



ONSITE TRACK EASY

USER GUIDE- Blocking Cardholders

User Access & Rights



LOGIN

Go to www.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.

onsite track easy

logged out

app8

change server

Onsite Login

Please enter your Username and Password.

Username:

Password:

login



BLOCKING CARDHOLDERS

Adding Users



STEP 1

Click on the “Person” tab.

Select one of the following to search;

- Lookup by ID
- Lookup Global
- Contractors
- Employees

- An ID search requires a card ID number.
- Global search requires a persons name and date of birth.
- Contractor option will display contracted persons to the company either by subcontract contract or labour hire or temporary arrangement.
- Employee option will display persons directly employed by the company.

The screenshot displays the Pegasus Newcastle software interface. The main navigation bar includes tabs for 'home', 'person', 'company', 'compliance', 'training', 'safety', 'report', and 'setup'. The 'person' tab is selected, and a dropdown menu is open, listing search options: 'lookup by id', 'lookup global', 'lookup roles & comps', 'cardholder custom fields', 'cardholder custom lists', 'contractors', 'crews', 'employees', 'employee positions', 'id checks', 'id checks lookup by id', 'messages', 'my session preferences', 'my user account', 'past cardholders', 'site contacts', 'users', and 'visitors'. An orange arrow points from the 'person' tab to the search options. Three search modal windows are overlaid on the interface: 'Lookup Person By Id' (with fields for Lookup ID and Use), 'Lookup Person Global Search' (with fields for Last Name, First Name, Middle Name, Date of Birth, and Drivers License Number), and 'Contractors for Pegasus Newcastle' (with fields for Find and From). Below these, 'Employees for Pegasus Newcastle' is also visible, with fields for Find and From, and checkboxes for 'Include Associated who have Other Home Sites' and 'Include Unassociated'.

Adding Users



STEP 2

Click on the persons name you need to add a card block to.

Employees for Pegasus Newcastle

printer friendly

Find

From

Include Associated who have Other Home Sites
 Include Unassociated

Found 3 matches.

Name	Id	Photo	Card Print	Employers	Roles	Home Sites
Ash, Test	002 304 766	Yes		PEGASUS MANAGEMENT PTY. LIMITED	Employee, User	Pegasus Newcastle
Tracey, Ashleigh	001 801 684	Yes	30 May 2018	PEGASUS MANAGEMENT PTY. LIMITED	Employee, Contractor	Pegasus Newcastle
Woolnough, Ashlee	001 455 094	Yes	15 Sep 2017	PEGASUS MANAGEMENT PTY. LIMITED	Employee	Pegasus Newcastle

- ▶ Leave search box blank to match any employee name, or enter a text fragment to find specific matching names.
- ▶ Leave all options un-ticked for employees whose home site is Pegasus Newcastle.
- ▶ **Include Associated who have Other Home Sites** means employees who are associated with your site but who have different home sites.
- ▶ **Include Unassociated** means employees who haven't been individually associated with this site but who work for site employers.
- ▶ Click an employee name to view the person's details.

Adding Users



STEP 3

Click on “Block” located under the cardholders photograph.

- This process will block a cardholder from accessing site due to misbehaviour, a breach or misdemeanour that is against site/employer rules and regulations and/or processes and procedures.

Test Ash (cardholder) 002 304 766

general competencies roles tasks keys training site contact messages

report


Works For

Default	Company	Id	Site Association	Roles	View
<input checked="" type="checkbox"/>	PEGASUS MANAGEMENT PTY. LIMITED	138	Employee	Employee	View

[add](#)

Cardholder

First Name: Test
Middle Name:
Last Name: Ash
Card Id: 002 304 766
First Site Login: none
PIN: 0000
Phone 1: * 0404040444
Phone 2: * 0404040444
Email 1: * atracey@pegasus.net.au
Email 2: * atracey@pegasus.net.au
Address: * 426 King Street
Town: * Newcastle
State: * NSW
Post Code: * 2302
Country: * Australia



Card Photo
Show Pending Photo
upload / process
Sticker Pic: [ok](#)

[block](#)

Authorised users can block an employee from SITE access. The user's name and the reason for the block will be recorded.

Adding Users



STEP 4

Enter your initials or name as the person performing the action and leave an admin note.

