



PEGASUS CLIENT PORTAL

USER GUIDE

Version 1.32

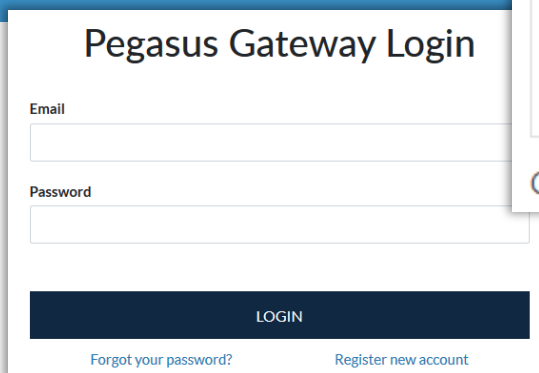
Login to the Client Portal

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

Click on the Client Portal Tab

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

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



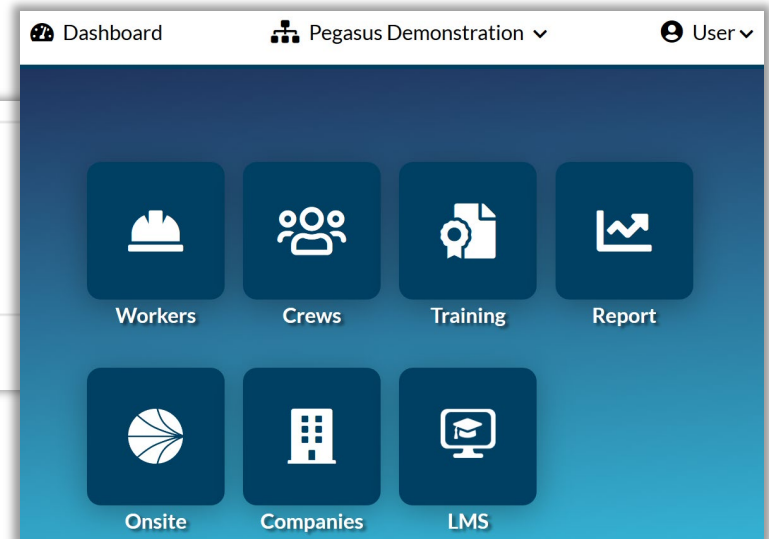
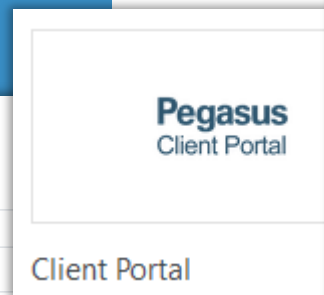
Pegasus Gateway Login

Email

Password

LOGIN

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



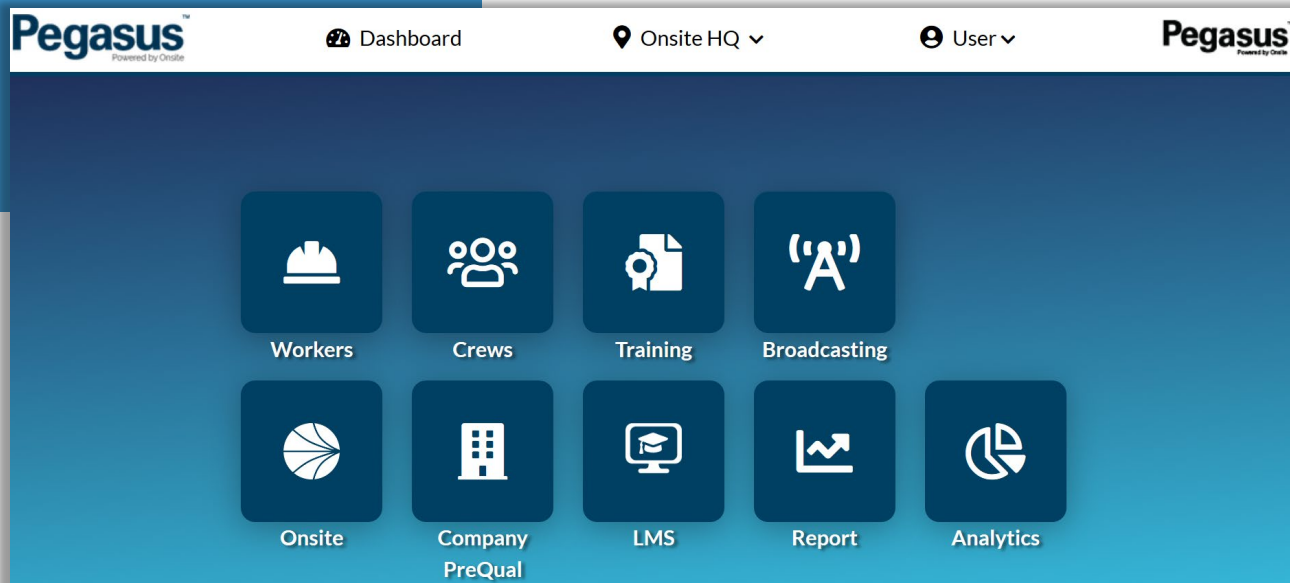
■ Login to the Client Portal – Notes on your access

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

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

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

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



Legend Page – Common Icons and Features



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



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



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

- The Colour Status icons represent Status on pages.

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

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

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

- 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.

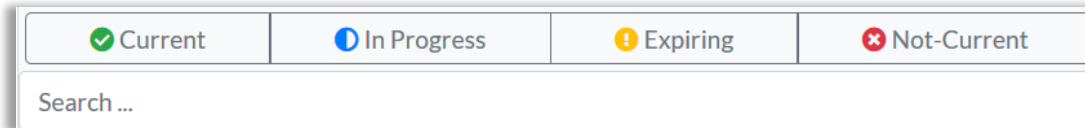
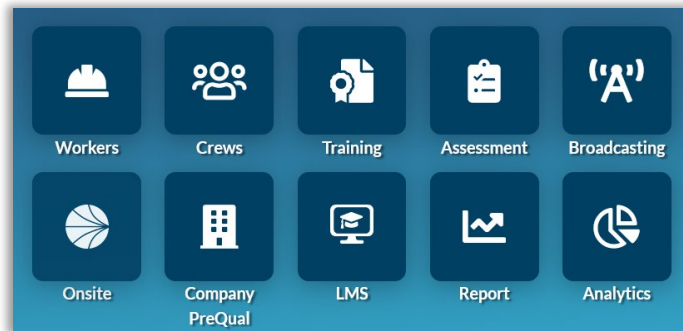
- The Onsite, Companies and LMS Tiles will open a page in a new browser window. These are separate items to the Client Portal and will open in a new window but use your Onsite Track Easy user rights and permissions.

