



ONSITE TRACK EASY

USERGUIDE-UserAccess&Rights

User Access & Rights



LOGIN

Go to 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 stylized 'e' inside, followed by the text 'onsite track easy'. Below the logo is a dark blue horizontal bar. On the left side, there is a light green sidebar with the text 'logged out', 'app8', and 'change server'. The main content area is white and contains the title 'Onsite Login', the instruction 'Please enter your Username and Password.', two input fields for 'Username:' and 'Password:', and a green 'login' button.



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 shows the Pegasus Newcastle site interface. The top navigation bar includes tabs for home, person, company, compliance, training, safety, report, setup, help, and system. The 'person' tab is selected. A dropdown menu is open under 'person', listing various options: lookup by id, lookup global, lookup roles & comps, cardholder custom fields, cardholder custom lists, contractors, crews, employees, employee positions, 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 displays 'Pegasus Newcastle' and 'timezone: Australia/NSW'. There is a 'complete Actions' button and a 'show' button. The page also shows session details and a 'Latest logout' link.

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 shows the Pegasus Newcastle site interface. The top navigation bar includes tabs for home, person, company, compliance, training, safety, report, setup, help, and system. The 'person' tab is selected. A dropdown menu is open under 'person', listing various options including '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 displays 'Pegasus Newcastle' and 'timezone: Australia/NSW'. There is a 'complete Actions' button and a 'show' button. The bottom right corner of the screenshot shows the Pegasus logo with the text 'Powered by Citrix'.

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

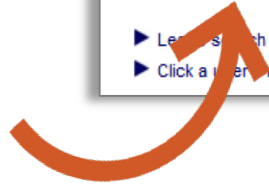
Site Users Cal Basis: Concurrent Login, Cals: 4

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

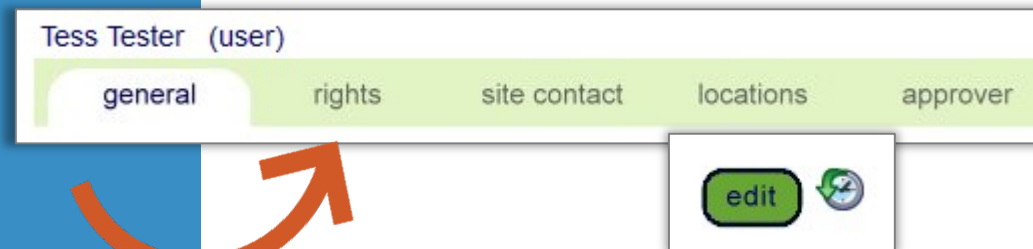


STEP 3

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 displays a user rights configuration window with the following elements:

- A list of user rights with checkboxes:
 - 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 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 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, including session tag, user ID, and role.

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 for 'Tess Tester' (user ID 002 631 844). 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 contains the text: 'Active: Untick Active to close the account and disable logins'. The bottom callout box contains the text: 'Active: Untick Active to close the account and disable logins'. Both callout boxes also feature 'cancel', 'save', and 'reset password' buttons. A third orange arrow points from the 'edit' button in the main profile view to the top callout box. A footer note states: '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.'

Inactivating Users



INACTIVE USER PROFILE

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

- User will not longer have ability to login.
- If reactivated, the old password will still be the same.

The image shows two overlapping screenshots from a user management system. The background screenshot displays the profile for 'Tess Tester (inactive user)' with tabs for 'general', 'rights', 'site contact', 'locations', and 'approver'. The 'general' tab is active, showing fields for Roles (User), User Id (002 631 844), Username, First Name (Tess), Middle Name, Last Name (Tester), Job Title, Phone 1, Phone 2, Email 1 (ttester@pegasus.net.au), Email 2, Address, Town, State, Post Code, Country (Australia), Scorm Access (disabled), and Active status (disabled). At the bottom, there are 'back' and 'edit' buttons. The foreground screenshot shows the 'Site Users' search results for the search term 'tess'. It includes a search bar, a 'search' button, and a checked 'Include Inactive' checkbox. Below the search bar, it says 'Found 1 matches.' and displays a table with one row for 'Tester, Tess', which is marked as inactive with a red 'X' in the 'Active' column. The table columns are Name, Active, ID, Username, Default Location, Web Access, User Manager, Employee, Employer, and Title. Below the table, there are instructions: 'Leave search box blank to match all user names, or enter a text fragment to find matching names.' and 'Click a user's name to view the user details.'

Tess Tester (inactive 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: ttester@pegasus.net.au
Email 2:
Address: *
Town: *
State: *
Post Code: *
Country: * Australia
Scorm Access: * **X** Whether this user account is required for launching SCORM online training
Active: * **X** Logins are disabled while this user account is inactive

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 Access Private Data or the Can Manage Users permission.

Site Users Cal Basis: Concurrent Login, Cals: 4

tess search Include Inactive add

Found 1 matches.

Name	Active	ID	Username	Default Location	Web Access	User Manager	Employee	Employer	Title
Tester, Tess	X	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's name to view the user details.



FOR QUESTIONS OR ASSISTANCE, PLEASE CALL

1300 131 194

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