



ONSITE TRACK EASY

Otis Contractor Management Portal

Portal User Guide: Employee Registration & Induction Bookings



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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>

The screenshot shows the OTIS Induction Management System portal. At the top left is the OTIS logo, and at the top right is the text "Induction Management System (For Subcontractors & Employees)". Below this is a navigation bar with "Home", "Help", "Terms & Conditions", and "Privacy". The main content area is divided into two columns. The left column contains a sidebar with a "Registration" link (highlighted in green) and four other links: "Profile", "Uploads", "SMS Review", and "Portal Access", each with a red 'X' icon. The right column has a "Welcome" section with instructions for OTIS Contractor/Vendor/Merchandiser/Demonstrator users. Below this is a "Register" section with a "Register" button (highlighted in green) and a "Login" section with a "Login" button (highlighted in green). The footer contains the website URL "www.otiscontractor.com.au", the slogan "The leader in moving people to new heights", and the "ALL SAFE" logo with the tagline "Every one. Every job. Every day."

- 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 **forgotten password** 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 User Account](#)
Request new password for your login: [Forgotten Password](#)

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

- 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:

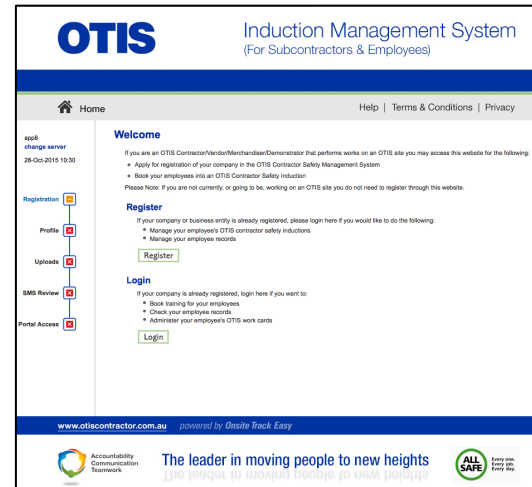
Email Address:

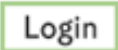
Submit

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.

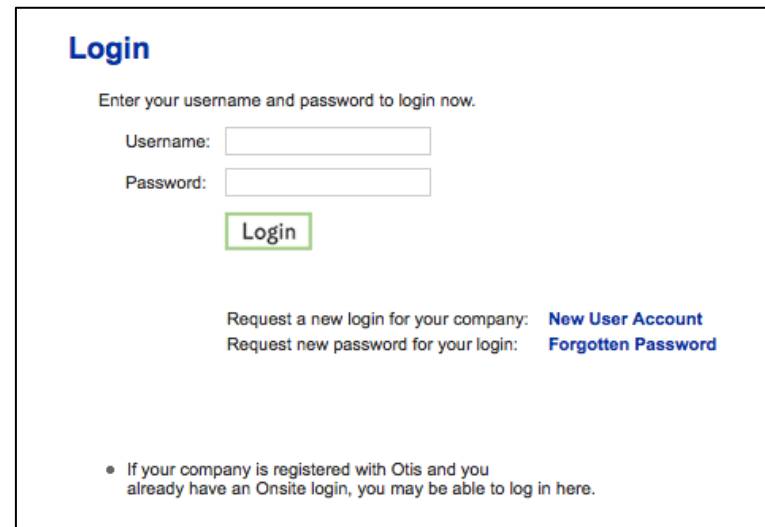
REGISTERING EMPLOYEES & BOOKING INDUCTIONS

a. Click 



b. Enter your username and password and click 

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**


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.*

d. **Search** for existing employees

Employee Compliance

 **Shopping Cart**
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
Requirements:	<ul style="list-style-type: none">• Role selection• Photo upload• File uploads• Mandatory Otis Card (if no previous issue)
Registration:	\$25.00 (plus \$2.50 GST) for initial registration
Card Cost:	\$15.00 (plus \$1.50 GST) per Card

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EMPLOYEES LIST

Search *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.




