



# PEGASUS CLIENT PORTAL

USER GUIDE

Version 1.39

# 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 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>

The image displays two screenshots of the Pegasus Client Portal interface. The left screenshot shows the login page with the Pegasus logo (an Avetta Company) and a 'My Portals' dropdown menu. The dropdown menu highlights the 'Pegasus Client Portal' option with a 'Continue' button. Below the dropdown are links for 'Forgot Login Details?', 'Create New Account', and 'What is a Pegasus Account?'. The right screenshot shows the dashboard after login, featuring a navigation bar with 'Dashboard', 'Pegasus Demonstration', and 'User' options. The main content area contains eight tiles: 'Workers', 'Crews', 'Training', 'Report', 'Onsite', 'Companies', and 'LMS', each with a corresponding icon.

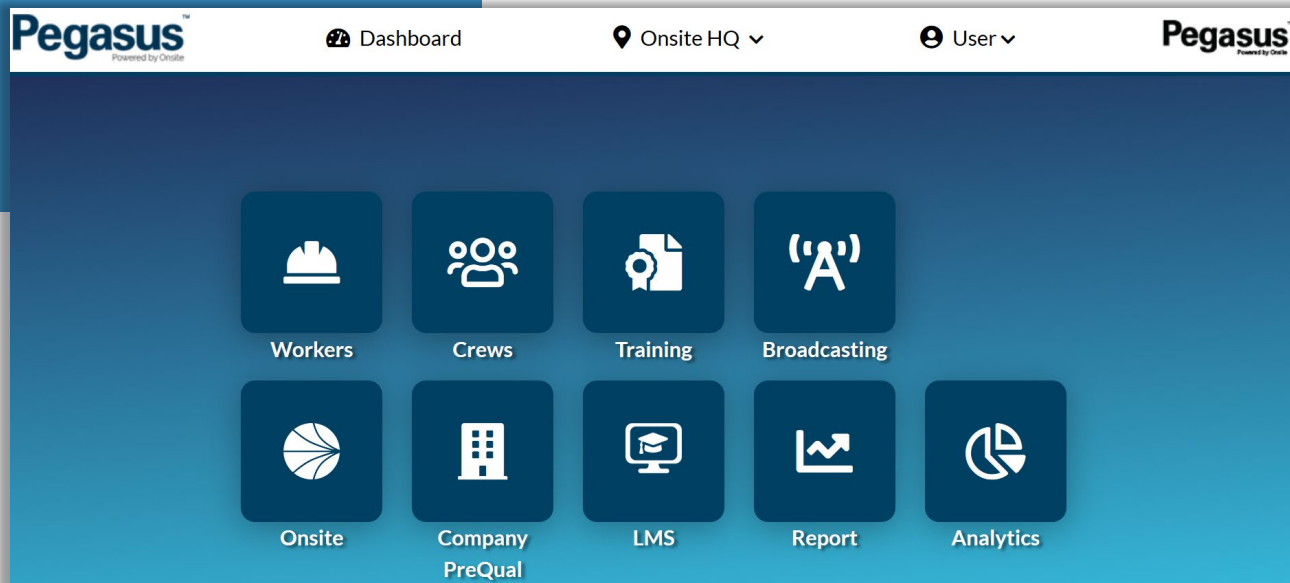
## ■ Login to the Client Portal – Notes on your access

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

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

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

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



# Legend Page – Common Icons and Features



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



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



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

- The Colour Status icons represent Status on pages.

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

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

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

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

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

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

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

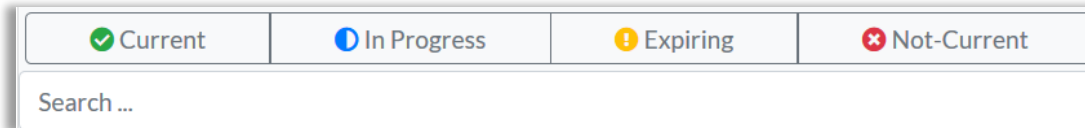
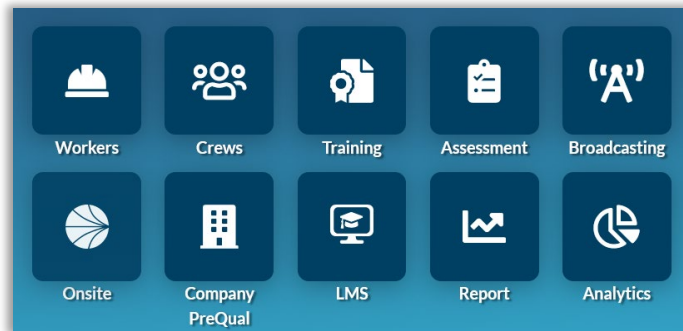
- The Onsite, Companies and LMS Tiles will open a page in a new browser window. These are separate items to the Client Portal and will open in a new window but use your Onsite Track Easy user rights and permissions.

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

- The filter option appears on various pages. Click on each status icon to filter out unwanted Competencies, Roles, Access keys, to focus on the ones you need.



- Dashboard Returns you to the Pegasus Gateway



- The Search option allows you to type in letters or words to start filtering out unwanted items. Can be used in conjunction with the Status filter.





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# VIEWING WORKER PROFILES

# Viewing Worker Profiles

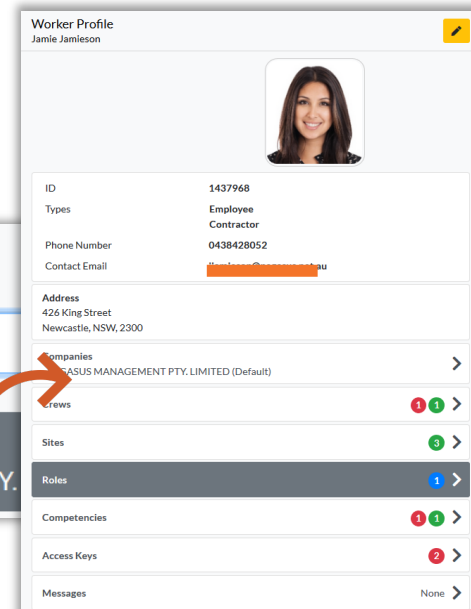
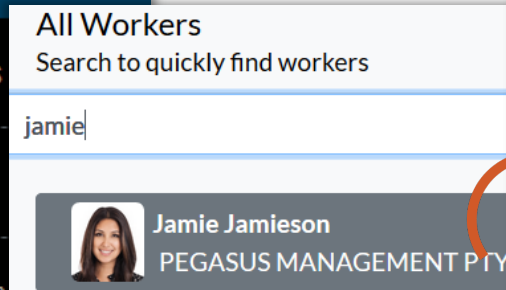
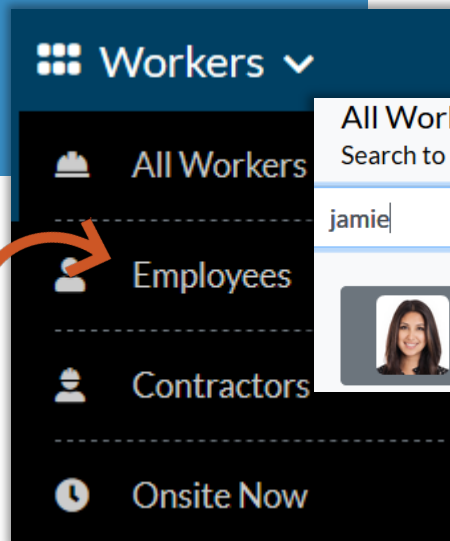
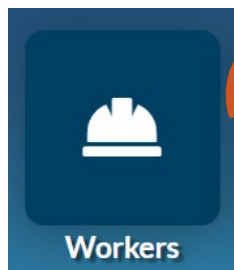
## Enter the Worker Module

Select your Worker group from the listed options.

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

Click on their name to view their profile

- Can search for workers through the All Workers, Employees or Contractor option. Onsite Now can also be used, but will only show currently logged in to site Workers
- Searching for workers can be done by:
  - First Name and/or Last Name
  - Company Name
  - ID Number
  - Combination of Name and Company Name (e.g Phil Electrical )
- Click Edit icon in top right to change worker details, if you have those user permissions.





# Viewing Worker Profiles Standard View

Viewing a Workers profile is standard.

Depending upon Workers configuration at your Site/Realm, different status will show against each item.

Can Edit Worker Personal Data and Block worker from this screen, if your account has relevant permissions.

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	v. [redacted]@pegasus.net.au
Unique Student Identifier (USI)	

Address  
426 King Street  
Newcastle, NSW, 2300

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

Card Subscriptions 1  
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. An arrow points from the second company to a detailed view on the right. This view is divided into three sections: Company Summary, Employment Details, and Sites. The Company Summary includes phone number, email, address, and location. The Employment Details section shows the training email address with an edit icon. The Sites section lists 'Pegasus Training' with a location pin icon and a right arrow.

