



# **ONSITE TRACK EASY**

**USER GUIDE**

**Safety Selection Changes November 2019**

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# SAFETY SELECTION PAGE OVERVIEW

# Safety Selections Overview



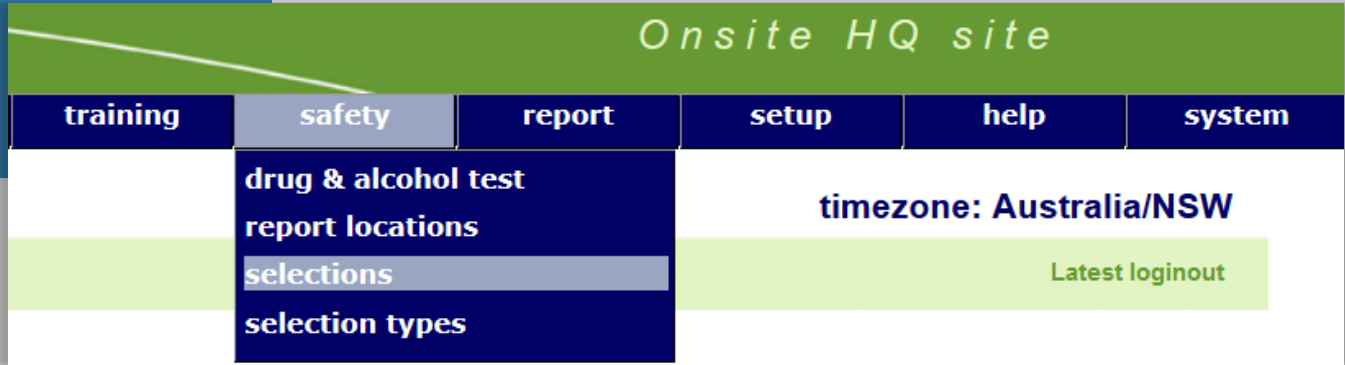
## OVERVIEW

The Safety Selections Feature is found in Onsite Track Easy under **SAFETY > SELECTIONS**

You must have the User Permission for your account enabled “Can Manage Safety Selections” to do most of the features listed in this guide.

- Safety Selections are a tool that works alongside Pegasus Kiosks/Logpoints/Tablets that can trigger an event that requests a cardholder, when selected, to perform a certain task before they can return to logon to site.
- Used effectively, it can run an assortment of safety tests at a site that are triggered under certain conditions.
- Can also be triggered against certain people types (Employees, Contractors and now Visitors) as well as against certain logpoints or locations.

 Can Manage **Safety Selections**



The screenshot shows a navigation menu for 'Onsite HQ site'. The menu items are: training, safety, report, setup, help, and system. The 'safety' menu is expanded, showing sub-items: drug & alcohol test, report locations, selections, and selection types. The 'selections' sub-item is highlighted. On the right side of the menu, it displays 'timezone: Australia/NSW' and 'Latest loginout'.

# Safety Selections Overview



## OVERVIEW

The Safety Selections page will allow you to view all the current, scheduled, pending or previously created Selections. Were one was previously run, you can view those results if necessary.

- **Note with Multiple Selections Running At Once**  
With the ability to schedule one off and recurring safety selections, it's possible that more than one will want to run on a logpoint at the same time. It's only possible for a single selection to be operational on any logpoint at once, and if there are selections for that logpoint with overlapping times, whichever one started first will be the one that takes effect

### Safety Selections

**Safety Selections**

Type: -- All --

Sort By: Status, Time

Status:  Pending  
 Scheduled  
 Running  
 Stopped  
 (but only unfinished)

