



ONSITE TRACK EASY

Retail FM Contractor Management Portal

Portal User Guide: Employee Registration and Induction Booking



CONTENTS

Overview3
Login (for existing companies)4
Registering Employees & Booking Inductions6

WHERE CAN I FIND HELP?

- Pegasus Safety** 1300 291 561
safetycompliance@pegasus.net.au
- Retail FM Contractor Information Website** <http://wowcontractor.com.au>

OVERVIEW

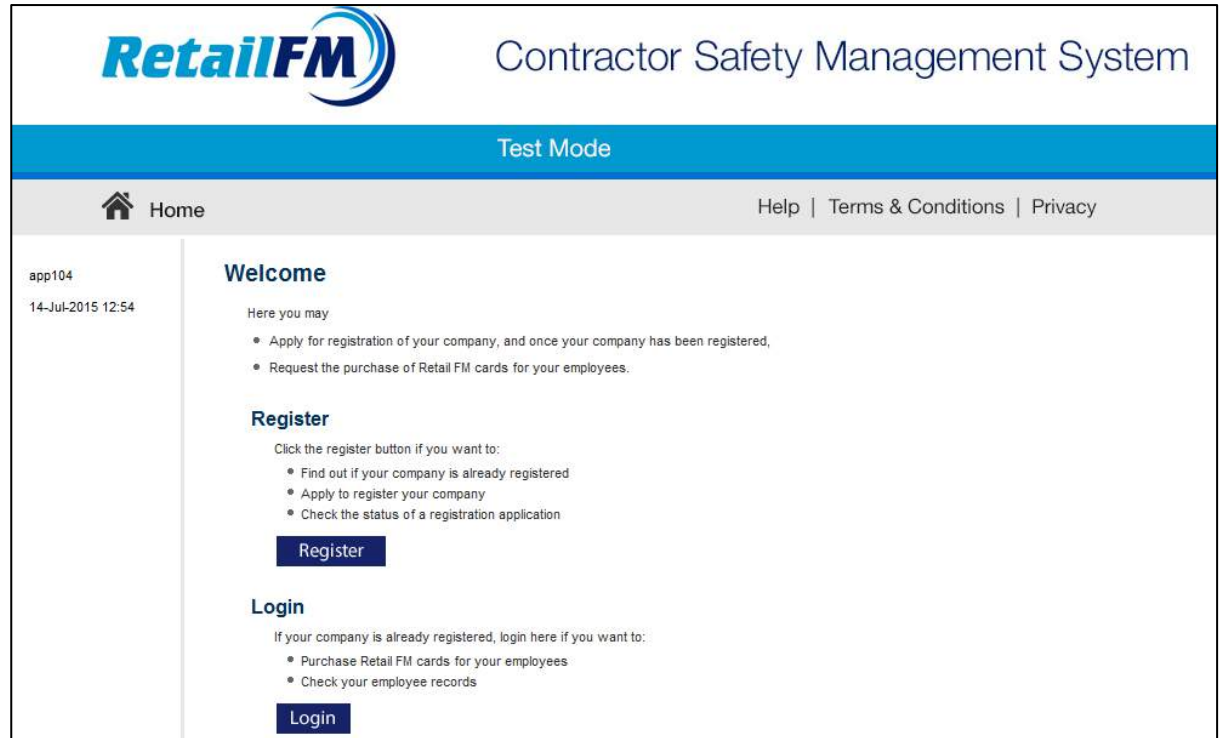
The Retail FM Contractor Safety Management System Portal is the gateway to allow contractors to register and meet the safety compliance requirements of Retail FM. This portal allows the nominated personnel of the contracting company to:

- Register their Company or Business Entity
- Complete the Company Profile Questions
- Upload and maintain relevant company licences and insurances
- Complete the Safety Management System review process
- Register their employees
- Select and upload role requirements
- Upload employee photos for efficient card production
- Book their employees into an induction
- Track employee induction and card status

LOGIN (FOR EXISTING COMPANIES)

a. Go to <https://secure.onsitetrackeasy.com.au/portal/common/public/login/login.jsp?psn=retailFM&bfpto=1>

b. Click **Login** to access the portal.