- 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

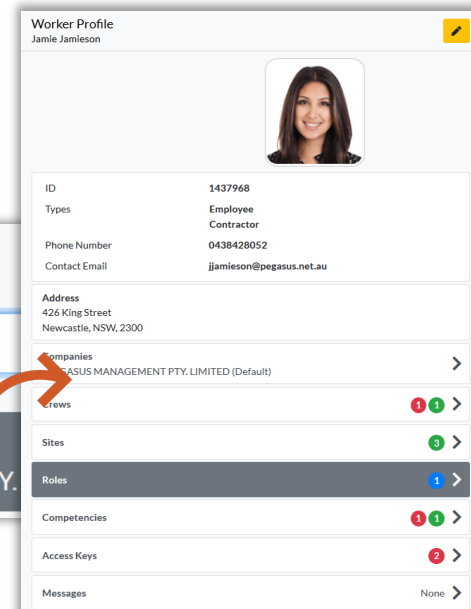
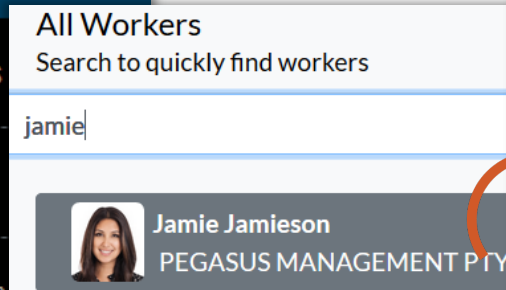
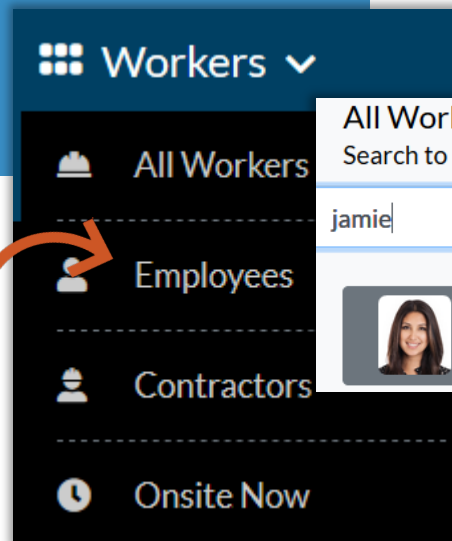
Enter the Worker Module

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.

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
1

Roles
2 1

Competencies
1 6

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.

The screenshot shows a user interface for viewing worker profiles. On the left, a blue box contains instructions. Below it, a 'Companies' section lists three companies: PEGASUS MANAGEMENT PTY. LIMITED (Default), Pegasus Safety And Training Pty Ltd, and Pegasus Management Pty. Limited. A red arrow points from the second company to a detailed view on the right. This view is divided into three sections: 'Company Summary' (Phone Number: 1300441433, Email: PegasusConcoTester@test.com, Address: 426 King Street, Newcastle NSW 2300, Company Associated?: Yes), 'Employment Details' (Training Email: webinartraining@pegasus.net.au), and 'Sites' (Pegasus Training).

Company Summary	
Phone Number	1300441433
Email	PegasusConcoTester@test.com
Address	426 King Street Newcastle NSW 2300
Company Associated?	Yes

Employment Details	
Training Email	webinartraining@pegasus.net.au

Sites	
Pegasus Training	>

Viewing Worker Profiles – Companies Section

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

Click on the Company

Scroll to bottom of page to list associated sites

Click on relevant site to see date associated

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

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

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

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

Companies
Companies for Jamie Jamieson

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

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

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

All Tabs view the same

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.

The screenshot shows a vertical navigation menu on the left with tabs for Crews, Sites, Roles, Competencies, Training, Access Keys, and Messages. The 'Roles' tab is selected, and a search overlay is displayed. The overlay has a search bar with the text 'Search ...' and a dropdown menu with the text 'Realm: Pegasus Demonstration'. To the right of the search bar are four status filters: 'Competent' (green checkmark), 'In Progress' (blue exclamation mark), 'Expiring' (yellow exclamation mark), and 'Not Competent' (red X). Below these filters are three checkboxes: 'Not Issued' (checked), 'Expired' (checked), and 'Inactive' (unchecked). An orange arrow points from the 'Roles' tab to the search bar.



ADDING AN EXISTING WORKER

Adding a Worker

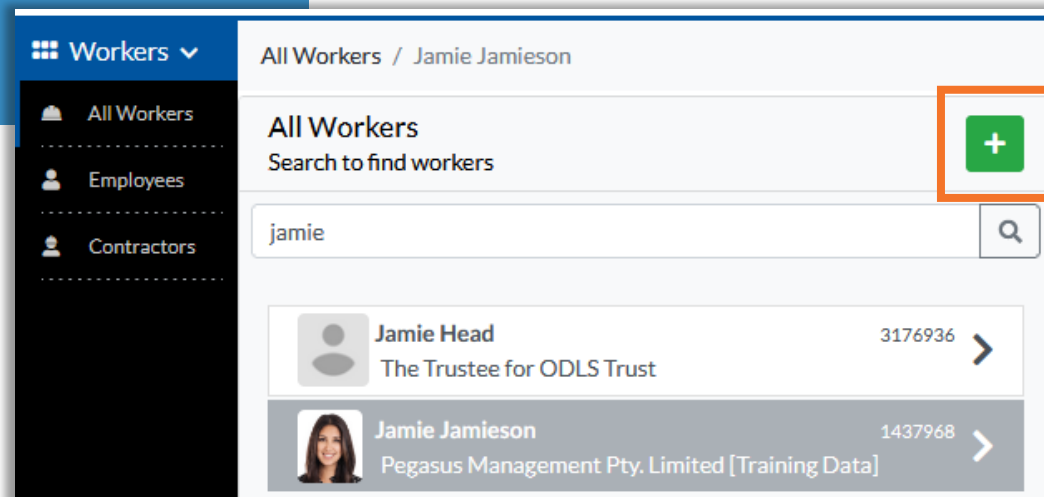
Adding a worker feature allows new employees to be added to Onsite under a company.