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

Employment Details	
Training Email	worker.training@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 includes a 'Company Summary' with contact information and 'Employment Details' with training email and employee number. The 'Worker's Site Company' section includes a location pin icon and a table of site details. A 'Companies' sidebar at the bottom left lists the worker's associated companies, with 'Pegasus Demonstration' highlighted. Red arrows indicate the flow from the sidebar to the main profile view and from the 'Sites' list to the 'Worker's Site Company' details.

Worker's Company	
PEGASUS MANAGEMENT PTY. LIMITED (Default)	
<b>Company Summary</b>	
Email	tnguyen@pegasus.net.au
Address	426 King Street Newcastle NSW 2300
<b>Employment Details</b>	
Training Email	[redacted]@pegasus.net.au
Employee Number	1437968
<b>Sites</b>	
	Hilton Foods - Truganina >
	<b>Pegasus Demonstration</b> >
	Hilton Foods - Bunbury >

Worker's Site Company	
PEGASUS MANAGEMENT PTY. LIMITED (Default)	
Person	Jamie Jamieson
Company	PEGASUS MANAGEMENT PTY. LIMITED
Site	Pegasus Demonstration
Association Date	2017-06-20
Associated By	Kim Dundas

**Companies**  
Companies for Jamie Jamieson

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

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

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

All Tabs view the same

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 navigation menu with the following items:

- Crews (None)
- Sites
- Roles
- Competencies (4 red, 1 blue)
- Training (1 green)
- Access Keys (2 red)
- Messages (None)

The Competencies dropdown is open, showing a search bar and a filter menu with the following options:

- Competent (green checkmark)
- In Progress (blue exclamation mark)
- Expiring (yellow exclamation mark)
- Not Competent (red X)

The filter menu also includes checkboxes for:

- Not Issued
- Expired
- Inactive

The search bar contains the text "Search ..." and the realm is identified as "Realm: Pegasus Demonstration".



# ADDING AN EXISTING WORKER



# Adding a Worker

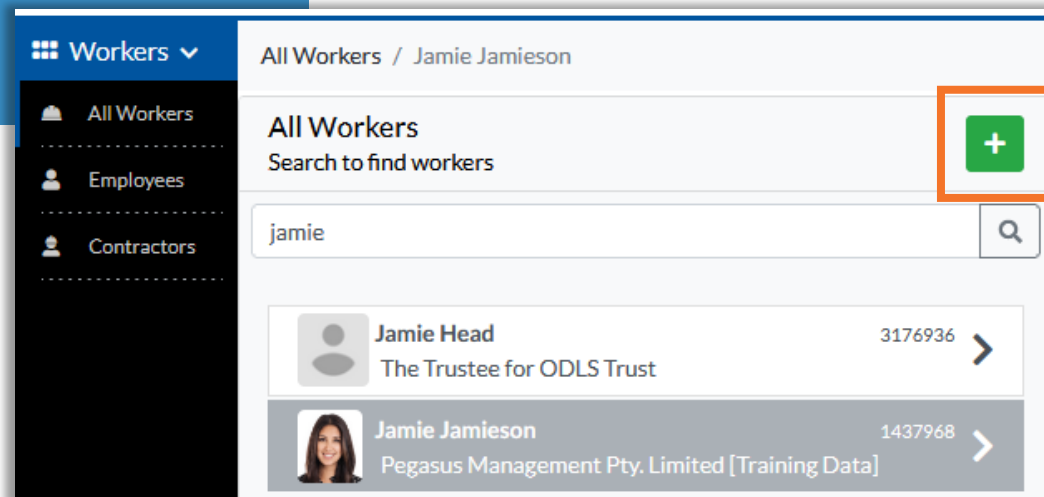
Adding a worker feature allows new employees to be added to Onsite under a company.

Does require User Permissions

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

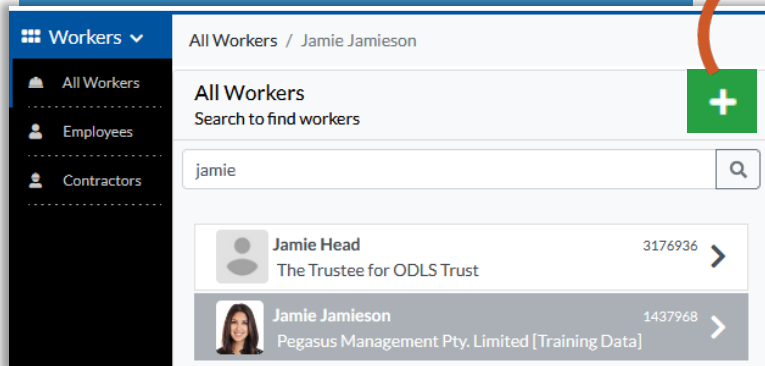
Input First Name

Input Last Name

Input Date of Birth

Press the *Next* when ready to proceed.

- Users will be able to search globally for existing workers, by inputting key information.
- Can only add workers from the All Workers section.



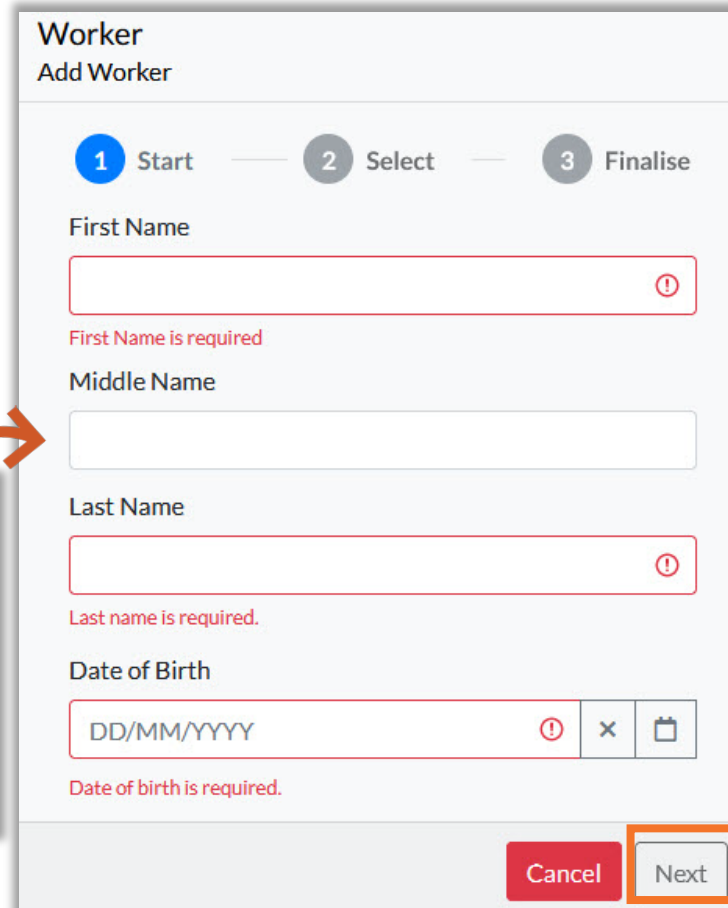
Workers ▾ All Workers / Jamie Jamieson

All Workers  
Search to find workers

jamie

Jamie Head  
The Trustee for ODLS Trust 3176936

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



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  
 DD/MM/YYYY Date of birth is required.

Cancel Next

# 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 shows Joe already exists and you can see what company he works for. Permission is required to associate this existing worker.

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

Select the existing worker to continue.

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

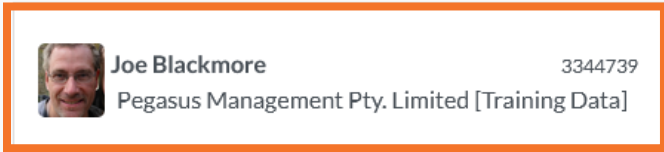
### Worker

Add Worker

1 Start — 2 **Select** — 3 Finalise

**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** to move to the next screen. If **no matches** are found, select **create as new** to move to the next screen.

1 Match Found



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

**CREATE AS NEW**

Cancel Back

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

**CREATE AS NEW**

**Permission Required**

I have permission from the worker to associate to this Realm/Site

Are you sure you want to add an existing worker?

No Yes

# Adding a Worker – Select Existing Worker

Selecting Joe as the existing worker

Press Yes

You are now asked 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.

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

**Permission Required**

I have permission from the worker to associate to this Realm/Site

Are you sure you want to add an existing worker?

