Lendlease
Site Access

User Guide for Company Relationships

Company Relationships Overview

- The Company Relationships Feature is designed for our Contractor Companies to help map out relationships they have at sites with the Client (Lendlease) and their own Sub-contractors.

- Contractor Companies will be able to make the relationship connections in the Roles Portal, so that they can track the hierarchy of these relationships when viewing a company.

- The relationship connection is defined as:
  - Making relations with a Parent Company (my company works for)
  - Making relations with a Sub-contractor Company (my company engages with this company).

- When establishing a relationship, Notification emails will be sent out to the company you wish to map, informing them of this relationship. If it's a new company, they will then also be invited to register in the portal.

- **Note**: The Company Relationships Feature is enabled by the Client (Lendlease, and not something that you enable as a Portal User.
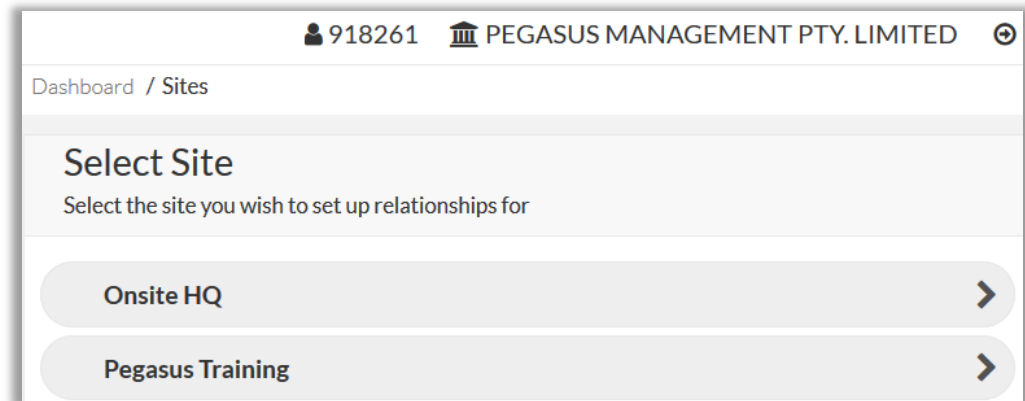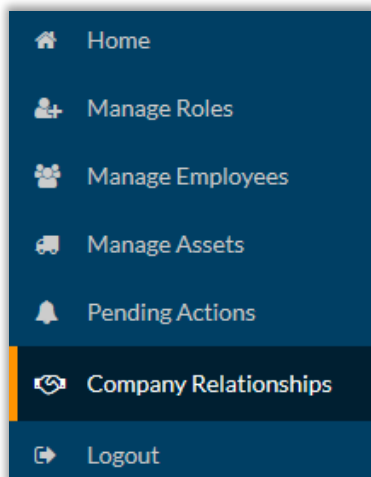
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ICON DESCRIPTIONS

Legend to Company Relationships

- House Icon will return you to the TOP Level of the Company Relationship Hierarchy whenever pressed.

