

User Guide

Adding People| Contractors

STEP ONE | Adding Contractors

Click on the Person tab and select contractors, this will then open a new page.



Click the add button. (This step assumes you have the user right “Can Associate Contractors”)



The image shows a form titled 'Contractors for Onsite HQ'. It contains a 'Find' search box, an 'add' button, a 'From' dropdown menu set to 'ALL CONTRACTOR COMPANIES', an 'Include Unassociated' checkbox, a 'search' button, and the text 'Ready to search'.

Type in Company name you wish to add the contractor against and search, or filter by company groups, if this is enabled. Or do empty search to show all companies.

Select Contractor Company

• Specific Company

Group: -- Do not filter by group --

Company	Id	ABN	Postal Address	Phone No.	Location
Aaa Concrete And Bricklaying	51772	34 973 888 413	154, TBA	07 338 4600	Onsite HQ
Abc Express	39829	63 281 821 286	112, Pegasus Drive, Mandurah	8488 188 888	Onsite HQ
Abm Contractors Pty Ltd	74542	74 188 284 488	112 Blue Street, Mandurah	8488 188 888	Onsite HQ
Activaterail Pty Ltd	81820	48 817 748 888	Level 1, 78 City Road, Southbank	414 124174	Onsite HQ

Select the Company this Contractor will be associated with at site. Once selected, a possible Blocked Cardholder screen might appear. Ensure the new Contractor is not already listed. They might already have a card in the system. If not, press “proceed” to continue.

Add New Contractor

Before adding a new contractor please review this list. Contractors can be blocked for various reasons, including the imposition of a BAN. Please check that the person you wish to add has not been blocked. Names may be spelled differently or the person may now be with a different company.

The following contractors are blocked within Onsite HQ!

Name	Card Id	Company	Date	Block Type	Blocker	Notes
Blog, James	000-000-004	(no companies)	16 Oct 2008	General	Rob Fitzgerald	Testing adding blocked contractor to training event
Brown, James	000 124 250	(no companies)	14 Nov 2019	Safety Selection	Onsite System	Temporary block for Safety Selectee
Carroll, James	000 287 080	(no companies)	15 Nov 2019	Safety Selection	Onsite System	Temporary block for Safety Selectee
Donner, Paul	000 411 888	Pegasus It Pty Ltd	13 Nov 2019	Safety Selection	Onsite System	Temporary block for Safety Selectee
Dunn, John	000 541 088	(no companies)	27 Apr 2010	General	Rob Fitzgerald	test 4
Fitzgerald, Robert	000 000 227	ONSITE TRACK EASY PTY LIMITED	04 Dec 2019	Safety Selection	Onsite System	Temporary block for Safety Selectee
Flemming, Jane	000 123 114	Caterpillar Global Mining Expanded Products Pty Ltd	13 Nov 2019	Safety Selection	Onsite System	Temporary block for Safety Selectee
Vojdanoski, Ilce	004 136 236	ONSITE TRACK EASY PTY LIMITED; PEGASUS MANAGEMENT PTY. LIMITED	11 Oct 2019	General	Ben Satchell	Breach
Webservicester1, Aardvark	000-000-504	(no companies)	17 Jun 2013	General	Aaron Stevenson	Test

For more details contact the Blocker and Authoriser. Notes marked as (Restricted) can only be viewed by an Onsite data manager. Only proceed if you are sure the person you want to add is not in this list!

Enter in their name and other details if you have those. Then press “search for existing” to ensure the person you are adding does not already have a profile in Onsite.

Add Contractor

Company:

Last Name:

First Name:

Middle Name:

Date of Birth: 19

Drivers License Number:

ADD CONTRACTOR TO ONSITE

Include "sounds like"

- ▶ Before a new contractor can be added use **search for existing**
- ▶ Search results will include system-wide Contractors and Employ
- ▶ Enter **additional search criteria** to segregate the most likely r

If there are no matching cardholders, click “add as new”.

SEARCH DONE: No Matching Cardholders Found.

add as new

- ▶ If you are sure there is no existing cardholder use **add as new** to proceed with adding the new contractor.
- ▶ Please make sure you are not creating a duplicate.

NOTE: If there **ARE** existing cardholders, you have the option to still add as new after clicking on the cardholder details and viewing the information. (*using Smith, Test in this example*)

EXACT MATCH ON ALL FIELDS

Name	ID	Checked	Companies	Person Type	Date of Birth	Visible
Smith, Test	413291		(private)	(private)	(private)	No - Add Company

add as new

- ▶ If you are sure there is no existing cardholder use **add as new** to proceed with adding the new contractor.
- ▶ Please make sure you are not creating a duplicate.

Clicking the user Smith, Test shows their current card in the system. You can decide to “use existing cardholder” ID if its correct, or chose “cancel” and return to “add as new”

Add Contractor

	NEW CONTRACTOR		ASSOCIATION REQUIRED
			EXISTING CARDHOLDER (ID = 413291)
Company:	Pegasus Management Pty. Limited [TNSW]	✘	(no companies)
Last Name:	smith	✔	Smith
First Name:	test	✔	Test
Middle Name:			
Date of Birth:		✘	24 Apr 1988
Drivers License Number:			
	cancel		use existing cardholder <input type="checkbox"/> Update existing with search data

When there is no matching entry, choosing “add as new” for our correct cardholder, *Citizen Johnathan*, a new screen appears, and we are required to enter in all the appropriate details for that contractor. Items marked with an Asterix will be “private Data” and are not visible to users if they do not have the user right “Can Access Private Data”.

