus Management Pty. Limited [Training Data] (Default) —

Card Subscriptions
Subscription expired on 06 Jan 2021

Crews — None

Sites

Roles

Competencies

Training — None

Assessments — None

Access Keys — None

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.

- Workers training email address is listed. Can be edited if required. Should be workers personal email in order for all training content to successfully be sent to worker when enrolled.

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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.

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

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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

According to Traffic Light Status system, status colours will apply so you can see 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 permissions in Onsite Track Easy.

- Competencies can be filtered through drop down box, to filter additional views as seen in screenshot below.

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ADDING AN EXISTING WORKER

Adding a Worker

Adding a worker feature allows new employees to be added to Onsite under a company.

Does require Permission

Part of adding the new worker is checking to see that a duplicate does not already exist in the system.

If a duplicate already exists, you can opt to select that found worker instead of creating a new possible duplicate.

- Must have permissions: "Access = Data Editor" and "Can Access Private Data = Enabled" in order to add new workers

- Follows similar workflow that still exists in Onsite Track Easy, but moving this into a feature of the Client Portal for Admins.
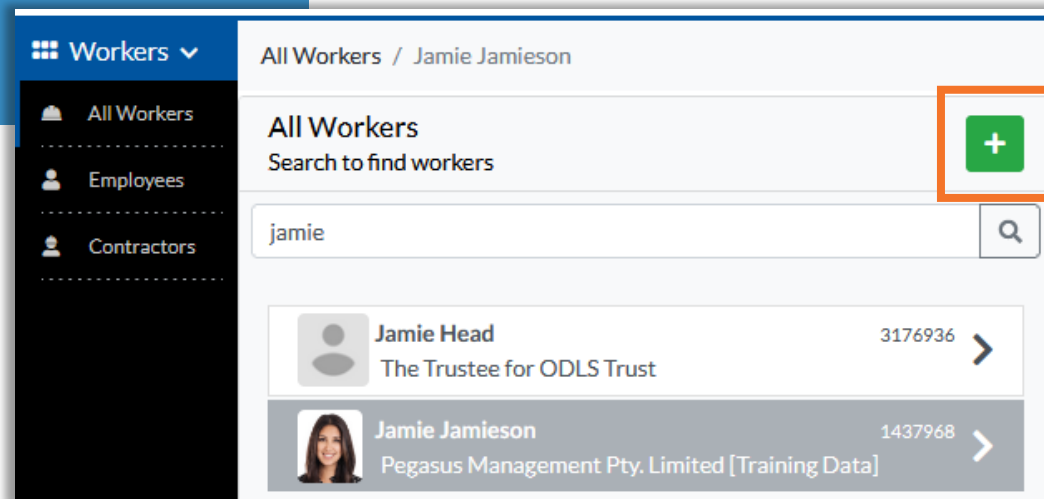
Adding a Worker – Select Existing Worker

Start adding a worker with the + icon

Input First Name

Input Last Name

Input Date of Birth

Press the Next Arrow when ready to proceed.

- Users will be able to search globally for existing workers, by inputting key information.

Adding a Worker – Select Existing Worker

Users will have the option to select an existing profile, if one is found, or create a new profile

Demo here show Joe already exists and you can see why company he works for. Permission is required to associate this existing worker.

This is a prompt to ensure correct processes are being followed.

• View below shows if existing worker is found matching details.

Adding a Worker – Select Existing Worker

Selecting Joe as the existing worker

Press Next

Will now be presented with what company they work for.

If company is NOT associated to site/realm, then will be given option to select company they work for.

Once company found, click Add to have that worker associated as an employee for that company.

- Managing workers through this process should be taken with caution, to ensure the correct company is being associated to that worker. If unsure Check with the workers company first.

Adding a Worker – Select Existing Worker

After Added, enter in required notes for the worker being added.

Press DONE when ready.

Worker page will refresh and show this worker now associated to site and what company they are working for.

- Once completed, this worker will be in the system officially as working for this company.

ADDING A NEW WORKER

Adding a Worker – New Worker

Adding a worker feature allows new employees to be added to Onsite under a company.

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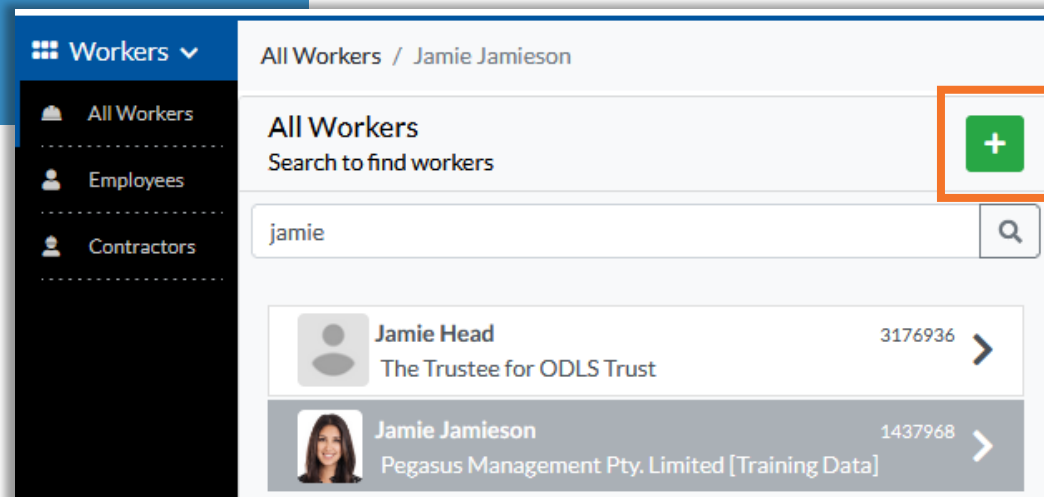
Adding a Worker – New Worker

