ONSITE TRACK EASY

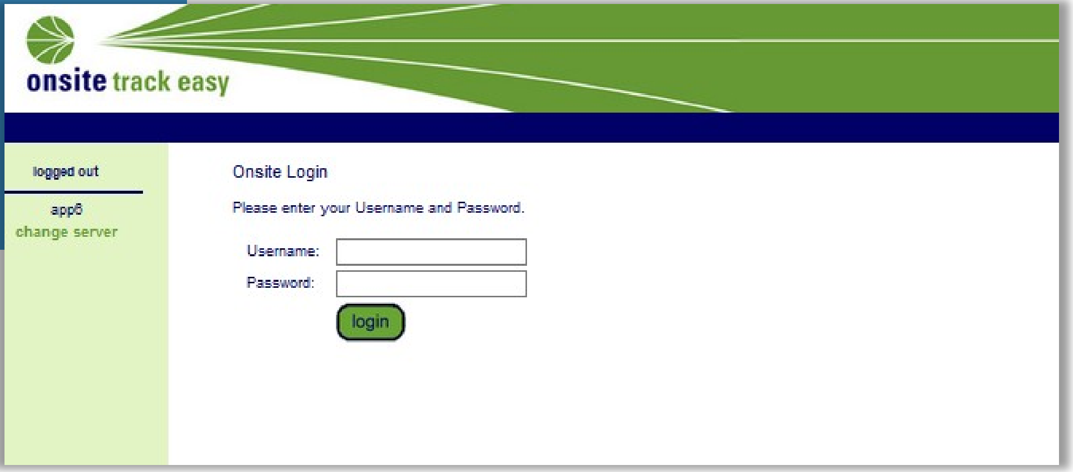
USERGUIDE-UserAccess&Rights

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.



ADDING USERS

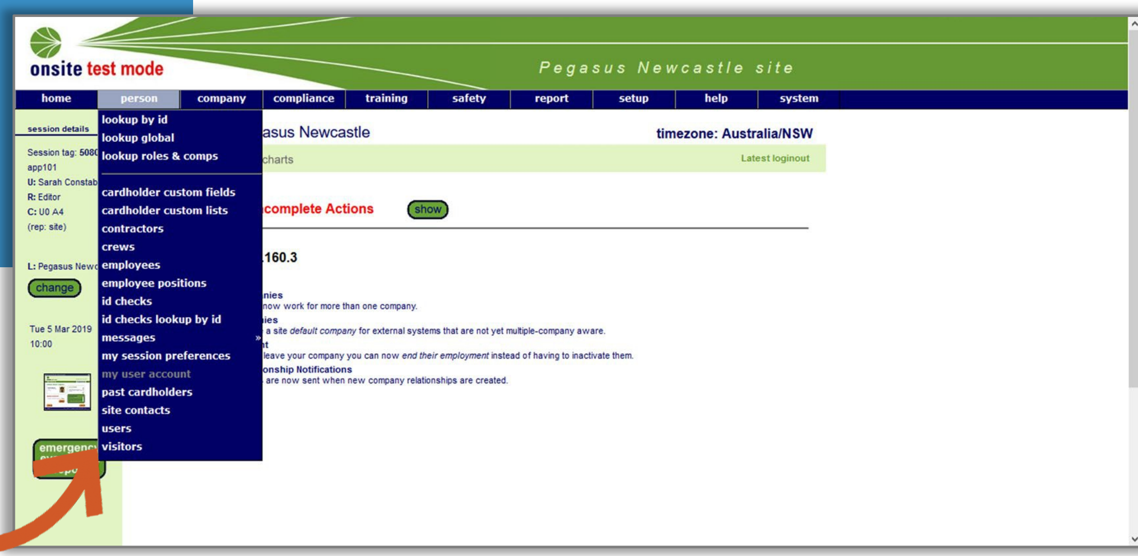
Adding Users

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.