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.
- NOTE: Card subscriptions can not be added here but must be added and paid for through the relevant Worker Portal. See this page for more information
<https://kb.pegasus.net.au/display/CA/Worker+Portal>



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.

Worker
Add Worker

1 Start — 2 Select — 3 Finalise

First Name

First Name is required

Middle Name

Last Name

Last name is required.

Date of Birth

Date of birth is required.

Cancel **Next** Done

Workers ▾ All Workers / Jamie Jamieson

All Workers
Search to find workers

jamie

Jamie Head
The Trustee for ODLs Trust 3176936

Jamie Jamieson
Pegasus Management Pty. Limited [Training Data] 1437968

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.

The screenshot shows the 'Add Worker' interface. At the top, it says 'Worker Add Worker'. Below this is a progress bar with three steps: '1 Start', '2 Select' (which is highlighted in blue), and '3 Finalise'. A blue information box contains the following text: 'An existing worker may be in our system that matches the information you have entered. If an existing worker is found, the worker will be shown in the results below. If the search result matches the worker, select the worker, and click the next arrow. If no matches are found, select create as new, and click the next arrow.' Below this, it says '1 Match Found' and shows a card for 'Joe Blackmore' with a profile picture, name, and company 'Pegasus Management Pty. Limited [Training Data]' and ID '3344739'. At the bottom of the card is a yellow 'CREATE AS NEW' button. At the very bottom of the interface are buttons for 'Cancel', a left arrow, a right arrow (which is highlighted with an orange box), and 'Done'.

The screenshot shows a 'Permission Required' dialog box. It has a header 'Permission Required' and a checkbox that is checked with the text 'I have permission from the worker to associate to this Realm/Site'. Below this is the question 'Are you sure you want to add an existing worker?' and two buttons: 'No' (red) and 'Yes' (green). Two orange arrows point from the 'Yes' button to the right arrow button in the screenshot above.

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.

1 Start 2 Select 3 Finalise

Worker Details

Company

Company is required.

Authoriser

Damien Challen (918261)

Notes

Select a Company

pegas

- PEGASUS IT
- PEGASUS MANAGEMENT LIMITED
- PEGASUS MANAGEMENT PTY. LIMITED
- Pegasus Management Pty. Limited [TfNSW]

Cancel Add

1 Match Found

Joe Blackmore 3344739 ✓
Pegasus Management Pty. Limited [Training Data]

CREATE AS NEW

Cancel < Next > Done

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.

1 Start — 2 Select — 3 Finalise

Worker Details

Company
Pegasus Management Pty. Limited [Training Data] ...


Authoriser
Damien Challen (918261)

Notes
Associating worker to this company

Cancel Done

Worker Profile

Joe Blackmore



ID	3344739
Types	Contractor
Date of Birth	01 Jan 1977
Phone Number	0428123456
Contact Email	dchallen@pegasus.net.au
Unique Student Identifier (USI)	

Address
426 King St
Newcastle, NSW, 2300

Next of Kin

Relationship	PARTNER
Name	Joe Blackmore
Phone	0428123456
Email	[redacted]@s.net.au

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



ADDING A NEW WORKER

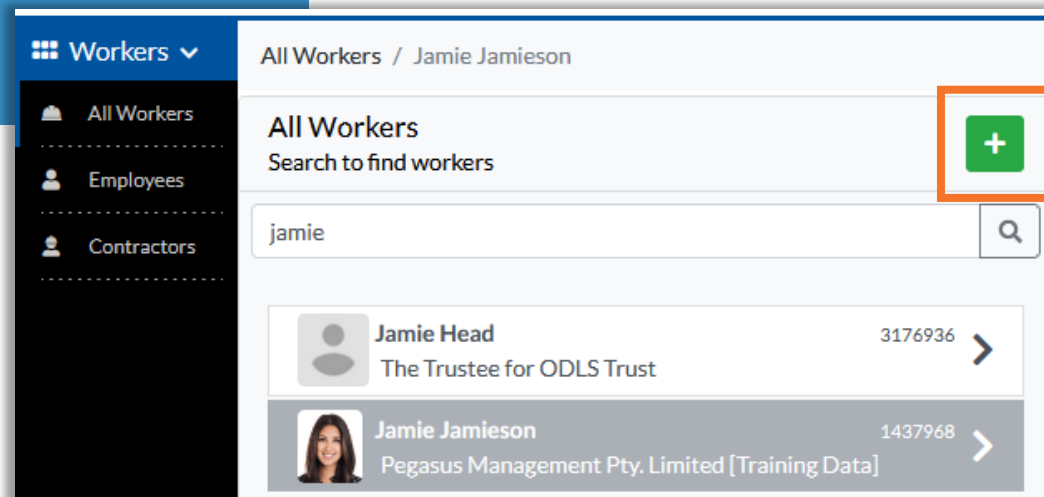
Adding a Worker – New Worker

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.

- 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 – New Worker

Start adding a worker with the + icon

Input First Name

Input Last Name

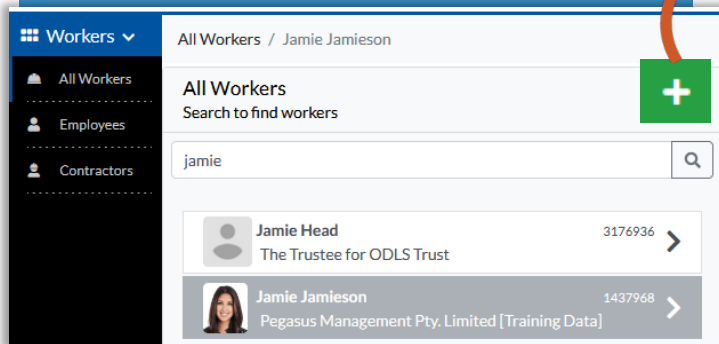
Input Date of Birth

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.



Worker
Add Worker

1 Start — 2 Select — 3 Finalise

First Name

First Name is required

Middle Name

Last Name

Last name is required.

Date of Birth

Date of birth is required.

Cancel Done

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.

The screenshot shows a dialog box titled "Worker Add Worker" with a progress indicator at the top showing three steps: 1 Start, 2 Select (highlighted), and 3 Finalise. A blue information box contains the following text:

i An existing worker may be in our system that matches the information you have entered. If an existing worker is found, the worker will be shown in the results below.

If the search result **matches** the worker, **select the worker**, and **click the next arrow**.

If **no matches** are found, **select create as new**, and **click the next arrow**.

