



ONSITE TRACK EASY

CONCOWEB
USERS & ACCESS RIGHTS

Version 1.1

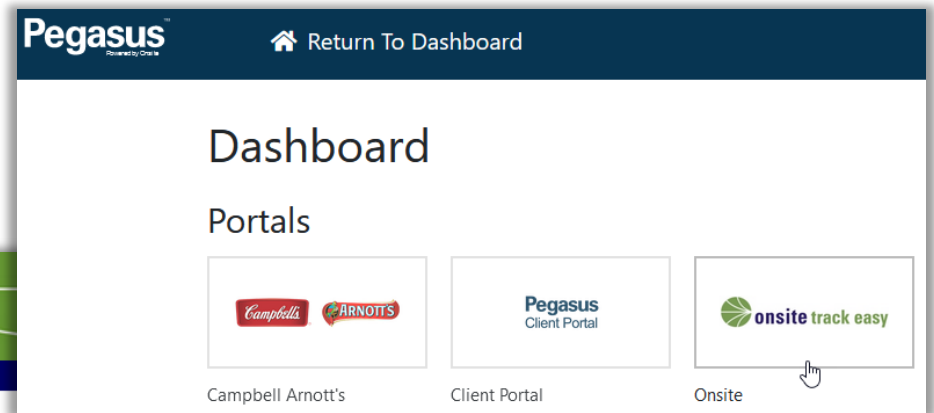
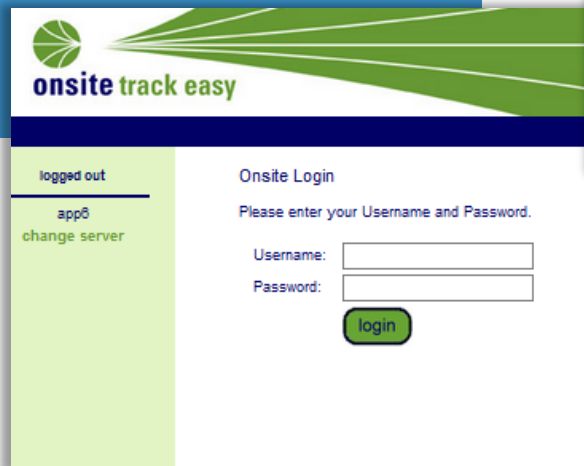
User Access & Rights



LOGIN

Go to <https://secure.onsitetrackeasy.com.au> and enter your login details then click the “Login” button.

- This is the main data storage area for all contracting companies, employees and contractors.
- You might also access this area via the Pegasus Gateway if you have that account setup. Learn more about that [here](#)





ONSITE TRACK EASY

ADDING USERS

Adding Users



STEP 1

Click on the “Person” tab.

Select “Users”.

- You can add as many users as needed.
- User access rights – what they can do when logged in – can be varied to suit the individual. These can be set at the time of creating the user or at any time as needed.

The screenshot displays the Onsite Contractor web application interface. At the top, the logo 'onsite contractor' is on the left, and 'Pegasus Management' is on the right. Below the logo is a navigation bar with tabs: 'home', 'person', 'company', 'report', and 'setup'. The 'person' tab is currently selected. A dropdown menu is open under the 'person' tab, listing several options: 'lookup by id', 'lookup roles & comps', 'employees', 'my session preferences', 'my user account', and 'users'. The 'users' option is highlighted with a mouse cursor. An orange arrow points from the 'users' option in the dropdown menu back to the 'person' tab in the navigation bar. The main content area shows a session detail panel on the left with information like 'Session tag: 9283', 'app1', 'U: Damien Challer', 'R: Editor', and 'C: U0 A3'. The main content area also displays 'Onsite Contractor' and 'timezone: /'. A promotional banner at the bottom right encourages purchasing a yearly subscription to 'Onsite Contractor Full' for unrestricted reporting on all employees' data.

Adding Users



STEP 2

Enter a portion of the persons name to ensure they have not already been entered.

Tick the Inactive box also to search inactive profiles.

Click “Add” if no results appear.

- If the person has already been created but is inactive, follow the steps in the Activating an Inactive User Profile section.

The screenshot shows the 'Site Users' interface. At the top left, it says 'Site Users'. On the right, it says 'Cal Basis: Concurrent Login, Cals: 4' and 'printer friendly' with a printer icon. Below this is a search bar containing the text 'tester' and a green 'search' button. To the right of the search bar is a checkbox labeled 'Include Inactive' which is checked. Further right is a green 'add' button. Below the search bar, it says 'Found 0 matches.' and a blue arrow points to the search bar with the text 'Leave search box blank to match all user names, or enter a text fragment to find matching names'. A large orange arrow points from the bottom of the page towards the 'add' button.

Adding Users



STEP 3

Search the list of existing people associated to the company to see if the person you are adding is there.

Click “Add as New” if not.

- This process allows the system to auto populate fields if the person is already under the company.