No Yes

Worker  
Add Worker

1 Start — 2 Select — 3 Finalise

**Worker Details**

Company  
Pegasus Management Pty. Limited [Training Data]

Authoriser  
Damien Challen (918261)

Notes  
Adding due to requiring site access now

Select a Company

pegas

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

Cancel Add

Cancel Back 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.

Worker  
Add Worker

1 Start — 2 Select — 3 Finalise

**Worker Details**


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

Authoriser  
Damien Challen (918261)

Notes  
Adding due to requiring site access now

Cancel Back Done

Worker Profile  
Joe Blackmore



ID	3344739
Types	Contractor
Date of Birth	01 Jan 1977
Phone Number	0428123456
Contact Email	[redacted]@s.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**

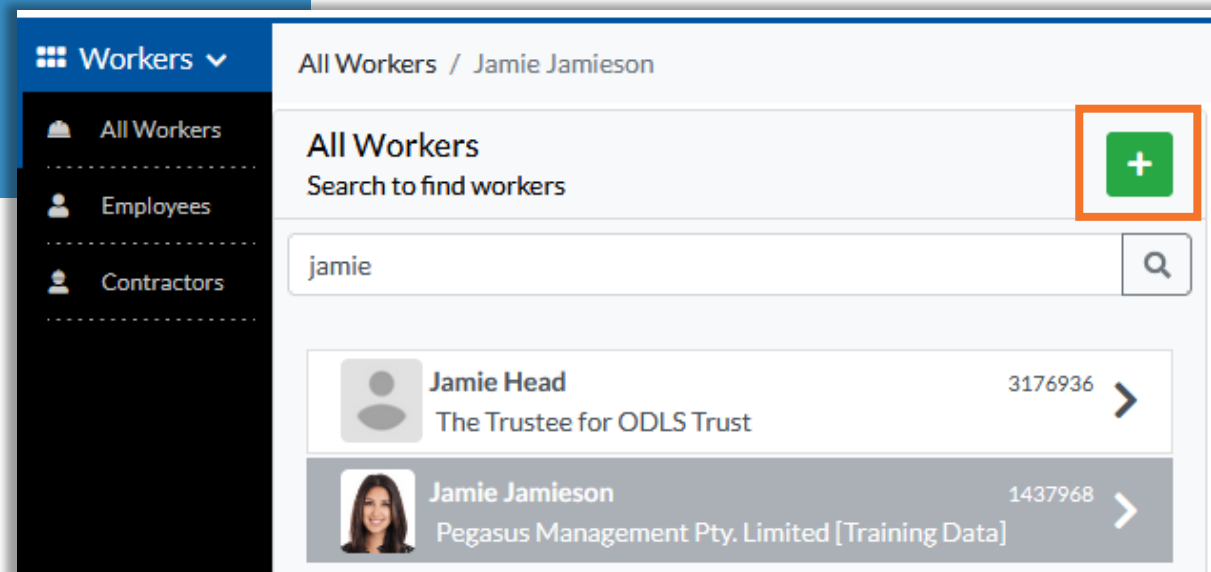
# Adding a Worker – New Worker

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.
- Feature is only available under All Workers



# 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.

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	>

### 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



# Adding a Worker – New Worker

If no match is found, Press CREATE AS NEW

This will progress to the next screen wanting to start the new worker process

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

Worker  
Add Worker

1 Start ———— 2 Select ———— 3 Finalise

**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 to move to the next screen.  
If no matches are found, select create as new to move to the next screen.

No Matches Found

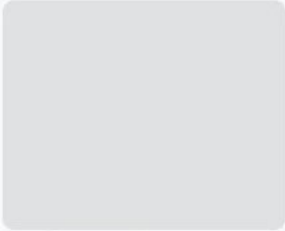
**CREATE AS NEW**

Cancel Back

Worker  
Add Worker

1 Start ———— 2 Select ———— 3 Finalise

Worker Details



Upload Clear

Photo is required

Company

Select a Company... ⋮

Company is required.

# 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. A modal at the bottom of the editor contains 'Upload' and 'Clear' buttons, along with a 'Photo is required' message. An arrow indicates that clicking 'Apply' in the editor leads to the 'Upload' button in the modal. From there, an arrow points to the 'Worker Details' screen. This screen shows the selected photo and includes 'Upload' and 'Clear' buttons. Below the photo is a 'Company' field with a red error message 'Company is required.' and a three-dot menu icon. The 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 )
- Local allows you to select the spoken language for the worker and will direct email to them in that supported language
- Address can be searched and selected from street information from Google

The screenshot 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 bar and a dropdown menu. Another modal window for 'Contact Information' is open, showing fields for Contact Email (with a red border and a red error message 'Email address is required.'), Contact Phone (with a red border and a red error message 'Phone number is required.'), and Gender. A third modal window for 'Next Of Kin' is open, showing fields for Relationship, First Name, Last Name, Phone Number, and Email. At the bottom right, there are three buttons: Cancel (red), Back (blue), and Done (green). Orange arrows indicate the flow from the main form to the modal windows and from the modal windows to the Done button.

# Adding a Worker – New Worker

New Unique *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**



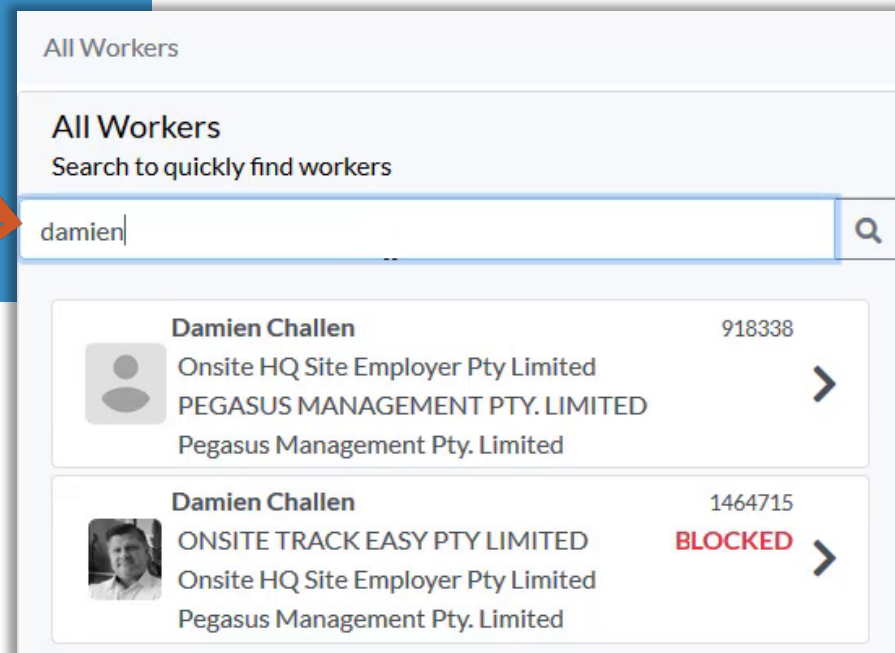
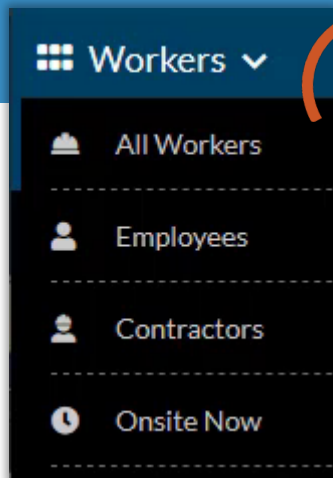
# Viewing Blocked Worker Profile

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.