Below the information box, the text "No Matches Found" is displayed. A yellow button labeled "CREATE AS NEW" is highlighted with a red border and a white checkmark icon in the top right corner. At the bottom of the dialog, there are buttons for "Cancel", a left arrow, a right arrow, and "Done".

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.

The diagram illustrates the workflow for adding a new worker. It begins with the 'Photo Editor' interface, which allows users to crop, rotate, re-align, or flip a photo. Once the photo is ready, the user presses 'Apply'. This leads to a 'Photo is required' prompt with 'Upload' and 'Clear' options. Clicking 'Upload' moves the user to the 'Worker Details' screen. In this screen, the photo is displayed, and the user can click 'Upload' or 'Clear'. Below the photo is a 'Company' field with a red error message 'Company is required.' The 'Worker Details' screen also features a progress indicator at the top with steps 1 Start, 2 Select, and 3 Finalise.

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)

The image shows a multi-step form for adding a new worker. The main form includes fields for Company (Pegasus Management Pty. Limited [Training Data]), First Name (Sarah), Middle Name, Last Name (Smedley), Date of Birth (01/12/1980), and Place of Birth (Australia). A modal window for 'Place of Birth' is open, showing a search box and a dropdown menu. Below it, the 'Contact Email' and 'Contact Phone' fields are highlighted with red borders and have red error messages: 'Email address is required.' and 'Phone number is required.' respectively. The 'Gender' field is a dropdown menu. To the right, a 'Next Of Kin' section is visible, with fields for Relationship, First Name, Last Name, and Phone Number. At the bottom right, there are three buttons: 'Cancel' (red), a back arrow (grey), and 'Done' (green). Orange arrows point from the 'Done' button back to the main form and from the 'Next Of Kin' section to the 'Done' button.

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.
- NOTE: Card subscriptions can not be added here but must be added and paid for through the relevant Worker Portal. See this page for more information <https://kb.pegasus.net.au/display/CA/Worker+Portal>

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

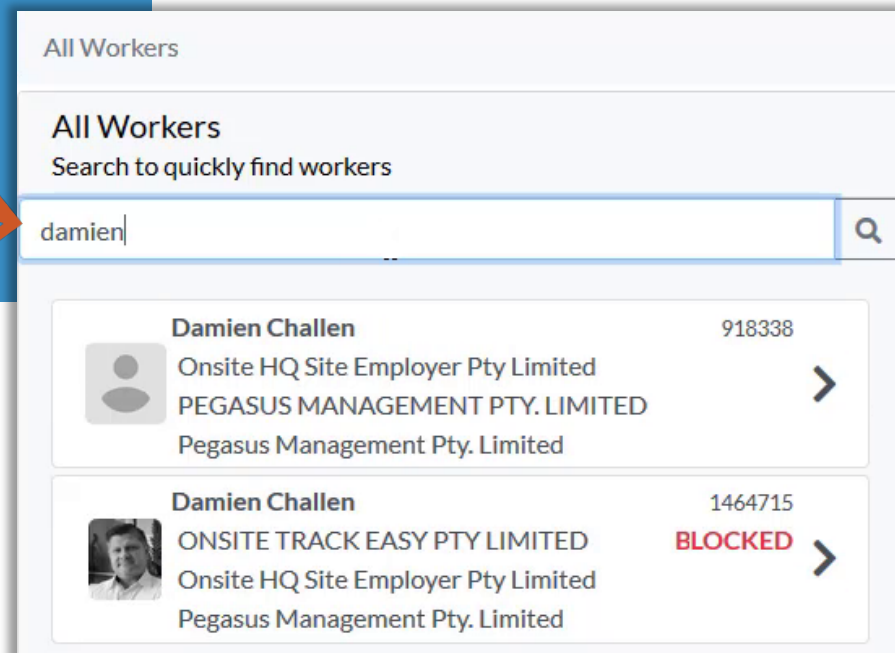
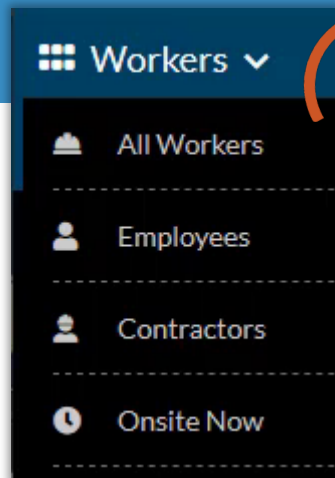
Viewing Blocked Worker Profile

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

Workers with a Site/Realm block 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.

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

Worker Profile

Damien Challen

Blocks In Place 2



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

Viewing Blocked Worker Profile

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

Click on the Block you wish to read more about.

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

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

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

Blocks
Blocks for Damien Challen

Realm : Pegasus Demonstration

- ALL in Realm : Pegasus Demonstration

Site : Pegasus Demonstration

- ALL in Site : Pegasus Demonstration

Worker Profile
Damien Challen

Blocks In Place 2

ALL in Realm : Pegasus Demonstration

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

Blocking a Worker

Click on the Worker profile you wish to Block

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

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

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

The image shows a mobile application interface. On the left is a list item for a worker profile. On the right is a detailed view of that worker's profile. An orange arrow points from the list item to the profile view, and another orange arrow points from the bottom right of the profile view to a red 'Block' button.

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

List Item: 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.

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

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	[REDACTED]
Phone Number	[REDACTED]
Contact Email	[REDACTED]

Attendance

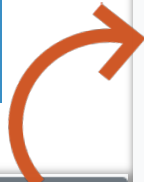
Site	Pegasus Training
Login	26 Feb 2020 10:29

