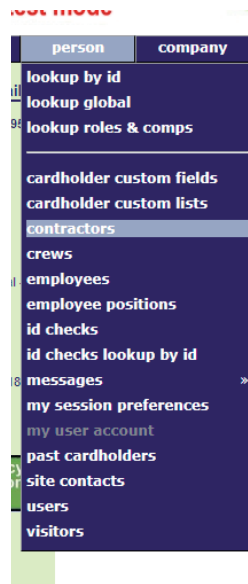




Associating contractors to site

OPTION 1 - Associate through contractor search



Step 1

Login to Onsite.

Click the *person* tab and select *contractors*.

Find

From 

Include Unassociated


Include Inactive

Step 2

Enter the contractor's name, tick the *Include Unassociated* box, then *search*.
Select their name.

ASSOCIATING CONTRACTORS TO SITE

Find

From 

Include Unassociated

Select Contractor Company

- All Companies
 - All Contractor Companies
- Specific Company





 Jason Smith (cardholder) 000 012 345

general


Works For

Default	Company	Id	Site Association	Roles	View	
	Onsite Track Easy Pty Limited	251	Associate Contractor			<input type="button" value="add"/>

Cardholder

 First Name: Jason
 Middle Name:
 Last Name: Smith
Card Id: 000 012 345
 Date of Birth: * 09 Jul 1976



 Card Photo

Step 3

To decrease the search results, choose the contracting company this cardholder is working for by clicking the hand icon and searching for the company.

Step 4

Click **Associate Contractor**.

WARNING

You are about to establish an association between Jason Smithson and your site. That association will enable access to personal information about Jason Smithson. Ensure that you have the appropriate authority from the owner of the personal information prior to establishing this association.

Please ensure this association is established in accordance with your site privacy policies and the Privacy Act 1988 (Cth). If you are unsure, please seek appropriate legal advice.

If you proceed, you will be recorded as the person who established this association. You or your employer may be personally liable for any damage resulting from any unauthorised use of the personal information.

TRANSFER COMPANY

If Jason Smithson no longer works for Onsite Track Easy Pty Limited, you may transfer this contractor to another company before making the association with Pegasus Demonstration.

Yes, transfer Jason Smithson to another company first.

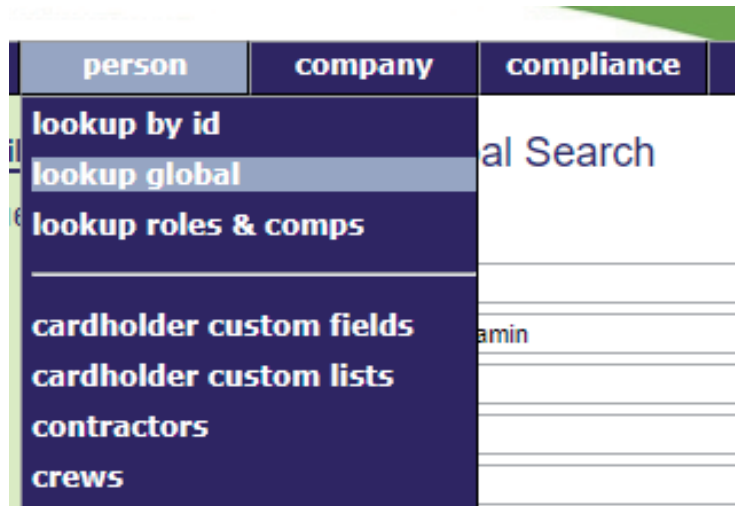
cancel

associate

Step 5

A warning will appear ensuring you want to associate the person. Click *associate*.

OPTION 2 - Associate through global lookup



Step 1

Click the *person* tab and select *lookup global*.

Lookup Person Global Search

Last Name:

First Name:

Middle Name:

Date of Birth:

Drivers License Number:

cancel

SEARCH FOR CARDHOLDER

▶ Search results will include system-wide Contractors and Employees you have permission to view from t
 ▶ Enter additional search criteria to segregate the most likely matches from the search results for easy i
 ▶ Select a name below to view the person.

Include "sounds like"

EXACT MATCH ON ALL FIELDS

Name	ID	Checked	Companies	Person Type	Date of Birth	Site	Visible
Smithson, Jason	465383		Onsite Track Easy Pty Limited	Contractor	09 Aug 39		No - Associate
Smithson, Jason	1740966		Pegasus Management Pty. Limited	Contractor	09 Aug 39		No - Associate

Step 2

Enter the contractor's name and date of birth and select their name from the search results.

ASSOCIATING CONTRACTORS TO SITE

Jason Smithson (cardholder)

000 012 345

general

Works For

Default	Company	Id	Site Association	Roles	View
	Onsite Track Easy Pty Limited	251	Associate Contractor		

add



Cardholder

First Name: Jason
Middle Name:
Last Name: Smithson
Card Id: 000 012 345

Contractor Name: Jason Smithson
Onsite Card Id: 000 012 345
Date of birth: 09 Aug 39
Company: Onsite Track Easy Pty Limited



Association Date: 25 May 18
Associated By: John Jones

WARNING

You are about to establish an association between Jason Smithson and your site. That association will enable access to personal information about Jason Smithson. Ensure that you have the appropriate authority from the owner of the personal information prior to establishing this association.

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If you proceed, you will be recorded as the person who established this association. You or your employer may be personally liable for any damage resulting from any unauthorised use of the personal information.

cancel

associate

Step 3

Click *Associate Contractor*.

Step 4

A warning will appear ensuring you want to associate this contractor. Click *associate*.

OPTION 3 - Associate through lookup ID



Step 1

Click the *person* tab and select *lookup by ID*.

Lookup Person By Id

Lookup ID: Use: Onsite Person ID Legacy ID

Results at 24 May 2018

Onsite ID: 465383
 Name: Jason Smithson
 Status: APPROVED
 Person Type: CONTRACTOR
 Associated: no
 Works For:



Default	Company	Id	Type
	Onsite Track Easy Pty Limited	251	Contractor

✓ NOT BLOCKED

Step 2

Type the Onsite ID of the contractor and select their name.

ASSOCIATING CONTRACTORS TO SITE

Jason Smithson (cardholder)

000 012 345

general

Works For

Default	Company	Id	Site Association	Roles	View
	Onsite Track Easy Pty Limited	251	Associate Contractor		

add



Cardholder

First Name: Jason
Middle Name:
Last Name: Smithson
Card Id: 000 012 345

Contractor Name: Jason Smithson
Onsite Card Id: 000 012 345
Date of birth: 09 Aug 39
Company: Onsite Track Easy Pty Limited



Association Date: 25 May 18
Associated By: John Jones

WARNING

You are about to establish an association between Jason Smithson and your site. That association will enable access to personal information about Jason Smithson. Ensure that you have the appropriate authority from the owner of the personal information prior to establishing this association.

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If you proceed, you will be recorded as the person who established this association. You or your employer may be personally liable for any damage resulting from any unauthorised use of the personal information.

cancel

associate

Step 3

Click *Associate Contractor*.

Step 4

A warning will appear ensuring you want to associate this contractor. Click *associate*.



For questions or assistance please call 1300 131 194
or email support@onsitetrackeasy.net.au