OTIS
Otis EHS Accredited

Cardholder Name EXP 29 OCT 15

000 000 000

- 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

Employee Compliance




Shopping Cart
 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
Requirements:	<ul style="list-style-type: none"> Role selection Photo upload File uploads Mandatory Otis Card (if no previous issue)
Registration:	\$25.00 (plus \$2.50 GST) for initial registration
Card Cost:	\$15.00 (plus \$1.50 GST) per Card

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EMPLOYEES LIST

Search

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

Found 4 matches

Submit

Tick one or more of the **Select** and **Card Required** boxes, then click the **Submit** button to proceed with this selection

Add Employee

Register **Employee** not yet in your employees list

Select	Card Required?	Last Name	First Name	Previous Approved Role Selections	Email	Card History	Reason Select Disabled
<input style="border: 2px solid red;" type="checkbox"/>	<input type="checkbox"/>	F	F	(none)	t@PEAGSUS.NET.AU		
<input type="checkbox"/>	<input type="checkbox"/>	Test	Lauren	(none)	test@pegasus.net.au		
<input type="checkbox"/>	<input type="checkbox"/>	Test	Test	(none)	test@pegasus.net.au		
<input type="checkbox"/>	<input type="checkbox"/>	Test	Test	(none)	test@pegasus.net.au		

f. Enter the employee details and click

Save

Add Employee to Lauren

Please enter fields, upload files and then submit the data (* = mandatory)
On submit a Otis card will be purchased for this person.

Shopping Cart
Total Cost: empty

1. Fields

Current Data

Added By: Lauren Chock

First Name: * Lauren

Middle Name:

Last Name: * Test

Date of Birth: * 21 Jun 1985 "dd mmm yy" or icon

Drivers Lic. Number:

Drivers Lic. State:

Drivers Lic. Class:

Drivers Lic. Expiry: "dd mmm yy" or icon

Gender:

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 menus

Cancel Save

2. Identification

Please enter the required fields.
Then you can proceed if required.

3. Files

Please enter the required fields
and complete identification steps.
Then you can upload the files.

4. Submit


Please enter all the required data.
Then you will be able to submit it.

On submit a Otis
card will be purchased for this person.

g. Click

Continue Entry of Person Test

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**



Shopping Cart
Total Cost: empty

1. Fields

Current Data
 Added By: Lauren Chock
 First Name: *
 Middle Name:
 Last Name: *
 Date of Birth: *
 Drivers Lic. Number:
 Drivers Lic. State:
 Drivers Lic. Class:
 Drivers Lic. Expiry:
 Gender:
 Address:

2. Identification

No additional identification data is required.
This person will be added as a new person in Onsite.

3. Files

No file uploads are required.


4. Submit

Click submit to send the data for processing.

On submit a Otis card will be purchased for this person.

h. Click on *process*

Employee Compliance



Shopping Cart
Total Cost: empty

SELECTION

Action	Card?	Last Name	First Name	General	Roles	Files Done	Infos Done	Cost	Data Status	Payment
Process	YES	Test	Person	✘				\$27.50	INCOMPLETE	

✓ = Entered ✘ = Mandatory Not Entered ✘ = Optional Not Entered

Action: Click 'Process' to continue an entry, and when complete, submit it or add it to the shopping cart.
Each person requires General entries, then File uploads.

Click link to view role data requirements: [Role Data Lookup](#)

i. Click on

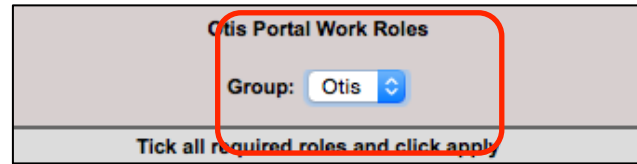
PROCESSING: PERSON TEST
(Registration, Subscription, Roles, Card)