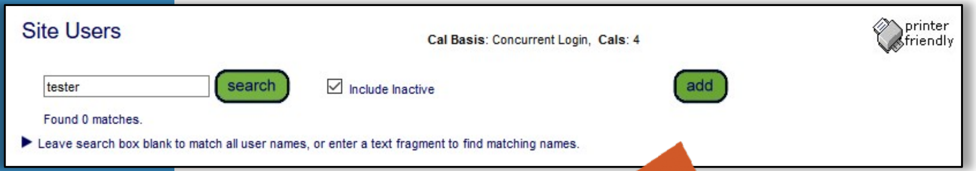
Adding Users

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.

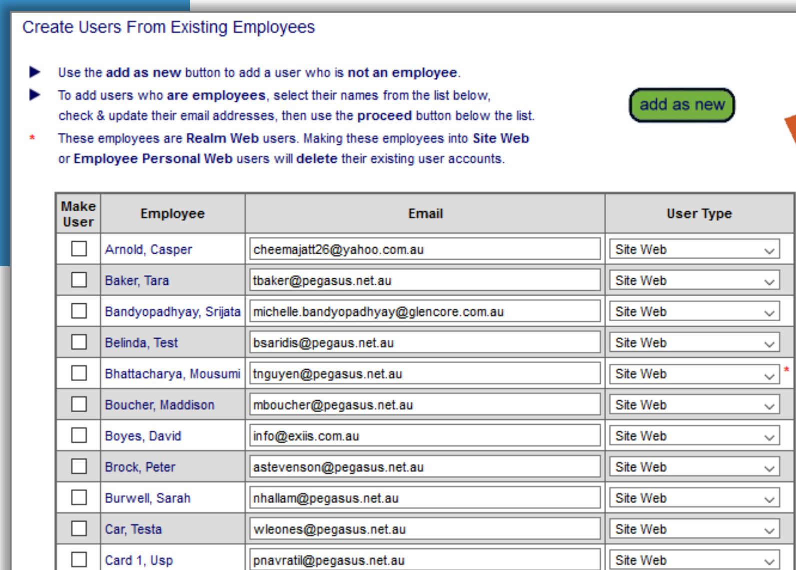
Adding Users

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

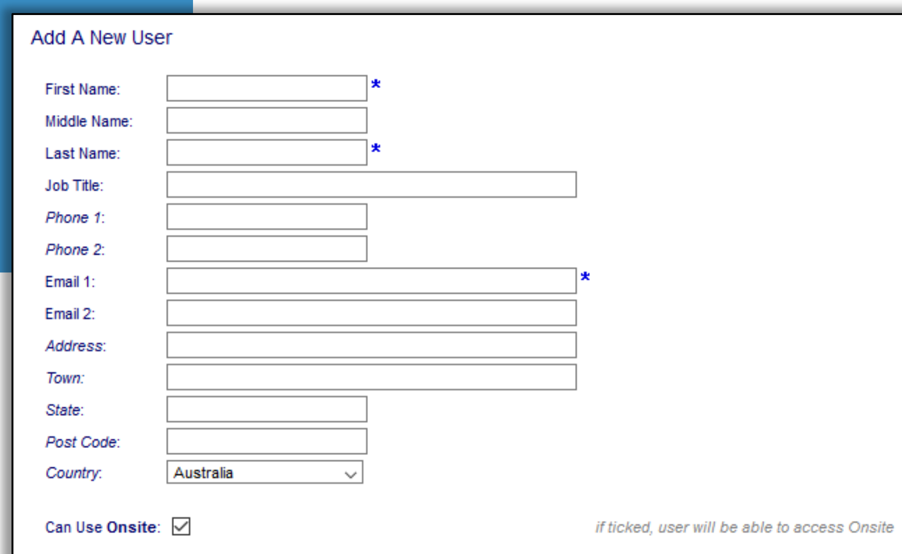
Make User	Employee	Email	User Type
☐	Arnold, Casper	cheemajatt26@yahoo.com.au	Site Web
☐	Baker, Tara	tbaker@pegasus.net.au	Site Web
☐	Bandyopadhyay, Srijata	michelle.bandyopadhyay@glencore.com.au	Site Web
☐	Belinda, Test	bsaridis@pegaus.net.au	Site Web
☐	Bhattacharya, Mousumi	tnguyen@pegasus.net.au	Site Web *
☐	Boucher, Maddison	mboucher@pegasus.net.au	Site Web
☐	Boyes, David	info@exiis.com.au	Site Web
☐	Brock, Peter	astevenson@pegasus.net.au	Site Web
☐	Burwell, Sarah	nhallam@pegasus.net.au	Site Web
☐	Car, Testa	wleones@pegasus.net.au	Site Web
☐	Card 1, Usp	pnavratil@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 wit h information and the changes that can be performed.
- Ensure you only tick this for those you need to access this area of the system.