Dates:  All  
 From    
to

**Recurring Configs**

Include Recurring Configs

Include Inactive

Name	Id	Status	Start Time	Stop Time	Planned Stop	Logpoints	Report To	Person Type	One In	Max	Pre Sel	Selected	To Do	Done	Created By	Active
Drug Test	2801	Pending				SWLP ADMIN, SWLP LP6 V2	Main Gate	Contractors, Employees	3		0, 0, 0				Brooke Furner	✓
Hearing test	2803	Pending				SWLP ADMIN	Main Gate	Contractors	3		0, 0, 0				Brooke Furner	✓
Drug Test	2944	Pending				SWLP ADMIN	Main Gate	Contractors, Employees	3		0, 0, 0				Katrina Soffer	✓
Drug Test	2945	Pending				SWLP ADMIN	Main Gate	Contractors, Employees	3		0, 0, 0				Katrina Soffer	✓
Drug Test	3469	Pending				SWLP ADMIN	Main Gate	Contractors, Employees	3		0, 0, 0				Damien Challen	✓
Drug Test	5171	Pending				SWLP OFFICE	Main Gate	Contractors, Employees	3		0, 0, 0				Aaron Stevenson	✓
Drug Test	5172	Pending				SWLP OFFICE	Main Gate	Contractors, Employees	3		0, 0, 0				Aaron Stevenson	✓
Drug Test	5772	Running	04-Dec-19 at 15:42			TECH LP6	Main Gate	Contractors, Employees, Visitors	1		0, 0, 0	3 / 3	1	2	Shane Humbles	✓
Drug Test	6015	Running	18-Dec-19 at 14:47			LOGPOINT ALL SCREENS	Main Gate	Contractors, Employees, Visitors	1		0, 0, 0	1 / 1	1	0	Shane Humbles	✓



# **SCHEDULED SAFETY SELECTIONS WITH START AND FINISH TIMES**

# Scheduled with Start and Finish Time



## STEP 1

Select SCHEDULED and enter the required safety selection dates and times details, by clicking on the Calendar Icon.

Adjust the Start and Stop Time accordingly and ensure you enter in a “Description for Selectees” and must have at least one Logpoint selected to continue.

- Previously all Safety Selections had to be manually started with the “Start Now”
- Scheduled selections require you to specify the Start and Stop dates and times. The Safety Selection will then run once, starting and stopping at the specified dates and times.

**Add Safety Selection / Recurring Cont**

Run Mode:  Automatic start and stop

Start Time:   enter date

Stop Time:   enter date/time

Selection Type:

Person Type:  Contractors  Employees

Select One In:  On average, one selection in hours

Max Selectees:  Stop the safety selection when the number of selectees reaches this limit

Pre Selected: Persons: 0 can only change in view  
Companies: 0 can only change in view  
Crews: 0 can only change in view

Report Location:

Report Within:  minutes Time after selection when selectee becomes overdue (5-60)

Alert Delay:  minutes Time after selectee overdue before included in alerts (0-60)

Description For Selectees:

Active:

Set time first then set date **Time 16 : 20**

2019  
Dec

S	M	T	W	T	F	S
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



# Scheduled with Start and Finish Time



## STEP 2

Scheduled Safety Selections can be re-edited before the event if required to change any parameters.

Once changes have been made, press “save” to commit changes.

- Before a Safety Selection executes, you can continue to enter it and manage its settings prior to its start.



### Safety Selection: Hearing test 6033

Run Mode:  Automatic start and stop at future times

ID: 6032 **SCHEDULED**

Start Time:   enter date/time as "dd mmm yy hh:mm" or click icon

Stop Time:   enter date/time as "dd mmm yy hh:mm" or click icon

Selection Type:

Person Type:  Contractors  Employees  Visitors

Select One In:  On average, one selection in how many possibilities? (1-100)

Max Selectees:  Stop the safety selection when this many people have been selected.

Pre Selected: Persons: 0 can only change in view mode  
Companies: 0 can only change in view mode  
Crews: 0 can only change in view mode

Report Location:

Report Within:  minutes Time after selection when selectee becomes overdue (5-60)

Alert Delay:  minutes Time after selectee overdue before included in alerts (0-60)

Description For Selectees:

Active:



# Scheduled with Start and Finish Time



## STEP 3

On the same page, you can choose which logpoint(s) you wish to run this selection against.

You can toggle between Online and Offline logpoints by pressing the “toggle” button.

Additionally you can bulk select logpoints based on locations with the “select” option next to Locations

- Previously you could only select online logpoints, as shown here where those with red crosses are offline and the tickboxes are greyed out so they can't be selected.
- Now you can remove that restriction by clicking the 'toggle' link under the logpoint list.
- This change is automatically saved, but it can easily be toggled back later if required.

