PEGASUS CLIENT PORTAL

BROADCASTING USER GUIDE

Version 1.13
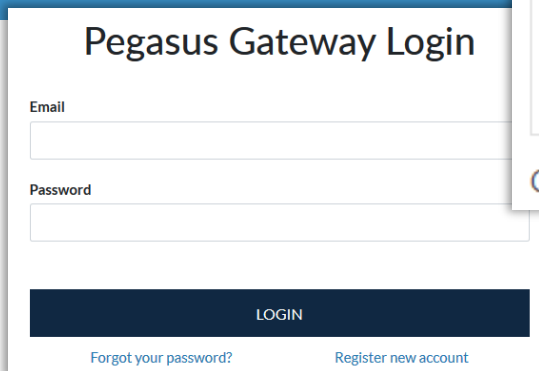
Pegasus™
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Login to the Client Portal

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

Click on the Client Portal Tab

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

- This guide assumes you already have an existing Pegasus Gateway Login and you have a Site or Realm user account in Onsite Track Easy.

- It also assumes you have created you Onsite Track Easy Tile in the Pegasus Gateway and then have added the Pegasus Client Portal Tile.

- **Aim:** To allow Client Portal Users (Onsite Track Easy Administrators/ Super Users/Supervisors/Data Administrators) the ability to perform a number of functions in the Client Portal.

- **Benefit:** The Client Portal offers a more streamlined view and approach to manipulating Employee and Contractor data that's pulled from Onsite Track Easy.

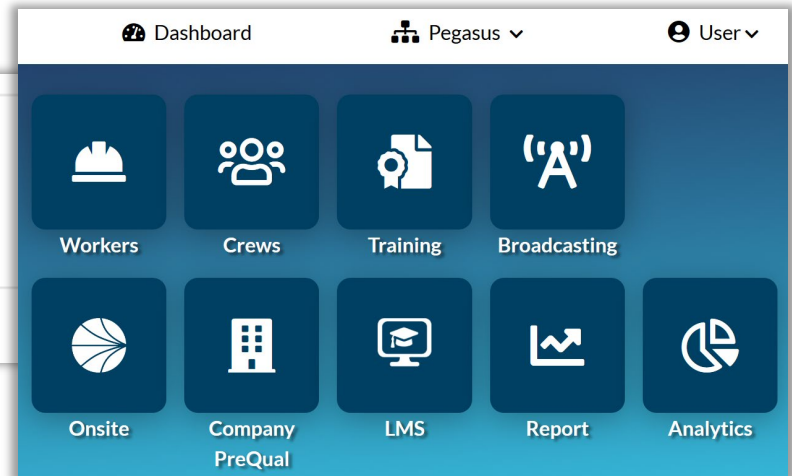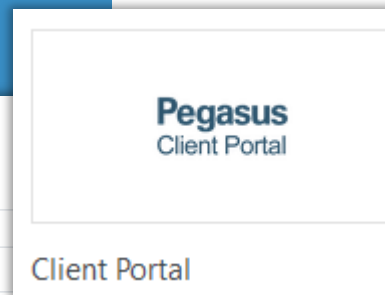- More information about the Pegasus Client Portal can be found at: https://kb.pegasus.net.au/display/CA/Client+Portal