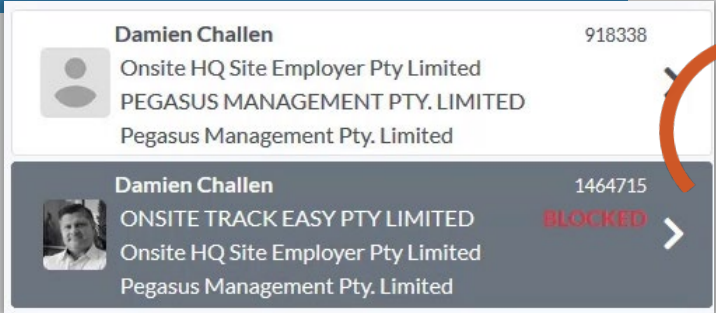


# Viewing Blocked Worker Profile

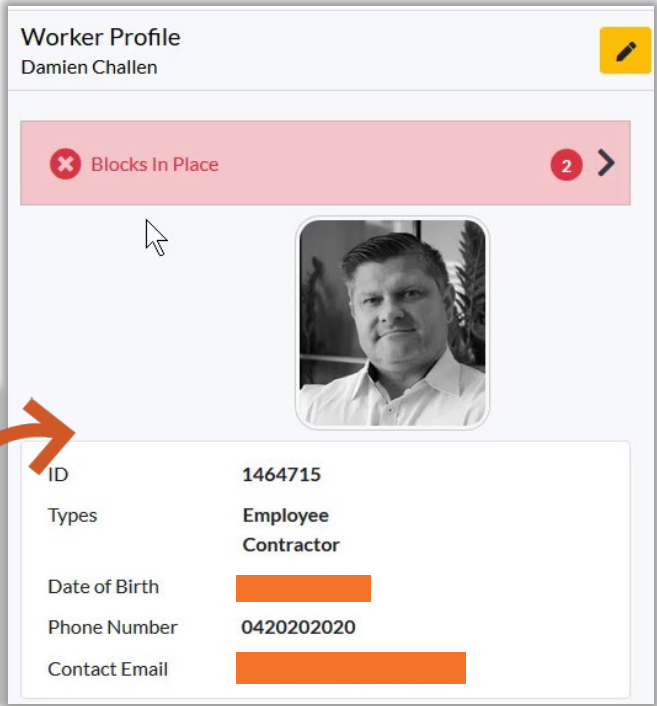
Number of applied blocks will show against the Workers Profile Page

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

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




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



Worker Profile  
Damien Challen

**Blocks In Place** 2



ID	1464715
Types	Employee Contractor
Date of Birth	[Redacted]
Phone Number	0420202020
Contact Email	[Redacted]

# 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 for a worker profile. On the left, a list item for 'Damien Challen' is shown with a right-pointing arrow. An orange arrow points from this list item to a larger, detailed view of the worker's profile on the right. The profile view includes a photo of Damien Challen with a red clock icon and the word 'Overtime' below it. Below the photo is a table of personal information, followed by an 'Attendance' section and a 'Next of Kin' section. At the bottom right of the profile view, there is a red 'Block' button. Another orange arrow points from the 'Block' button back to the list item.

Worker Profile	
Damien Challen	
	
<b>Overtime</b>	
ID	918338
Types	Employee Contractor
Date of Birth	[REDACTED]
Phone Number	[REDACTED]
Contact Email	[REDACTED]
<b>Attendance</b>	
Site	Pegasus Training
Login	26 Feb 2020 10:29
<b>Next of Kin</b>	
Relationship	FATHER
<b>Block</b>	

# 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?

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

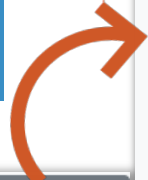
Site	Pegasus Training
Login	26 Feb 2020 10:29

Address

2 Sutcliffe St  
Cameron Park, NSW, 2285

Next of Kin

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



# Unblocking a Worker

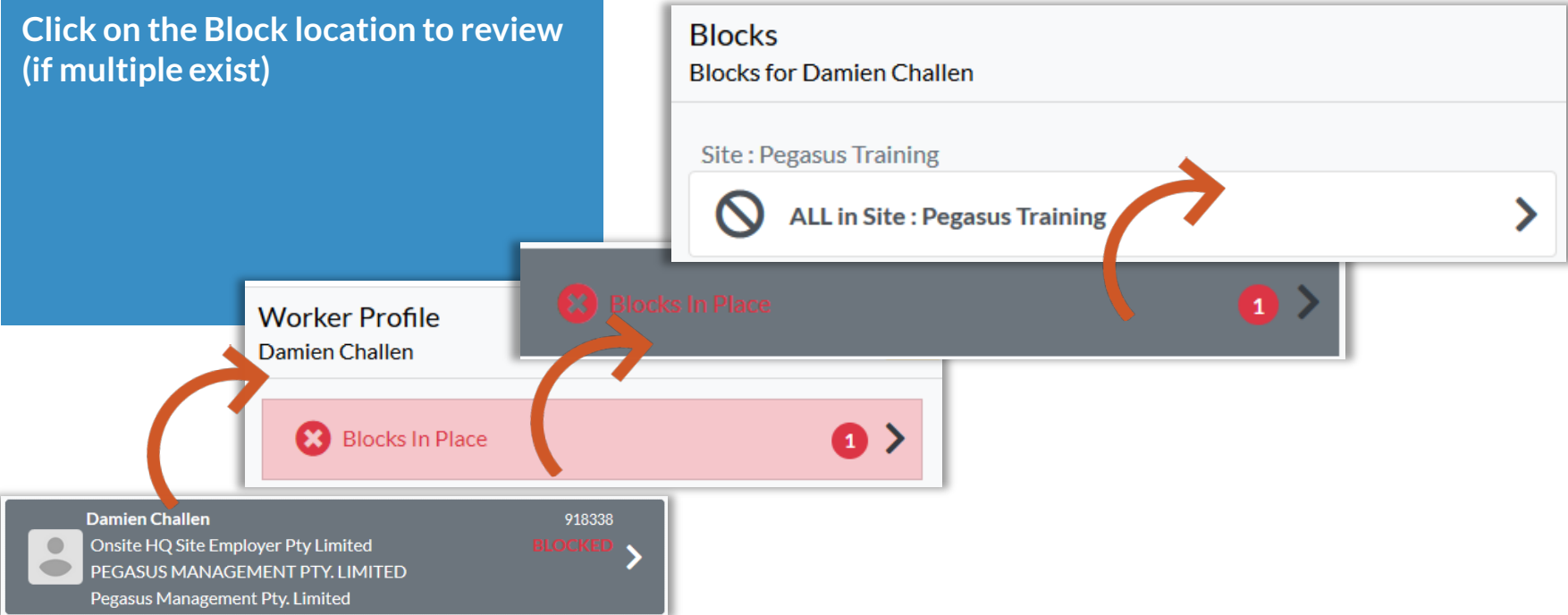
Worker is now Blocked.

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 illustrates the unblocking process through three sequential screenshots:

- Block List:** A list of blocks for 'Damien Challen' is shown. The selected block is 'ALL in Site : Pegasus Training'.
- Block Details:** The details for the selected block are displayed, including the authoriser 'Damien Challen (918261)', the date '12 Mar 2020', and the note 'User Has lost Card, blocking until found or replaced'.
- Unblock Confirmation:** A dialog box prompts the user to confirm unblocking. The 'Notes' field contains 'Worker has found lost card. Unblocking for this reason'. The 'Restricted' toggle is turned on. The confirmation prompt is 'Are you sure you want to unblock?' with 'Yes' and 'No' buttons.



# MANAGING ACCESS KEYS

# Viewing Worker Access Keys

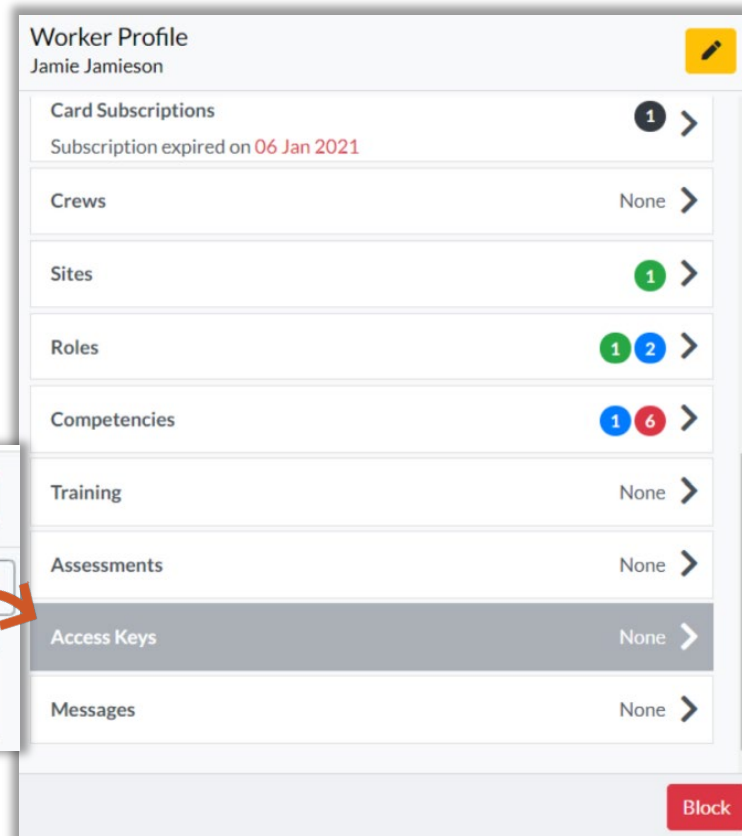
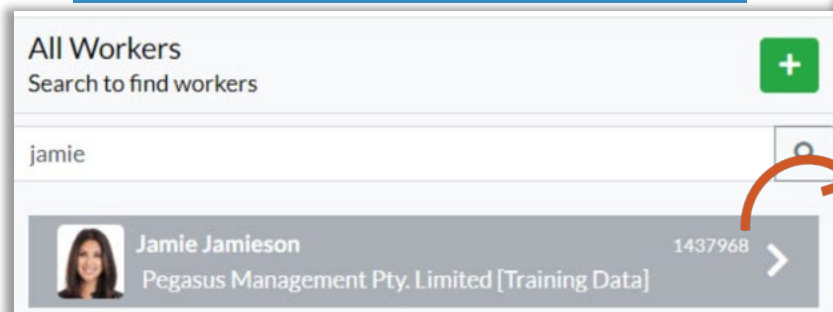
Enter the Worker Module