Address

2 Sutcliffe St
Cameron Park, NSW, 2285

Next of Kin

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



Unblocking a Worker

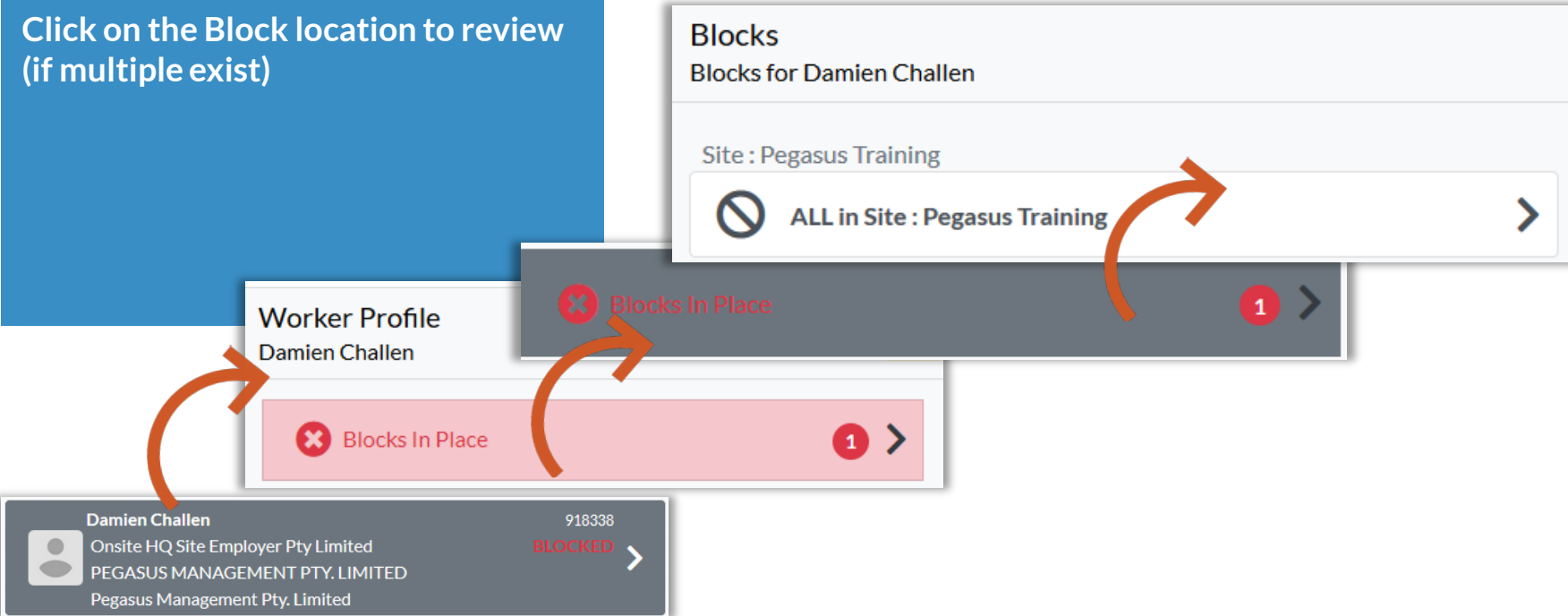
Worker is now Blocked.

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.

The image displays a sequence of three screenshots from the Pegasus Training system, illustrating the process of unblocking a worker. The first screenshot shows a list of blocks for a user named Damien Challen, with one block highlighted. The second screenshot shows the details of that block, including the authoriser (Damien Challen) and a note: "Worker has found lost card. Unblocking for this reason". The third screenshot shows a confirmation dialog asking "Are you sure you want to unblock?" with "Yes" and "No" buttons. Red arrows indicate the flow from the list to the details, and then to the confirmation dialog.

Blocks
Blocks for Damien Challen

Site : Pegasus Training

ALL in Site : Pegasus Training

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

Authoriser: Damien Challen (918261)

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

Restricted:

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

Are you sure you want to unblock?

Yes No

Unblock



MANAGING ACCESS KEYS

Viewing Worker Access Keys

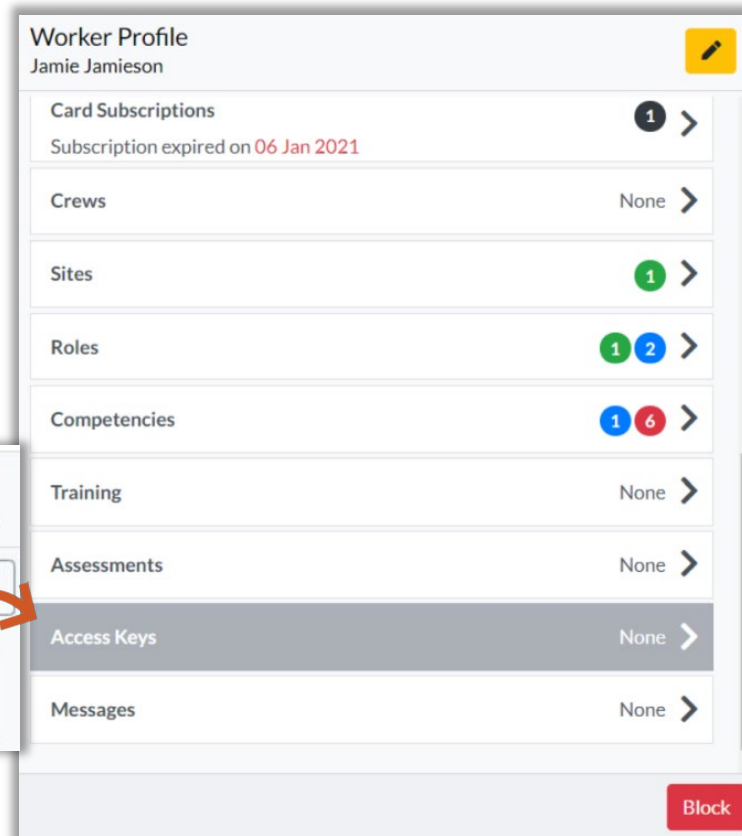
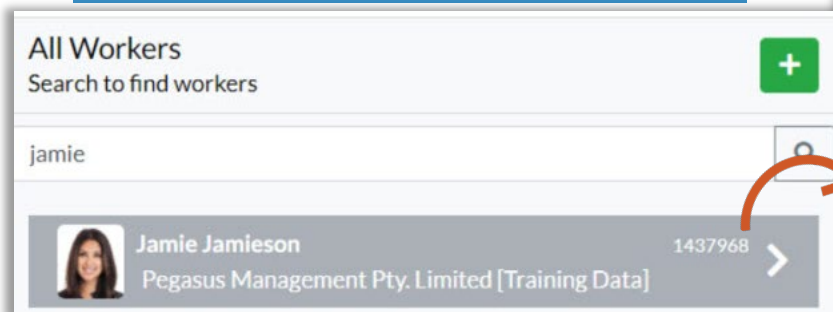
Enter the Worker Module