Start adding a worker with the + icon

Input First Name

Input Last Name

Input Date of Birth

Press the Next Arrow when ready to proceed.

NOTE: Done does not become greyed out until the end of the process is reached.

- Users will be able to search globally for existing workers, by inputting key information.

Adding a Worker – New Worker

If no match is found, Press CREATE AS NEW

This will show a tick, then press the Next arrow once more to progress

- View below shows if no existing worker is found matching details.

Adding a Worker – New Worker

Add a new phot by uploading the relevant image file

A picture editor module will allow you to crop, rotate, re-align or flip the photo for best view.

Press Apply to commit this photo.

Photo can be changed again if required before continuing.

Move onto completing Workers Details

- Picture format is limited to JPG picture files only .

- Ensure photo is Passport Style Format. It should be on clear background, no sunglasses, no hats, and not blurry.

Adding a Worker – New Worker

Complete all highlighted details for the Worker. These will vary between clients.

Red bordered items are mandatory items

Once all complete press Done

- Validation will occur on some fields, or drop down lists to choose from locations (country/state)

Company

Pegasus Management Pty. Limited [Training Data]

First Name

Sarah

Middle Name

Last Name

Smedley

Date of Birth

01/12/1980

Place of Birth

Australia

Place of Birth

Contact Email

Email address is required.

Contact Phone

Phone number is required.

Gender

Next Of Kin

Relationship

First Name

First Name

Last Name

Last Name

Phone Number

Phone Number

Email

Cancel   Done

Adding a Worker – New Worker

New Unique Pegasus Worker ID now shows against their Profile

Note: For clients who enforce a Unique Email Address, the worker's email address must be exclusive for the worker's profile to be saved. The user will be advised if the worker's email address is not unique.

ID CHECKS:
A worker who has an existing ID Check recorded against their profile will have the following fields locked during the Edit Worker function:

Photo
First Name
Middle Name
Last Name
Date of Birth

- Can now edit this worker and modify any other items if required/needed to change.

Worker Profile
Sarah Smedley

ID	3869675
Types	Contractor
Date of Birth	01 Dec 1980
Phone Number	0420202020
Contact Email	test@pegasus.net.au
Unique Student Identifier (USI)	

Address
426 King Street
Newcastle, , 2300

Companies
Pegasus Management Pty. Limited [Training Data] (Default) —

Card Subscriptions   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 with have the "BLOCKED" text next to their profile.

Click on the Worker
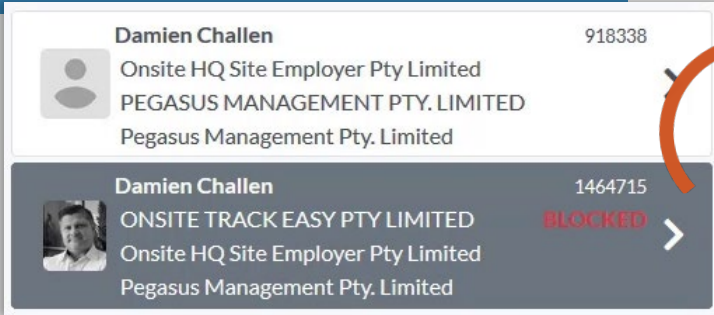
- A Blocked Worker will be denied access to log into sites at a Logpoints. An alert will be sent to listed contacts if Blocked Worker attempts site access at a logpoint.

- All users of the Client Portal can see any Blocks a Worker has.

