

## **ONSITE TRACK EASY**

## **Otis Contractor Management Portal Portal User Guide: Employee Registration & Induction Bookings**



#### **CONTENTS**

Overview	.2
Login (for existing companies)	.4
Registering Employees & Booking Inductions	.6

#### WHERE CAN I FIND HELP?

**Pegasus Safety** 

Australia: 1300 305 072 New Zealand: +61 2 4047 0496

otissafetycompliance@pegasus.net.au

**Otis Contractor Information Website** 

http://otiscontractor.com.au

#### **OVERVIEW**

The Otis Contractor Management Portal is the gateway for contracting companies to register their employees and meet the Otis role requirements. This portal allows the nominated personnel of the contracting company to:

- Register their Company or Business Entity
- Complete the Company Profile Questions
- Register their employees
- Select and upload role requirements
- Upload employee photos for efficient card production
- Book their employees into an induction
- · Track employee induction and card status

# LOGIN (FOR COMPANIES EXISTING COMPANIES)

a. Go to

https://secure.onsitetrackeasy.com.au/portal/otis/welcome. jsp?psn=otis



b. Click Login to access the portal:

C.	Enter username and password and click on Login. This will bring you to the home screen. If you have forgotten your password click on <b>forgotten password</b> and go to step d.	Login         Enter your username and password to login now.         Username:         Password:         Login         Request a new login for your company:         New W         Request new password for your login:
		<ul> <li>If your company is registered with Otis and you already have an Onsite login, you may be able to log in here.</li> </ul>
d.	Enter first name and last name and click on Submit . Your login details will be sent your email address (please be sure to check your junk mail as it is an automated email). If you do not receive an email, please contact the help desk on 1300 305 072.	Forgotten Password Please enter your first name, last name and email address. First Name: Last Name: Email Address: Submit

You must enter the **exact spelling** used when you set up your user account. If these details are correct the password will be sent to your email address.

Forgotten Password

## **REGISTERING EMPLOYEES & BOOKING INDUCTIONS**



🏠 н	ome	Help   Terms & Conditions   Privacy	
app8 change server 28-Oci-2015 10:30	Welcome If you are an OTIS Contractor/Ven • Apply for registration of your oc • Book your employees into an O	torMechandeseDemonstrater that performs works on an OTIS site you may access this website for the following: mpany in the OTIS Contractor Safety Management System TS Contractor Safety Induction	
Registration 📃	Please Note: If you are not current Register	y, or going to be, working on an OTIS site you do not need to register through this website.	
Profile 🚺	Manage your employee's     Manage your employee r     Redister	reg da montal regionanza, presente region nella la posi monta nel a da da montalmente. Tri S contractor safety inductions econta	
Uploads 🔀	Login		
SMS Review	If your company is already reg Book training for your em Check your employee rec Administer your employee	istered, login here if you want to: Jolymons ords I's OTIS work cards	
	Login		
www.ot	iscontractor.com.au powered b	y Onsite Track Easy	
www.ot	scontractor.com.au powered b Accountability Teamwork Differences Teamwork Differences Teamwor	e Onaite Tinek Easy	
www.ot	Accountanting Accoun	r Omite Treek Easy	
www.ot	According to a constant According to constant According to a constant According to a constant	P Onsite Tack Easy	
www.dt	According to the leader According to the lead	Outle Teck Easy      or in moving people to new heights	
www.of	Accentative Market State Market State Mar	Y Ounter Frack Eary  er in moving people to new heights	

b. Enter your username and password and click

Login

**Please note:** Additional user accounts can be setup from here if required

 If your company is registered with Otis and you already have an Onsite login, you may be able to log in here.