<input type="checkbox"/>	SWLP MONITORING	SWLP	
<input type="checkbox"/>	SWLP OFFICE	SWLP	
<input checked="" type="checkbox"/>	SWLP ONSITE HQ	SWLP	
<input checked="" type="checkbox"/>	SWLP WAREHOUSE	SWLP	
<input checked="" type="checkbox"/>	TECH LP6	LP6	✘
<input checked="" type="checkbox"/>	TEST	LP5	✘
<input checked="" type="checkbox"/>	WAREHOUSE MAIN	LP4	✘

Online and offline logpoints selectable (toggle)

If a logpoint is in multiple selections running at the same time it only uses the earliest one

Only online logpoints selectable (toggle)

If a logpoint is in multiple selections running at the same time it only uses the earliest one

### Select Logpoints By Location:

Location	Action
Onsite HQ	select / deselect
Admin	select / deselect
Factory	select / deselect
HQ Office	select / deselect
LP6	select / deselect
Monitoring	select / deselect
Warehouse	select / deselect



# RECURRING SAFETY SELECTIONS

# Recurring Safety Selections



## STEP 1

Open Safety Selection Page and click on ADD to create a new event

Choose your Run Mode as "RECURRING"

- The ability to create recurring selections will save time for administrators by not having to continually manage new selections.
- Future Day, Week or Month selection will allow administrators to plan safety selections in advance, to prepare for upcoming events or planned work

### Add Safety Selection / Recurring Config

Run Mode: **RECURRING**  *Automatic start and stop at repeated intervals*

Recur Every: **MANUAL**

Between: **SCHEDULED** 30

Selection Type: **RECURRING**

Person Type:  Contractors  Employees  Visitors

Select One In:  *On average, one selection in how many possibilites? (1-100)*

# Recurring Safety Selections



## STEP 2

Choose the DAY, WEEK or MONTH option.

Complete day or month selections if chosen, and ensure you enter in a “Description for Selectees” and must have at least one Logpoint selected to continue.

Hold CTRL key to select multiple items for Week and Month options

- This allows you to set up safety selections to run every day, week or month. In each case you must specify the start and stop times.
- These are times only, not dates, as the dates come from your choice of the recurrence cycle.
- If you want to stop a scheduled or recurring safety selection from running, just inactivate it.
- NOTE: With the ability to schedule one off and recurring safety selections, it's possible that more than one will want to run on a logpoint at the same time. It's only possible for a single selection to be operational on any logpoint at once, and if there are selections for that logpoint with overlapping times, whichever one started first will be the one that takes effect

The screenshot displays the configuration interface for recurring safety selections. It includes the following fields and options:

- Run Mode:** RECURRING (Automatic start and stop)
- Recur Every:** DAY, WEEK, MONTH
- Between:** 12:30 to 15:30
- Days of Week:** Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday
- Days of Month:** 01, 02, 03, 04, 05, 06, 07, 08, 09, 10 (Use control key to select multiples)
- Selection Type:** WEEK, MONTH
- Person Type:** Employees (checked), Visitors



**CONFIGURE FOR SPECIFIC  
WORKERS OR GROUP**

# Specify Specific Workers or Group



## STEP 1

Once you have created a Safety Selection and saved it, you will now have the option to “Pre-Select” persons, companies or crews.

Click on the word “change” to open a new screen, find the group or individual, and add them to the selected list.

You can still change at any time the members selected, by clicking the word “change” again.

- The option to choose individuals, crews or a specific company to Always be chosen at the Safety Selection screen is now available.
- This will nominate these workers or groups to skip the random process and be “pre-selected” for your created Safety Selection.
- Only once a Safety Selection has been created, then will these options appear.

Add Persons

- Contractor  
 Employee  
 Visitor

search

Pre Selected:    Persons:    0    [change](#)  
                         Companies:    0    [change](#)  
                         Crews:        0    [change](#)

### Recurring Config: Hearing test 6035

Run Mode:  Automatic start and stop at repeated intervals  
Recur Every:   
Between:  to   
Selection Type:   
Person Type:  Contractors  Employees  Visitors  
Select One In:  On average, one selection in how many possibilities? (1-100)  
Max Selectees:  Stop the safety selection when this many people have been selected.

Pre Selected: Persons: 3 [hide](#) [change](#)

Id	Type	Name
3225108	Contractor	Patel, Jane
3091776	Employee	Smith, Ann
3224619	Contractor	Smythe, Steve

Companies: 2 [hide](#) [change](#)

Id	Type	Name
251	Contractor	ONSITE TRACK EASY PTY LIMITED
134	Contractor	Pegasus Training Pty Ltd

Crews: 2 [hide](#) [change](#)

Id	Name
1	A crew
3	B crew

# Specify Specific Workers or Group



## STEP 2

To view people whether pre selected or needing to be processed, at the bottom of viewing the relevant running safety selection is the “selectees” area.