Login to the Client Portal – Notes on your access

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

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

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

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

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

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

- Not all links such as Training, Report, Companies or LMS work, once again depending upon your user rights and what has been configured for your Company.
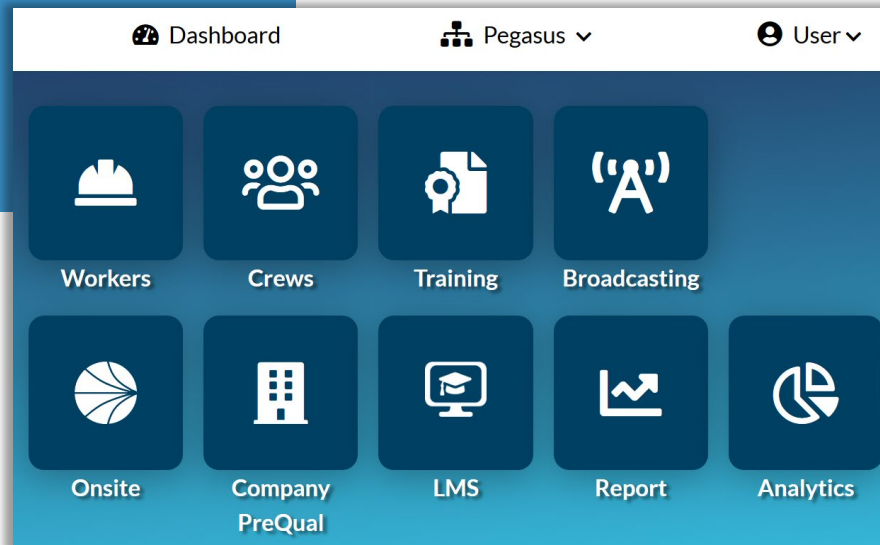
Legend Page – Common Icons and Features

- 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

Workers | Crews | Training | Broadcasting

Onsite | Company PreQual | LMS | Report
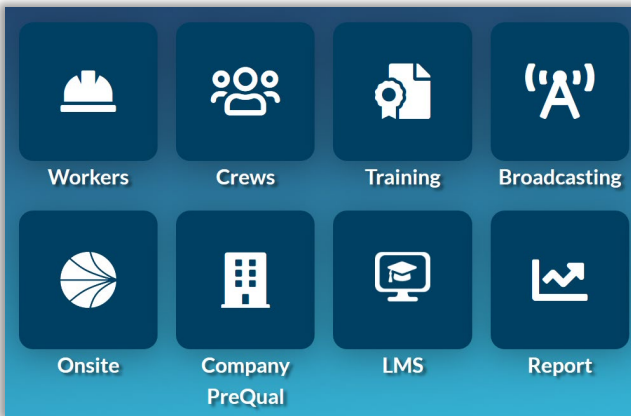
- The Worker, Crews, Training, Report and Broadcasting Tile Icons will launch the appropriate page in the Client Portal.

- The Onsite, Company PreQual and LMS Tiles will open a page in a new browser window. As these are essentially separate items to the Client Portal, they will open the option in a new window but still retain you Onsite Track Easy user rights and permissions in that new browser window.

Current	In Progress	Expiring	Not-Current
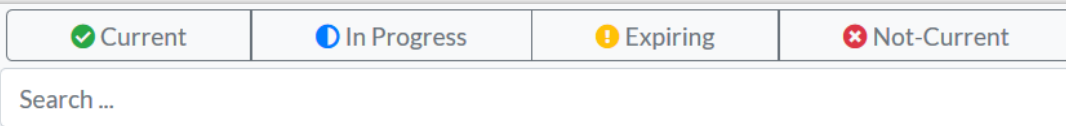
Search ...

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

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

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BROADCASTING

Broadcasting – Overview

- Broadcasting is the term used to send out mass messages to group types via SMS or Email from the Pegasus Client Portal.

- This is a Paid module that your Pegasus Account Manager will need to implement in Onsite Track Easy before use.

- In order to limit who can use this feature, new Onsite Track Easy User Rights have been developed.

  - *Can View All Broadcasts*

  - *Can Send Email Broadcasts*

  - *Can Send SMS Broadcasts*

- There are four (4) types of recipients configured for messaging:

  - *All Workers who are associated to a Site (Site Broadcast)*

  - *All Workers in a list for Explicitly Selected Workers (Worker Broadcast)*

  - *All Workers in a list of Companies (Company Broadcast)*

  - *All Workers in a list of Crews (Crew Broadcast)*
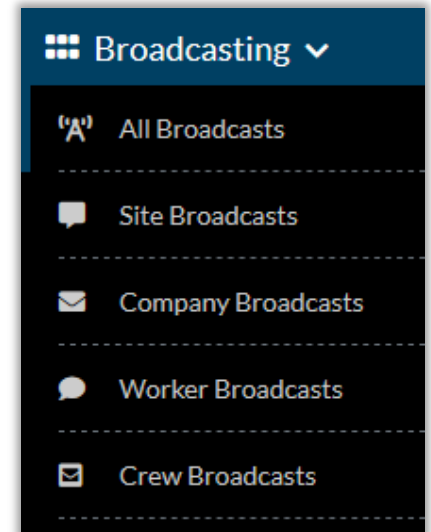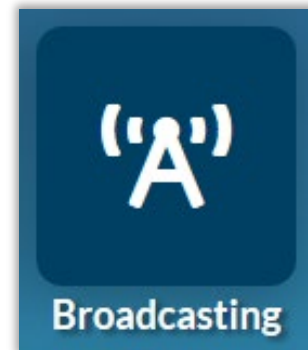
- Pegasus Account Managers will be responsible for updating the "SMS Packs" for users to send Bulk SMS Messages.

- A new status page will be available to see how much SMS credit will be remaining for those users.

- Notifications of successful Broadcasting events will be triggered to the person creating the Broadcast.

- Visibility of sent Emails/SMS Broadcasts will be available to users in the Client Portal.

Broadcasting – Configuration

Pegasus Account manager will enable the Add-in

Enable the Broadcasting Rights required against the user account in Onsite Track Easy.

Open the Client portal.

Broadcasting Icon should appear Solid. Click Icon to open.

If transparent, hovering over will show your permissions do not allow access.

- Pegasus Account Manager will first need to enable this for your Site/Realm in Onsite Track Easy.

- Ability to edit user account permissions usually reserved for Site/Realm administrators. If you can't change your permissions, see your relevant Onsite Track Easy contact.

- Broadcasting icon will show as semi-transparent and display notification if Broadcasting ability is not turned on for your Site/Realm in the Client Portal.

You don't have enough permission

Broadcasting

Pegasus Demonstration Realm

general   add-ins   sites

Broadcasting Rights

Can View **All Broadcasts** ✔
Can Send **Email Broadcasts** ✔
Can Send **SMS Broadcasts** ✔

Realm Add-ins

✘ Analytic Reports   *Enable Analytic Reports*
✘ Assessments   *Enable Assessments*
✔ Broadcasting Module   *Enable Broadcasting*

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Broadcasting – View Screens

Click on Broadcasting Icon

Will open new screen

Can now move between each type of broadcast, or view all that have taken place with the "All Broadcasts" option.

- Site Broadcasts – Send SMS and/or Email to every currently Associated Worker at a site. Limited to Employees, Contractors and Visitors with completed Mobile Number/Email address listed. Blocked Workers get message too.

- Company Broadcasts – Send SMS and/or Email to all Workers of a particular company with completed Mobile Number/Email address listed. Multiple companies can be sent the same message at once.

- Worker Broadcasts - Send SMS and/or Email to Workers at a site. Limited to Employees, Contractors and Visitors with completed Mobile Number/Email address listed. Sent to selected Workers you choose.