The screenshot displays the RetailFM Contractor Safety Management System interface. At the top left is the RetailFM logo, and to its right is the text "Contractor Safety Management System". Below this is a blue header bar with "Test Mode" in white. A navigation bar contains a home icon and "Home" on the left, and "Help | Terms & Conditions | Privacy" on the right. The main content area is split into two columns. The left column shows "app104" and "14-Jul-2015 12:54". The right column features a "Welcome" section with a list of actions: "Apply for registration of your company, and once your company has been registered," and "Request the purchase of Retail FM cards for your employees." Below this is a "Register" section with instructions to click the register button if you want to: "Find out if your company is already registered", "Apply to register your company", and "Check the status of a registration application". A blue "Register" button is provided. The "Login" section follows, with instructions to login here if your company is already registered, and actions: "Purchase Retail FM cards for your employees" and "Check your employee records". A blue "Login" button is also present.

c. Enter username and password and click on **Login**. This will bring you to the home screen. If you have forgotten your password click on **forgotten password** and go to step D.

The screenshot shows the login page for the RetailFM Contractor Safety Management System. At the top left is the RetailFM logo, and at the top right is the text "Contractor Safety Management System". Below this is a blue horizontal bar. Underneath is a navigation bar with a home icon and the word "Home" on the left, and links for "Help | Terms & Conditions | Privacy" on the right. The main content area is divided into two columns. The left column contains the text "app104" and "14-Jul-2015 12:23". The right column is titled "Login" and contains the instruction "Enter your username and password to login now." followed by two input fields: "Username:" and "Password:". Below these fields is a blue "Login" button. At the bottom of the right column, there are two links: "Request a new login for your company: [New User Account](#)" and "Request new password for your login: [Forgotten Password](#)". The "Forgotten Password" link is highlighted with a red rectangular box.

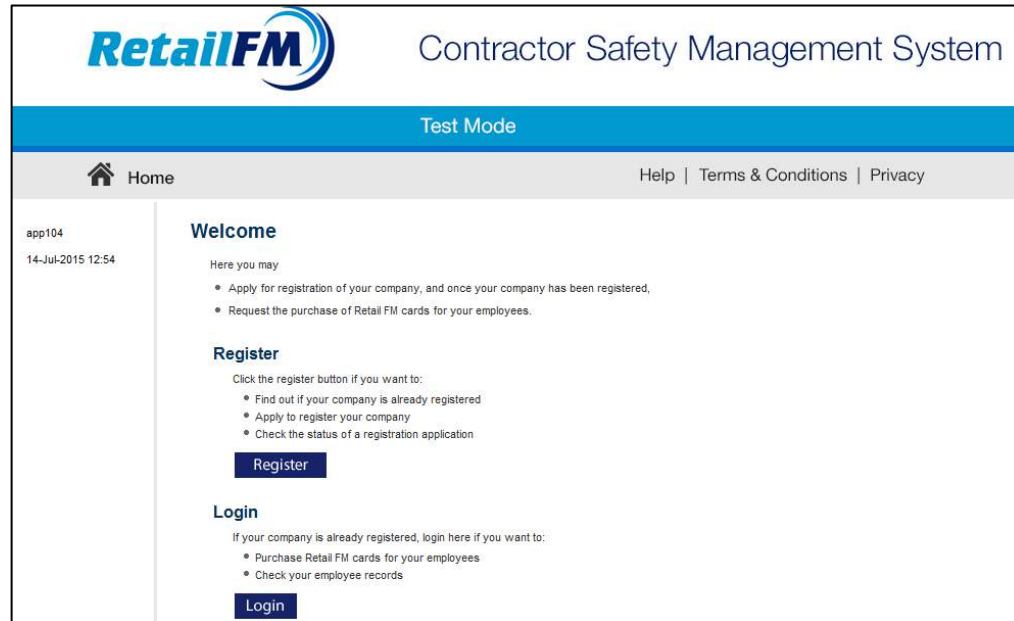
d. Enter first name and last name and click on **Submit**

Your login details will be sent your email address (please be sure to check your junk mail as it is an automated email). If you do not receive an email, please contact the help desk on **1300 291 561**.

The screenshot shows the "Forgotten Password" form. The title "Forgotten Password" is at the top in a large, bold, blue font. Below the title is the instruction "Please enter your first name, last name and email address." followed by three input fields: "First Name:", "Last Name:", and "Email Address:". Below these fields is a blue "Submit" button. At the bottom of the form, there is a note: "You must enter the **exact spelling** used when you set up your user account. If these details are correct the password will be sent to your email address."