- Blocks are also reflected in the Mobile App.
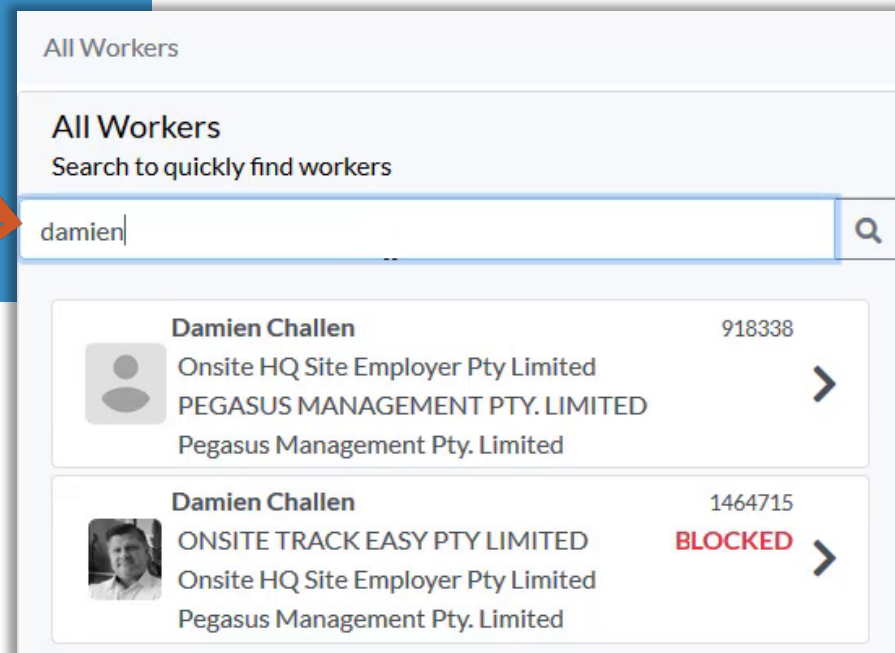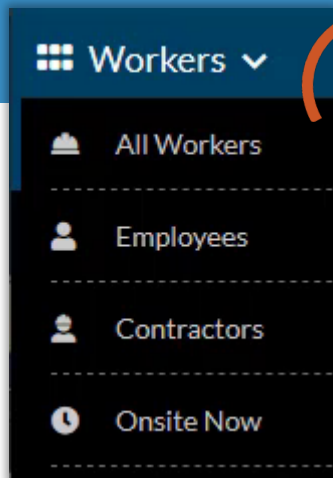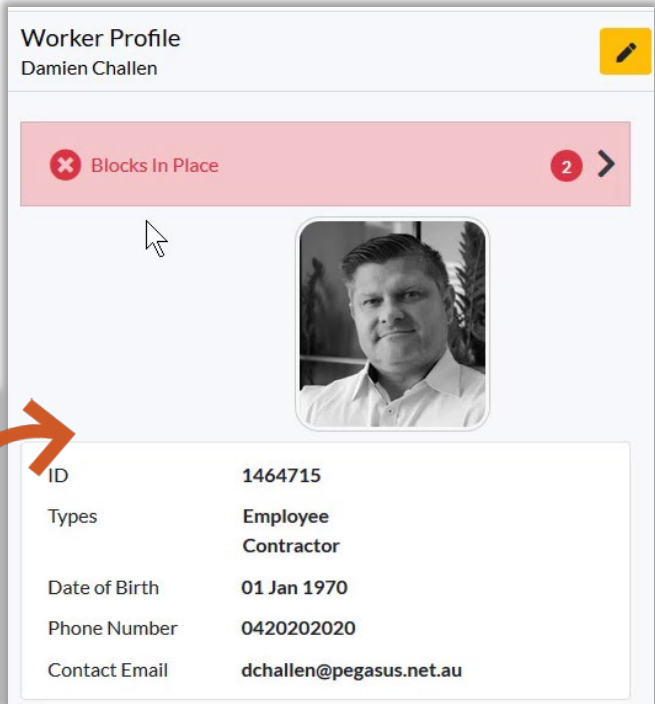
Viewing Blocked Worker Profile

Number of applied blocks will show against the Workers Profile Page

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

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

Viewing Blocked Worker Profile

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

Click on the Block you wish to read more about.

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

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

- Workers can be Blocked at the Realm, Site or at a particular Location.

- Site Alerts can be configured to alert specific email addresses if a Blocked Worker is attempting to log into an Access Point (Boomgate/Turnstile/Logpoint/Kiosk/Tablet) where they are Blocked.

- Restricted Comments can be added so only those with user right "Can Access Private Data" will be able to read.

Blocks
Blocks for Damien Challen

Realm : Pegasus Demonstration

🚫 ALL in Realm : Pegasus Demonstration >

Site : Pegasus Demonstration

🚫 ALL in Site : Pegasus Demonstration >

Worker Profile
Damien Challen

❌ Blocks In Place 2 >

ALL in Realm : Pegasus Demonstration

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

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Blocking a Worker

Click on the Worker profile you wish to Block

Click the "Block" button at the bottom right of the profile

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

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

Blocking a Worker

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

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

Authoriser Details logged against the block.

Enter in the Note for the Block.

Choose if note is restricted to certain viewers.

Press Yes when ready.

- Restricted Comments can be added so only those with user right "Can Access Private Data" will be able to read.

- Workers can be Blocked at the Realm, Site or at a particular Location.

- A Note must be given. It is recorded then as an Admin note in the Onsite Track Easy system.

| 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?   Yes   No

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

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Blocking a Worker

Worker is now Blocked.