- Crew Broadcasts – Send SMS and/or Email to particular crews with completed Mobile Number/Email address listed. Multiple Crews can be sent the same message at once.
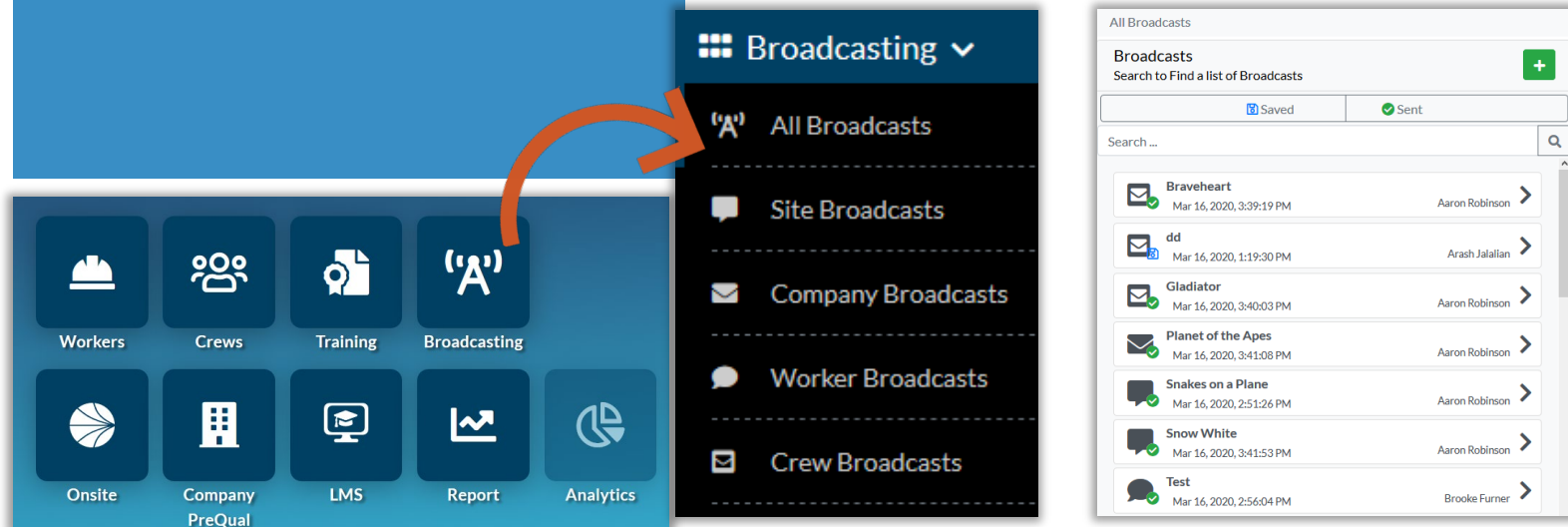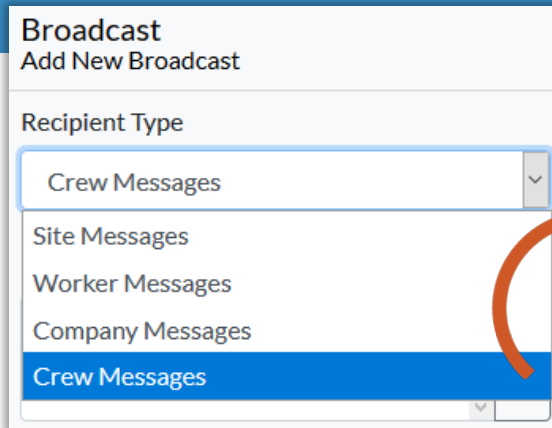
Broadcasting – Creating

Click on [+] to open the New Broadcast screen

Choose your Recipient Type from the dropdown. Crew for this example.

Click on the "…" to open the Recipient List. This is context sensitive so will change depending upon your chosen Recipient Type.
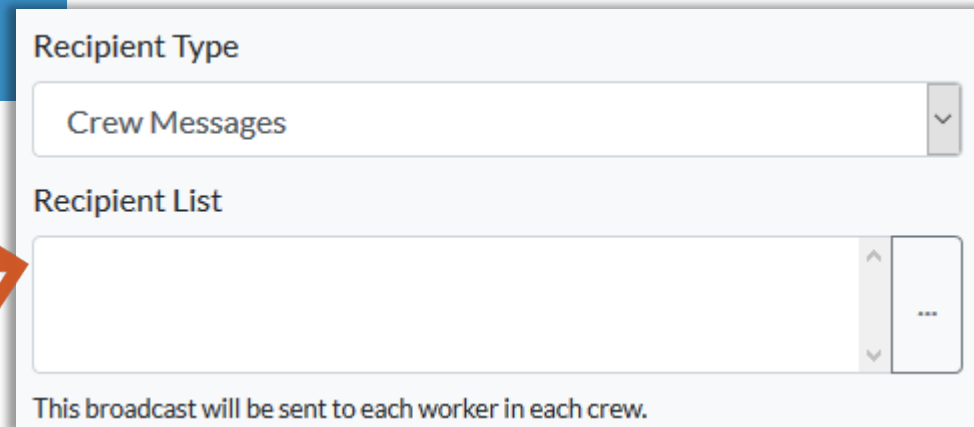
- All Broadcasts use the same screens, so the process is documented here once.