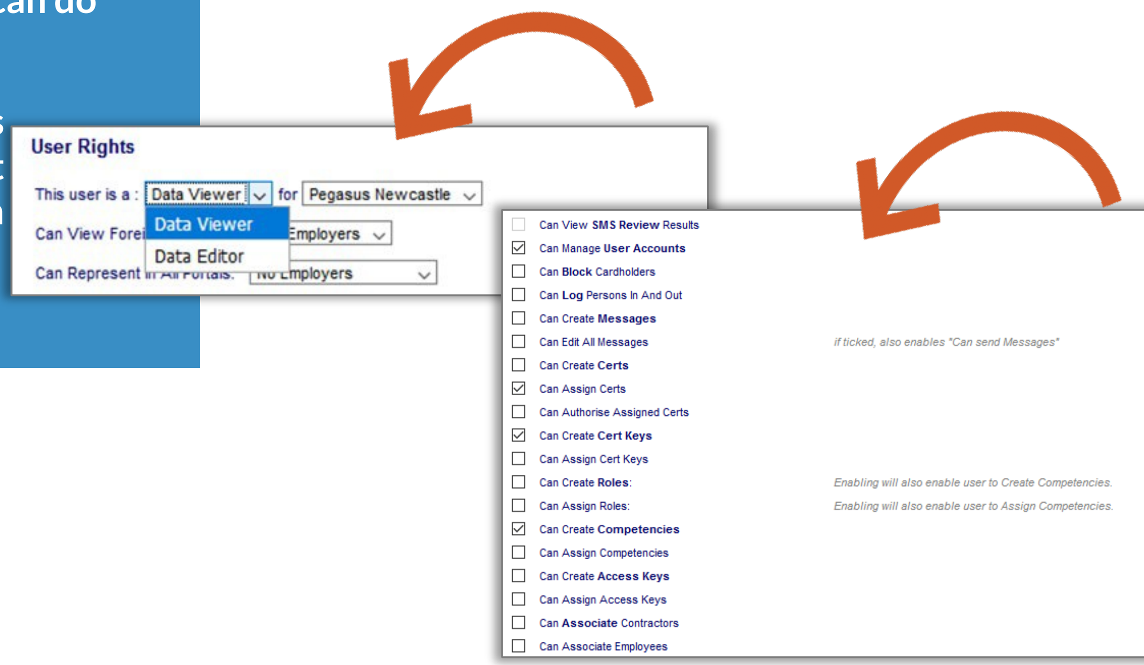
Adding Users

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.