#### c. Select Manage Employee Data

d. Search for existing employees

#### Welcome to your company's login area From here you can manage employee roles and Company Relationships. Manage Employee Data Register employees, maintain roles and order cards. View Employees View details of your employees and their data. **Company Relationships** Your company relationships at Otis. Shopping Cart **Employee Compliance** Total Cost: empty PLEASE NOTE: Just because a card is shown here does not mean you may order it. Please ensure the person is entitled to a card before you order it. You may not qualify for a refund if your order is rejected. If you're unsure about any card order please contact the portal administrator (see details on the help menu). Description: Otis Personal Compliance Roles and Card OTIS Requirements: Role selection ---Otis EHS Accredite Photo upload File uploads · Mandatory Otis Card (if no previous issue) Cardholder Name EXP 29 OCT 15 \$25.00 (plus \$2.50 GST) for initial registration **Registration:** (AH) []][ Card Cost: \$15.00 (plus \$1.50 GST) per Card 000 000 000

Back

EMPLOYEES LIST

Search Enter

Enter a name fragment (blank for all) and click search to list your employees

You can also select employees that has not yet been entered. Please click search first to make sure the person is not already in your employees list. Then an Add Employee button will be provided. e. If employee appears in the list, please click on the

tick box under *select* and click Submit. If the employee does not appear in the list select, select

Add Employee

to create a new employee

	Comp	liance					та 👘	tal Cost: empty
PLEASE NOT	E: Just bec entitled to If you're to	ause a card o a card befo unsure abour	is shown he are you order t any card ord	ere does not mean you may order it. Please it. You may not qualify for a refund if your orded der please contact the portal administrator (see	e ensure er is reje e details	re the person is ected. Is on the help me	nu).	
Description:	Otis Pers	onal Compli	ance Roles a	Ind Card		OTIC		_
Requiremen	s: • Role s • Photo • File up • Manda	election upload ploads atory Otis Ca	ırd (if no prev	ious issue)		Otis E	HS Accredited	
Registration	\$25.00	(plus \$2.50	GST) for init	ial registration	- 1		EXP 29 0	CT 15
-	_						AL	(servere
Back	\$15.00	(plus \$1.50 )	GST) per Ca	ard		000 000 000	. (	line
Card Cost: Back PLOYEE	\$15.00 ELIST Strick one o then click i	Searc	h Enter to list	ard a name fragment (blank for all) and click <b>sear</b> your employees <b>Card Required</b> boxes, ceed with this selection	Add	ecco deo deo	Register <b>Employ</b> not yet in your er	ree nployees list
Card Cost: Back PLOYEE Cound 4 match Submit	\$15.00 LIST Tick one o then click 1 Required?	(plus \$1.50 ) Searc	h Enter to list Select and button to proc	ard a name fragment (blank for all) and click sear your employees Card Required boxes, seed with this selection Previous Approved Role Selections	Add	ecco coo coo	Register Employ not yet in your er	ree nployees list y Reason Select Disab
Card Cost: Back PLOYEE	\$15.00 LIST Tick one o then click 1 Required?	(plus \$1.50 ) Searc r more of the the Submit t Last Name F	h Enter to list Select and o putton to proc First Name F	ard ard aname fragment (blank for all) and click sear your employees Card Required boxes, seed with this selection Previous Approved Role Selections (none)	Add	Employee Email @PEAGSUS.NE	Register Employ not yet in your er Card Histor	ree nployees list y Reason Select Disab
Card Cost: Back PLOYEE	\$15.00 LIST S LIST SS Tick one o then click Required?	(plus \$1.50 f Searc r more of the the Submit I Last Name F Test	h Enter to list Select and of First Name F Lauren	ard ard aname fragment (blank for all) and click sear your employees Card Required boxes, eed with this selection Previous Approved Role Selections (none) (none)	Add	Email Email BEAGSUS.NE	Register Employ not yet in your er Card Histor T.AU et.au	ree nployees list y Reason Select Disab
Card Cost: Back PLOYEE Jound 4 match Submit	\$15.00 LIST SLIST Tick one o then click Required?	(plus \$1.50 f Searc r more of the Submit t Last Name F Test Test	h Enter to list Select and oproc First Name F Lauren Test	ard ard ard aname fragment (blank for all) and click sear your employees Card Required boxes, seed with this selection Previous Approved Role Selections (none) (none) (none)	Add to te	Email @PEAGSUS.NE test@pegasus.no test@peagsus.no	Register Employ not yet in your en Card Histor ET.AU et.au	ree nployees list y Reason Select Disab

