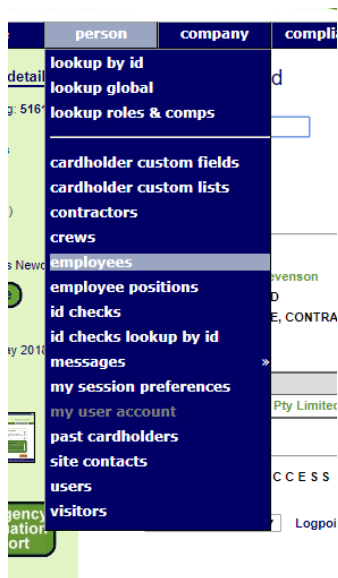


# User Guide

## 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 Employee'

Felicity Stevenson (cardholder)

001 740 966

general

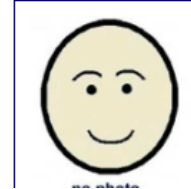
Works For

Default	Company	Id	Site Association	Roles	View
	Pegasus Management Pty. Limited	138	Associate Employee		

add

Cardholder

First Name: Felicity  
Middle Name:  
Last Name: Stevenson  
Card Id: 001 740 966



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.

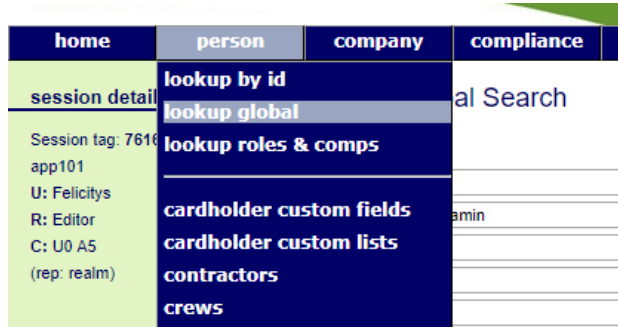
If you proceed, you will be recorded as the person who established this association. You or your employer may be personally liable for any damage resulting from any unauthorised use of the personal information.

cancel

associate

## STEP 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

### 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 for
- ▶ Enter additional search criteria to segregate the most likely matches from the search results for e
- ▶ 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	Visible
Stevenson, Felicity	465383		Onsite Track Easy Pty Limited	Employee	09 Aug 39	Yes
Stevenson, Felicity	1740966		Pegasus Management Pty. Limited	Employee	09 Aug 39	No - Associate

Click 'Associate Employee'

Felicity Stevenson (cardholder)

001 740 966

general

Works For

Default	Company	Id	Site Association	Roles	View
	Pegasus Management Pty. Limited	13	Associate Employee		

add



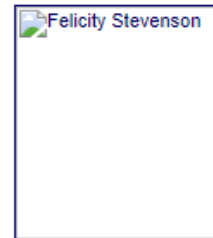
Cardholder

First Name: Felicity  
Middle Name:  
Last Name: Stevenson  
Card Id: 001 740 966

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**

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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 (cardholder)

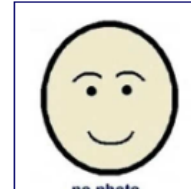
001 740 966

general

Works For

Default	Company	Id	Site Association	Roles	View
	Pegasus Management Pty. Limited	138	Associate Employee		

add



Cardholder

First Name: Felicity  
Middle Name:  
Last Name: Stevenson  
Card Id: 001 740 966

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.

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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