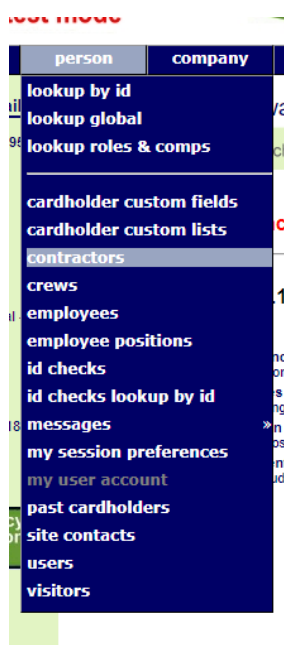


User Guide

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 

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 Contractor'

 Aaron Stevenson (cardholder) 000 049 884




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: Aaron
 Middle Name:
 Last Name: Stevenson
Card Id: 000 049 884

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.

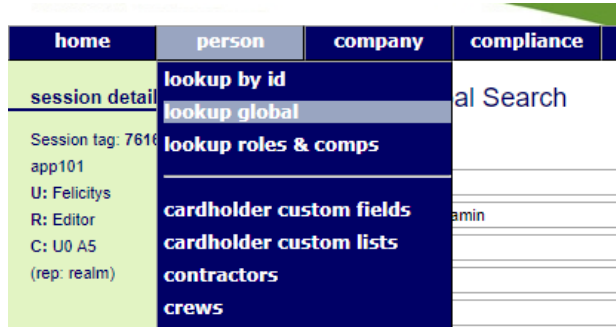
TRANSFER COMPANY

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.

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 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
Stevenson, Felicity	465383		Onsite Track Easy Pty Limited	Contractor	09 Aug 39		No - Associate
Stevenson, Felicity	1740966		Pegasus Management Pty. Limited	Contractor	09 Aug 39		No - Associate

Click 'Associate Contractor'

Felicity Stevenson (cardholder)

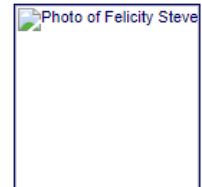
000 465 383

general

Works For

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

add



Cardholder

First Name: Felicity
Middle Name:
Last Name: Stevenson
Card Id: 000 465 383

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

Contractor Name: Felicity Stevenson
Onsite Card Id: 000 465 383
Date of birth: 09 Aug 39
Company: Onsite Track Easy Pty Limited

Association Date: 25 May 18
Associated By: Felicity Stevenson



WARNING

You are about to establish an association between Felicity Stevenson and your site. That association will enable access to personal information about Felicity 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.

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

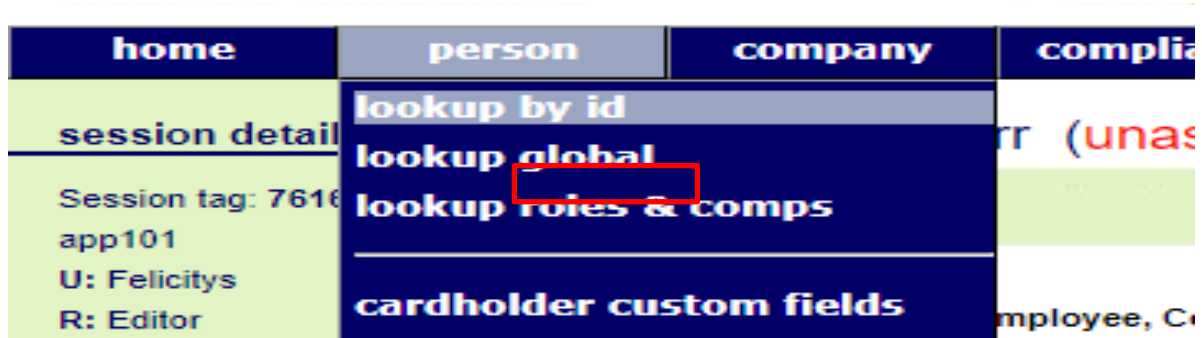
Onsite ID: 465383
Name: **Felicity Stevenson**
Status: APPROVED
Person Type: CONTRACTOR
Associated: **no**
Works For:

Default	Company	Id	Type
	Onsite Track Easy Pty Limited	251	Contractor



NOT BLOCKED

Click 'Associate Contractor'



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

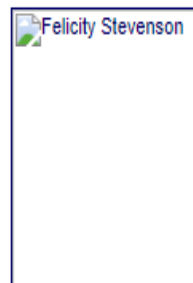
Lookup Person By Id

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