



# ONSITE TRACK EASY

USER GUIDE- User Access & Rights

# User Access & Rights



## LOGIN

Go to [onsitetrackeasy.com.au](https://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.

The screenshot shows the 'onsite track easy' login interface. At the top left is the logo, which consists of a green circle with a white leaf-like pattern, followed by the text 'onsite track easy' in a sans-serif font. Below the logo is a dark blue horizontal bar. On the left side, there is a light green sidebar with the text 'logged out' at the top, followed by 'app8' and 'change server' below it. The main content area is white and contains the heading 'Onsite Login' and the instruction 'Please enter your Username and Password.' Below this are two input fields: 'Username:' and 'Password:'. A green 'login' button is positioned below the password field.



# 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 Pegasus Newcastle site interface. At the top, there is a green header with the Pegasus logo and the text "onsite test mode" and "Pegasus Newcastle site". Below the header is a navigation menu with tabs: home, person, company, compliance, training, safety, report, setup, help, and system. The "person" tab is selected. On the left side, there is a sidebar with session details and a list of options. The "users" option is highlighted with a red arrow. The main content area shows "Pegasus Newcastle" and "timezone: Australia/NSW". There is a "complete Actions" button and a "show" button. The page also displays "160.3" and some text about site default company for external systems.

# 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.

Site Users Cal Basis: Concurrent Login, Cals: 4 

Include Inactive

Found 0 matches.

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

# 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	nguyen@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 A New User

First Name:  \*

Middle Name:

Last Name:  \*

Job Title:

Phone 1:

Phone 2:

Email 1:  \*

Email 2:

Address:

Town:

State:

Post Code:

Country:

Can Use Onsite:  if ticked, user will be able to access Onsite



# Adding Users



## STEP 5

You can have the person only able to view data or they can be a data editor and the area they can do this in.

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

- Data editor means the person can change information, roles, and competencies.
- They can run reports and edit details for employees and contractors.
- A user may not need to be in an IT area of the system so the access can be set to allow access to a certain area of the system.

**User Rights**

This user is a : **Data Viewer** for **Pegasus Newcastle**

Can View Fore: **Data Viewer** Employers

Can Represent: **Data Editor** Employers

- Can View SMS Review Results
- Can Manage User Accounts
- Can Block Cardholders
- Can Log Persons In And Out
- Can Create Messages
- Can Edit All Messages
- Can Create Certs
- Can Assign Certs
- Can Authorise Assigned Certs
- Can Create Cert Keys
- Can Assign Cert Keys
- Can Create Roles:
- Can Assign Roles:
- Can Create Competencies
- Can Assign Competencies
- Can Create Access Keys
- Can Assign Access Keys
- Can Associate Contractors
- Can Associate Employees

*If ticked, also enables "Can send Messages"*

*Enabling will also enable user to Create Competencies.*

*Enabling will also enable user to Assign Competencies.*



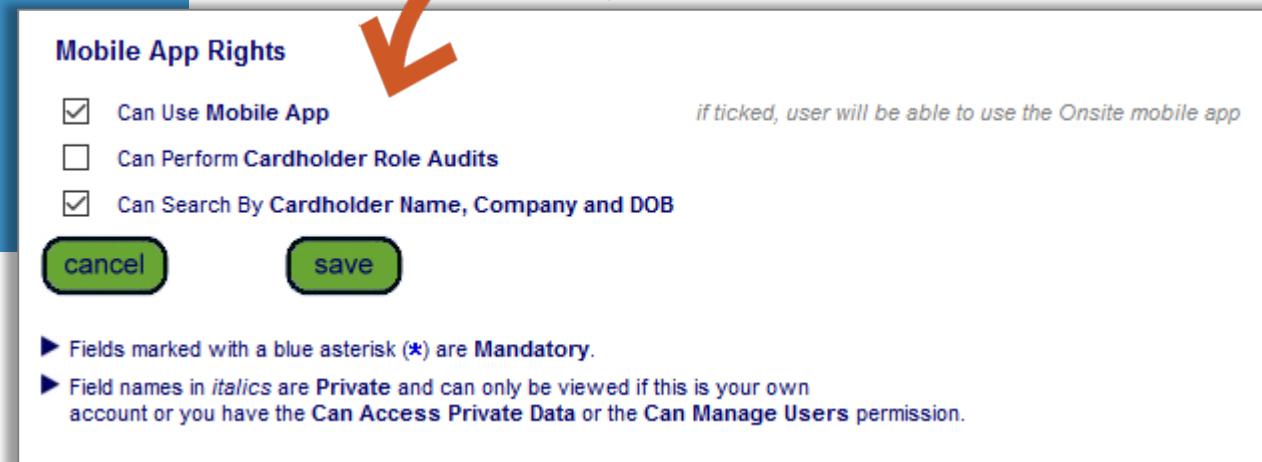
# Adding Users



## 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.



# 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 displays the Pegasus Newcastle site interface. At the top, there is a green header with the Pegasus logo and the text "onsite test mode" and "Pegasus Newcastle site". Below the header is a navigation bar with tabs: home, person, company, compliance, training, safety, report, setup, help, and system. The "person" tab is currently selected. A dropdown menu is open under the "person" tab, listing various 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. The "users" option is highlighted in blue. An orange arrow points to the "users" option. The main content area shows "Pegasus Newcastle" and "timezone: Australia/NSW". There is a "complete Actions" button and a "show" button. The page also displays session details, including session tag, user name, and role.