Here is where you can view any pre-selected items as well as click on a name listed to process that person

- If a Company is pre selected then any person working for that company on your site that presents at a logpoint running that safety selection will be explicitly selected.
- If it's a Crew, then any person who is a member of that crew will be explicitly Whenever persons are selected, regardless of how that selection occurs, they appear at the bottom of the view selection page.
- You can see the ' basis ' on which they were selected. If pre selected that will be ' Person ', ' Company ' or ' Crew '. Otherwise it will be ' Random ', meaning it was done using a random selection algorithm based on the ' Select One In ' value specified in the safety selection

**SELECTEES**      3 / 3

3 To Do      *Click name to process selectee*

Name	Card ID	Person Type	Company	Due in H:M	Selected	Basis	Logpoint
<a href="#">JOHNNY TESTER</a>	001 017 425	Visitor	n/a	0:11	12 Nov 19 at 16:58	Random	SWLP ONSITE HQ
<a href="#">Test Person 1</a>	001 525 671	Employee	Onsite HQ Site Employer Pty Limited	0:13	12 Nov 19 at 16:58	Person	SWLP ONSITE HQ
<a href="#">Test EmployeeUser</a>	000 031 718	Employee	Onsite HQ Site Employer Pty Limited	0:14	12 Nov 19 at 16:58	Company	SWLP ONSITE HQ

0 Done



**SPECIFY PERSON TO ALWAYS BE  
SELECTED**



# Specify Specific Worker



## STEP 1

Find the worker you wish to enable this for under the menu PERSON > EMPLOYEE, CONTRACTOR or VISITOR, or use PERSON > LOOKUP BY ID

Look at their profile and below their Legacy ID section, will be the option to “Always Select”  
Once enabled, the change is immediate.

- The option to choose an individual to always be selected every time there is a Safety Selection running is now enabled.
- If a person is selected in a safety selection due to this setting, the ‘basis’ will show as ‘Perpetual’, and that person will continue to be selected every time they present for login at a logpoint that’s running any safety selection on your site.
- As with all other selectees, once they’ve been processed, following selection, they may then login at a logpoint that’s still running the selection for which they were processed.

**Legacy Id** Legacy ID = (none specified)

**Site Settings**  
Manual Login Manager: For logpoints with no manual button

**Custom Fields**  
Car Rego:

**Custom Lists**  
Department:  
Shift:

**Safety Selections**  
Always Select: **disable** Whether to select this person in every running Safety Selection (an Admin Note is automatically created when this is changed)

**Safety Selections**  
Always Select: **enable** Whether to select this person in every running Safety Selection (an Admin Note is automatically created when this is changed)



# MAXIMUM SELECTEES

# Maximum Selectees



## OVERVIEW

Maximum Selectees is now an option.

Specify the limit of people you wish to be selected for the duration of this Safety Selection

- You can specify a maximum number of selectees for each Safety Selection, and if that limit is reached before the scheduled or manual stop time, the Safety Selection will be immediately stopped .
- If the stop time arrives first, the Safety Selection will stop even though the maximum limit hasn't been reached.

### Add Safety Selection / Recurring Config

Run Mode:	<input type="text" value="SCHEDULED"/>	<input type="button" value="v"/>	<i>Automatic start and stop at future times</i>
Start Time:	<input type="text" value="20 Dec 2019 10:55"/>	<input type="button" value="19"/>	<i>enter date/time as "dd mmm yy hh:mm" or click icon</i>
Stop Time:	<input type="text" value="20 Dec 2019 13:55"/>	<input type="button" value="19"/>	<i>enter date/time as "dd mmm yy hh:mm" or click icon</i>
Selection Type:	<input type="text" value="Drug Test"/>	<input type="button" value="v"/>	
Person Type:	<input checked="" type="checkbox"/> Contractors	<input checked="" type="checkbox"/> Employees	<input type="checkbox"/> Visitors
Select One In:	<input type="text" value="3"/>		<i>On average, one selection in how many possibilities? (1-100)</i>
Max Selectees:	<input type="text" value="no limit"/>		<i>Stop the safety selection when this many people have been selected.</i>
Pre Selected:	Persons: 0		<i>can only change in view mode</i>
	Companies: 0		<i>can only change in view mode</i>
	Crews: 0		<i>can only change in view mode</i>
Report Location:	<input type="text" value="Main Gate"/>	<input type="button" value="v"/>	
Report Within:	<input type="text" value="15"/>	minutes	<i>Time after selection when selectee becomes overdue (5-60)</i>
Alert Delay:	<input type="text" value="60"/>	minutes	<i>Time after selectee overdue before included in alerts (0-60)</i>



# SELECTING VISITORS

# Selecting Visitors



## STEP 1

Selecting Visitors is now visible under when either starting a Safety Selection or editing an existing one.

