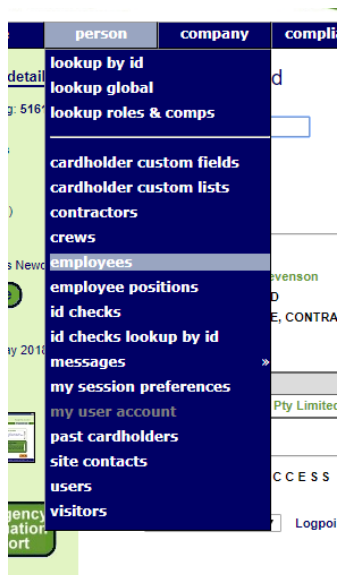


# User Guide

## Associating to site | Employees


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

Click on the Person tab and select Employee



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

Find

From 

Include Associated who have Other Home Sites

Include Unassociated

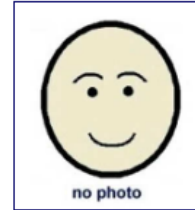
Click 'associate'

Felicity Stevenson (unassociated employee, contractor)

001 740 966

general

Roles: Employee, Contractor\*  
Employer: Pegasus Management Pty. Limited  
First Name: Felicity  
Middle Name:  
Last Name: Stevenson  
Card Id: 001 740 966  
Date of Birth:\* 18 May 1989  
Gender:\* Female  
Drivers Lic. No.:\*  
Drivers Lic. State:\*  
Drivers Lic. Class:\*  
Drivers Lic. Expiry:\*



No Card Photo  
(no 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.

### Associate Felicity Stevenson with Pegasus Gunnedah

Employee Name: Felicity Stevenson  
Onsite Card Id: 001 740 966  
Date of birth: 18 May 89  
Company: Pegasus Management Pty. Limited  
  
Association Date: 24 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.

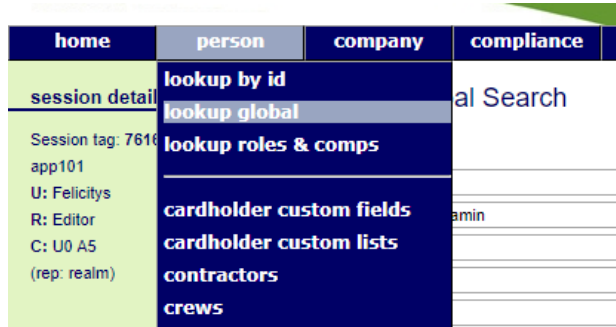
If you proceed, you will be recorded as the person who established this association. You or your employer may be personally liable for any damage resulting from any unauthorised use of the personal information.

cancel

associate

## STEP TWO | Associate Employee through Global Lookup

Under the person tab, select 'Lookup global'




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

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 the Australia & New Zealand regions.
- ▶ 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	Visible	Active
Stevenson, Felicity	465383	<input type="checkbox"/>	Onsite Track Easy Pty Limited	Employee	18 May 89	Yes	✓
Stevenson, Felicity	1740966	<input type="checkbox"/>	Pegasus Management Pty. Limited	Employee	18 May 89	No - Associate employee	✓

Click 'associate'

Felicity Stevenson (unassociated employee, contractor)

001 740 966

general

Roles: Employee, Contractor\*  
Employer: Pegasus Management Pty. Limited  
First Name: Felicity  
Middle Name:  
Last Name: Stevenson  
Card Id: 001 740 966  
Date of Birth: \* 18 May 1989  
Gender: \* Female  
Drivers Lic. No: \*  
Drivers Lic. State: \*  
Drivers Lic. Class: \*  
Drivers Lic. Expiry: \*



No Card Photo  
(no 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.

Employee Name: Felicity Stevenson  
Onsite Card Id: 001 740 966  
Date of birth: 18 May 89  
Company: Pegasus Management Pty. Limited

Association Date: 24 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.

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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 24 May 2018

Onsite ID: 1740966  
Name: Felicity Stevenson  
Status: APPROVED  
Person Type: EMPLOYEE, CONTRACTOR  
Active: yes  
Employer: Pegasus Management Pty. Limited  
Employer ID: 138



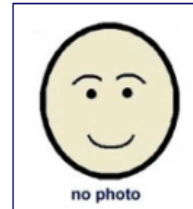
Click 'Associate Employee'

Felicity Stevenson (unassociated employee, contractor)

001 740 966

general

Roles: Employee, Contractor\*  
Employer: Pegasus Management Pty. Limited  
First Name: Felicity  
Middle Name:  
Last Name: Stevenson  
Card Id: 001 740 966  
Date of Birth: \* 18 May 1989  
Gender: \* Female  
Drivers Lic. No: \*  
Drivers Lic. State: \*  
Drivers Lic. Class: \*  
Drivers Lic. Expiry: \*



No Card Photo  
(no 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.

Employee Name: Felicity Stevenson  
Onsite Card Id: 001 740 966  
Date of birth: 18 May 89  
Company: Pegasus Management Pty. Limited

Association Date: 24 May 18  
Associated By: Felicity Stevenson



### WARNING

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cancel

associate