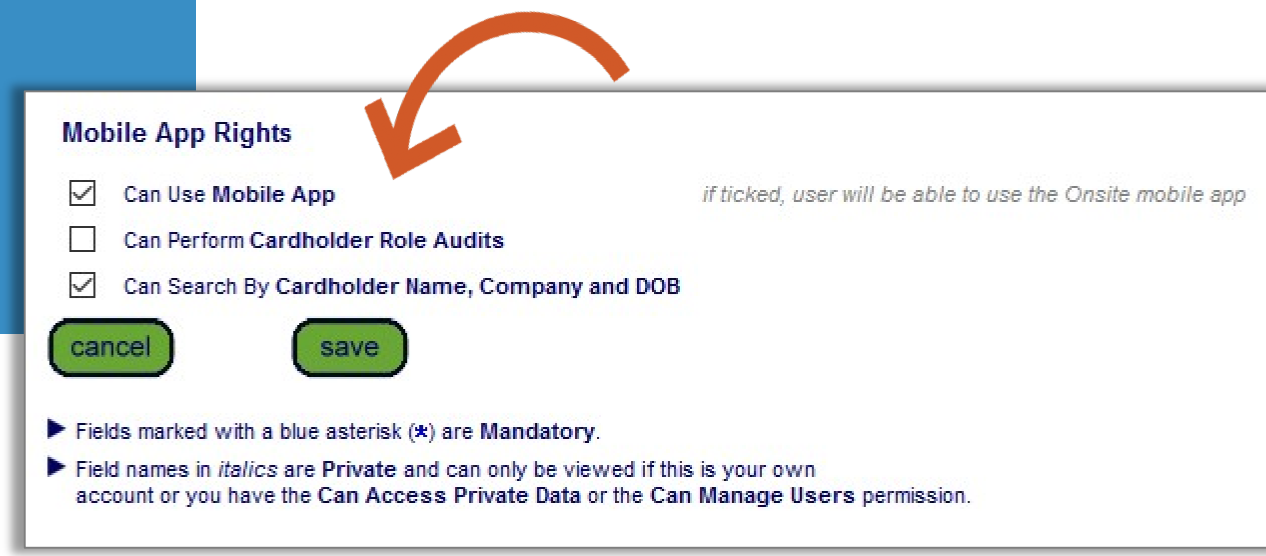


Adding Users

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.



CHANGING USER RIGHTS

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Changing User Rights

STEP 1

Click on the “Person” tab.

Select “Users”.

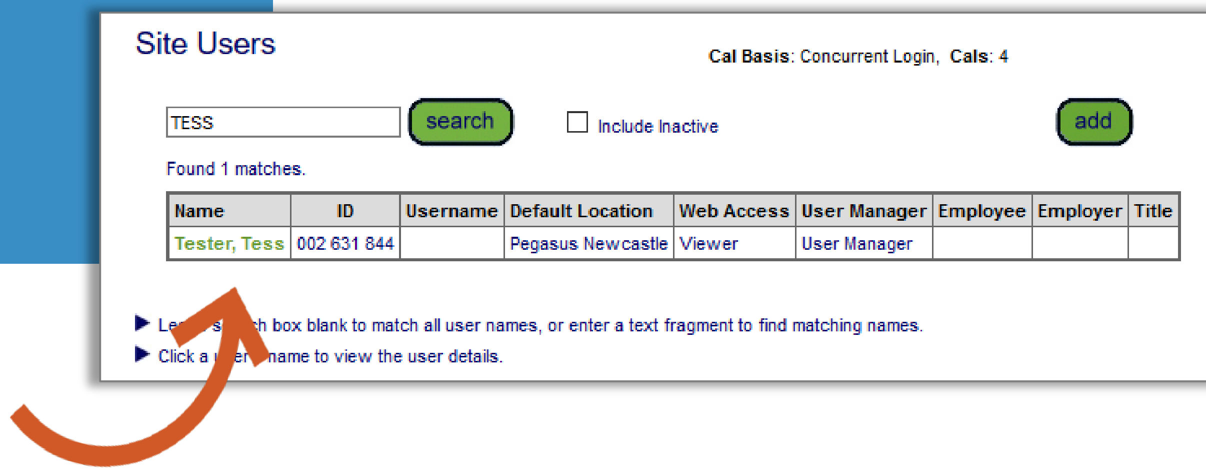
- You can change user rights any time.
- User access rights – what they can do when logged in – can be varied to suit the individual.