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

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

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

Unblocking a Worker

Worker is now Blocked.

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

Click on the "Block in place" to review

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

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

- Realm level blocks will also show against a worker at all sites under that Realm

- Site blocks will only show when looking at the relevant site in the Client Portal. (unless looking at the Realm Level view)

Blocks
Blocks for Damien Challen

Site : Pegasus Training

🚫 ALL in Site : Pegasus Training ›

❌ Blocks In Place 1 ›

Worker Profile
Damien Challen

❌ Blocks In Place 1 ›

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

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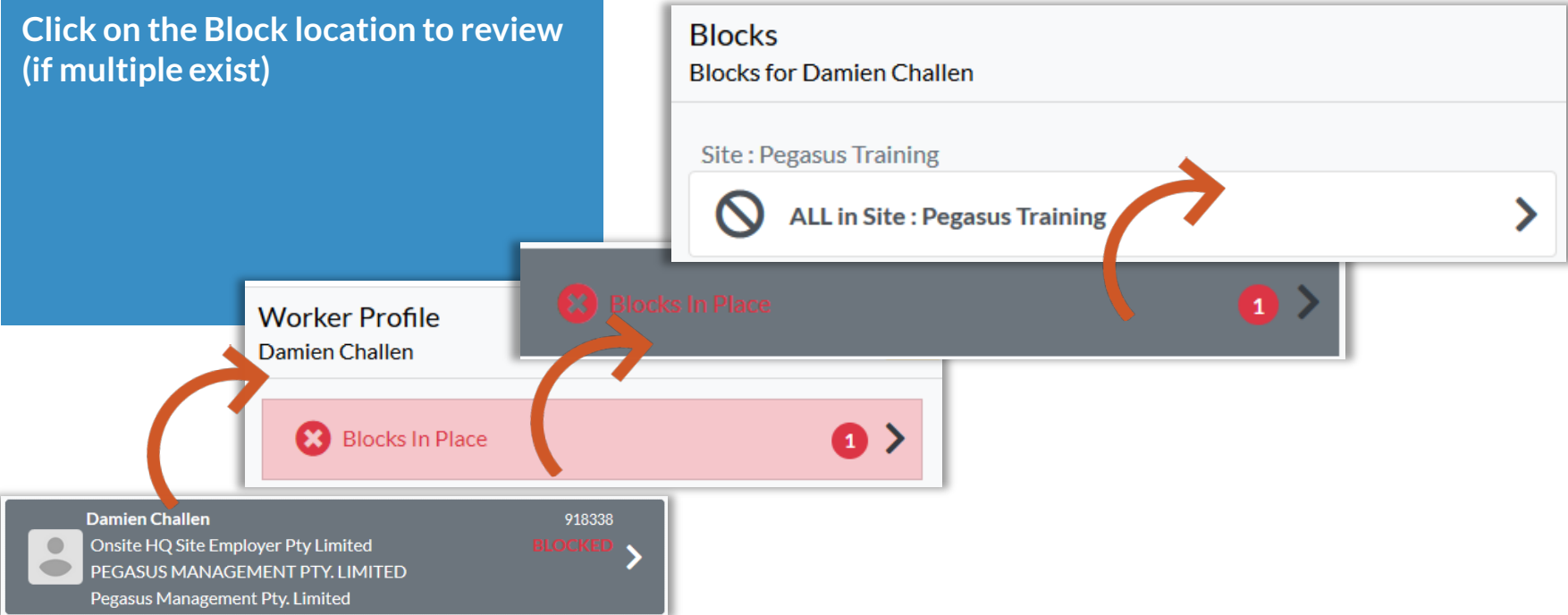
Unblocking a Worker

Click the Unblock button

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

Authoriser Details logged against the block.

Clock Yes when ready to Unblock

Cardholder will now be unblocked.

- Blocks can be edited to make note unrestricted if necessary. Must be done by user with those permissions.

- Unblock note is stored in Onsite Track Easy system as an Admin Note.

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

MANAGING ACCESS KEYS

Viewing Worker Access Keys

Enter the Worker Module

Search for Worker or scroll down through the names (defaulted to first name alphabetically).

Click on their name to view their profile

View their Existing Access Keys

- Access Key is a control that determines access to a location or site.

- An Access Key depends on competencies, so even when someone has the Access Key assigned to them, it will only work if they have all the required current competencies assigned.