- Each Recipient Type will cause the Recipient List to change context. Different results will display for each.

- Site Messages will only allow ONE Site to be selected.

- Worker Messages will allow multiple workers to be selected.

- Company Messages will allow multiple Companies to be selected.

- Crew Messages will allow multiple Workers to be selected.

Broadcast
Add New Broadcast

Recipient Type

Crew Messages

Site Messages
Worker Messages
Company Messages
Crew Messages

Recipient Type

Crew Messages

Recipient List

This broadcast will be sent to each worker in each crew.

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Broadcasting – Creating

From the Crew Select window, choose the crews you wish to send messages to.

Can use Search feature to find crews if a lot of results show.

Once Ticked, press Save

Enter in Subject and Message

Tick SMS/Email delivery option

Press Save when ready

- All Subject and Message screens work the same for all Recipient Types, so this example is using the Crew Recipients.

- Note: There is 1000 character limit for Email Broadcasts only.
  A 500 Character limit for SMS Broadcasts
  A 500 Character limit when both SMS and Email are ticked together.

- Can Save for later and edit before sending.

- Email, SMS or Both types can be sent. Note that SMS option is a cost and requires appropriate credit to successfully complete. Insufficient credit will stop message being sent until sufficient credit is available.

Select Crew

Search ...

Selected Crews: 3

A crew
Aarons Test Crew
Apollo Team
arash crew
Auditors
B crew
Blue Mountains Room Crew
Business Development
Business Services
Compliance

Cancel   Add

Recipient List

A crew x   Apollo Team x   arash crew x   ...

This broadcast will be sent to each worker in each crew.

Subject

COVID-19

Message

Team, please follow proper hand washing procedure as displayed in all bathrooms
Regards
CEO Tim Cook

Characters left: 155

☐ SMS
☑ Email

Cancel   Save

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Broadcasting – Saved Message Options

Click on All Broadcasts

Search for message draft that was saved

Edit if required

Delete if required

Press Workers to review who will receive message

- All broadcast screen allows you to search for messages sent or saved, and by keyword of Subject name.

- Can alter message before sending by pressing Edit icon ✏️

- Can even change Broadcast type when editing.

All Broadcasts / Broadcast Profile

Broadcasts
Search to Find a list of Broadcasts

🖫 Saved	✅ Sent

Search ...

💬 **3 workers**
Mar 23, 2020, 1:19:42 PM   Arash Jalalian

💬 **arash message**
Mar 23, 2020, 4:36:53 PM   Arash Jalalian

✉️ **COVID-19**
Mar 24, 2020, 12:38:10 PM   Damien Challen ❯

View Broadcast
COVID-19   ✏️

✉️

Saved

Broadcast Type	CREW
Created on	Mar 24, 2020
Created by	Damien Challen
Recipients	A crew, Apollo Team, arash crew
Saved on	Mar 24, 2020
Conditions	EMAIL

Subject

COVID-19

Message

Team, please follow proper hand washing procedure as displayed in all bathrooms Regards CEO Tim Cook

Workers	17 ❯

Send   Remove

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Broadcasting – Saved Message Options

Click on Workers

Can review who will receive message before sending

Will list number of workers expected to receive message

Can delete Broadcast completely

- All Workers that will get message can be seen and searched from this list.

- Can scroll to see all workers. List will continue to cache as you continue to scroll down the list

- Cannot remove anyone from this list. You need to change the Broadcast Type and its recipients in order to do so.