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



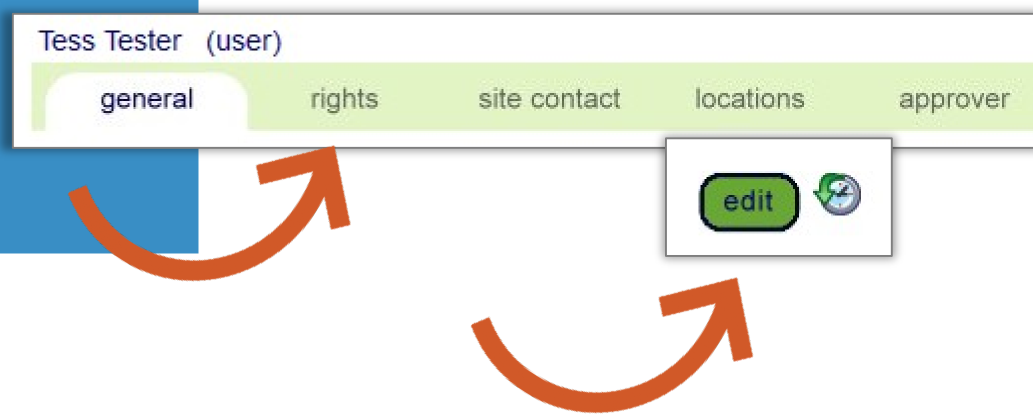
Changing User Rights

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.



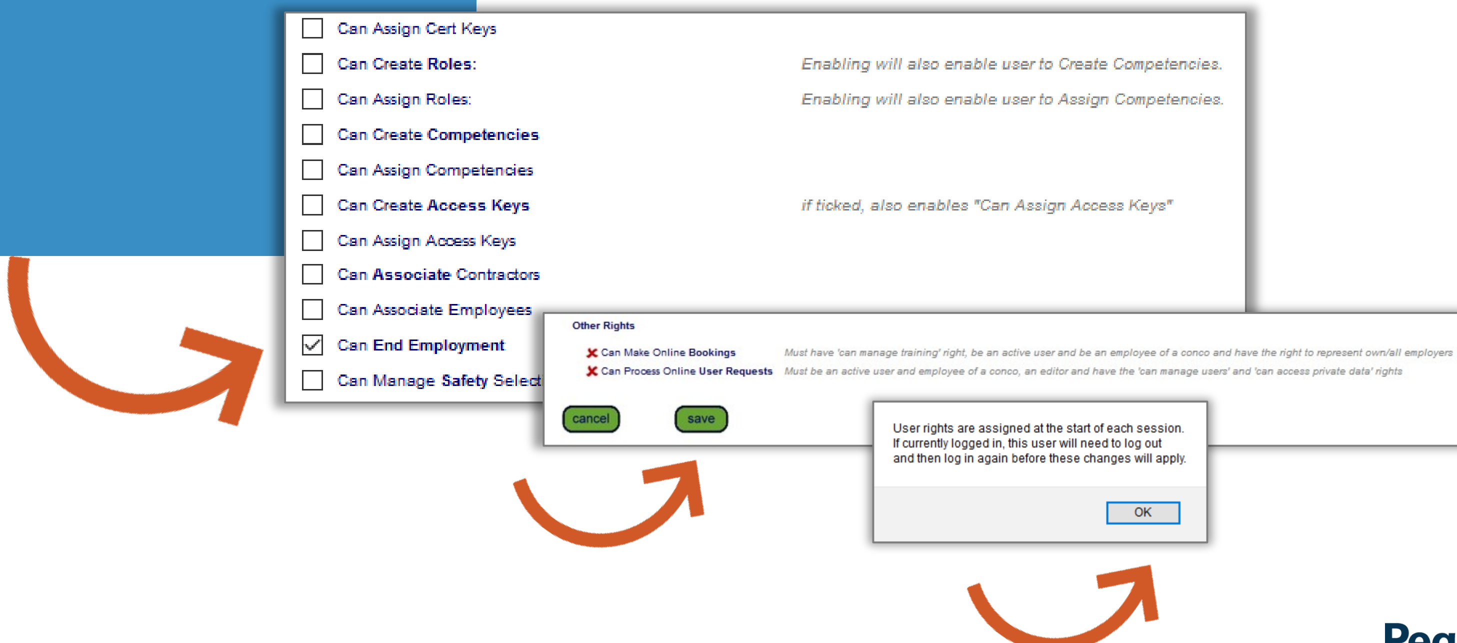
Changing User Rights

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.



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.