f. Enter the employee details and click Save

lease enter fields, upload files	s and then submit the data (* = mandatory)	
on submit a Otis card will be pu	irchased for this person.	2. Identification
		Please enter the required fields.
Current Data Added By:	Lauren Chock	Then you can proceed if required.
First Name: *	Lauren	
Middle Name:		3. Files
Last Name: *	Test	Please enter the required fields
Date of Birth: *	21 Jun 1985 "dd mmm yy" or icon	Then you can upload the files.
Drivers Lic. Number:		
Drivers Lic. State:		4. Submit
Drivers Lic. Class:		Please enter all the required data.
Drivers Lic. Expiry:	"dd mmm yy" or icon	Then you will be able to submit it.
Gender:	<b>\$</b>	card will be purchased for this person.
Address:		
Town:		
State/Province:		
Post Code:		
Phone: *	49491234	
Email: *	test@pegasus.net.au	
Next of Kin First Name:		
Next of Kin Last Name:		
Next of Kin Phone:		
Next of Kin Email:		
Next of Kin Relationship:	Please select	
Historical Data	Previous contact details	
Phone:		
Email:		
Address:		
Town:		
State/Province:		
Post Code:		
Declaration: *	I agree with Terms & Conditions and Privacy men	us

# g. Click Submit

h. Click on process

Shopping Cart **Continue Entry of Person Test** Total Cost: empty Please enter fields, upload files and then submit the data (\* = mandatory) On submit a Otis card will be purchased for this person. Employee Status: Started 2. Identification 1. Fields No additional identification data is required. This person will be added as a new person in Onsite . Current Data Lauren Chock Added By: First Name: 🖈 Person Middle Name: 3. Files Last Name: \* Test No file uploads are required. Date of Birth: \* 24 Mar 1964 Drivers Lic. Number: 4. Submit Drivers Lic. State: Click submit to send the data for processing. Drivers Lic. Class: Submit Drivers Lic. Expiry: On submit a **Otis** card will be purchased for this person. 0 Gender: Address:

m	ployee C	ompl	iance						Shopp Total Co	ing Cart st: empty	
EL	ECTION										
1	Action	Card?	Last Name	First Name	General	Roles	Files Done	Infos Done	Cost	Data Status	Payment
ľ	Process	YES	Test	Person	×				\$27.50	INCOMPLETE	
	✓ = Entered       X = Adatory Not Entered       X = Optional Not Entered       Click link to view role data requirements:         Action: Click 'Process' to continue an entry, and when complete, submit it or add it to the shopping cart.       Role Data Lookup         Each person requires General entrifies, then File uploads.       Role Data Lookup										
в	ack										

i. Click on Select Roles

PROCESSING: PERSON TEST (Registration, Subscription, Roles, Card) GENERAL*	Terminate
Registration, Subscription, Roles, Card Select Roles Mandatory; Requires valid select	tion

j. Select the relevant site from drop down menu



k. Select your functional role/s from the list, then scroll

to the bottom and click Apply. Once the roll has been added, click the cross to exit the Roles window.