- Arrow icon will open Messaging Window so a personalised message can be sent directly to the company subscription contact. Sent to the company that this arrow is located on.
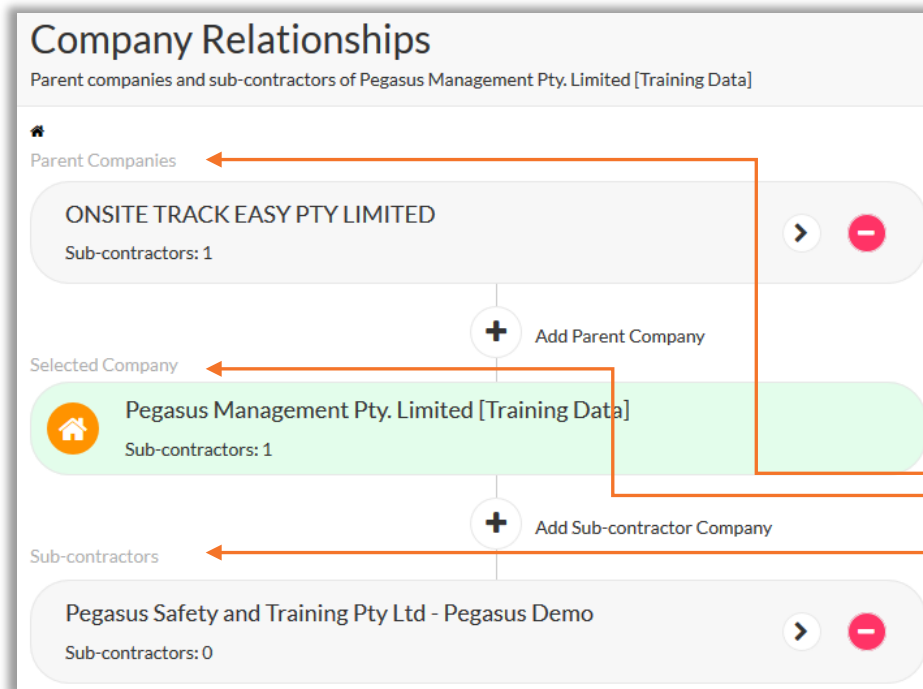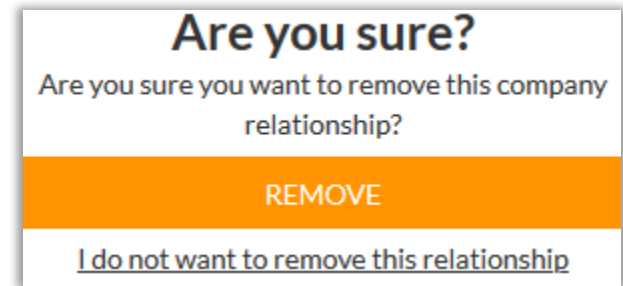

- Minus icon, when pressed will prompt a pop-up screen asking if you wish to remove the Relationship. Can be cancelled if accidentally pressed.

- Shows the three areas of relationships between all companies at all times

- NOTE: At this time, Sub-contractors of Sub-contractors can not be added. Will just need to be setup as a Sub-contractor company under the "Selected" company.

- Amber House Icon will always show YOUR company on screen in reference to the other companies, no matter how many Parent Companies or Sub-contractor companies you configure.

SETTING UP A COMPANY RELATIONSHIP

Setting Up Company Relationships

Login to the relevant Roles Portal

Click on the Company Relationships module

This will open a new screen on the right-hand side

Select the Site you wish to manage your first Relationship with.

- If you are unsure of other Roles Portals you can access, a full list is available here: https://kb.pegasus.net.au/display/OCCS/Roles+Portal/#PortalList

- Creating relationships is only visible in this Roles Portal

- New relationships have to be created for each site that you work at, even if that will be the same relationship.
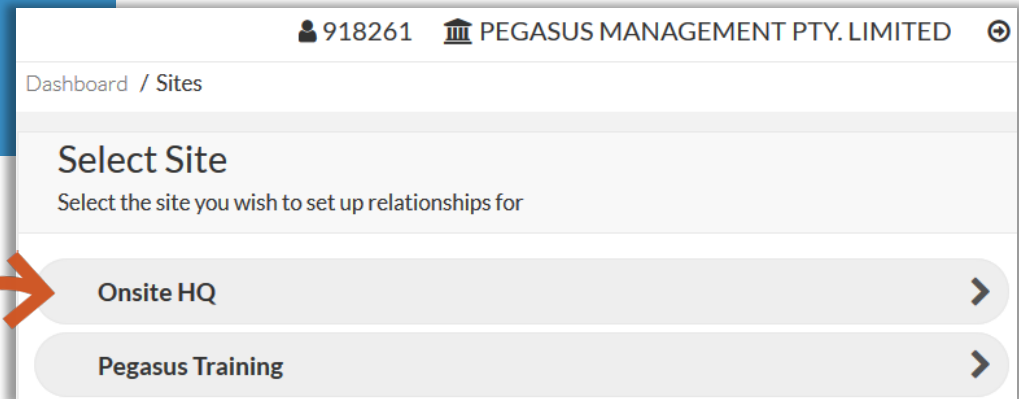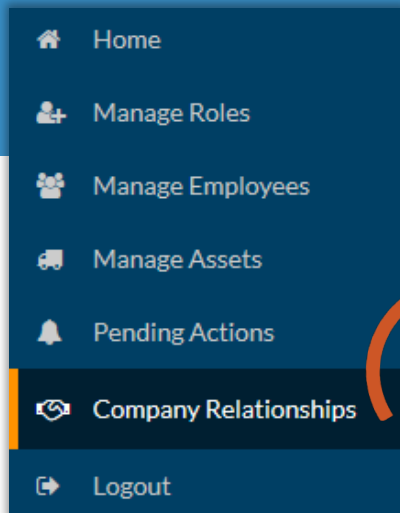
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Company Relationships
Parent companies and sub-contractors of PEGASUS MANAGEMENT PTY. LIMITED