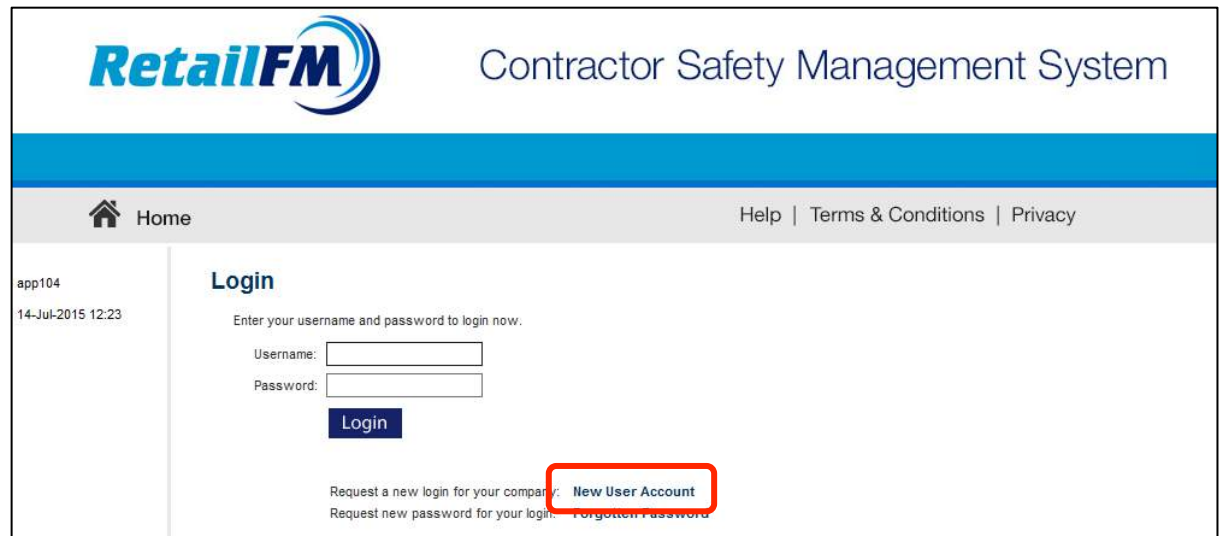
REGISTERING EMPLOYEES & BOOKING INDUCTIONS

a. Click [Login](#)



b. Enter your username and password and click [Login](#)

Please note: Additional user accounts can be setup from here if required by clicking on **new user account**



c. Select **Manage Employee Data**

Welcome to your company's login area

From here you can manage employee roles and Company Relationships.


Manage Employee Data *Register employees, maintain roles and order cards.*

View Employees *View details of your employees and their data.*

Company Relationships *Your company relationships at Retail FM.*


d. **Search** for existing employees

Employee Compliance

 **Shopping Cart**
Total Cost: *empty*

PLEASE NOTE: Just because a card is shown here does not mean you may order it. Please ensure the person is entitled to a card before you order it. You may not qualify for a refund if your order is rejected. If you're unsure about any card order please contact the portal administrator (see details on the help menu).

Description:	RetailFM Personal Compliance Roles and Card
Requirements:	<ul style="list-style-type: none"> • Subscription (included in Initial Registration) • Role selection • Photo upload • File uploads • Mandatory Retail FM Card (if no previous issue)
Registration:	\$40.00 (plus \$4.00 GST) for initial registration and subscription
Card Cost:	Free Card
Subscription:	24 months duration \$40.00 (plus \$4.00 GST) per Subscription Renewal on expiry



Back


EMPLOYEES LIST

Search *Enter a name fragment (blank for all) and click **search** to list your employees*

You can also select employees that has not yet been entered.
Please click **search** first to make sure the person is not already in your employees list.
Then an **Add Employee** button will be provided.

- e. If employee appears in the list, please click on the tick box under **order** and click on **order**.
 If the employee does not appear in the list select, select **Add Employee** to create a new employee

Employee Compliance



Shopping Cart
Total Cost: <i>empty</i>

PLEASE NOTE: Just because a card is shown here does not mean you may order it. Please ensure the person is entitled to a card before you order it. You may not qualify for a refund if your order is rejected. If you're unsure about any card order please contact the portal administrator (see details on the help menu).