Create Users From Existing Employees

- ▶ Use the **add as new** button to add a user who is **not an employee**.
- ▶ To add users who **are employees**, select their names from the list below, check & update their email addresses, then use the **proceed** button below the list.
- These employees are **Realm Web** users. Making these employees into **Site Web** or **Employee Personal Web** users will **delete** their existing user accounts.

add as new

Make User	Employee	Email	User Type
<input type="checkbox"/>	Arnold, Casper	cheemajatt26@yahoo.com.au	Site Web
<input type="checkbox"/>	Baker, Tara	tbaker@pegasus.net.au	Site Web
<input type="checkbox"/>	Bandyopadhyay, Srijata	michelle.bandyopadhyay@glencore.com.au	Site Web
<input type="checkbox"/>	Belinda, Test	bsaridis@pegasus.net.au	Site Web
<input type="checkbox"/>	Bhattacharya, Mousumi	tnghuyen@pegasus.net.au	Site Web
<input type="checkbox"/>	Boucher, Maddison	mboucher@pegasus.net.au	Site Web
<input type="checkbox"/>	Boyes, David	info@exis.com.au	Site Web
<input type="checkbox"/>	Brock, Peter	astevenson@pegasus.net.au	Site Web
<input type="checkbox"/>	Burwell, Sarah	nhallam@pegasus.net.au	Site Web
<input type="checkbox"/>	Car, Testa	wleones@pegasus.net.au	Site Web
<input type="checkbox"/>	Card 1, Usp	pnavrati@pegasus.net.au	Site Web



Adding Users



STEP 4

Enter the persons details. All mandatory items are marked with an asterisk.

- You can opt for the person to be able to use Onsite.
- Onsite allows a much greater freedom with information and the changes that can be performed.
- Ensure you only tick this for those you need to access this area of the system.

Add Onsite Contractor User

add

First name:	<input type="text" value="Pegasus"/> *
Middle name:	<input type="text"/>
Last name:	<input type="text" value="ConcoTester"/> *
Job title:	<input type="text"/>
Phone 1: *	<input type="text"/>
Phone 2: *	<input type="text"/>
Email 1:	<input type="text" value="PegasusConcoTester@test.com"/> *
Email 2:	<input type="text"/>
Address: *	<input type="text"/>
Town: *	<input type="text"/>
State: *	<input type="text"/>
Post code: *	<input type="text"/>
Country: *	<input type="text" value="Australia"/> ▼
Can Use Onsite:	<input checked="" type="checkbox"/>



Adding Users



STEP 5

You can have the person only able to view data or they can be a data editor.

You can select user rights by ticking the boxes next to the actions the person can perform.

- Data editor means the person can change personal information.
- A user may not need to access all areas of the system so the access can be set to allow access to a certain areas.
- NOTE: Creating an account here will enable access in the various [Contractor Worker Portals](#)

User Rights

Onsite Contractor Access Level:

Data Viewer ▾

Can Manage User Accounts:

Data Viewer

Can End Employment:

Data Editor

User Rights

Onsite Contractor Access Level:

Data Viewer ▾

Can Manage User Accounts:

Can End Employment:

Can Edit Onsite Contractor Settings:

Can Access Private Data:

Can Manage Training:

Can View SMS Review Results:

Can Action Corrective Actions:

Can View Corrective Actions:

Adding Users



STEP 6

Click on “Save” when done.

- The person will receive an email with their login details.
- They can change their username and password when they login.
- NOTE: For contractors the Mobile App currently DOES NOT WORK. This is under development. This settings appears as it is a GLOBAL setting for all users of the onsite system. Preferably leave enabled for future use.

Mobile App Rights

Can Use **Mobile App** *if ticked, user will be able to use the Onsite mobile app*

Can Perform **Cardholder Role Audits**

Can Search By **Cardholder Name, Company and DOB**

cancel **save**

▶ Fields marked with a blue asterisk (*) are **Mandatory**.

▶ Field names in *italics* are **Private** and can only be viewed if this is your own account or you have the **Can Access Private Data** or the **Can Manage Users** permission.



ONSITE TRACK EASY

CHANGING USER RIGHTS

Changing User Rights



STEP 1

Click on the “Person” tab.

Select “Users”.

- You can change user rights any time.
- User access rights – what they can do when logged in – can be varied to suit the individual.

The screenshot shows the Onsite Contractor Pegasus Management web application. The top navigation bar includes tabs for 'home', 'person', 'company', 'report', and 'setup'. The 'person' tab is active, and a dropdown menu is open, listing options: 'lookup by id', 'lookup roles & comps', 'employees', 'my session preferences', 'my user account', and 'users'. The 'users' option is highlighted with a mouse cursor. A red arrow points from the 'users' option in the dropdown menu back to the 'person' tab in the navigation bar. The main content area displays 'Onsite Contractor' and 'timezone: /'. A promotional message for a yearly subscription to 'Onsite Contractor Full' is visible on the right side of the page.

Changing User Rights



STEP 2

Enter a portion of the persons name click their name in the search results.

Site Users Cal Basis: Concurrent Login, Cals: 4

TESS Include Inactive

Found 1 matches.

Name	ID	Username	Default Location	Web Access	User Manager	Employee	Employer	Title
Tester, Tess	002 631 844		Pegasus Newcastle	Viewer	User Manager			

▶ Leave search box blank to match all user names, or enter a text fragment to find matching names.
▶ Click a user name to view the user details.