- When the Access Key does not have any required competencies, simply assigning the key to a person provides them with site access.
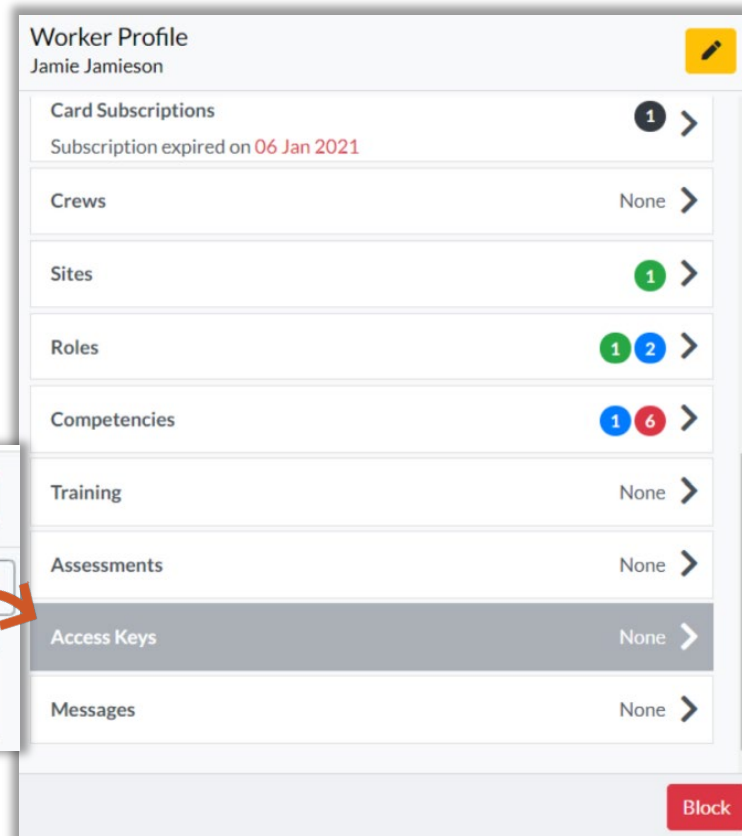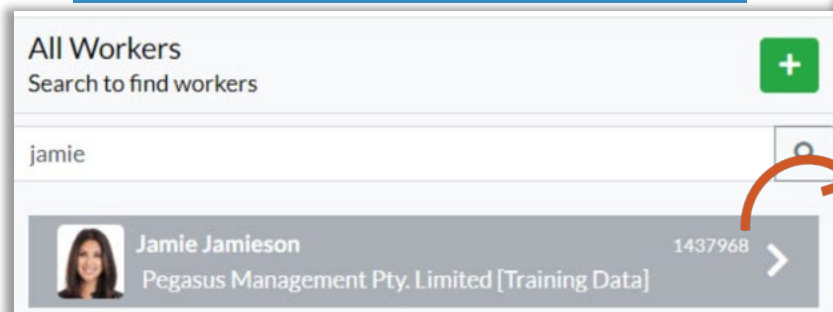
Viewing Worker Access Keys - Adding

Click on the Access Key Tile
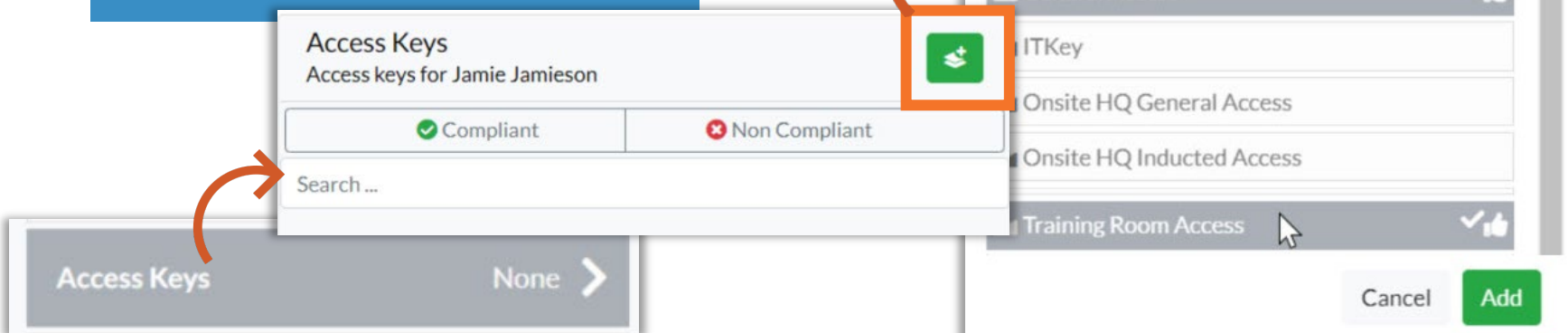
Click the Plus Sign to Add an Access Key

Choose the Access Keys to Add

All Keys can be added, but status indicator of Access Key will show Red if Worker does not meet requirements

NOTE: Some keys might be added automatically by site configuration settings.

- Can add multiple Access Keys at the same time

- Thumbs Up Indicator – Worker Meets those requirements already

- No Thumb indicator – Worker DOES NOT meet requirements.

Viewing Worker Access Keys - Adding

View Access Key Requirements by Clicking on Key

Clicking on Competencies

See breakdown of Access Key Components.

- Use Colour coding to instantly see which Competencies are Valid (**Green**) Expiring in 90 days or less (**Amber**) or Expired/Not Issues (**Red**)

Viewing Worker Access Keys - Removing

View the access key you wish to remove

Click on Remove Button

Prompt will appear to confirm action

Press yes to confirm

Access Key will be removed

NOTE: Keys can be reassigned by a site admin or the system in some circumstances.