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

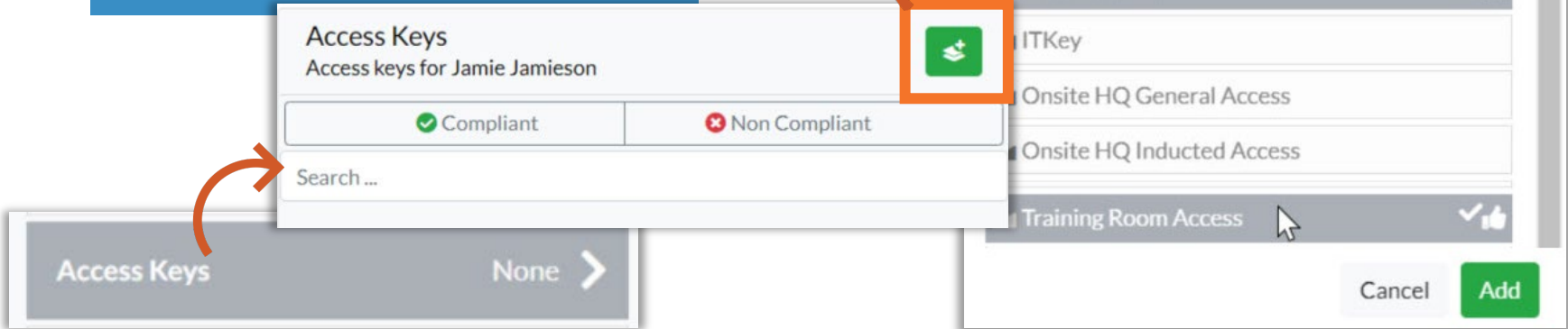
Click the Plus Sign to Add an Access Key

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.



The screenshot shows the 'Add Access Keys' dialog box. At the top, there is a search bar. Below it, the site is identified as 'Onsite HQ'. A list of access keys is displayed, each with a status indicator: a thumbs up icon for compliant keys and a thumbs down icon for non-compliant keys. The keys listed are: 'Comp-less' (compliant), 'Complexx Key' (compliant), 'Factory Key2' (non-compliant), 'General Access' (compliant), 'ITKey' (non-compliant), 'Onsite HQ General Access' (non-compliant), 'Onsite HQ Inducted Access' (non-compliant), and 'Training Room Access' (compliant). At the bottom right, there are 'Cancel' and 'Add' buttons. An orange box highlights a green plus sign button in the top right corner of the dialog. An orange arrow points from this button to the 'Access Keys' tile in the bottom left corner of the slide, which also has a right-pointing arrow and the text 'None'. Another orange arrow points from the 'Access Keys' tile to the search bar in the dialog box.

# 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 user interface for viewing worker access key requirements. It consists of several overlapping panels:

- Main Menu:** Located at the bottom left, it shows 'Access Keys' with a green circle containing '4' and a red circle containing '1'.
- Access Key List:** A list of access keys including 'Comp-less', 'Comple Key', 'General Acc...', 'Training Room Access', and 'ITKey'. Each item has a key icon and a status indicator (green checkmark or red X).
- Worker's access key ITKey:** A detailed view for the 'ITKey' access key, showing a 'Non Compliant' status with a red key icon and a red X.
- Access Key Competencies ITKey:** A breakdown of competencies for the ITKey. It includes a search bar and a 'Mandatory' section with one entry: 'Software Support Controller - INT Technician.Intermediate' with a red X icon.
- Person Details:** A panel showing details for 'Jamie Jamieson', including 'Access Key: ITKey', 'Site: Onsite HQ', and 'Location: Onsite HQ'.

Orange arrows indicate the navigation flow: from the 'Access Keys' menu to the 'ITKey' entry, then to the 'Worker's access key ITKey' panel, and finally to the 'Access Key Competencies ITKey' panel.

# 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 a list of access keys for 'Onsite HQ' with a 'Remove' button. A detailed view of the 'ITKey' shows it is 'Non Compliant' and lists details for Jamie Jamieson. A confirmation dialog box prompts the user to confirm the removal, warning that it will prevent the worker from logging in and generate an admin note.

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

Competencies 1 >

Remove

Confirm removal of access keys

No Yes



# **ONSITE NOW, LOG OFF WORKER & EMERGENCY EVACUATION**

# Viewing Worker Profiles – Onsite Now

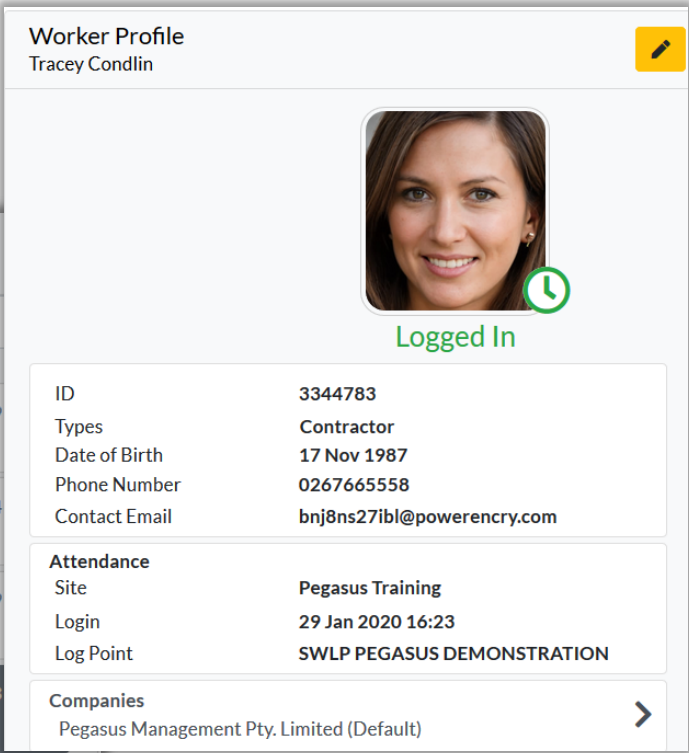
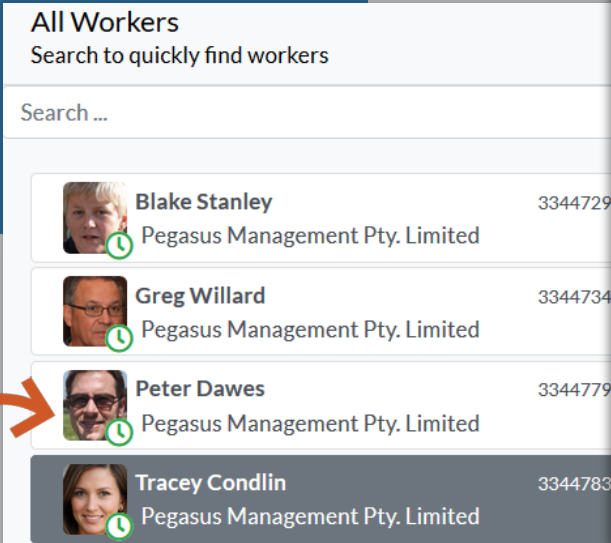
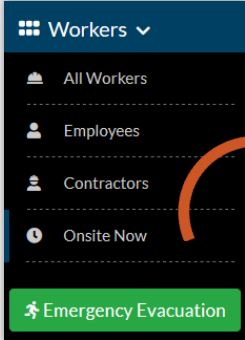
To view current Logged in Workers, click “Onsite Now”

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

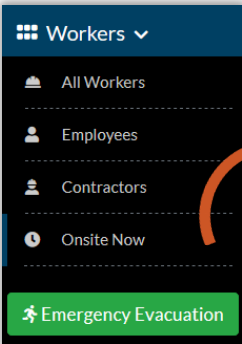


Amber = Approaching withing 2 hours of Site Fatigue Limit



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 ... 🔍

👤	<p><b>BEN SATCHELL</b> <span style="float: right;">3832653</span></p> <p>PEGASUS <span style="float: right;">➤</span></p> <p>🛑 31 Aug 2021 23:06 ( AMAZON KIOSK 1)</p>
👤	<p><b>BEN SATCH</b> <span style="float: right;">3832561</span></p> <p>PEGASUS <span style="float: right;">➤</span></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 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		Current Location	Person Name	Phone	Company Name	Person Type	Onsite Id	Activity
Login Time	Ago							
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		Current Location	Person Name	Phone	Company Name	Person Type	Onsite Id	Activity
Login Time	Ago							
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		Current Location	Person Name	Phone	Company Name	Person Type	Onsite Id	Activity
Login Time	Ago							
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 workflow for assigning competencies to a worker. It shows the 'Workers' module with a search bar containing 'jamie'. The search results list 'All Workers' and 'Employees'. The 'All Workers' section shows a search bar with 'jamie' and a result for 'Jamie Jamieson' from 'PEGASUS MANAGEMENT PTY. LIMITED'. The 'Competencies' tab is selected, showing a list of tabs: Crews (1), Sites (3), Roles (1), Competencies (1), and Access Keys (2). Red and green circles with numbers indicate the number of items in each category.