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

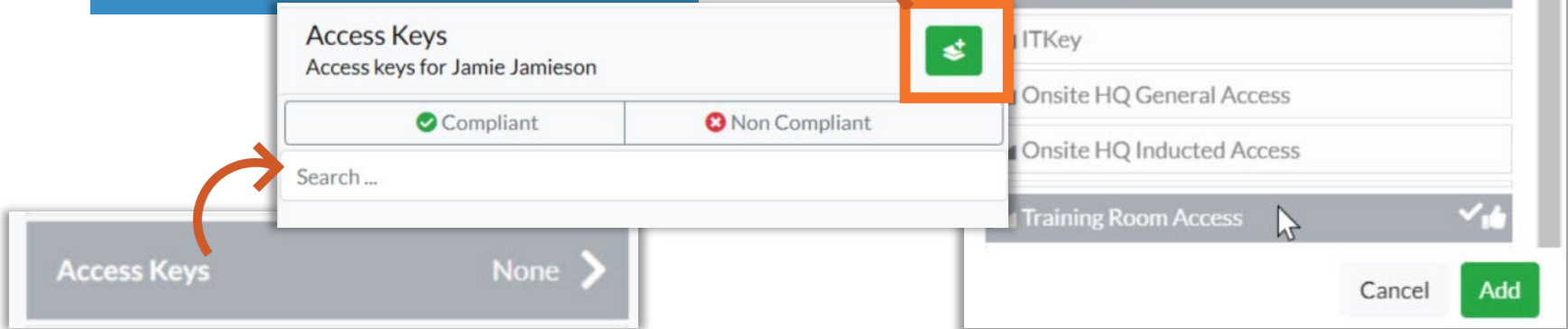
Click the Plus Sign to Add an Access Key

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.



Access Keys
Access keys for Jamie Jamieson

Compliant Non Compliant

Search ...

Access Keys None >

Add Access Keys

Search ...

Site: Onsite HQ

- Comp-less ✓ thumbs up
- Complexx Key ✓ thumbs up
- Factory Key2
- General Access ✓ thumbs up
- ITKey
- Onsite HQ General Access
- Onsite HQ Inducted Access
- Training Room Access ✓ thumbs up

Cancel Add

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)

The screenshot illustrates the workflow for viewing worker access key requirements. It shows a main menu with 'Access Keys' (4 green, 1 red), a list of key types (Comp-less, Complex Key, General Access, Training Room Access, ITKey), and a detailed view of an ITKey for Jamie Jamieson. The ITKey details include a 'Non Compliant' status, a key icon with a red 'X', and a 'Mandatory' section listing 'Software Support Controller - INT Technician.Intermediate'. A 'Competencies' section at the bottom right shows a red '1' and a right arrow.

Access Key Competencies	
ITKey	
Competent	In Progress
Expiring	Not Competent
Search ...	
Mandatory	
Software Support Controller - INT	
Technician.Intermediate	

Worker's access key	
ITKey	
Non Compliant	
Person	Jamie Jamieson
Access Key	ITKey
Site	Onsite HQ
Location	Onsite HQ
Competencies	1

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

The screenshot illustrates the process of removing an access key in the Pegasus system. It shows three main components:

- Access Keys List:** A list of access keys for 'Site: Onsite HQ'. The 'ITKey' is highlighted with a red 'x' icon, indicating it is non-compliant. A red arrow points from this key to the detailed view.
- Worker's access key ITKey:** A detailed view of the selected key. It shows the key is 'Non Compliant' with a red 'x' icon. Below this, a table lists the key's details:

Person	Jamie Jamieson
Access Key	ITKey
Site	Onsite HQ
Location	Onsite HQ

A 'Competencies' section is visible with a red '1' and a right arrow. A red 'Remove' button is located at the bottom right of this view. A red arrow points from the 'Remove' button to the confirmation dialog.
- Confirmation Dialog:** A yellow dialog box with the text: 'Removing the assignment of any access key will prevent the worker from logging in. Removing an access key/s will automatically generate an Admin Note with a timestamp and your user details.' Below the text are 'No' and 'Yes' buttons. A hand cursor is over the 'Yes' button. A red arrow points from the 'Yes' button back to the 'Access Keys' list.



ONSITE NOW, LOG OFF WORKER & EMERGENCY EVACUATION

Viewing Worker Profiles – Onsite Now

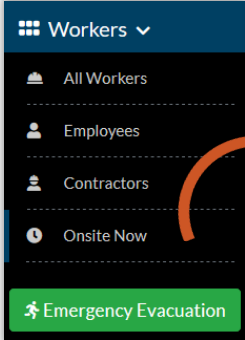
To view current Logged in Workers, click “Onsite Now”

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.



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

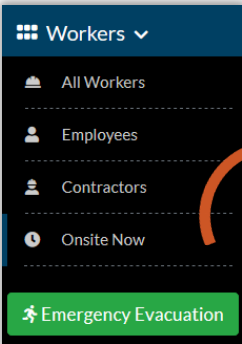


Amber = Approaching withing 2 hours of Site Fatigue Limit



Red = Over Site Fatigue Limit

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

👤	<p>BEN SATCHELL 3832653</p> <p>PEGASUS ➔</p> <p>🕒 31 Aug 2021 23:06 (AMAZON KIOSK 1)</p>
👤	<p>BEN SATCH 3832561</p> <p>PEGASUS ➔</p> <p>🕒 31 Aug 2021 13:57 (AMAZON KIOSK 1)</p>

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.

The screenshot displays the 'Onsite Workers' interface. At the top, there is a search bar and two status filters: 'Logged In' (active) and 'Warning'. Below the search bar, a list of workers is shown. The first worker, Damien Challen, is highlighted. His profile card shows a photo, a green 'Logged In' icon, and the following details: Onsite HQ Site Employer Pty Limited, ONSITE TRACK EASY PTY LIMITED, Pegasus Management Pty. Limited, Pegasus Management Pty. Limited, and 6 Jul 2020 14:00 (SWLP ONSITE HQ).

An orange arrow points from the worker's profile to a modal form titled 'Logged Out By'. The modal form contains the following fields and options:

- 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 (green button), No (red button)

Below the worker's profile card, there is a table with the following data:

ID	1464715
Types	Employee Contractor
Attendance	
Login	4 May 2020 11:13
Site	Pegasus Training

At the bottom of the worker's profile card, there are two buttons: 'Log Out' (red) and 'Block' (red). An orange arrow points from the 'Log Out' button to the modal form.