- Removing Keys done not remove worker Competencies or Roles

ONSITE NOW, LOG OFF WORKER & EMERGENCY EVACUATION

Viewing Worker Profiles – Onsite Now

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

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

Shows fatigue status indicator

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

- Can click on Worker profile in Onsite Now to view that Workers Profile in Full

- If navigating workers onsite of Onsite Now, will also display Icon showing if they are currently logged in.

Viewing Worker Profiles – Onsite Now

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

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

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

Or Overstayers - Over 14 Hours (Red)

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

- Green = Under Site Fatigue Limit

- Amber = Approaching withing 2 hours of Site Fatigue Limit

- Red = Over Site Fatigue Limit

- Typical Site Fatigue limit is set at 14 hours.

- Icon visible in other Worker screens while navigating Client Portal

- Number of workers in each fatigue level also shown in brackets
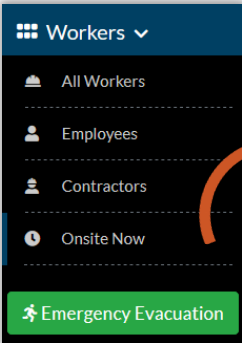
On Site Workers
Search to find workers

| ⏱ Logged In (0) | ⏱ Warning (0) | ⏱ Overstayer (6) |

Search ...

BEN SATCHELL
PEGASUS
31 Aug 2021 23:06 (AMAZON KIOSK 1)   3832653

BEN SATCH
PEGASUS
31 Aug 2021 13:57 (AMAZON KIOSK 1)   3832561

⋮⋮⋮ Workers ⌄
- ⛑ All Workers
- 👤 Employees
- 👤 Contractors
- 🕐 Onsite Now
- 🏃 Emergency Evacuation

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Viewing Worker Profiles – Log Off Worker

When viewing a worker profile, the "Log Out" option is visible if the worker is currently logged in at site

"Log Out" also appears in Onsite Now page when viewing a worker

To action a worker, Click on "Log Out"

Enter in any mandatory field items

Click Yes when asked are you sure.

Worker is the logged out of site.

- Only appears if have the user right " can Log persons in and out"

- Will need to give reason before able to apply the logout

- Will record the person making the logout in admin notes for later review.

- Once logged out, worker will no longer appear in onsite now reports until they log back in.

Onsite Workers
Search to find workers

| Logged In | Warning |

Search ...

Damien Challen
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)

Overstayer

ID	1464715
Types	Employee
	Contractor

Attendance
| Login | 4 May 2020 11:13 |
| Site | **Pegasus Training** |

Log Out   Block

Logged Out By

Damien Challen (918261)

I know this person has left site because

Confirmed by trusted associate of person

Note

Left site Earlier to go to another Job site.

Depart At

25 / 09 / 2020   13   25

Are you sure?   Yes   No

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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

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)

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 |

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Assigning Competencies to a Worker

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

It will then be highlighted, now click "Add"

This will then open the Assign Competency screen again

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

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

- **Important that you apply at the correct level. Talk to a Pegasus representative if you are unsure!**

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.

- For more information on Pending Steps, please see this video

- 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.

Assigning Competencies to a Worker – Changing Progress

View Progress Section

Click on Incomplete Action required

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

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

- Additional steps might be required to change progress of a competency from "In Progress" to "Competent"

- Each step completed will have information added as to who completed that step. In example below, Damien Challen is recording that Betty White did the training, but his name is recorded against this competency process step.

- Green "Trained" text indicates Progress step successfully completed

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?   No   Yes

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

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Assigning Competencies to a Worker – Completed Steps

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

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

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

- Competency will also show in Onsite Track Easy against that workers profile, with data and notes matching what was entered while approving this competency.

- Document attachments, if any, can now also be viewed by approved editors and viewers.

- User Permissions to View Documents are "Can Download Files"

Assigning Competencies to a Worker – Adding a Document

Click "+Add Document"

Click "Browse"

Click "Open" to attach document to competency

Now stored against Competency

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

- Document uploads limited to pdf, doc, docx, xls, xlsx, txt, jpg or jpeg file types

- Executable or zip/compressed files can not be attached.

- User Permissions to Add Documents are" Can Upload Files".

- User Permissions to View Documents are "Can Download Files"

ADDING ROLES

Assigning Roles to a Worker

Roles should <u>NOT</u> be assigned in the Client Portal.

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

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

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

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

- If unsure of Roles Portal website, check the client page on https://www.Pegasus.net.au/contractors for a link on the relevant client page.

- More information on roles portal here https://kb.pegasus.net.au/display/CA/Roles+Portal

RENEWING AN EXPIRED COMPETENCY

Expired/Expiring Competency – Renewing

Same process as viewing a Worker's competencies

Click on Competency under Worker Profile

Click on "Renew"

Enter in associated details and click "Save"

- Competency requirements are different for clients and the particular competency.