🏠

Parent Companies

➕ Add Parent Company

Selected Company

🏠 PEGASUS MANAGEMENT PTY. LIMITED
Sub-contractors: 0

➕ Add Sub-contractor Company

Sub-contractors

Select Site
Select the site you wish to set up relationships for

Onsite HQ

Pegasus Training

Pegasus
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Setting Up Company Relationship – Parent Company

Click the + next to "Add Parent Company"

Enter in ABN number of Parent Company and press "Search"

If company exists click "Add Parent Company" next to the Company name you want to list as your Parent Company

- **Parent Company** means you work Under that company

- Could mean you sub-contract to them or if there are multiple company branches, you can list the one you work under or report to.

- Can add multiple companies using this method if required.

Add Parent Company

Please select which country the company resides in:

Australia

ABN (Australian Business Number):
Don't know your ABN? Find it here
Please enter the ABN of your business and click 'Search'.

84 098 220 743

Search

Registered Entity Name:
ABN: 84098220743

ONSITE TRACK EASY PTY LIMITED

Contact: P

Add Parent Company

Status: **In System**

+ Add Parent Company

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Setting Up Company Relationship – Parent Company

Once Parent Company added, a window appears to send an email to the Company Contact

This email will stat that you have added them as the Contact in the Company Relationships Feature.

Also allows for a personalized message to be added.

- Contact name and email address is retrieved from the listed Company Subscription Contact tab in Onsite Track Easy.

- No action is required by the Parent Company at this time. Purely a notification feature.

- This relationship is now visible to the Client (Lendlease, Aldi etc) so they can track these relationships via Reporting.

Company Relationships
Parent companies and sub-contractors of PEGASUS MANAGEMENT PTY. LIMITED

🏠

Parent Companies

ONSITE TRACK EASY PTY LIMITED
Sub-contractors: 1

➕ Add Parent Company

Selected Company

🏠 PEGASUS MANAGEMENT PTY. LIMITED
Sub-contractors: 0

➕ Add Sub-contractor Company

Sub-contractors

Company Information

ONSITE TRACK EASY PTY LIMITED
ABN: 84 098 220 743

Contact

Contact name: P_____k (_____@pegasus.net.au)

Just registering you as our Parent Company in the Roles Portal for Reference

Send Message

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Click on the Site, you wish to list the relationship against

Click on the + "Add Sub-contractor Company" button
Enter in the ABN and Search

Press "Add Sub-contractor Company" if search reveals a result for company that's already in the System. This will show "In System" next to Status.

- Press "Find it here" to launch the ABN lookup page to track down the number you need for a subcontractor if you don't have it.

- If they already exists in the Pegasus Onsite Track Easy system and are registered, they will appear as "Status: In System"

- IF ABN has multiple business names, they will display in this screen as well. Select the Name you are familiar with.

Setting Up Company Relationship – Sub-Contractor Company

After Sub-contractor Company added, shows # of Sub-contractors under your Company.

A window appears to send an email to the Company Contact .

This email will stat that you have added them as the Contact in the Company Relationships Feature.

Also allows for a personalized message to be added.

- Sending email to established Sub-contractor company is optional.

- Press ">" to send another message at any time if required

- Press "-" if you wish to Remove Sub-contractor company at any time. This will then reflect in the portal.