# 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.

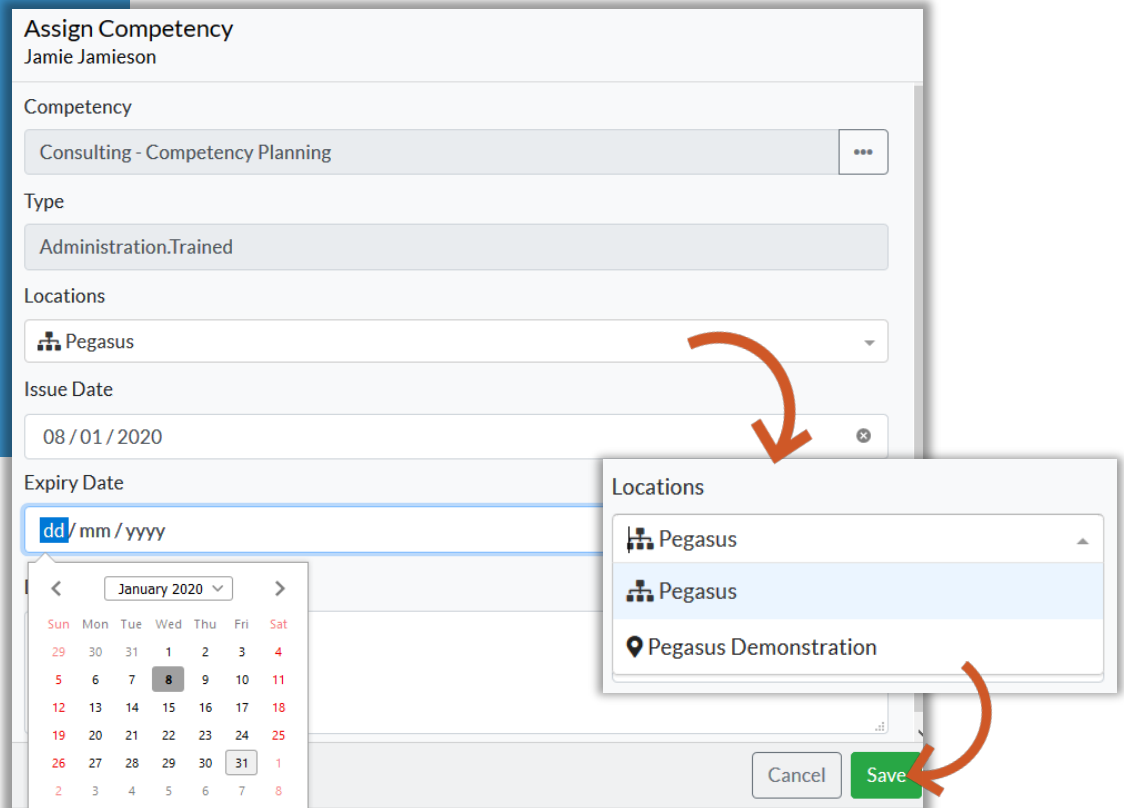
Click "Save" when completed.

- 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”

**Document Add Document**

Uploaded By  
Damien Challen (918)

Description

Document  
Choose file Browse

Cancel Save

File Selection Dialog:  
Pegasus, Compliance.doc, compliance.pdf, licence.jpg, LTM1500.jpg, Training Upload Document.docx

**Worker's Document**  
compliance.pdf

Training Evidence

Document

Uploaded By	Damien Challen
Uploaded Date	8 Jan 2020
Authority	Pegasus
Associated By	Damien Challen
Associated Date	8 Jan 2020

compliance.pdf Cloud Icon





**ADDING ROLES**

# Assigning Roles to a Worker

Roles should NOT be assigned in the Client Portal.

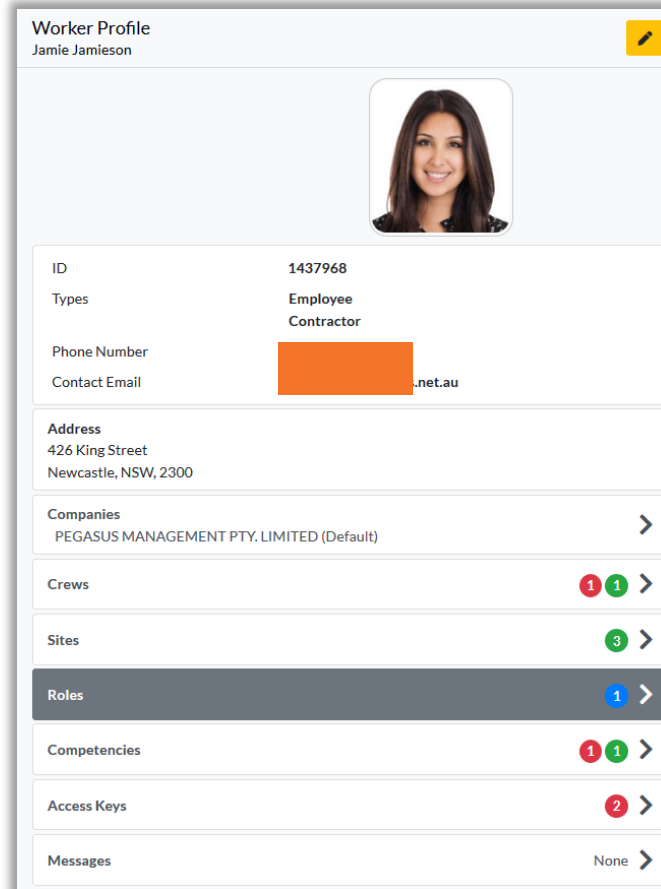
Applying Roles here will not assign online training events, which will make the role unable to be completed for the worker.

Always apply for Roles in the Supplier portal (previously called Roles 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 Supplier 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 [Redacted]

Contact Email [Redacted].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 >

# Assigning Roles to a Worker

If Roles MUST be applied, you can add from the Roles Module under the Worker Profile

Once selected you can see existing Roles. Click the “+” to add a new Role

- This requires “can Add Roles” user permission for the “+” to appear
- If a Role requires user training, those training courses will not be assigned when adding the Role. The Role will appear as In Progress.

The screenshot shows the 'Worker Profile' for Joe Blackmore. The profile includes fields for Name, Phone, and Email. Below these are sections for Companies, Card Subscriptions, Crews, Sites, and Roles. The 'Roles' section is highlighted with an orange box and shows a '1' icon and a right arrow. An overlay window titled 'Roles for Joe Blackmore' is open, showing a '+', status filters (Current, In Progress, Expiring, Not-Current), a search bar, and a list of roles including 'APAC - In-Store Entertainer' with a right arrow.

# Assigning Roles to a Worker

The list of Roles available to be chosen will appear

This can be limited to the Site or Realm access you have

Select the Role to add and press Add

Select a Role

Search ...

Any Location ...

Realm: GlobalCo - \*Global

- APAC - Electrician
- APAC - Heavy Truck Driver
- APAC - HVAC Technician
- APAC - Pest Control
- APAC - Project Manager (Construction)
- APAC - Welder
- CANADA - Welder (Coded)

Cancel Add

- A Role will display its requirements when added. A Role might be automatically Complete depending upon the workers existing competencies.
- In Progress Roles will need to be reviewed to see if training needs to be assigned (where applicable).

