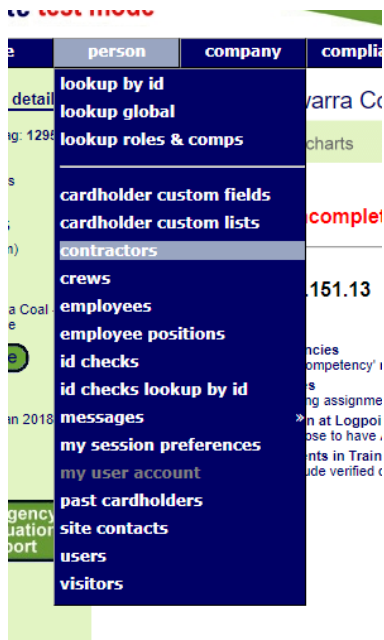


# User Guide

## Associating to site | Contractors


### STEP ONE | Associate Contractor through the Contractor search

Click on the Person tab and select Contractors



Type the name of the contractor you are searching for, tick the **Include Unassociated** box and click search. Once found, click the name of the contractor you would like to associate.


Find

From  ALL CONTRACTOR COMPANIES

Include Unassociated  
 Include Inactive

To reduce search results, choose the contracting company this person is working for by click the hand icon and search for the company.

Find

From 

Include Unassociated

## Select Contractor Company

- All Companies

All Contractor Companies

- Specific Company

Click 'Associate'


 Aaron Stevenson (unassociated contractor) 000 049 884

general

ServiceLocator.getScopeConcoService()

Person Type: Contractor  
Company: Onsite Track Easy Pty Limited  
 First Name: Aaron  
 Middle Name:  
 Last Name: Stevenson  
Card Id: 000 049 884  
 Date of Birth: 09 Jul 76  
Gender: \* Male  
Drivers Lic. No: \* 11418514  
Drivers Lic. State: \* NSW  
Drivers Lic. Class: \* C,R  
Drivers Lic. Expiry: \*



 Card Photo

### RESTRICTED DATA ACCESS

Only limited data is currently available as this contractor is not associated with your site.

Until this person has been associated with your site you will not be able to access any additional details or to enter site-specific data such as Competencies or Competency Keys.

A warning will appear ensuring you are wanting to associate the person, click associate.

### WARNING

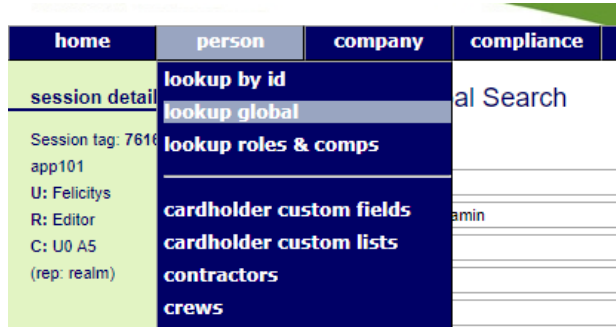
You are about to establish an association between Aaron Stevenson and your site. That association will enable access to personal information about Aaron Stevenson. Ensure that you have the appropriate authority from the owner of the personal information prior to establishing this association.

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

## STEP TWO | Associate Contractor through Global Lookup

Under the person tab, select 'Lookup global'




Type the name and date of birth of the contractor you are trying to find. Once found click into that person

### Lookup Person Global Search

Last Name:

First Name:

Middle Name:

Date of Birth:  

Drivers License Number:

cancel

#### SEARCH FOR CARDHOLDER

search for existing


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

Include "sounds like"

#### EXACT MATCH ON PERSON WITH ID CHECK

Name	ID	Checked	Companies	Person Type	Date of Birth	Visible
Stevenson, Aaron	49884		Onsite Track Easy Pty Limited	Contractor	09 Jul 76	No - Associate

Click 'Associate'

 Aaron Stevenson (unassociated contractor)


000 049 884

general

ServiceLocator.getScopeConcoService()

Person Type: Contractor  
Company: Onsite Track Easy Pty Limited  
First Name: Aaron  
Middle Name:  
Last Name: Stevenson  
Card Id: 000 049 884  
Date of Birth: 09 Jul 76  
Gender: \* Male  
Drivers Lic. No: \* 11418514  
Drivers Lic. State: \* NSW  
Drivers Lic. Class: \* C,R  
Drivers Lic. Expiry: \*



 Card Photo

### RESTRICTED DATA ACCESS

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Until this person has been associated with your site you will not be able to access any additional details or to enter site-specific data such as Competencies or Competency Keys.

associate

A warning will appear ensuring you are wanting to associate the person, click associate.

### WARNING

You are about to establish an association between Aaron Stevenson and your site. That association will enable access to personal information about Aaron Stevenson. 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 Aaron Stevenson 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 Aaron Stevenson to another company first.

cancel

associate

## STEP THREE | Associate Contractor through Lookup ID

Under the person tab, select 'Lookup by ID'



Type the Onsite ID of the contractor you are trying to find. Once found click into that person

### Lookup Person By Id

Lookup ID:

Use:  Onsite Person ID  
 Legacy ID

Results at 24 May 2018


Onsite ID: 465383  
Name: **Felicity Stevenson**  
Status: APPROVED  
Person Type: CONTRACTOR  
Associated: **no**  
Works For:

Default	Company	Id	Type
	Onsite Track Easy Pty Limited	251	Contractor



NOT BLOCKED

Click 'Associate'

 Aaron Stevenson (unassociated contractor)


000 049 884

general

ServiceLocator.getScopeConcoService()

Person Type: Contractor  
Company: Onsite Track Easy Pty Limited  
 First Name: Aaron  
 Middle Name:  
 Last Name: Stevenson  
Card Id: 000 049 884  
 Date of Birth: 09 Jul 76  
Gender: \* Male  
Drivers Lic. No: \* 11418514  
Drivers Lic. State: \* NSW  
Drivers Lic. Class: \* C,R  
Drivers Lic. Expiry: \*



 Card Photo

### RESTRICTED DATA ACCESS

Only limited data is currently available as this contractor is not associated with your site.

Until this person has been associated with your site you will not be able to access any additional details or to enter site-specific data such as Competencies or Competency Keys.

associate

A warning will appear ensuring you are wanting to associate the person, click associate.

### WARNING

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

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Yes, transfer Aaron Stevenson to another company first.

cancel

associate