GENERAL *

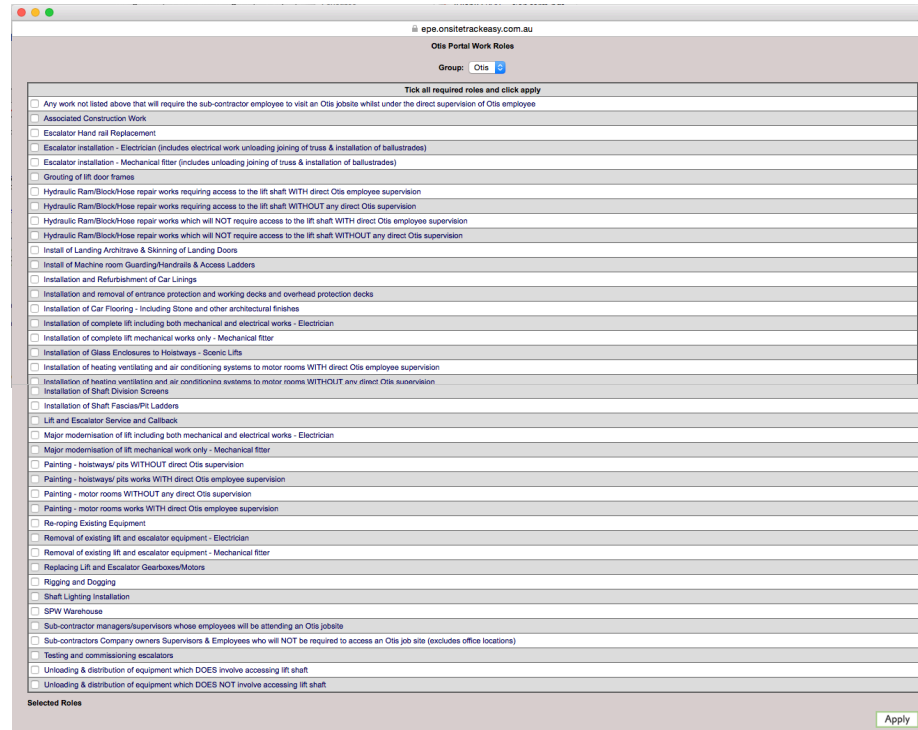
Registration, Subscription, Roles, Card

Mandatory; Requires valid selection

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.



- 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**.

GENERAL*

Registration, Subscription, Roles, Card

Select Roles **Mandatory; Requires valid selection**

Roles: Unloading & distribution of equipment which DOES NOT involve accessing lift shaft

Previous Roles: (none)

Communicate To: *Name of person*

Communicate By:

Email:

Mobile: in

Declaration: I agree with the Terms & Conditions and Privacy menus

Card Shipment

Communicate To: **copy from** Card Order

Communicate By:

Email:

Mobile: in

Attention To: **copy from** Person Company

Address:

Town:

State/Province:

Postcode:

Country:

You must save these entries before you can proceed with the next step **Save**

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

FILE **hide files**

File1: * **Photo**
X **Mandatory Cardholder Photo**

Head and shoulders well lit photo taken from the front with a plain background. Please remove hat or sunglasses. Image can be larger than needed as it will be framed and cropped before printing on the card.

Please upload a photo of this employee

Upload

n. Click on **choose file** and select file to upload

app104
29-Oct-2015 12:17
Lauren Chock
Lauren

Registration
Profile
Uploads
SMS Review
Portal Access

Upload Photo of Person Test

Description: **Photo**
Maximum Size: 2 Mb
Requirement: Head and shoulders well lit photo taken from the front with a plain background. Please remove hat or sunglasses. Image can be larger than needed as it will be framed and cropped before printing on the card.

File to Upload * **Choose File** no file selected Browse to select file for upload

Name: * Friendly name for this file after upload

Comment:

Status:

Back

► **Browse** for the file and enter field values. Then you will be able to do the upload.
► **Permitted File Types**
Only jpg files are permitted for this upload.
► **Maximum File Size**
Only files up to 2 Mb in size will be accepted for upload.

www.otiscontractor.com.au *powered by Onsite Track Easy*

Accountability
Communication
Teamwork

The leader in moving people to new heights

ALL SAFE Every one. Every job. Every day.

o. Click **Save**.

Edit Upload Photo of Person Test

Description: **Photo**
Maximum Size: 2 Mb
Requirement: Head and shoulders well lit photo taken from the front with a plain background. Please remove hat or sunglasses. Image can be larger than needed as it will be framed and cropped 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*
Browse to select replacement file for upload

File to Upload: no file selected

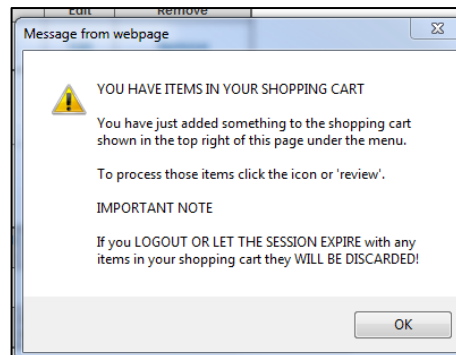
Name: * *Friendly name for this file after upload*

Comment:

Status:

- ▶ You may edit the fields and click **save**, or **browse** for a new file to upload.
- ▶ **Permitted File Types**
Only **jpg** files are permitted for this upload.
- ▶ **Maximum File Size**
Only files up to **2 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**.

Online Training Email

Please enter a valid employee email address. It will be used to provide access to online training for the employee. An invalid address will result in the employee not being able to complete the training requirements for this selection.

Email:

copy from **Employee**

r. Agree to training declaration and click **Save**.