Worker's Role  
APAC - Electrician

In Progress

Person	Joe Blackmore
Realm	GlobalCo - *Global
Assigned Date	27 July 2022
Assigned By	Damien Challen
Active	✓

Competencies 1 1 4 >



# **RENEWING AN EXPIRED COMPETENCY**



# Expired/Expiring Competency – Renewing

Same process as viewing a Worker's competencies


Click on Competency under Worker Profile

Click on "Renew"

Enter in associated details and click "Save"


- Competency requirements are different for clients and the particular competency.
- Some might have additional steps, as listed in this guide, that are required before competency is "Complete"

Worker's Competency  
Building & Construction Industry

  
Expiring

Person	Greg Willard
Competency	Building & Construction Industry
Type	OH&S-WHS-
Location	Pegasus
Issue Date	29 Jan 2020
Expiry Date	12 Feb 2020
Active	✓

Progress

 Appoint


Documents

+ Add Document

Renew Deactivate

Renew Competency  
Building & Construction Industry

Owner  
Pegasus

Location  
 Pegasus

Issue Date  
29/01/2020

Expiry Date  
29/05/2020

Description  
Renewal of temporary Licence

Cancel Save





# MANAGING CREWS

# Managing Crews - Viewing

Click the “Crews” module icon

Current Complete, Incomplete, and Inactive Crews are listed

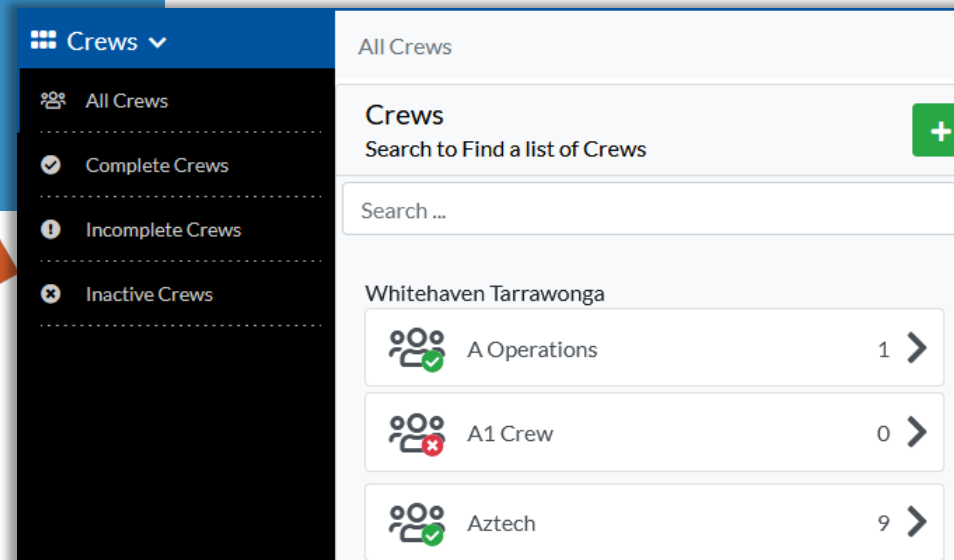
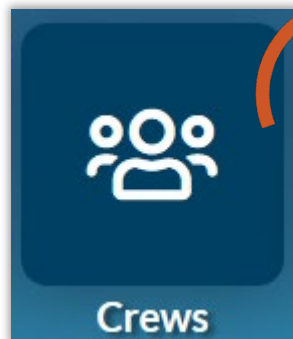
Click on a relevant Crew to view its Members

Active Crew = In Use

Inactive Crew = Disabled/not for reporting

Incomplete Crew = Has not met crew minimum members

- Note: This step assumes you have user rights permission “Can Manage Crews”.
- Crews can be managed from a Site or Realm level in the Client Portal
- Workers can be members of multiple crews at a site
- Crews are incorporated into reports such as Onsite Now by Crew, Expiring Competencies by Crew. These focus just on the team members you wish to manage.



# Managing Crews - Viewing

Click on the Crew you wish to view

Will show Crew Details.

Ability to Edit Crew Name or Make Inactive is a user permission.

Can still view Crews otherwise.

Click "Members" to continue

- Inactive crews can still be managed and viewed, but will not appear on reports unless made active
- Can use to build up crews for particular events (e.g. shutdown) and then make inactive once event is no longer operational
- Can use crews to create specific groups that other users of the portal can reference. E.g. Fire Wardens, First Aid Officers, Payroll, Receptionists etc.

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

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

The detailed view on the right is titled 'Crew Profile Marketing Crew' and includes a yellow edit icon. It features a 'Complete' status with a green checkmark and a group icon. Below this, a table lists the crew's details:

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

At the bottom of the detailed view, there is a 'Members' button with a count of 5 and a right-pointing arrow.

# Managing Crews - Viewing

Can search/filter workers out by Name or Company





Click on Crew Member to view more details

Click on a different Crew member to view their details


- Pressing Red Box Icon will change from Crew Module back to Worker Module.
- Make Leader is an optional item

**Members**  
Members for Marketing Crew


Search ...

	<b>Marko Stefanovic</b> PEGASUS MANAGEMENT PTY. LIMITED	1437971	>
	<b>Sarah Patel</b> PEGASUS MANAGEMENT PTY. LIMITED	1437972	>
	<b>Damien Challen</b> Onsite HQ Site Employer Pty Limited PEGASUS MANAGEMENT PTY. LIMITED Pegasus Management Pty. Limited	918338	>
	<b>Aaron Robinson</b> 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.
- Crew Leaders are notified via email if a worker has been selected for a Safety Selection at a Logpoint. See [this guide](#) for more information

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 as the current worker, with a crown icon next to his name. A green 'Make Leader' button is shown with an arrow pointing to the crown icon. To the right, the 'Crew's Member' profile for Damien Challen is displayed, showing his photo and details: Crew (Marketing Crew), Worker (Damien Challen), Person Id (918338), Site (Pegasus Training), Leader (checked), and Default Crew (checked). At the bottom of the profile, there are buttons for 'Make Default', 'Not Leader', and 'Remove'.

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

# Managing Crews – Adding Members

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

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

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

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

The image shows two screenshots from a software interface. On the left is a dialog box titled "Add Members To Crew" with a search bar and a list of workers. On the right is a "Members" list for a "Marketing Crew".

**Add Members To Crew Dialog:**

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

**Members List:**

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

Arrows indicate the flow of information: from the "Add" button in the dialog to the "Add" button in the dialog, and from the "Add" button in the dialog to the "Members" list.



# Managing Crews – Creating New

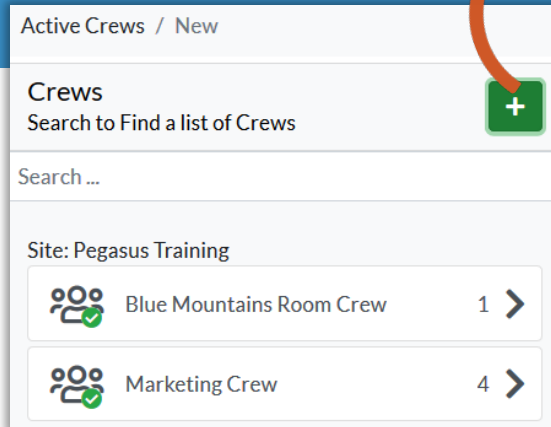
Under Active or Inactive Crew screen, click “+” to create a new crew

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

Click Active or Inactive status

Click “Save” to create this Crew

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



Crew  
Add New Crew

Name  
Payroll Team

Locations  
Administration

Min Members  
0

Active

Cancel Save

Crew Profile  
Payroll Team

Active

Crew	Payroll Team
Site	Pegasus Training
Location	Administration
Min Members	0

Members 0 >



# OPTIONAL TOOLS

# Optional Tools – Batch Job Module

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



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

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

A new screen will prompt.

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



Add Attendee(s) to Training

Search ...

Marketing Crew

Any Types

	Adam Boyle	41437
Pegasus 24 Seven Excavations ONSITE TRACK EASY PTY LIMITED Pegasus Management Pty. Limited		
	Damien Challen	918338
Pegasus ONSITE TRACK EASY PTY LIMITED Onsite HQ Site Employer Pty Limited		
	Jane Smith	3284265
Pegasus [redacted].au		
	Marko Stefanovic	1437971
Pegasus [redacted]		
	Sarah Patel	1437972
Pegasus [redacted].com		

Select All      Cancel      Add

Add Attendee(s) to Training

Search ...

Marketing Crew

Any Types

	Adam Boyle	41437	✓
Pegasus 24 Seven Excavations ONSITE TRACK EASY PTY LIMITED Pegasus Management Pty. Limited			
	Damien Challen	918338	✓
Pegasus ONSITE TRACK EASY PTY LIMITED Onsite HQ Site Employer Pty Limited			
	Jane Smith	3284265	✓
Pegasus [redacted].au			
	Marko Stefanovic	1437971	✓
Pegasus [redacted]			
	Sarah Patel	1437972	✓
Pegasus [redacted].com			

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 point from the gear icon in the warning dialog to the gear icon in the table header, and from the gear icon in the table header to the progress bar of the 'IN\_PROGRESS' batch (row 5).