Description:	RetailFM Personal Compliance Roles and Card
Requirements:	<ul style="list-style-type: none"> Subscription (included in Initial Registration) Role selection Photo upload File uploads Mandatory Retail FM Card (if no previous issue)
Registration:	\$40.00 (plus \$4.00 GST) for initial registration and subscription
Card Cost:	Free Card
Subscription:	24 months duration \$40.00 (plus \$4.00 GST) per Subscription Renewal on expiry

Back

EMPLOYEES LIST


Search

Enter a name fragment (blank for all) and click **search** to list your employees

Found 0 matches

Add Employee

Register **Employee** not yet in your employees list



f. Enter the employee details and click

Save

Add Employee to Lauren

Please enter fields, upload files and then submit the data (* = mandatory)
On submit a Retail FM card will be purchased for this person.

Shopping Cart
Total Cost: empty

1. Fields

Current Data
Added By: Lauren Chock

First Name: *
Middle Name:
Last Name: *
Date of Birth: *

Drivers Lic. Number:
Drivers Lic. State:
Drivers Lic. Class:
Drivers Lic. Expiry:

Gender:

Address:
Town:
State/Province:
Post Code:
Phone: *
Email A:
Next of Kin First Name:
Next of Kin Last Name:
Next of Kin Phone:
Next of Kin Email:
Next of Kin Relationship: Please select

Historical Data
Previous contact details:
Phone:
Email:
Address:
Town:
State/Province:
Post Code:
Destination: * I agree with Terms & Conditions and Privacy menu

The minimum Next of Kin fields are First Name, Last Name, Phone and Relationship.

2. Identification

Please enter the required fields.
Then you can proceed if required.

3. Files

Please enter the required fields
and complete identification steps.
Then you can upload the files.

4. Submit

Please enter all the required data.
Then you will be able to submit it.
On submit a Retail FM
card will be purchased for this person.

g. Click

Submit

Continue Entry of Lauren Chock

Please enter fields, upload files and then submit the data (* = mandatory)
On submit a Retail FM card will be purchased for this person.

Shopping Cart
Total Cost: empty

Employee Status: **Started**

1. Fields

Current Data
Added By: Lauren Chock

First Name: * Lauren
Middle Name:
Last Name: * Chock
Date of Birth: * 21 Feb 1993

Drivers Lic. Number:
Drivers Lic. State:
Drivers Lic. Class:
Drivers Lic. Expiry:
Gender:

2. Identification

No additional identification data is required.

3. Files

No file uploads are required.

4. Submit

Click submit to send the data for processing.

On submit a Retail FM
card will be purchased for this person.

h. Click on **Process**

Employee Compliance Shopping Cart
Total Cost: empty

SELECTION

Action	Card?	Last Name	First Name	General	Roles	Files Done	Infos Done	Cost	Data Status	Payment
Process	YES	Chock	Lauren	X				\$44.00	INCOMPLETE	

✓ = Entered X = Mandatory Not Entered X = Optional Not Entered

Action: Click 'Process' to continue an entry, and when complete, submit it or add it to the shopping cart.
Each person requires General entries, then File uploads.

Click link to view role data requirements:
[Role Data Lookup](#)

[Back](#)

i. Click on

[Select Roles](#)

PROCESSING: LAUREN CHOCK [Back](#) [Terminate](#)
(Registration, Subscription, Roles, Card)

GENERAL*

Registration, Subscription, Roles, Card

[Select Roles](#) Mandatory; Requires valid selection

j. All roles from all states will appear, to narrow down your search select the state in which the role is carried out

k. Select your role/s from the list, then scroll to the bottom and click [Apply](#)

epe.onsitetrackeasy.com.au

Retail FM Portal Work Roles

Group: NSW

Tick all required roles and click apply

- Cleaning
- Consultants
- Electrical Apprentice
- NSW Electrical Installation
- NSW Electrical Maintenance
- NSW Refrigeration / HVAC Installation
- NSW Refrigeration / HVAC Maintenance
- Refrigeration - Installation of cool room/freezer room panels only
- Refrigeration - Maintenance of cool room/freezer room panels only
- Refrigeration Apprentice
- Trades Assistant
- Work Experience

Selected Roles
Electrical Apprentice

[Apply](#)

- I. Click to **agree to the terms and conditions** (available from the link at the top of the page), enter card shipment details (or copy from person or company) and click **Save**