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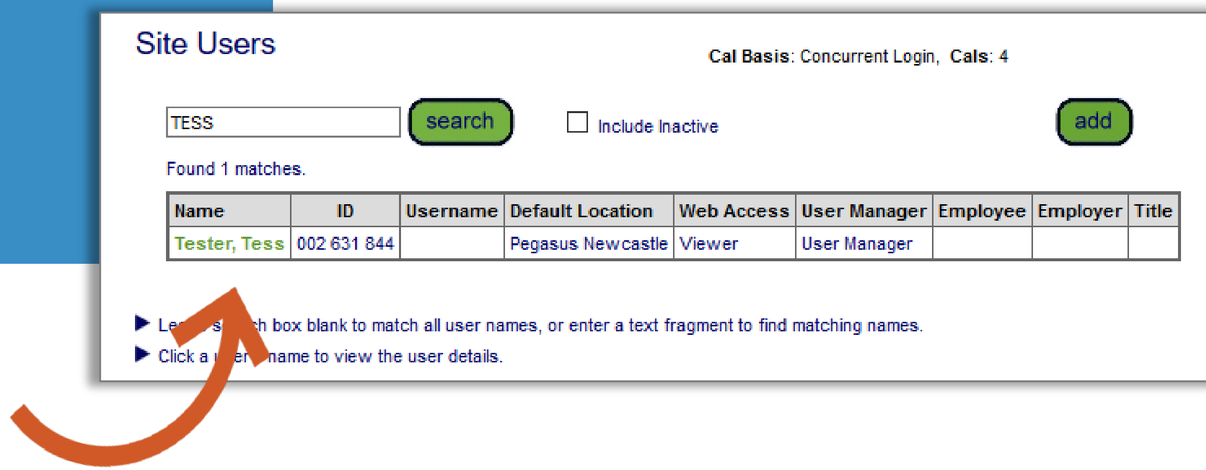
Inactivating Users

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



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).

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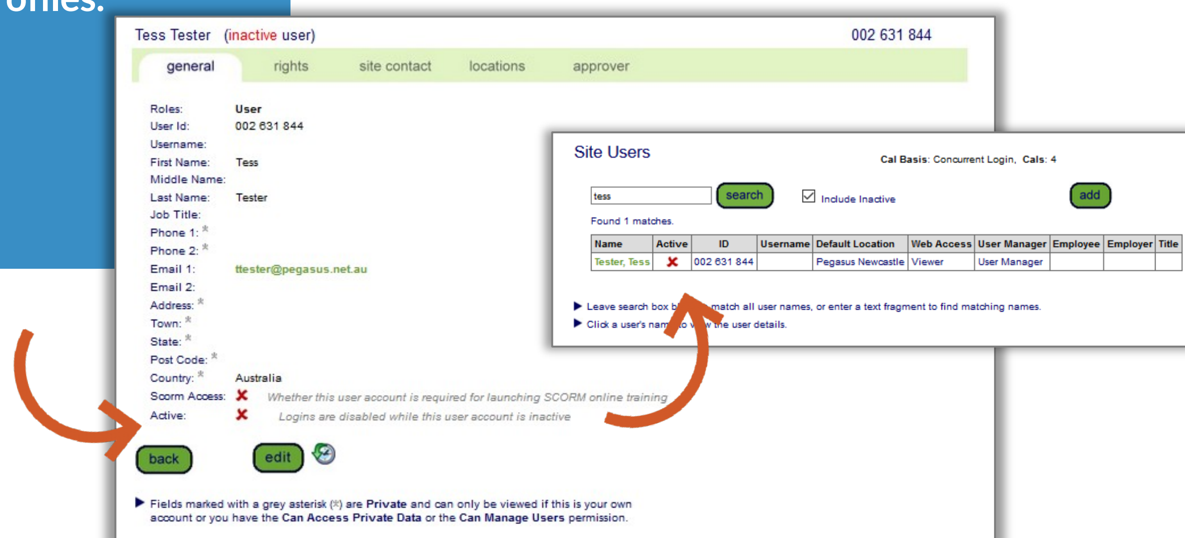
Inactivating Users

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.



FOR QUESTIONS OR ASSISTANCE, PLEASE CALL

1300 131 194

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

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