


User Guide

Creating Users | Sites

STEP ONE | Creating User accounts from Employee Profile

In the persons profile, click the 'Make User Button'



Amy Dundas (employee) 001 437 968

general competencies groups roles tasks keys training messages

site contact locations report

Roles: Employee
Employer: Pegasus Management Pty. Limited

make user make contractor

Ensure the person email address is correct and click 'apply'

New User Requires Email Address

Amy Dundas does not currently have an email address specified.
An email address is now required for sending the user account password.

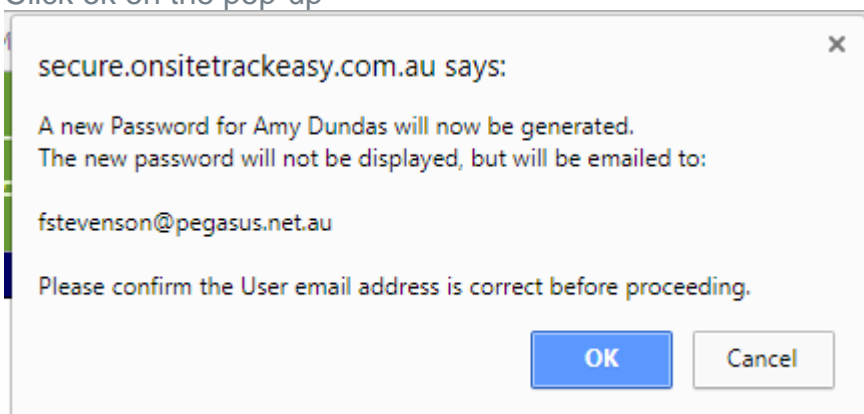
Please specify a valid email address:

Email:

cancel

apply

Click ok on the pop-up



secure.onsitetrackeasy.com.au says:

A new Password for Amy Dundas will now be generated.
The new password will not be displayed, but will be emailed to:

fstevenson@pegasus.net.au

Please confirm the User email address is correct before proceeding.

OK Cancel

Select the rights tab and scroll down to click edit.

Can search by Cardholder Name, Company and DOB

Other Rights

- X** Can Make Online Bookings *Must have 'can manage training*
- X** Can Process Online User Requests *Must be an active user.*

edit

▶ These site rights determine what permissions the user has with the site da

Select the tick boxes of the rights the person should have and click 'save'

- Can View SMS Review Results
- Can Manage User Accounts
- Can Access Financial Reports
- Can Block Cardholders
- Can Log Persons In And Out
- Can Create Messages
- Can Edit All Messages *if ticke*
- Can Create Certs
- Can Assign Code

All Employee user accounts will default to Data Viewer, in the locations tab of the user account you will need to click Apply to give Data Editor status.

Amy Dundas (user)



These settings control where Amy Dundas can log in and what type of Web Access applies. The "default" setting is the one that will initially apply at the next login.

CURRENT LOCATIONS

Permitted Location	Web Access	Default
<input checked="" type="radio"/> Pegasus Demonstration	Viewer	(default)

EDIT LOCATION

As this user has only one Location left your edit options are limited. To close this user account edit the general settings and tick Inactive.

- Delete
- Set as default
- Change access level to



ADD LOCATION

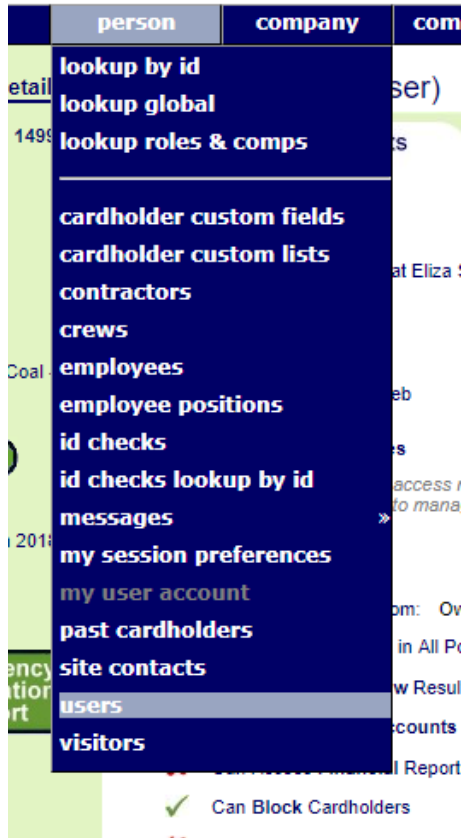
as



*N.B If you change a persons rights while they are logged in, they will need to logout and then back in again for these changes to take effect.

STEP TWO | Creating User accounts for contractors

Click the person tab and select users



Click add

Site Users

Cal Basis: Concurrent Login, Cals: 15

search

Include Inactive

add

Ready to search

- ▶ Leave search box blank to match all user names, or enter a text fragment to find matching names.

Click add as new

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.

add as new

Complete the mandatory fields and tick the boxes for the applicable user rights.
Scroll to the bottom and click Save

Mobile App Rights

- Can Use Mobile App
- Can Perform Cardholder Role Audits
- Can search by Cardholder Name, Company and I

cancel

save