GENERAL*

Card Order

Select Roles **Mandatory; Requires valid selection**

Roles: Electrical Installation

Communicate To: Rhiannon Manning *Name of person*

Communicate By: Email

Email: rmanning@pegasus.net.au

Mobile: in Australia

Declaration: I agree with the Terms & Conditions and Privacy menus

Card Shipment

Communicate To: Rhiannon Manning **copy from** Card Order

Communicate By: Email

Email: rmanning@pegasus.net.au

Mobile: in Australia

Attention To: Brooke Cronin **copy from** Person Company

Address: 426 King St

Town: Newcastle

State/Province: NSW

Postcode: 2300


Country: Australia

You must save these entries before you can proceed with the next step

Save

- m. Upload file requirements (mandatory requirements will be marked with a red **X**, however if you do hold qualifications that are non-mandatory please upload) by clicking

Upload


FILES hide files 

File1: * **Photo**
X **Mandatory Cardholder Photo**

Head and shoulders well lit photo taken from the front with a plain background. Please remove hat or sunglasses. Image can be larger than needed as it will be framed and cropped before printing on the card.

Please upload a photo of this employee

Upload


File2: * **Electrical Licence Full**
X  **Electrical.Licence.Full**

Mandatory for Roles: Electrical Installation

Please upload your Full Electrical Licence

Please upload a single file

Upload

File3: **Working at Height Certification**
X  **Safety.Statement of Attainment.Working at Heights**

Conditional for Roles: Electrical Installation
Please note this is not a mandatory upload however if you do hold this qualification please upload

Please upload evidence for Working at Height Certification

Optional single file upload

Upload

n. Click on **browse** and select file to upload

The screenshot shows the 'Upload Photo of Rhi Test' form. The 'File to Upload' field is empty, and the 'Browse...' button is highlighted with a red rectangle. A 'Choose File to Upload' dialog box is open, showing the 'Documents' library with a file named '01 Weekly reports'.

Upload Photo of Rhi Test

Description: **Photo**
Maximum Size: 2 Mb
Requirement: Head and shoulders well lit photo taken from the front with a plain background. Please remove hat or sunglasses. Image can be larger than needed as it will be framed and cropped before printing on the card.

File to Upload: * **Browse...** Browse to select file for upload

Name: * Friendly name for this file after upload

Comment:

Status:

Back

o. Click **Upload**

p. Continue uploading role requirements and then scroll down to the training section. Online training will be auto booked based on role requirements, however you will need to book your classroom induction

Note: If your employee already has a current induction, the requirement will appear as 'complete' and no booking will be required.

The screenshot shows the 'Upload Photo of Rhi Test' form with the file 'C:\Users\rmanning\Desktop\Test Photo1.jpg' selected in the 'File to Upload' field. The 'Upload' button is now visible.

Upload Photo of Rhi Test

Description: **Photo**
Maximum Size: 2 Mb
Requirement: Head and shoulders well lit photo taken from the front with a plain background. Please remove hat or sunglasses. Image can be larger than needed as it will be framed and cropped before printing on the card.

File to Upload: * C:\Users\rmanning\Desktop\Test Photo1.jpg **Browse...** Browse to select file for upload

Name: * Friendly name for this file after upload

Comment:

Status:

Upload

Back

q. Enter an email address for online training login details, or select to **copy from employee**

Online Training Email

Please enter a valid employee email address. It will be used to provide access to online training for the employee. An invalid address will result in the employee not being able to complete the training requirements for this card.

Email:

copy from **Employee**

r. Agree to training declaration and click

Save

Training Declaration

I agree to purchase any outstanding training listed above for this employee and that they will undertake this training within a reasonable time frame.

Cancel **Save**

s. Scroll up and click

Add To Cart

Registration, Subscription, Roles, Card

Shopping Cart
Total Cost: empty

SELECTION

Action	Card?	Last Name	First Name	General	Roles	Files Done	Infos Done	Cost	Data Status	Payment
Processing ▶	YES	Chock	Lauren	✓	Electrical Apprentice	2 of 2 ✓	0 of 0 ✓	\$44.00	COMPLETE	READY

✓ = Entered ✗ = Mandatory Not Entered ✕ = Optional Not Entered

Click link to view role data requirements:
[Role Data Lookup](#)

PROCESSING: LAUREN CHOCK
(Registration, Subscription, Roles, Card)

Back **Add To Cart** **Terminate**

t. Click **OK**

Message from webpage

YOU HAVE ITEMS IN YOUR SHOPPING CART

You have just added something to the shopping cart shown in the top right of this page under the menu.