- Some might have additional steps, as listed in this guide, that are required before competency is "Complete"

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

[handshake] 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

56

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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.
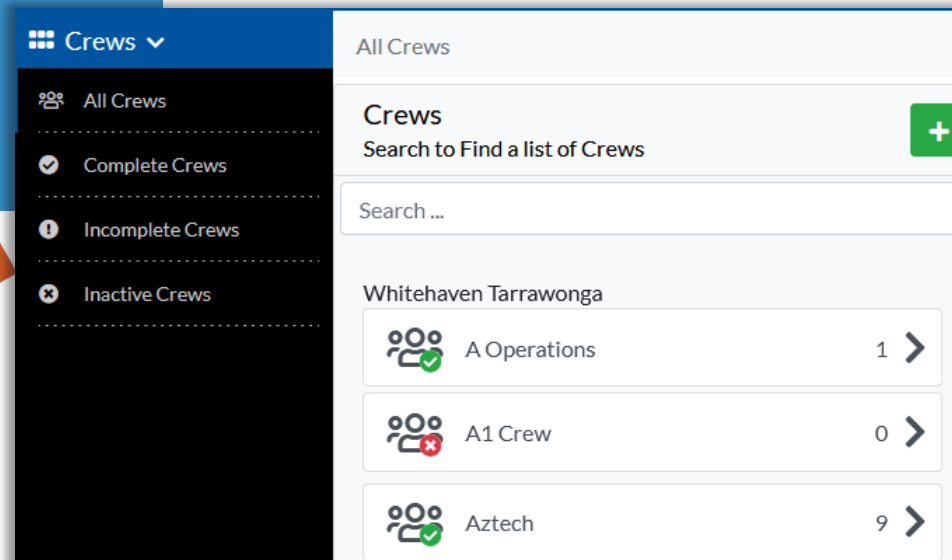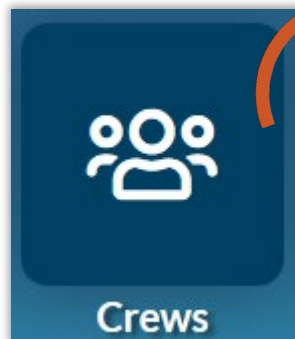
Managing Crews - Viewing

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.

Managing Crews - Viewing

Can search/filter workers out by Name or Company

Click on Crew Member to view more details

Click on a different Crew member to view their details

- Pressing Red Box Icon will change from Crew Module back to Worker Module.

- Make Leader is an optional item

Managing Crews - Viewing

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

Can be removed under worker profile if no longer Leader

- Can make Multiple People Crew Leaders, and all will have crown icon .

- Worker can also be removed from this screen.

Managing Crews – Adding Members

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

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

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

- Added people are instantly visible in crew.

- Icon to add people to crew is not visible if user rights do not allow.

Managing Crews – Creating New

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

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

Click Active or Inactive status

Click "Save" to create this Crew

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

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 >

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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.

Can Manage **Classroom Training**
Can Manage **Online Training**

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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).

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.