# Changing User Rights



## STEP 2

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

- You can search either for first name or last name only

**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

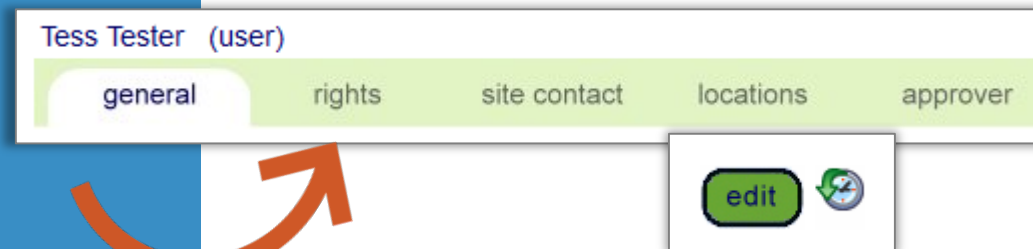


## STEP 3

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.



# 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 re-login to activate the changes.

The screenshot shows a user rights configuration window with the following elements:

- A list of checkboxes for user rights:
  - Can Assign Cert Keys
  - Can Create Roles: *Enabling will also enable user to Create Competencies.*
  - Can Assign Roles: *Enabling will also enable user to Assign Competencies.*
  - Can Create Competencies
  - Can Assign Competencies
  - Can Create Access Keys *if ticked, also enables "Can Assign Access Keys"*
  - Can Assign Access Keys
  - Can Associate Contractors
  - Can Associate Employees
  - Can End Employment
  - Can Manage Safety Select
- A section titled "Other Rights" with two items:
  - Can Make Online Bookings *Must have 'can manage training' right, be an active user and be an employee of a conco and have the right to represent own/all employers*
  - Can Process Online User Requests *Must be an active user and employee of a conco, an editor and have the 'can manage users' and 'can access private data' rights*
- Buttons for "cancel" and "save".
- A confirmation dialog box with the text: "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." and an "OK" button.



# 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 Pegasus Newcastle site interface. At the top, there is a green header with the Pegasus logo and the text "onsite test mode" and "Pegasus Newcastle site". Below the header is a navigation menu with tabs: home, person, company, compliance, training, safety, report, setup, help, and system. The "person" tab is selected. A dropdown menu is open under the "person" tab, listing various 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. The "users" option is highlighted with a red arrow. The main content area shows "Pegasus Newcastle" and "timezone: Australia/NSW". There is a "complete Actions" button and a "show" button. The page also displays session details and a "Latest logout" link.

# Inactivating Users



## STEP 2

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

- You can search either for first name or last name only

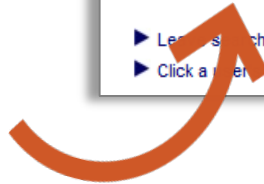
**Site Users** Cal Basis: Concurrent Login, Cals: 4

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)'. The form includes fields for Roles, User Id, 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 and the 'save' button. The top callout box shows the checkbox checked and the text 'Tick Active to close the account and disable logins'. The bottom callout box shows the checkbox unchecked and the text 'Untick Active to close the account and disable logins'. Both callout boxes include 'cancel', 'save', and 'reset password' buttons. A third callout box with an orange arrow points to the 'edit' button at the bottom of the form.

Tess Tester (user) 002 631 844

general rights site contact locations approver

Roles: User  
User Id: 002 631 844  
Username:  
First Name: Tess  
Middle Name:  
Last Name: Tester  
Job Title:  
Phone 1: \*  
Phone 2: \*  
Email 1: tttester@pegasus.net.au  
Email 2:  
Address: \*  
Town: \*  
State: \*  
Post Code: \*  
Country: \* Australia  
Scorm Access: ✗ Whether this user account is required for launching SCORM online training  
Active: ✓

Active:  Tick Active to close the account and disable logins

cancel save reset password

► Fields marked with a grey asterisk (\*) are Private and can only be viewed if this is your own account or you have the Can Manage Private Data or the Can Manage Users permission.

Active:  Untick Active to close the account and disable logins

cancel save reset password

► Fields marked with a grey asterisk (\*) are Private and can only be viewed if this is your own account or you have the Can Manage Private Data or the Can Manage Users permission.

back edit

► Fields marked with a grey asterisk (\*) are Private and can only be viewed if this is your own account or you have the Can Manage Private Data or the Can Manage Users permission.

# Inactivating Users



## INACTIVAE USER PROFILE

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

- Communication you receive may be reminders for expiring insurances, licences, or worker documents.
- You may also receive induction details, approval emails, and return or corrective actions emails (detailing what needs to be provided) if a document has not met business rules.

The screenshot displays the user management interface for an inactive user, Tess Tester. The profile page shows various fields such as Roles, Username, First Name, Middle Name, Last Name, Job Title, Phone numbers, Email addresses, Address, Town, State, Post Code, and Country. The 'Active' status is marked with a red 'X', and a note indicates that logins are disabled while the user account is inactive. There are 'back' and 'edit' buttons at the bottom of the profile page.

Overlaid on the profile page is a 'Site Users' search window. The search criteria are 'tess' and 'Include Inactive' is checked. The search results table shows one match for 'Tester, Tess' with an 'Active' status of 'X'.

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

Instructions for the search window:

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

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.



FOR QUESTIONS OR ASSISTANCE, PLEASE CALL

**1300 131 194**

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