- The admin note can be as detailed or minimal as you like but remember to leave it with enough detail so the reason can be easily seen and the appropriate action taken for that cardholder.
- The admin note can contain a time period for how long the block is to remain in place or it can be left on indefinitely.
- The individuals profile will be marked as “Blocked”.

Block Test Ash

Warning

When you **block** a cardholder that person will no longer be able to access the areas specified in the Location setting. To **un-block** this person in the future your Session Location must equal the Location specified below.

Action: Cardholder Block Test Ash
Date: 05 Mar 19
Site: Pegasus Newcastle
Location: Pegasus Newcastle
Created By: Sarah Constable
Authoriser: Sc

Restricted: If ticked, this note will only be viewable by users with Manager access (recommended)

Comment: enter a reason for the block here

Location: ALL locations within Pegasus Newcastle
 ONLY at Pegasus Newcastle

▶ To proceed you will need to name the person who authorised this change, which may be you, and to explain why the change is being made.
▶ Your entries will be logged in an Admin Note, which can be accessed from the Report menu.
▶ If you cancel, this action will NOT occur, and this cardholder's details page will be redisplayed.

[cancel](#) [proceed](#)



Card Photo
[Show Pending Photo upload / process](#)
Sticker Pic: [ok](#)

BLOCK INFO

Block Type: General
Created By: Sarah Constable
Date: 05 Mar 2019
Authoriser: Sc
Blocked In: Pegasus Newcastle and below

[details](#) [unblock](#)

[view as user](#)

Adding Users



BLOCKED CARDHOLDER LOGON MESSAGE

A cardholder will see a message similar to the one here.

- In Onsite the cardholder profile will display like this after searching the person.
- The message entered when adding the block will be displayed here and on the logpoint and/or kiosk.
- This will stay like this until the block is removed.


Lookup Person By Id printer friendly

Lookup ID: Use: Onsite Person ID Legacy ID

Results at 05 Mar 2019

Onsite ID: 2304766
Name: Test Ash
Status: APPROVED
Person Type: EMPLOYEE
Associated: yes
Works For:

Default	Company	Id	Type
✓	PEGASUS MANAGEMENT PTY. LIMITED	138	Employer

 SITE LOGPOINT ACCESS LAST 90 DAYS
None

✗ BLOCKED!

CHECK LOGPOINT ACCESS

Site: Logpoint:

Company: PEGASUS MANAGEMENT PTY. LIMITED
Can Log In: **no**
Person is blocked from site



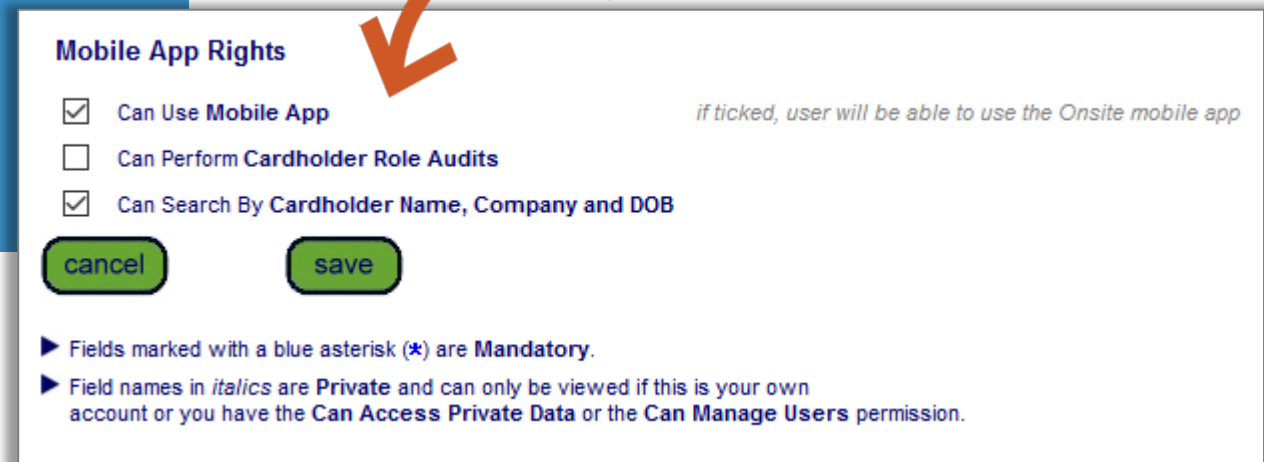
Adding Users



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.