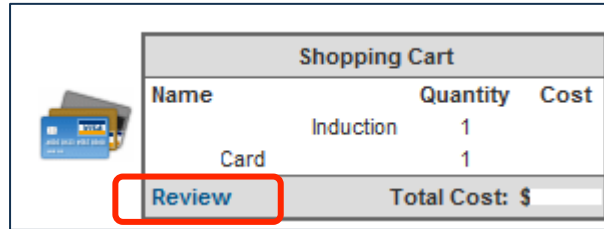
To process those items click the icon or 'review'.

IMPORTANT NOTE

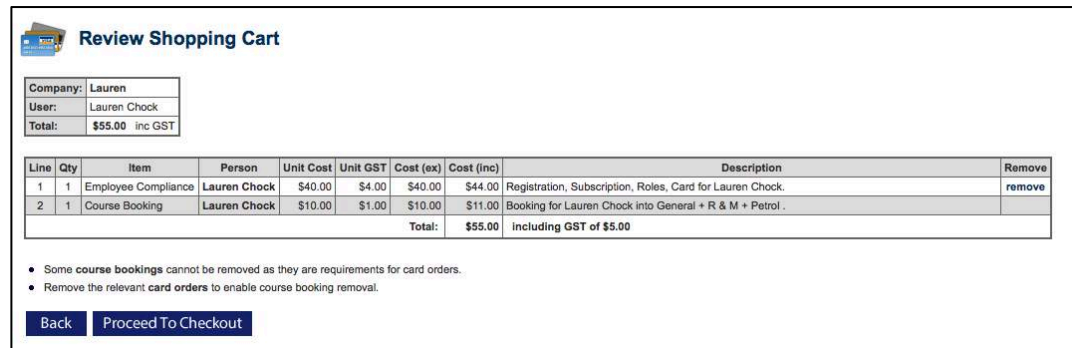
If you LOGOUT OR LET THE SESSION EXPIRE with any items in your shopping cart they WILL BE DISCARDED!

OK

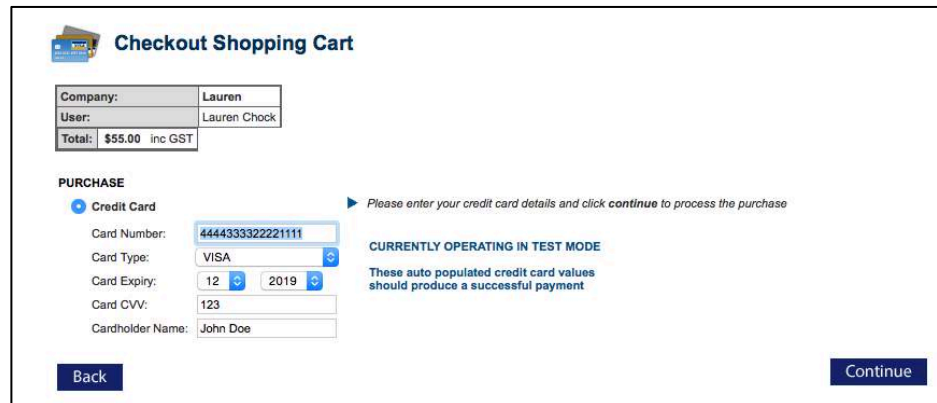
u. Click **review**



v. Review and ensure all training events and Onsite Cards are listed, and click **Proceed To Checkout**



w. Enter the payment details and select **Continue**



- x. Your documents will be assessed and authorised. If they do not meet requirements, they will be returned for action. You will receive an email telling you this, and it will show as ***action required*** on the home screen of the portal when you login.

Once the upload requirements have been verified, online training will be approved and your employees will be emailed login details.

Once all online training has been successfully completed, the classroom induction booking will be approved and a confirmation email sent to the employee.

NOTE: Competencies will need to be maintained as they expire.

WHERE CAN I FIND HELP?

Pegasus Safety

1300 291 561
safetycompliance@pegasus.net.au

Retail FM Contractor Information Website

<http://wowcontractor.com.au>