Company Information

ONSITE TRACK EASY PTY LIMITED

ABN: 84 098 220 743

Contact

Contact name: P⬛⬛k (⬛⬛@pegasus.net.au)

Just adding you as a Sub-contractor Company in the Roles Portal.
No action required at this time, just a formality.
Regards
Pegasus Management Training

Send Message

Selected Company

🏠 Pegasus Management Pty. Limited [Training Data]
Sub-contractors: 1

➕ Add Sub-contractor Company

Sub-contractors

ONSITE TRACK EASY PTY LIMITED
Sub-contractors: 1   ❯ ⊖

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Setting Up a New Company – Parent or Sub-contractor

If company does not exist in the Pegasus System after an ABN search, Press "Invite".

Ensure you enter in valid details on behalf of the Main Company Contact.

Press "Create Company".

Email will be sent to Main Contact to manage their login to the portal.

- If you do not have the correct details for the Parent or Sub-contractor company that you want to add, then DO NOT invite them.

- Incorrect details will slow the onboard process, as invalid email address or contact details might cause the relationship to be uncontactable. Additionally the company, if they are not expecting this request may think this is Spam.

- Can do this process for a Parent or Sub-Contractor company.

Add Sub-contractor Company

Please select which country the company resides in:

Australia

ABN (Australian Business Number):
Don't know your ABN? Find it here
Please enter the ABN of your business and click 'Search'.

72 470 283 092   Search

Registered Entity Name: Concept Management Pty Ltd
ABN: 72470283092
Mr Doughnuts
Status: **Not in System**

Concept Management Pty Ltd
Status: **Not in System**   Invite

The Trustee For Fisher Family Trust
Status: **Not in System**   Invite

Invite

Main Contact

ABN*	72 470 283 092
Company Name*	Mr Doughnuts
First Name*	David
Last Name*	Smith
Email*	davidsmith@test.com
Phone*	0420202020

Create Sub-contractor Company

VIEWING EXISTING RELATIONSHIPS

Viewing Existing Company Relationships

Login to the relevant Roles Portal

Click on the Company Relationships module

This will open a new screen on the right-hand side

Select the Site you wish to view the active relationships

- If a company administrator or user has setup some company relationships, you are able to view them here.

- Exercise caution, as currently relationships can be removed by all users of the Roles Portal. No user permissions currently set that prevent users deleting Company Relationships.

EMAILS SENT BY RELATIONSHIP MODULE

Emails Sent By Relationship Module

Hi ONSITE TRACK EASY PTY LIMITED,

Damien Challen from Pegasus Management Pty. Limited [Training Data] has listed your organisation as its parent company in the Lendlease Site Access Workforce Management System.

GO TO THE SYSTEM NOW to review this company relationship.

- If a company is added as a Parent Company, an email is sent to them outlining they have been added. Clicking "Go to the system now" will currently open the Roles Portal so the administrator of *ONSITE TRACK EASY PTY LIMITED* can log in. They can then setup their own Company Relationships.

Hi Pegasus Safety and Training Pty Ltd - Pegasus Demo,

Damien Challen from Pegasus Management Pty. Limited [Training Data] has listed your organisation as its subcontractor in the Lendlease Site Access Workforce Management System.

GO TO THE SYSTEM NOW to review this company relationship.

- If a company is added as a Sub-contractor Company, an email is sent to them outlining they have been added. Clicking "Go to the system now" will currently open the Roles Portal so the administrator of *Pegasus Safety and Training Pty Ltd – Pegasus Demo* can log in. They can then setup their own Company Relationships.

Hi Pegasus Safety and Training Pty Ltd - Pegasus Demo,

Pegasus Management Pty. Limited [Training Data] has this message for you.

I am adding you as a subcontractor so I can track in the Lendlease Worker Portal - Company Relationships System

GO TO THE SYSTEM NOW to review your company relationships.

- If a company information email was sent, this is an example of the message format that would be received by the nominated Company Subscription contact.

- These emails are optional. Its just a convenience that has been added to the Company Relationships feature.

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FOR QUESTIONS OR ASSISTANCE, PLEASE CALL

1300 183 990

OR EMAIL **lendlease@pegasus.net.au**