Tick the box to enable Visitors to now be chosen at logpoints when this Safety Selection is active.

- A 'visitor' checkbox to the Person Type is available for selection. When ticked, any visitors who presents for login at a logpoint running that safety selection will be subject to the same random selection process as the other person types.
- If the visitor is selected, they can be processed on the safety selection view page, the same as Contractors and Employees.
- One major difference with visitors, though, is that there's no 'block' applied, so they could, theoretically, create themselves as a new visitor and then login, without having been processed.

### Add Safety Selection / Recurring Config

Run Mode:  Automatic start and stop at future times

Start Time:   enter date/time as "dd mmm yy hh:mm" or click icon

Stop Time:   enter date/time as "dd mmm yy hh:mm" or click icon

Selection Type:

Person Type:  Contractors  Employees  Visitors

Select One In:  On average, one selection in how many possibilities? (1-100)

Max Selectees:  Stop the safety selection when this many people have been selected.

Pre Selected: Persons: 0 can only change in view mode  
Companies: 0 can only change in view mode  
Crews: 0 can only change in view mode

Report Location:

Report Within:  minutes Time after selection when selectee becomes overdue (5-60)

Alert Delay:  minutes Time after selectee overdue before included in alerts (0-60)

Description For Selectees:

Active:

cancel

save



# PROCESSING SAFETY SELECTEES

# Processing Safety Selection Selectees



## STEP 1

To view Selectees needing processing, Open the Safety Selections Page, Click Search and then Click the relevant Selection.

This will open the Safety Selection Page

- If you can not find the selection you need you might need to tick on "Include Inactive" as that is disabled by default.
- Worker must be processed in order to continue to then log onto site.

### Safety Selections

**Safety Selections**  
Type:   
Sort By:   
Status:  Pending  
 Scheduled  
 Running  
 Stopped  
Dates:  All  
 From  to

**Recurring Configs**  
 Include Recurring Configs  
 Include Inactive

**Safety Selections**  
Found 8 selections.

Name	Id	Status	Start Time	Stop Time	Planned Stop	Logpoints
Drug Test	2801	Pending				SWLP ADMIN, SWLP LP6 V2
Hearing test	2803	Pending				SWLP ADMIN
Drug Test	2944	Pending				SWLP ADMIN
Drug Test	2945	Pending				SWLP ADMIN
Drug Test	3469	Pending				SWLP ADMIN
Drug Test	5171	Pending				SWLP OFFICE
Drug Test	5172	Pending				SWLP OFFICE
Drug Test	5839	Running	19-Dec-19 at 08:43			LOGPOINT ALL SCREENS , T



# Processing Safety Selection Selectees



## STEP 2

At bottom of the Safety Selection you are viewing, you can see the list of Selectees already chosen (if some have)

Click on each name in the “To Do” section to open their profile.

- If a Safety Selectee fails to appear or refuses to undertake processing, the system will count down and automatically then block them from site. Based upon the “Report Within” time setting listed in the Safety Selection options.
- When worker exceeds the “Report Within” time, an automatic email alert is sent to all persons listed on the Alert
- To be able to process Selectees, users must have the “Can Manage Safety Selections” right.

### SELECTEES 6 / 6

#### 4 To Do *Click name to process selectee*

Name	Card ID	Person Type	Company	Due in H:M	Selected	Basis	Logpoint
Shane Humbles	000 704 128	Contractor	ONSITE TRACK EASY PTY LIMITED	- 29:31	19 Dec 19 at 08:51	Random	LOGPOINT ALL SCREENS
SHANE TESTMCFITZ	003 320 206	Visitor	TESTCOMPANY101P	- 29:24	19 Dec 19 at 08:58	Random	TECH LP6
FISTSNTAME LASTNSDFUI	003 320 187	Visitor	TESTCOMPANYOFFLINE	- 29:24	19 Dec 19 at 08:58	Random	TECH LP6
FIRSTNTEST LASTNTEST	003 320 207	Visitor	TESTCOMPANYLESSTESTSP	- 29:22	19 Dec 19 at 09:00	Random	TECH LP6