# 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

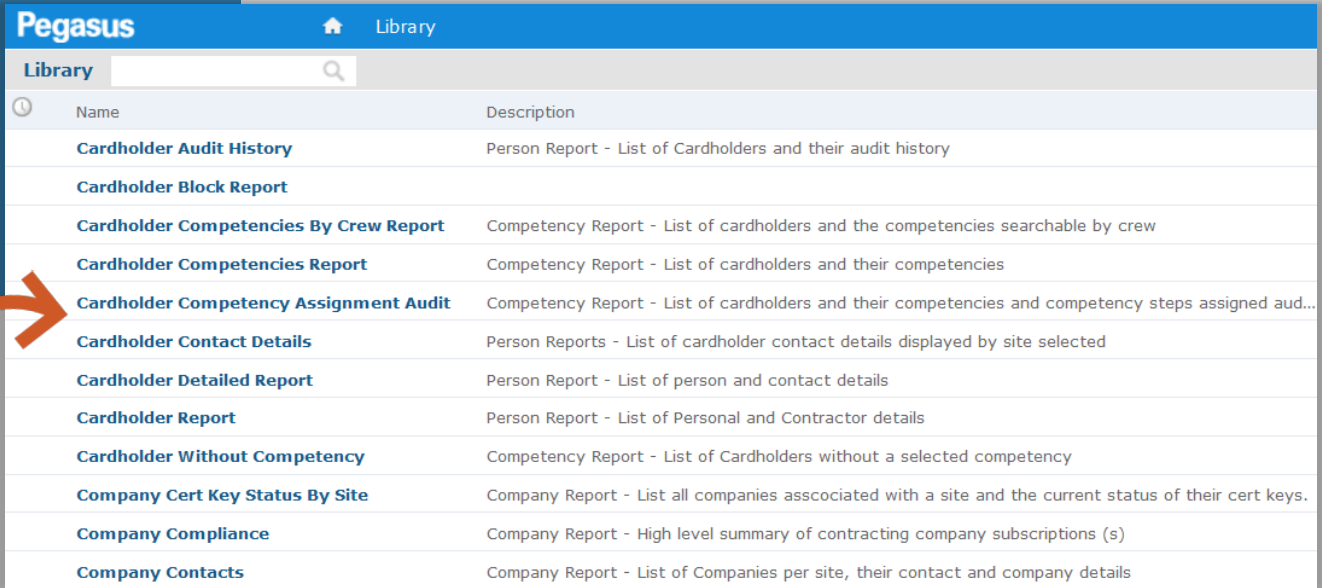
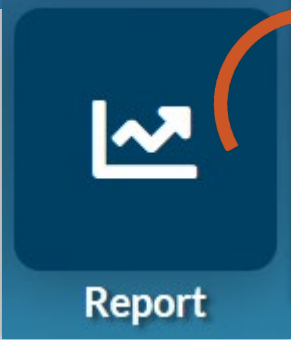
Report loads Business Intelligence Reports in a New Browser Tab

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 Quick Reference Guides are accessible on that page

A screenshot of the Pegasus web application's "Library" page. The page has a blue header with the Pegasus logo and a home icon. Below the header is a search bar and a table of reports. An orange arrow points from the "Report" icon in the previous block to the "Cardholder Competency Assignment Audit" row in the table.

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

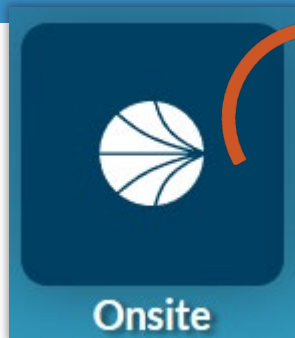


# Optional Tools – Onsite

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

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

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



A screenshot of the Onsite Track Easy web application interface. The header features the "onsite track easy" logo on the left and "Pegasus Training site" on the right. A navigation menu below the header includes links for home, person, company, compliance, training, safety, report, setup, help, and system. The main content area is titled "Welcome to Pegasus Training" and includes a "timezone: Australia/NSW" indicator. There are tabs for "general" and "charts", with "Latest loginout" text on the right. A red heading "Pending Data / Incomplete Actions" is followed by a "show" button. Below this, the "Latest Version 2.170.9" is displayed, along with a "New Features" section listing: "Multiple Companies" (Cardholders may now work for more than one company), "Default Companies" (Cardholders have a site default company for external systems that are not yet multiple-company aware), "End Employment" (When employees leave your company you can now end their employment instead of having to inactivate them), and "Company Relationship Notifications" (Notification emails are now sent when new company relationships are created). A "change" button is visible in the left sidebar, and an "emergency evacuation report" button is at the bottom left of the main content area.

# Optional Tools – Company PreQual

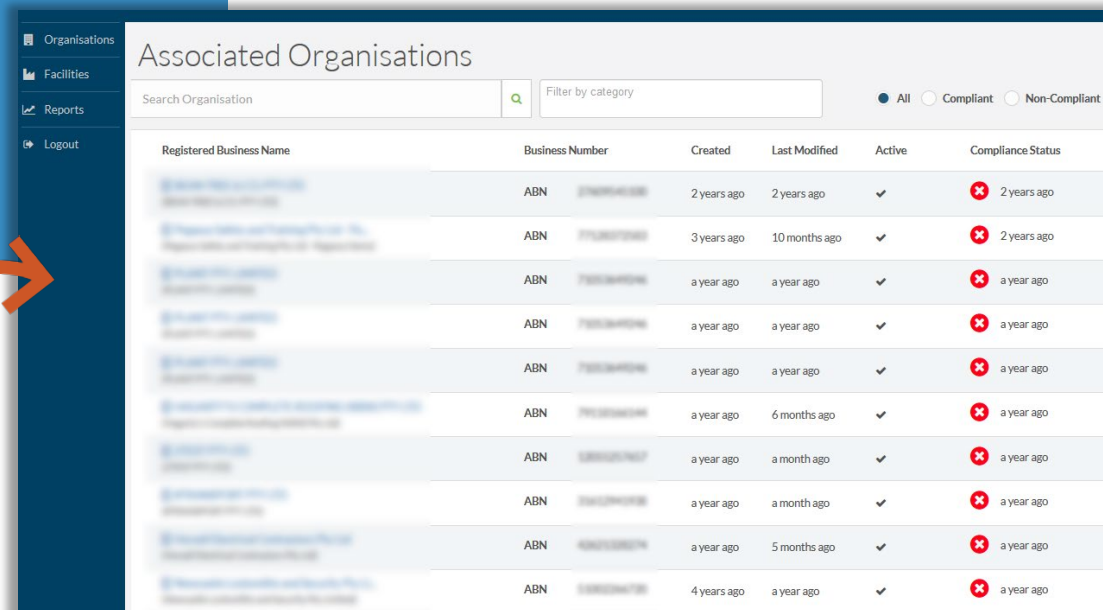
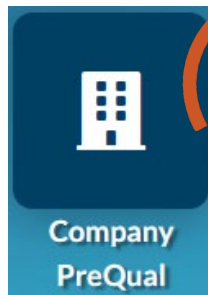
Company PreQual icon will load in a new browser window, the Company Compliance Client Access View

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
- An additional user account is required. Available from your Pegasus Account Manager.
- NOTE: Not all Clients use this feature
- 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 770041000	2 years ago	2 years ago	✓	✗ 2 years ago
[Blurred]	ABN 770041000	3 years ago	10 months ago	✓	✗ 2 years ago
[Blurred]	ABN 770041000	a year ago	a year ago	✓	✗ a year ago
[Blurred]	ABN 770041000	a year ago	a year ago	✓	✗ a year ago
[Blurred]	ABN 770041000	a year ago	a year ago	✓	✗ a year ago
[Blurred]	ABN 770041000	a year ago	6 months ago	✓	✗ a year ago
[Blurred]	ABN 100000000	a year ago	a month ago	✓	✗ a year ago
[Blurred]	ABN 100000000	a year ago	a month ago	✓	✗ a year ago
[Blurred]	ABN 400000000	a year ago	5 months ago	✓	✗ a year ago
[Blurred]	ABN 100000000	4 years ago	a year ago	✓	✗ a year ago



FOR QUESTIONS OR ASSISTANCE, PLEASE CALL

**1300 441 433**

OR EMAIL [info@pegasus.net.au](mailto:info@pegasus.net.au)