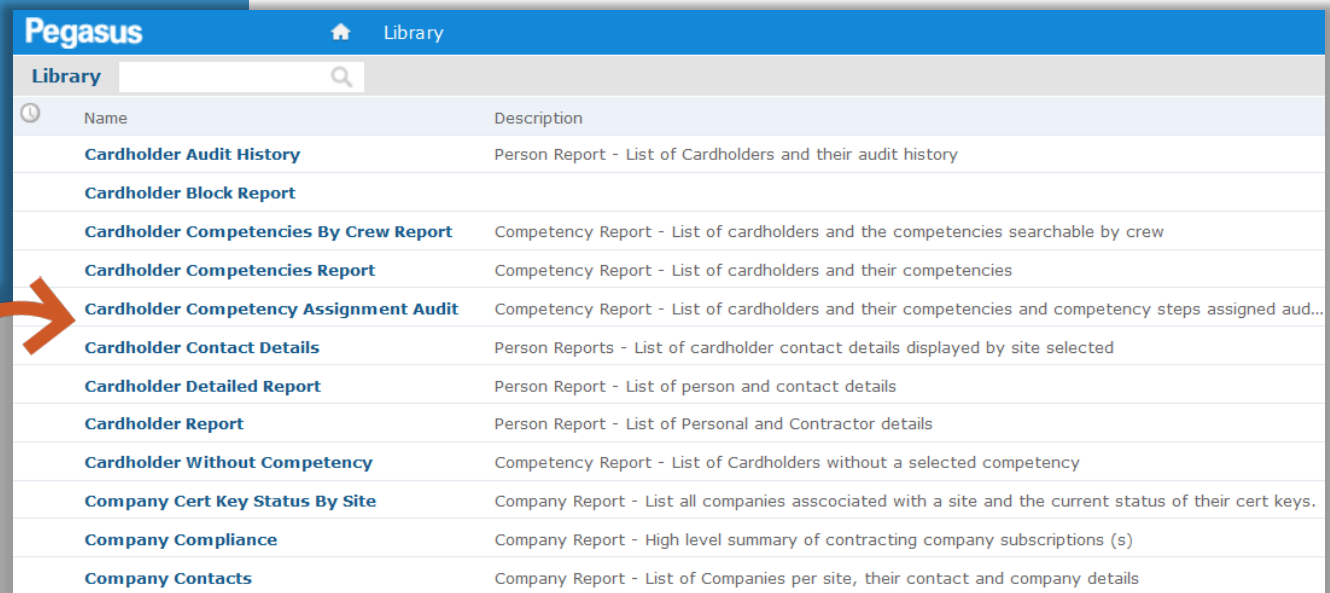# Optional Tools – Report

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
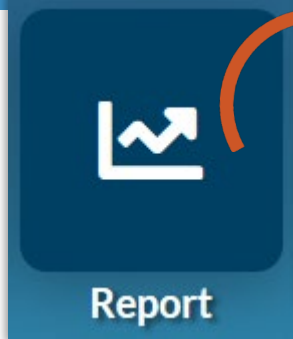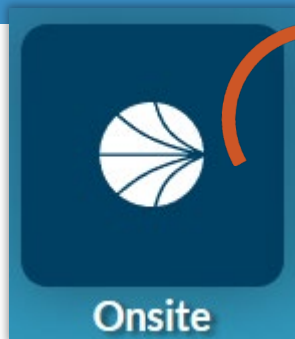

Name	Description
Cardholder Audit History	Person Report - List of Cardholders and their audit history
Cardholder Block Report	
Cardholder Competencies By Crew Report	Competency Report - List of cardholders and the competencies searchable by crew
Cardholder Competencies Report	Competency Report - List 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 asscociated 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

Report

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Optional Tools – Onsite

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

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

- Onsite contains features still not implemented in Client Portal.

- Logpoint Configuration, Safety Selections, creating new Roles and Competencies; are all items still created presently in Onsite Track Easy and are not implemented in the Client Portal.

- If you can not find the tool you need, enter Onsite Track Easy. Changes made will be reflected in the Client Portal. E.g. logging an overstayer out of onsite will reflect in the Onsite Now in Client Portal.
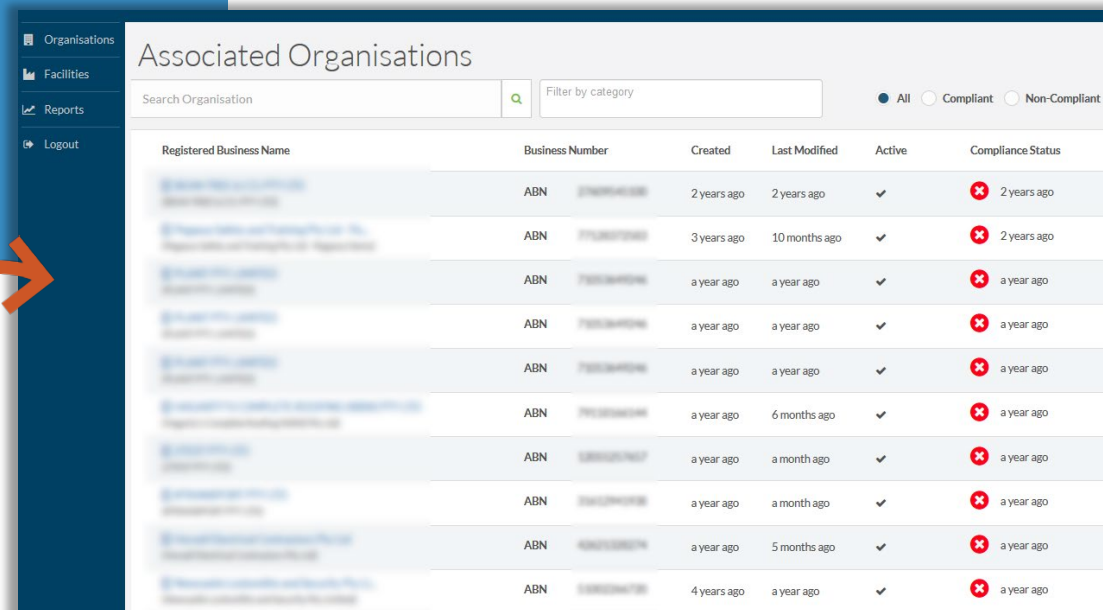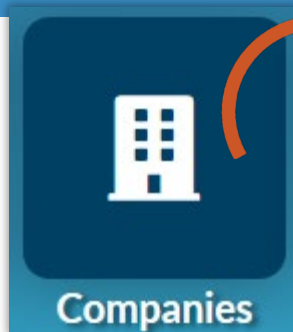
Optional Tools – Companies

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

FOR QUESTIONS OR ASSISTANCE, PLEASE CALL

1300 131 194

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

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