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.

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.

Adding Users

STEP 2

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

Adding Users

STEP 3

Click on "Block" located under the cardholders photograph.

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

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".

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

Lookup ID: 2304766   **Use:** ◉ Onsite Person ID   ○ Legacy ID   apply

Results at 05 Mar 2019

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

SITE LOGPOINT ACCESS LAST 90 DAYS
None

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

✗ BLOCKED!

CHECK LOGPOINT ACCESS

Site: Pegasus Newcastle   **Logpoint:** PEGASUS NEWCASTLE GROUND   check

Company: PEGASUS MANAGEMENT PTY. LIMITED
Can Log In: no

Person is blocked from site
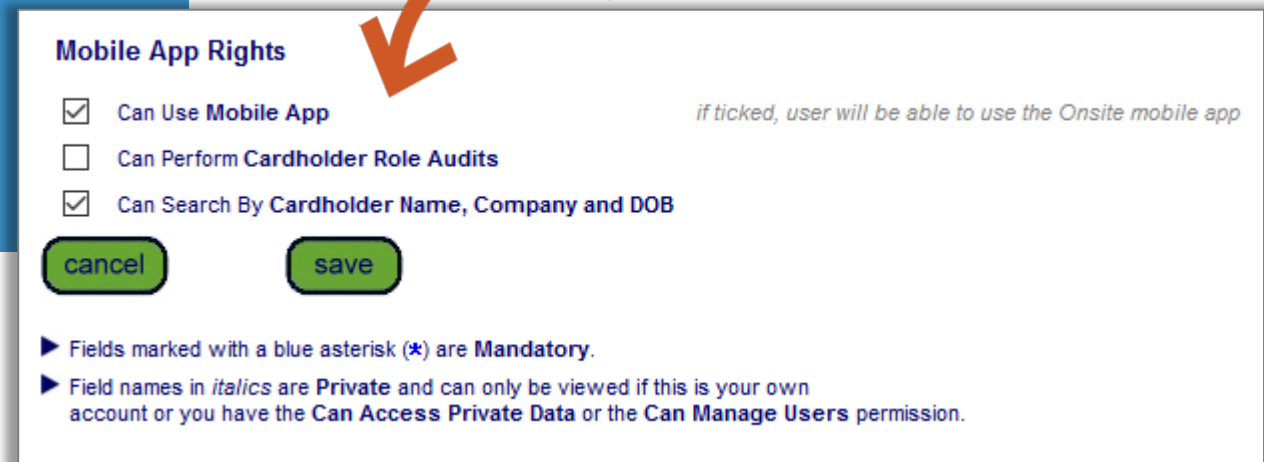
Adding Users

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.

Pegasus
Powered by Onsite

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**

- 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.

Pegasus
Powered by Onsite

Adding Users

STEP 2

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

Employees for Pegasus Newcastle

printer friendly

Find ash

From ALL EMPLOYERS

☐ Include Associated who have Other Home Sites
☐ Include Unassociated

add

search

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.

Pegasus
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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.

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:	Sc
Restricted:	☑ If ticked, this note will only be viewable by users with Manager access (recommended)
Comment:	Enter a reason for the block removal

▶ 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

FOR QUESTIONS OR ASSISTANCE, PLEASE CALL

1300 131 194

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