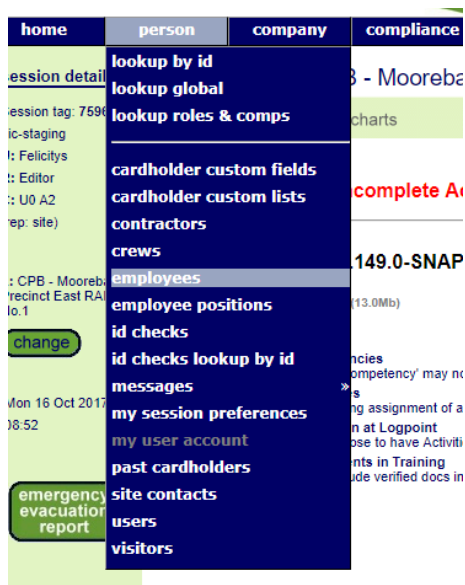


User Guide

Associating to site| Employees


STEP ONE | Associate Employees through the Employees page

Click on the Person tab and select employees



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

Find

From 

Include Associated who have Other Home Sites

Include Unassociated

Include Inactive

Click associate
Kayla Lindsay (unassociated employee)

000 440 777

general

Roles: Employee
Employer: Pegasus Safety And Training Pty Ltd
First Name: Kayla
Middle Name:
Last Name: Lindsay
Card Id: 000 440 777
Date of Birth: *
Gender: *
Drivers Lic. No: *
Drivers Lic. State: *
Drivers Lic. Class: *
Drivers Lic. Expiry: *



Card Photo
Show Pending Photo

RESTRICTED DATA ACCESS

Only limited data is currently available as this employee is not associated with a work location on your site.

Until this person has been associated with a work location on 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 Kayla Lindsay and your site. That association will enable access to personal information about Kayla Lindsay. 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

Select the employees work location and click associate. The employee will now be associated to site.

Work Locations:

These settings control where Kayla Lindsay can log in at Onsite Logpoints. Allowing access to a Location also allows access to all Locations within it.

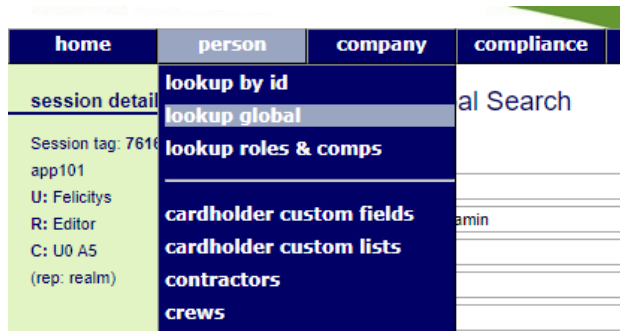
Pegasus Demonstration

cancel

associate

STEP TWO| Associate Employee through Global Lookup

Under the person tab, select 'Lookup global'



Type the name of the employee 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:

SEARCH FOR CARDHOLDER

- ▶ Search results will include system-wide Contractors and Employees you have permission to view from the Australia and Oceania region with a matching last name or drivers license.
- ▶ Enter additional search criteria to segregate the most likely matches from the search results for easy identification.
- ▶ Select a name below to view the person.

Include "sounds like"

EXACT MATCH ON ALL FIELDS

Name	ID	Checked	Company	Person Type	Date of Birth	Drivers License Number	Drivers License State	Drivers License Class	Drivers License Expiry	Visible	Active
Lindsay, Kayla	415359		Australian Rail Track Corporation Ltd	Employee	(private)	(private)	(private)	(private)	(private)	No - Contact employer	✓
Lindsay, Kayla	440777		Pegasus Safety And Training Pty Ltd	Employee						No - Associate employee	✓

Click associate

Kayla Lindsay (unassociated employee)

000 440 777

general

Roles: Employee
Employer: Pegasus Safety And Training Pty Ltd
First Name: Kayla
Middle Name:
Last Name: Lindsay
Card Id: 000 440 777
Date of Birth: *
Gender: *
Drivers Lic. No: *
Drivers Lic. State: *
Drivers Lic. Class: *
Drivers Lic. Expiry: *



Card Photo
Show Pending Photo

RESTRICTED DATA ACCESS

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cancel

associate

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Pegasus Demonstration

cancel

associate

STEP THREE| Associate Employee through Lookup ID

Under the person tab, select 'lookup by ID'



Type the Onsite ID of the employee 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 23 Jan 2018

Onsite ID: 440777
Name: **Kayla Lindsay**
Status: APPROVED
Person Type: EMPLOYEE
Active: **yes**
Employer: Pegasus Safety And Training Pty Ltd
Employer ID: 39255



Click associate

Kayla Lindsay (unassociated employee)

000 440 777

general

Roles: Employee
Employer: Pegasus Safety And Training Pty Ltd
First Name: Kayla
Middle Name:
Last Name: Lindsay
Card Id: 000 440 777
Date of Birth: *
Gender: *
Drivers Lic. No: *
Drivers Lic. State: *
Drivers Lic. Class: *
Drivers Lic. Expiry: *



Card Photo
Show Pending Photo

RESTRICTED DATA ACCESS

Only limited data is currently available as this employee is not associated with a work location on your site.

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associate

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WARNING

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cancel

associate

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Pegasus Demonstration

cancel

associate