Viewing Worker Profiles – Emergency Evacuation

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

Can filter by Person

Can Print Results

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

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

Workers ▾

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

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

print by person

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

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

Logpoint: LEVEL 2 DESKTOP									
Login Time	Ago	Current Location	Person Name	Phone	Company Name	Person Type	Onsite Id	Activity	
1/29/20, 8:47 AM	7 hr:53 min51				ONSITE TRACK EASY PTY LIMITED	Employee	641751		
1/29/20, 8:46 AM	7 hr:55 min45				PEGASUS MANAGEMENT PTY. LIMITED	Employee	1489457		
1/29/20, 8:40 AM	8 hr:00 min50				PEGASUS MANAGEMENT PTY. LIMITED	Employee	114272		
1/29/20, 8:19 AM	8 hr:21 min52				PEGASUS MANAGEMENT PTY. LIMITED	Employee	1015180		
1/29/20, 7:45 AM	8 hr:56 min09				PEGASUS MANAGEMENT PTY. LIMITED	Employee	1612261		
1/22/20, 11:54 AM	52 hr:47 min04				ORACLE NETSUITE	Visitor	3343753		
1/22/20, 11:53 AM	52 hr:48 min42				ORACLE NETSUITE	Visitor	3285918		
1/22/20, 9:27 AM	55 hr:14 min25				NCIG	Visitor	3321930		



ASSIGNING COMPETENCIES

Assigning Competencies to a Worker

Enter the Worker Module

Search for your worker

Click on their name to view their profile

Scroll down and click on the Competencies Tab

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

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

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

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

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.

- 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.


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:

- + Add Document:** A button with a green border and a plus sign, highlighted by an orange arrow.
- Document Add Document:** A form with fields for:
 - Uploaded By:** Damien Challen (918...)
 - Description:** A text input field.
 - Document:** A "Choose file" button and a "Browse" button.
 - Buttons:** "Cancel" and "Save" at the bottom.
- File Selection Dialog:** A window showing a grid of files:
 - Pegasus (image)
 - Compliance.doc (Word document)
 - compliance.pdf (PDF document, highlighted with a red box and an orange arrow pointing to the 'Open' button)
 - licence.jpg (image)
 - LTM1500.jpg (image)
 - Training Upload Document.docx (Word document)
- Worker's Document:** A view for the selected document, titled "compliance.pdf". It shows:
 - Document Icon:** A PDF icon with the text "Training Evidence" below it.
 - Document Details:**
 - Uploaded By: Damien Challen
 - Uploaded Date: 8 Jan 2020
 - Authority: Pegasus
 - Associated By: Damien Challen
 - Associated Date: 8 Jan 2020
 - Download Icon:** A cloud icon with a download arrow, next to the filename "compliance.pdf".



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

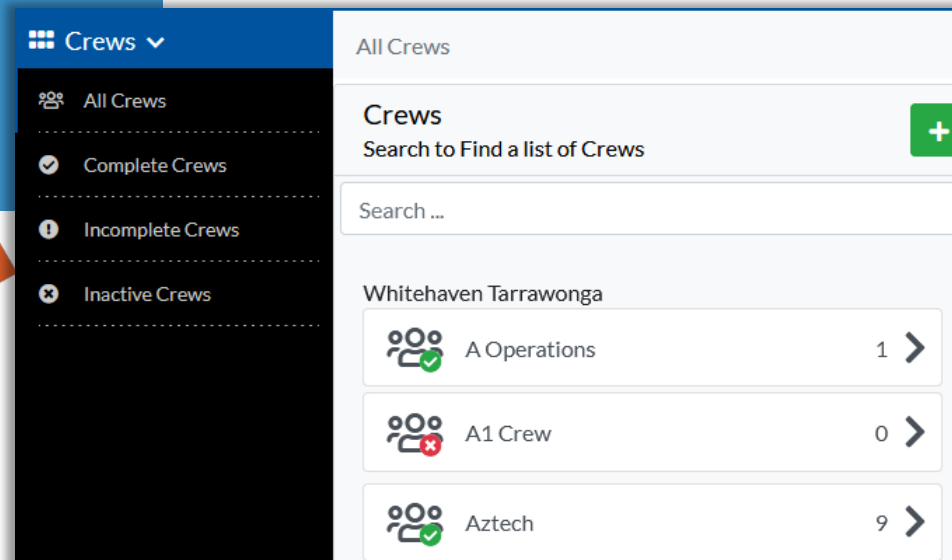
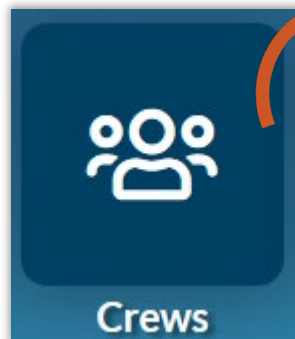
Click on a relevant Crew to view its Members

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 with a grey background and a red arrow pointing to its details.
- Payroll Team (0 members)

The 'Marketing Crew' details panel on the right shows:

- Crew Profile** (Marketing Crew)
- Complete** (indicated by a green checkmark)
- Crew**: Marketing Crew
- Site**: Pegasus Training
- Location**: Pegasus Training
- Min Members**: 0
- Is Complete**: ✓
- Is Active**: ✓
- Members**: 5

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 a crown icon next to his name in the list. To the right, the 'Crew's Member' profile for Damien Challen is shown, including a photo and a table of details.

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

Managing Crews – Adding Members

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

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

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

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

The image shows two screenshots from a software interface. On the left is a dialog box titled "Add Members To Crew" with a search bar and a list of workers. On the right is a "Members" list for a "Marketing Crew" showing the same workers after they have been added. A green square icon with a white plus sign and a person silhouette is shown below the dialog, with arrows pointing to the "Add" button in the dialog and the "Add" icon in the top right of the "Members" list.

Add Members To Crew

Search ...

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

Cancel Add

Members
Members for Marketing Crew

Search ...

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

Managing Crews – Creating New

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

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

Click Active or Inactive status

Click “Save” to create this Crew



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

Active Crews / New

Crews
Search to Find a list of Crews

Search ...

Site: Pegasus Training

-  Blue Mountains Room Crew 1 >
-  Marketing Crew 4 >

Crew
Add New Crew

Name
Payroll Team


Locations
Administration

Min Members
0

Active

Cancel Save

Crew Profile
Payroll Team


Active

Crew	Payroll Team
Site	Pegasus Training
Location	Administration
Min Members	0

Members 0 >



OPTIONAL TOOLS

Optional Tools – 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

Red arrows in the image indicate the flow from the warning dialog to the gear icon in the table, and from the gear icon to the progress bar in the table row.