iii epe.onsitetrackeasy.com.au	
Otis Portal Work Roles	
Group: Otis 🟮	
Tick all required roles and click apply	
Any work not listed above that will require the sub-contractor employee to visit an Otis jobsite whilst under the direct supervision of Otis employee	
Associated Construction Work	
Escalator Hand rail Replacement	
Escalator installation - Electrician (includes electrical work unloading joining of truss & installation of ballustrades)	
Escalator installation - Mechanical fitter (includes unloading joining of truss & installation of ballustrades)	
Grouting of lift door frames	
Hydraulic Ram/Block/Hose repair works requiring access to the lift shaft WITH direct Otis employee supervision	
Hydraulic Ram/Block/Hose repair works requiring access to the lift shaft WITHOUT any direct Otis supervision	
Hydraulic Ram/Block/Hose repair works which will NOT require access to the lift shaft WITH direct Otis employee supervision	
Hydraulic Ram/Block/Hose repair works which will NOT require access to the lift shaft WITHOUT any direct Otis supervision	
Install of Landing Architravo & Skinning of Landing Doors	
Install of Machine room Guarding/Handrails & Access Ladders	
Installation and Refurbishment of Car Linings	
Installation and removal of entrance protection and working decks and overhead protection decks	
Installation of Car Flooring - Including Stone and other architectural finishes	
Installation of complete lift including both mechanical and electrical works - Electrician	
Installation of complete lift mechanical works only - Mechanical fitter	
Installation of Glass Enclosures to Holstways - Scenic Lifts	
Installation of heating ventilating and air conditioning systems to motor rooms WITH direct Otis employee supervision	
Installation of heating ventilating and air conditioning systems to motor rooms WITHOUT any direct Otis supervision Installation of Shaft Division Screens	
Installation of Shaft Fascias/Pit Ladders	
Lift and Escalator Service and Caliback	
Major modernisation of lift including both mechanical and electrical works - Electrician	
Major modernisation of lift mechanical work only - Mechanical fitter	
Painting - hoistways/ pits WITHOUT direct Otis supervision	
Painting - hoistways/ pits works WITH direct Otis employee supervision	
Painting - motor rooms WITHOUT any direct Otis supervision	
Painting - motor rooms works WITH direct Otis employee supervision	
Re-roping Existing Equipment	
Removal of existing lift and escalator equipment - Electrician	
Removal of existing lift and escalator equipment - Mechanical fitter	
Replacing Lift and Escalator Gearboxes/Motors	
Rigging and Dogging	
Shaft Lighting Installation	
SPW Warehouse	
Sub-contractor managers/supervisors whose employees will be attending an Otis jobsite	
Sub-contractors Company owners Supervisors & Employees who will NOT be required to access an Otis job site (excludes office locations)	
Testing and commissioning escalators	
Unloading & distribution of equipment which DOES involve accessing lift shaft	
Unloading & distribution of equipment which DOES NOT involve accessing lift shaft	
total Balan	

I. Click to *agree to the terms and conditions* (available from the link at the top of the page), enter card shipment details (or copy from person or

company) and click Save

Select Roles	Mandatory; Requires valid select	tion	
Roles:		which DOES NOT in	volve accessing lift
Previous Roles:	(none)		
Communicate To:	Lauren Chock	Name of p	erson
Communicate By:	Email ᅌ		
Email:	tworkman@pegasus.net.au		
Mobile:	in Australia		0
Declaration:	I agree with the Terms & Condition	s and Privacy menu	is
ard Shipment			
Communicate To:		copy from	n 🗌 Card Order
Communicate By:	Email		
Email:			
Email:	in Australia		^
Email: Mobile:	in Australia		
Email: Mobile: Attention To:	in Australia	C	Oppy from ☐ Person ☐ Comp
Email: Mobile: Attention To: Address:	in Australia	C	ppy from Person Comp.
Email: Mobile: Attention To: Address: Town:	in Australia	C	♦ Person Comp.
Email: Mobile: Attention To: Address: Town: State/Province:	in Australia	Ct	Oppy from ☐ Person ☐ Comp.
Email: Mobile: Attention To: Address: Town: State/Province: Postcode:	in Australia	C	Oppy from ☐ Person ☐ Comp.