#### 2 Done *Click name to view processed selectee*

Name	Card ID	Person Type	Company	Selected	Basis	Logpoint	Processed
Fitzy McFitzerson	000 000 229	Contractor	ONSITE TRACK EASY PTY LIMITED	19 Dec 19 at 08:56	Random	LOGPOINT ALL SCREENS	20 Dec 19 at 14:17
FIRSTNTES LASTNTES	003 320 205	Visitor	COMPTEST	19 Dec 19 at 08:57	Random	LOGPOINT ALL SCREENS	20 Dec 19 at 14:37

Processed	Processor	Process Note
20 Dec 19 at 14:17	Shane Humbles	Processed safety selectee Fitzy McFitzerson from selection Drug Test (id:5839)
20 Dec 19 at 14:37	Damien Challen	Processed safety selectee FIRSTNTES LASTNTES from selection Drug Test (id:5839)



# Processing Safety Selection Selectees



## STEP 3

The option to “process now” appears at the bottom of the screen. Process Note is automatically populated for convenience, but can be overwritten.

Option to keep person Blocked is available if they have failed the Safety Selection process or some other reason required at site.

Press “process now” to unblock this worker and allow them to log back in at site.

They will now appear in Selectees section as “Done”

- Below example show contractor failed to appear in the time required and is currently Blocked from site.
- “Due In” time shows how time duration since worker was chosen at logpoint for the Safety Selection. This worker has exceeded the initial 15 minutes allocated by 28 minutes 49 seconds

### Process Safety Selectee Fitzy McFitzerson

Name: **Fitzy McFitzerson**  
Card ID: 000 000 229  
Person Type: Contractor  
Company: ONSITE TRACK EASY PTY LIMITED  
Selection: **Drug Test 5839**  
Selected: 19 Dec 19 at 08:56  
Logpoint: LOGPOINT ALL SCREENS  
Due In: **- 28:49** (Overdue)



#### SITE ACCESS

Current Status: **BLOCKED** by this Selection

#### PROCESS

Process Note: Processed safety selectee Fitzy McFitzerson from selection Drug Test (id:5839)

*Note only visible to users with Can Manage Safety Selections right*

Keep Blocked:

When you process a selectee the selection-based site access block is removed. To keep this person blocked from site, tick above to add a new general block.

back

process now



# SAFETY SELECTION ALERTS

# Safety Selection Alerts



## STEP 1

To view the Alert Packs, open **SETUP > ALERTS**

Choose location you wish to view. Location marked with Asterix is the top site level for all alerts.

Click relevant location and scroll to “Overdue Safety Selectee Alert” and enter in relevant email addresses. Those listed will be informed of selectees not presenting for processing.

- There is a ‘ Selected Safety Selectees ’ alert in every alert pack. This sends an alert every time a person is selected in any safety selection on your site.
- Once a Selectee exceeds the limit, configured by the “Report Within” time limit, the email will trigger.
- No limit to email addresses, but separate multiple email addresses with a comma,

Pack Location	Active Alerts	Issue Date	Comment
* Onsite HQ	11	16-May-06	Demonstrations
Admin	0	05-Apr-16	
Factory	0	05-Apr-16	
HQ Office	2	30-Jun-09	
LP6	3	20-Jul-17	
Monitoring	0	19-Aug-15	
Warehouse	0	05-Apr-16	

### Onsite HQ: Overdue Safety Selectee Alert

ON

Send Alerts:  *Send alerts if selectees have not been processed by the time specified in the selection*

Email To:

Email CC:

cancel

save

### Process Safety Selectee Fitzy McFitzerson

Name: **Fitzy McFitzerson**

Card ID: 000 000 229

Person Type: Contractor

Company: ONSITE TRACK EASY PTY LIMITED

Selection: **Drug Test 5839**

Selected: 19 Dec 19 at 08:56

Logpoint: LOGPOINT ALL SCREENS

Due In: **- 28:49 (Overdue)**





FOR QUESTIONS OR ASSISTANCE, PLEASE CALL

**1300 131 194**

OR EMAIL **[support@onsitetrackeasy.com.au](mailto:support@onsitetrackeasy.com.au)**