Training Declaration

I agree to purchase any outstanding training listed above for this employee and that they will undertake this training within a reasonable time frame.

Cancel **Save**

s. Scroll up and click **Add to Cart**.

Registration, Subscription, Roles, Card

Shopping Cart
Total Cost: empty

SELECTION

Action	Card?	Last Name	First Name	General	Roles	Files Done	Infos Done	Cost	Data Status	Payment
Processing ▶	YES	Test	Person	✓	Unloading & distribution of equipment which DOES NOT involve accessing lift shaft	1 of 1 ✓	0 of 0 ✓	\$27.50	COMPLETE	READY

✓ = Entered ✗ = Mandatory Not Entered ✕ = Optional Not Entered

Click link to view role data requirements: [Role Data Lookup](#)

PROCESSING: PERSON TEST
(Registration, Subscription, Roles, Card)

Back **Add to Cart** **Terminate**

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.

t. Click **review**.

Shopping Cart

Name	Quantity	Cost
Employee Compliance	1	\$27.50
EST-011 Safety Signs	12	\$0.00
		Total Cost: \$27.50

Review

- u. Review and ensure all training events and Onsite Cards are listed, and click

Review Shopping Cart

Company:	Lauren
User:	Lauren Chock
Total:	\$220.00 inc GST

Line	Qty	Item	Person	Unit Cost	Unit GST	Cost (ex)	Cost (inc)	Description	Remove	
1	1	Company Compliance Subscription		\$200.00	\$20.00	\$200.00	\$220.00	Otis Company Compliance Subscription from 28 Oct 2015 to 28 Oct 2017.	remove	
							Total:	\$220.00	including GST of \$20.00	

[Back](#) [Proceed to Checkout](#)

- v. Enter the payment details and select [Continue](#)

Checkout Shopping Cart

Company:	Lauren
User:	Lauren Chock
Total:	\$220.00 inc GST

PURCHASE

Credit Card ▶ Please enter your credit card details and click **continue** to process the purchase

Card Number:

Card Type:

Card Expiry:

Card CVV:

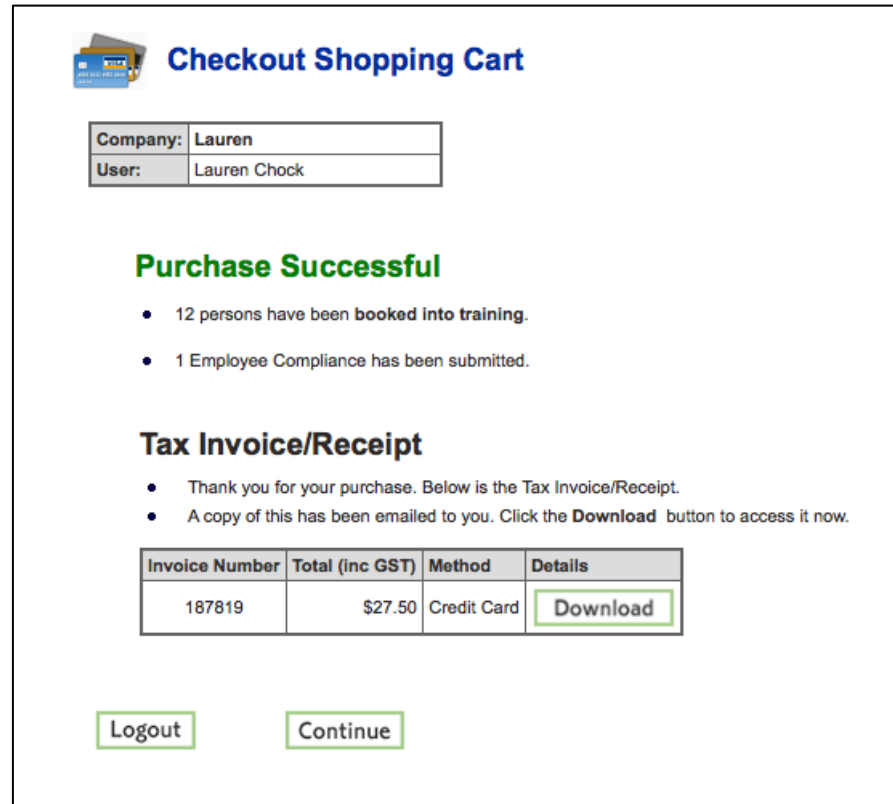
Cardholder Name:

CURRENTLY OPERATING IN TEST MODE
These auto populated credit card values should produce a successful payment

[Back](#) [Continue](#)

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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