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.



UNBLOCKING CARDHOLDERS

Adding Users



STEP 1

Click on the “Person” tab.

Select one of the following to search;

- Lookup by ID
- Lookup Global
- Contractors
- Employees

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- Global search requires a persons name and date of birth.
- Contractor option will display contracted persons to the company either by subcontract contract or labour hire or temporary arrangement.
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Adding Users



STEP 2

Click on the persons name you need to add a card block to.

Employees for Pegasus Newcastle

printer friendly

Find

From

Include Associated who have Other Home Sites
 Include Unassociated

Found 3 matches.

Name	Id	Photo	Card Print	Employers	Roles	Home Sites
Ash, Test	002 304 766	Yes		PEGASUS MANAGEMENT PTY. LIMITED	Employee, User	Pegasus Newcastle
Tracey, Ashleigh	001 801 684	Yes	30 May 2018	PEGASUS MANAGEMENT PTY. LIMITED	Employee, Contractor	Pegasus Newcastle
Woolnough, Ashlee	001 455 094	Yes	15 Sep 2017	PEGASUS MANAGEMENT PTY. LIMITED	Employee	Pegasus Newcastle

- ▶ Leave search box blank to match any employee name, or enter a text fragment to find specific matching names.
- ▶ Leave all options un-ticked for employees whose home site is Pegasus Newcastle.
- ▶ **Include Associated who have Other Home Sites** means employees who are associated with your site but who have different home sites.
- ▶ **Include Unassociated** means employees who haven't been individually associated with this site but who work for site employers.
- ▶ Click an employee name to view the person's details.

Changing User Rights



STEP 3

Click on the “Block” button.

- This can be done when a block has reached the timeframe it was to be active for or at the discretion of management.

Test Ash (cardholder) **BLOCKED** 002 304 766

general competencies roles tasks keys training site contact messages

report

Works For

Default	Company	Id	Site Association	Roles	View
✓	PEGASUS MANAGEMENT PTY. LIMITED	138	Employee	Employee	View add

Cardholder

First Name: Test
Middle Name:
Last Name: Ash
Card Id: 002 304 766
First Site Login: none
PIN: 0000
Phone 1: * 0404040444
Phone 2: * 0404040444
Email 1: * atracey@pegasus.net.au
Email 2: * atracey@pegasus.net.au
Address: * 426 King Street
Town: * Newcastle
State: * NSW
Post Code: * 2302
Country: * Australia
Place of Birth: *
Date of Birth: * 02 Feb 1991
Gender: *
Drivers Lic. No: *
Drivers Lic. State: *
Drivers Lic. Class: *
Drivers Lic. Expiry: *



Card Photo
[Show Pending Photo upload / process](#)
Sticker Pic: [ok](#)

BLOCK INFO

Block Type: General
Created By: Sarah Constable
Date: 05 Mar 2019
Authoriser: SC
Blocked In: Pegasus Newcastle and below

[details](#) [unblock](#)



Changing User Rights



STEP 4

Leave an admin note to state why the block is being removed.

- The information entered in the notes can be referenced later should it be required.

Un-block Test Ash

Warning

Un-blocking a cardholder will provide access to all locations that were allowed before the block was applied. Please ensure the person who created the original block, **Sarah Constable**, is consulted.

Action: Cardholder Un-block **Test Ash**
Date: 05 Mar 19
Site: Pegasus Newcastle
Location: Pegasus Newcastle
Created By: Sarah Constable
Authoriser:
Restricted: If ticked, this note will only be viewable by users with Manager access (recommended)
Comment:

▶ To **proceed** you will need to name the person who authorised this change, which may be you, and to explain why the change is being made.
▶ Your entries will be logged in an Admin Note, which can be accessed from the Report menu.
▶ If you **cancel**, this action will NOT occur, and this cardholder's details page will be redisplayed.



FOR QUESTIONS OR ASSISTANCE, PLEASE CALL

1300 131 194

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