m. Upload file requirements (mandatory requirements will be marked with a red X) by clicking Upload



n. Click on choose file and select file to upload



o. Click Save

Edit Upload	I Photo of Person Test	
Description: Maximum Size: Requirement:	Photo 2 Mb Head and shoulders well lit photo taken from the front with a plain backgrov sunglasses. Image can be larger than needed as it will be framed and crop	und. Please remove hat or ped before printing on the card.
Existing File:	Uploaded on 29-Oct-15 at 12:33 by Lauren Chock	Browse to upload new, or edit fields and Save to keep
File to Upload:	Choose File no file selected	Browse to select replacement file for upload
Name: * Comment:	images	Friendly name for this file after upload
Status:		
Back		
<ul> <li>You may edit the</li> <li>Permitted File Ty Only jpg files are</li> </ul>	ields and click <b>save</b> , or <b>browse</b> for a new file to upload. rpes permitted for this upload.	
Maximum File Si Only files up to 2	ze Mb in size will be accepted for upload.	

p. Click OK.



q. Enter an email address for online training login details, or select to *copy from employee.* 

r. Agree to training declaration and click



Terminate

Role Data Lookup

s. Scroll up and click Add to Cart

t. Click *review.* 

	Shoppin	g Cart	
Name		Quantity	Cost
 Employee	Compliance	1	\$27.50
 EST-011 S	afety Signs	12	\$0.00
Review		Total Cost:	\$27.50

All mandatory entries for this application are complete. It may now be added to your cart. If you intend to provide any more optional file uploads or information please do that first.

Back

Add to Cart

PROCESSING: PERSON TEST (Registration, Subscription, Roles, Card) u. Review and ensure all training events and Onsite Cards are listed, and click

			ап						
Com	pany	y: Lauren							
Use	r:	Lauren Chock							
Tota	l:	\$220.00 inc GST							
Line	Qty	/ Item	Person	Unit Cost	Unit GST	Cost (ex)	Cost (inc)	Description	Remove
Line 1	Qty	/ Item Company Compliance Subscription	Person	Unit Cost \$200.00	Unit GST \$20.00	Cost (ex) \$200.00	Cost (inc) \$220.00	Description Dtis Company Compliance Subscription from 28 Oct 2015 to 28 Oct 2017.	Remove remove
1	Qty 1	Item     Company Compliance Subscription	Person	Unit Cost \$200.00	Unit GST \$20.00	Cost (ex) \$200.00 Total:	Cost (inc) \$220.00 \$220.00	Description Otis Company Compliance Subscription from 28 Oct 2015 to 28 Oct 2017. Including GST of \$20.00	Remove remove

v. Enter the payment details and select Continue

Company:	Lauren		
User:	Lauren Chock		
Total: \$220.00 inc GS	r		
PURCHASE Credit Card		Please enter your credit card details and click continue to process the purchase	
Card Number:	4444333322221111		
Card Type:	VISA	CURRENTLY OPERATING IN TEST MODE	
Card Expiry:	12 ᅌ 2019 ᅌ	These auto populated credit card values should produce a successful payment	
Card CVV:	123		
Cardholder Name:	John Doe		
Back			Continu

w. Your documents will be assessed and authorised. If they do not meet requirements, they will be returned for action. You will receive an email telling you this, and it will show as *action required* on the home screen of the portal when you login. Once the upload requirements have been verified, online training will be approved and your employees will be emailed login details. Once all online training has been successfully completed, the classroom induction booking will be approved and a confirmation email sent to the employee.

*NOTE*: Competencies will need to be maintained as they expire.

#### **Checkout Shopping Cart** Company: Lauren User: Lauren Chock Purchase Successful 12 persons have been booked into training. 1 Employee Compliance has been submitted. Tax Invoice/Receipt Thank you for your purchase. Below is the Tax Invoice/Receipt. A copy of this has been emailed to you. Click the Download button to access it now. Invoice Number Total (inc GST) Method Details 187819 \$27.50 Credit Card Download Logout Continue

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