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

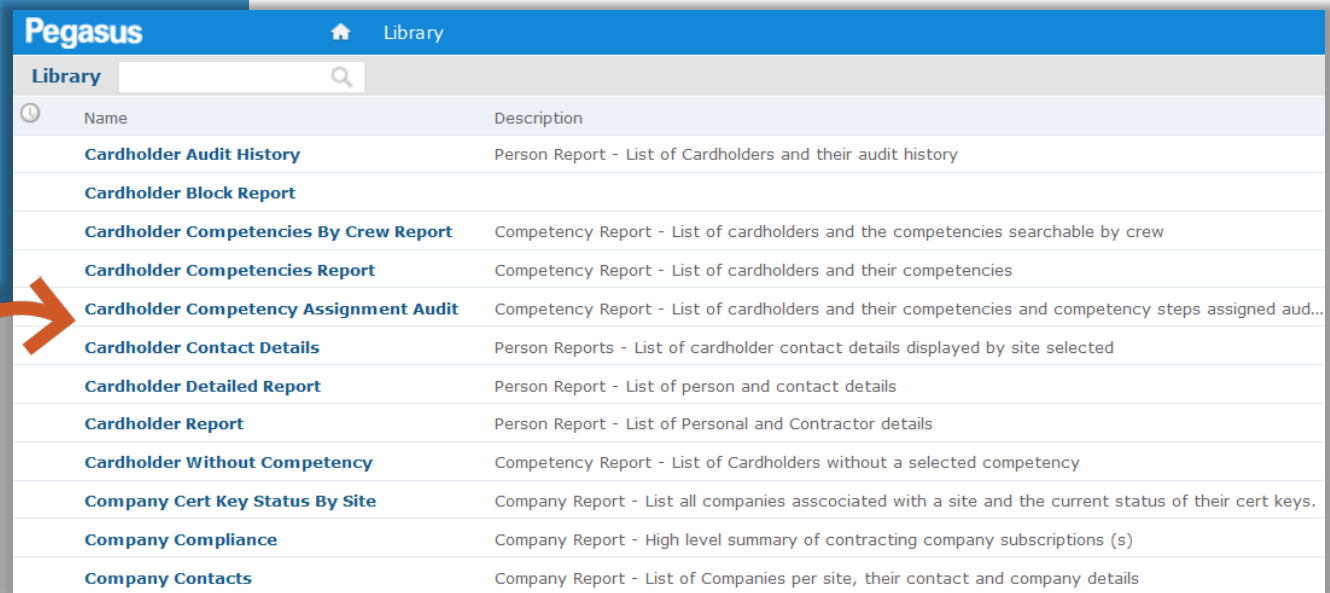
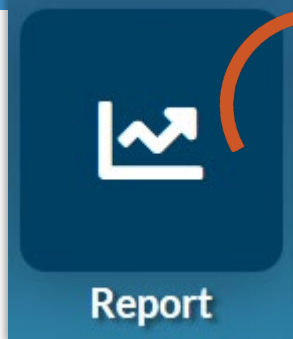
Report loads Business Intelligence Reports in a New Browser Tab

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".

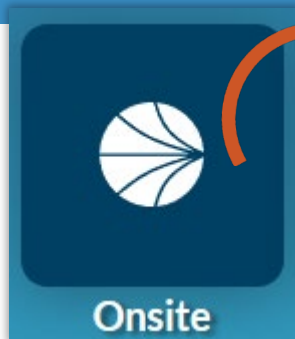
Name	Description
Cardholder Audit History	Person Report - List of Cardholders and their audit history
Cardholder Block Report	
Cardholder Competencies By Crew Report	Competency Report - List of cardholders and the competencies searchable by crew
Cardholder Competencies Report	Competency Report - List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

Optional Tools – Onsite

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

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

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



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

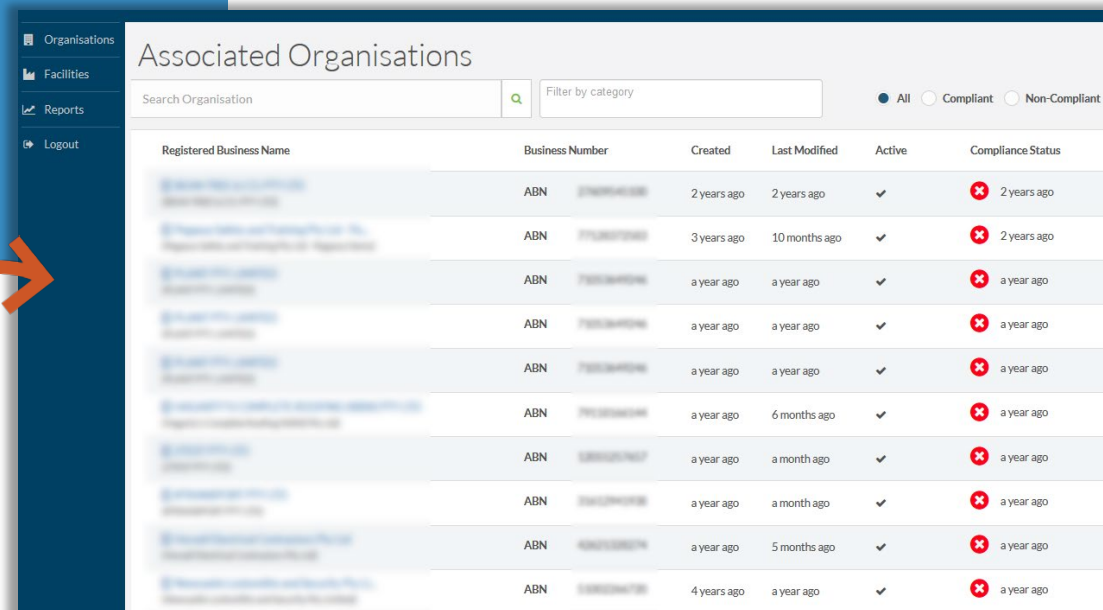
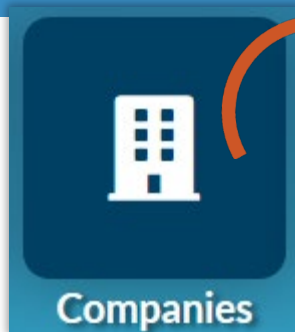
Optional Tools – Companies

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

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

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

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



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



FOR QUESTIONS OR ASSISTANCE, PLEASE CALL

1300 131 194

OR EMAIL support@onsitetrackeasy.com.au