- Can Remove this Broadcast before sending if you press Remove,

Broadcasting – Sending Message

Click on All Broadcasts

Search for message drafted

Click on Message to view

If all details are in order press Send

- All broadcast screen allows you to search for messages sent or saved, and by keyword of Subject name.

- Can alter message before sending by pressing Edit icon ✏️

- Can even change Broadcast type when editing

All Broadcasts / Broadcast Profile

Broadcasts
Search to Find a list of Broadcasts

💾 Saved	✅ Sent

Search ...

3 workers
Mar 23, 2020, 1:19:42 PM   Arash Jalaliar

arash message
Mar 23, 2020, 4:36:53 PM   Arash Jalaliar

COVID-19
Mar 24, 2020, 12:38:10 PM   Damien Challen ❯

View Broadcast
COVID-19   ✏️

Saved

Broadcast Type	**CREW**
Created on	**Mar 24, 2020**
Created by	**Damien Challen**
Recipients	**A crew, Apollo Team, arash crew**
Saved on	**Mar 24, 2020**
Conditions	**EMAIL**

Subject

COVID-19

Message

Team, please follow proper hand washing procedure as displayed in all bathrooms Regards CEO Tim Cook

Workers   17 ❯

Send   Remove

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Broadcasting – Sending Message

Broadcasts containing SMS are checked to see if required SMS credit is available

Will inform of remaining credit.

Will refuse to send if exceed remaining credits.

If all ok, press Yes to send message

- All Broadcast credits are managed by your Pegasus Account Manager.

- Note to Send Broadcasts still requires user account permissions

View Broadcast
COVID-19

Saved

Broadcast Type	CREW
Created on	Mar 24, 2020
Created by	Damien Challen
Recipients	A crew, Apollo Team, arash crew
Saved on	Mar 24, 2020
Conditions	EMAIL

Subject

COVID-19

Message

Team, please follow proper hand washing procedure as displayed in all bathrooms Regards CEO Tim Cook

Warning

You are about to send messages to 17 worker(s). This cannot be undone.

Email Usage: 17 of 99931 remaining

Are you sure you want to send this broadcast?   No   Yes

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Broadcasting – Sent Messages - Status

Click on All Broadcasts

Search for message sent. Shows Green Tick when message was sent

Click on Message to view

- Message Status Field is added once Send is pressed.

- Begins with "Processing", ends with "Failed or "Sent"

- Shows the Global status of the Broadcast. If one person only received the message its classed as "Sent".

- Need to review status of workers to see who did and did not receive the Broadcast.

Workers   163   13   15   >

Sent

Broadcast Type	CREW
Created on	Mar 24, 2020
Created by	Damien Challen
Recipients	A crew, Apollo Team, arash crew
Saved on	Mar 24, 2020
Conditions	EMAIL
Message Status	Failed

COVID-19
Mar 24, 2020, 1:27:56 PM   Damien Challen   >

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SMS Broadcast Messages – Will go to listed Phone # 1 under Profile in Onsite Track Easy

Email Broadcast Messages - Will go to listed Email #1 under Profile in Onsite Track Easy

Client Portal Profile can be edited to add the above values if not present

When successful message Sent, see examples 1 and 2

- If Phone #1 not filled out, message will fail

- Phone can be in format +614xxxxxxxx or 04xxxxxxxx

- Land line numbers will not send a sms e.g 02 or 08

- If Email #1 not filled out, message will fail

- Emails/SMS are sent from our dedicated notification server email address that is not monitored for email/SMS replies.

Broadcasting – Viewing Status

Click on All Broadcasts

Search for Worker

Can filter out via name search and status type

Click on Message to view

- Can view each individual that was sent a message to check status.

- Partial = if both delivery methods were selected (SMS & EMAIL) it will show which delivery method was sent and which one wasn't.

- Reasons for message sending/not sending will be displayed.

- Reasons can be : Blocked, Missing, Failed, Empty Destination (*could not find valid email or sms where selected*)

FOR QUESTIONS OR ASSISTANCE, PLEASE CALL

1300 131 194

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

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