Jonathan Citizen (cardholder)

003 281 495

general

First Name:	<input type="text" value="Jonathan"/>
Middle Name:	<input type="text" value="Test"/>
Last Name:	<input type="text" value="Citizen"/>
PIN:	<input type="text" value="0000"/>
Phone 1: *	<input type="text"/>
Phone 2: *	<input type="text"/>
Email 1:	<input type="text"/>
Email 2: *	<input type="text"/>
Address: *	<input type="text"/>
Town: *	<input type="text"/>
State: *	<input type="text"/>
Post Code: *	<input type="text"/>
Country: *	<input type="text" value="Australia"/>
Place of Birth: *	<input type="text"/>
Date of Birth: *	<input type="text"/> <input type="text" value="19"/>
Gender: *	<input type="text"/>
Drivers Lic. No: *	<input type="text"/>
Drivers Lic. State: *	<input type="text"/>
Drivers Lic. Class: *	<input type="text"/>
Drivers Lic. Expiry: *	<input type="text"/> <input type="text" value="19"/>
Fingerprint:	<input type="checkbox"/> An enrolment will be done when a logpoint requires verification

Once all details are entered in here, at the bottom of the screen select either “save” to add this one entry, or “save & add new” to restart the process for an additional contractor you wish to add for the same company (*after completing Step Two*).

cancel

save

save & add new

► Fields marked with a grey asterisk (*) are **Private** and can only be viewed by users with the **Can Access Private Data** permission, which you have.

STEP TWO | Associating Contractors

After pressing the “save” or “save & add new” button, you now must “associate” this contractor to your site. This will then allow this newly created profile to be visible and you can then work with their profile at your site. If you do not associate them, their cardholder profile is still created against that company.

Associate Jonathan Citizen from Pegasus Management Pty. Limited [TfNSW] with Onsite HQ

Contractor Name: Jonathan Test Citizen

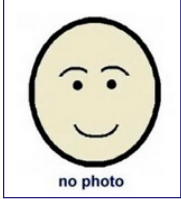
Onsite Card Id: 003 281 495

Date of birth:

Company: Pegasus Management Pty. Limited [TfNSW]

Association Date: 05 Dec 19

Associated By: Damien Challen



no photo

WARNING

You are about to establish an association between Jonathan Citizen and your site. That association will enable access to **personal information** about Jonathan Citizen. 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

Once associated, you now have full view of their Cardholder Profile.

Jonathan Citizen (cardholder)
003 281 495

general
competencies
roles
keys
training
messages
report

Works For

Default	Company	Id	Site Association	Roles	View
✓	Pegasus Management Pty. Limited [TfNSW]	64251	Contractor Un-associate	Contractor	View

add

Cardholder

First Name: Jonathan

Middle Name: Test

Last Name: Citizen

Card Id: 003 281 495

PIN: 0000

Phone 1: *

Phone 2: *

Email 1: *

Email 2: *

Address: *

Town: *


State: *

Post Code: *

Country: * Australia

Place of Birth: *

Date of Birth: *



no photo

No Card Photo
(no pending photo)

upload

Sticker Pic: n/a

block

Authorised users can block an employee from SITE access. The user's name and the reason for the block will be recorded.

STEP THREE | Adding a Photo to a Contractor

A Photo can be added if required. Click on the “upload” text under the photo space and then browse to the photo you want, select and then press “upload”

Add Pending Photo to Jonathan Citizen

Photo to Upload: No file selected. *Browse to select photo for upload*

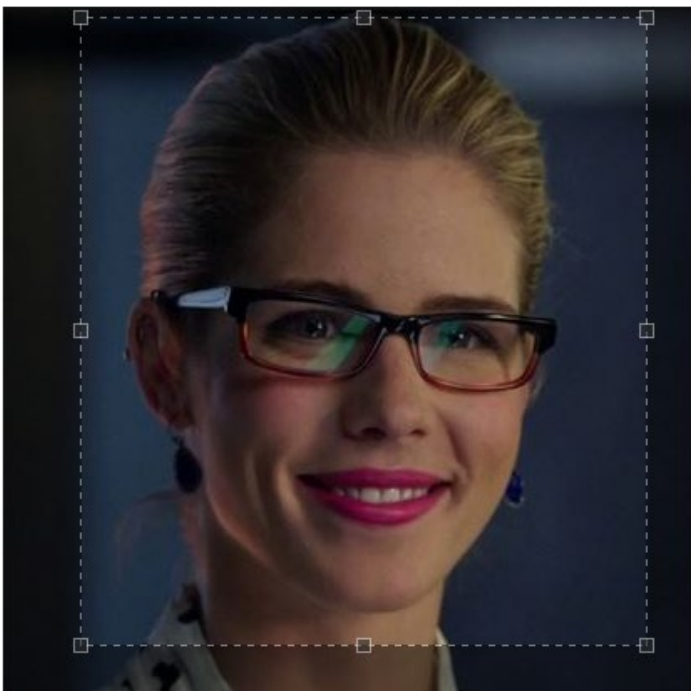
Upload Status:

- ▶ **Permitted File Types**
Only the following file types may be uploaded: **jpg**.
- ▶ **Maximum File Size**
Only files up to **5 Mb** in size will be accepted for upload.

Crop as necessary and click ‘apply’

Process Photo

Source Photo



Instructions

- ▶ The final photo initially shows the top left corner of the **source photo**.
- ▶ Rotate by clicking arrows if required.
- ▶ Drag out a **selection frame** on the source photo to define the area you want to use.
- ▶ **Resize** the frame with its handles.
- ▶ **Reposition** the frame by dragging it.

Final Photo