Changing User Rights



STEP 3

Click on the Rights tab in the menu bar.

Scroll down and click on "Edit".

- When you edit user rights the changes will be activated when the user logs in after the change has been saved.
- The Clock icon next to the Edit button is the "Edit History" button. You can use it to view any previous changes that have occurred and who made those changes to a users rights.



Changing User Rights



STEP 4

Tick in the boxes next to the user rights you want the individual to have.

Scroll down and click on "Save".

- Selecting user rights is as easy as ticking a box and saving.
- All user rights will be active for the location in the system the user has been set as an editor or viewer under.
- User rights can be inactivated by the same process but unticking the boxes next to the rights you want to remove.
- Click on OK in the pop up window, this is to advise that the user will need to login to activate the changes.

Specific Data Rights

- Can Manage **User Accounts**
- Can End **Employment**
- Can Edit Onsite Contractor **Setting**
- Can Access **Private Data**
- Can Manage **Training**
- Can View **SMS Review Results**
- Can Action **Corrective Actions**
- Can View **Corrective Actions**

User rights are assigned at the start of each session. If currently logged in, this user will need to log out and then log in again before these changes will apply.

OK



ONSITE TRACK EASY

INACTIVATING USERS

Inactivating Users



STEP 1

Click on the “Person” tab.

Select “Users”.

- You can inactivate users as needed.
- User access profiles can be reactivated at any time by a user that has editor rights.

The screenshot displays the Onsite Contractor web application interface. At the top, there is a green header with the 'onsite contractor' logo on the left and 'Pegasus Management' on the right. Below the header is a dark blue navigation bar with tabs for 'home', 'person', 'company', 'report', and 'setup'. The 'person' tab is currently selected. A dropdown menu is open under the 'person' tab, listing several options: 'lookup by id', 'lookup roles & comps', 'employees', 'my session preferences', 'my user account', and 'users'. The 'users' option is highlighted with a mouse cursor. A red arrow points from the 'users' option in the dropdown menu back to the 'person' tab in the navigation bar. The main content area shows a session detail sidebar on the left with information like 'Session tag: 9283', 'app1', 'U: Damien Chall...', 'R: Editor', and 'C: UC...'. The main content area also displays 'Onsite Contractor' and 'timezone: /'.

Inactivating Users



STEP 2

Enter a portion of the persons name click their name in the search results.

Site Users Cal Basis: Concurrent Login, Cals: 4

TESS Include Inactive

Found 1 matches.

Name	ID	Username	Default Location	Web Access	User Manager	Employee	Employer	Title
Tester, Tess	002 631 844		Pegasus Newcastle	Viewer	User Manager			

▶ Leave search box blank to match all user names, or enter a text fragment to find matching names.
▶ Click a user name to view the user details.



Inactivating Users



STEP 3

Once you have opened the individual's profile that is to be inactivated, click on "Edit".

Untick the "Active" box and click "Save".

- By inactivating the profile you are not deleting it from the system, you are essentially placing the user access rights into a no access state and the profile becomes hidden.
- You can access it at any time later by searching for the individual with the Inactivate box ticked in the Site Users section. (refer to previous screen to see an example image of this section).

The screenshot shows the user profile edit form for 'Tess Tester' (user ID 002 631 844). The form includes fields for Roles, Username, First Name, Middle Name, Last Name, Job Title, Phone, Email, Address, Town, State, Post Code, Country, Scorm Access, and Active. The 'Active' checkbox is currently checked. Two callout boxes with orange arrows point to the 'Active' checkbox, showing it being toggled to unchecked. The callout boxes contain the text: 'Untick Active to close the account and disable logins' and 'Fields marked with a grey asterisk (*) are Private and can only be viewed if this is your own account or you have the Can Access Private Data or the Can Manage Users permission.' The 'cancel', 'save', and 'reset password' buttons are visible in both callout boxes.

Inactivating Users



INACTIVE USER PROFILE

This is the profile when it is inactive and how the search results will appear when searching including inactive profiles.

- Inactive users can no longer log into Onsite Track Easy or any of the Worker Portals.
- They can be re-activated at any time.

Pegasus ConcoTester (inactive Onsite Contractor user)

general rights

User Id: 003 506 693
Username:
First Name: Pegasus
Middle Name:
Last Name: ConcoTester
Job Title:
Phone 1: *
Phone 2: *
Email 1: PegasusConcoTester@test.com
Email 2:
Address: *
Town: *
State: *
Post Code: *
Country: * Australia
Scorm Access: ✘ Whether this user account is required for launching SCORM online training
Active: ✘ Logins are disabled while this user account is inactive

back edit ↻

Onsite Contractor Users

search Include Inactive

Found 11 matches.

Name	Active	ID	Username	Web Access
Challen, Damien	✓	003 344 681		Editor
ConcoTester, Pegasus	✘	003 506 693		Viewer



ONSITE TRACK EASY

FOR QUESTIONS OR ASSISTANCE, PLEASE CALL

1300 131 194

OR EMAIL support@onsitetrackeasy.com.au