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”)

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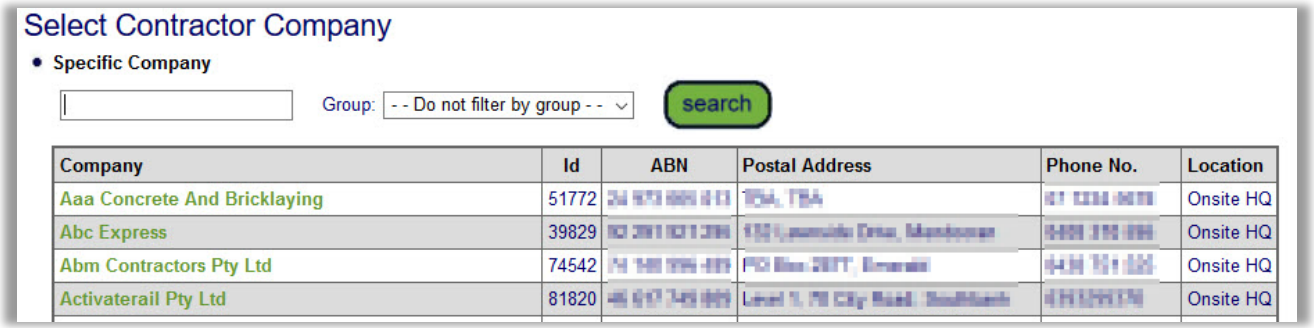
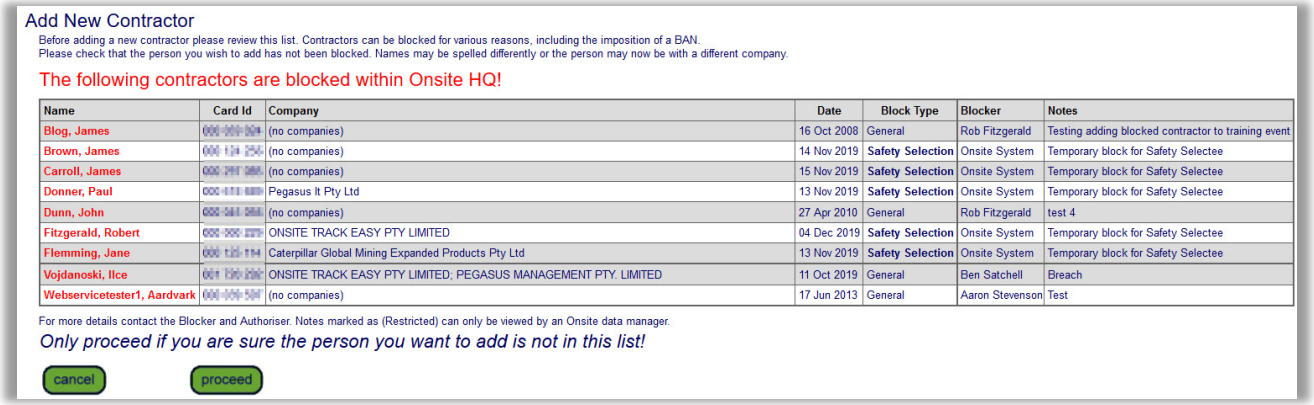
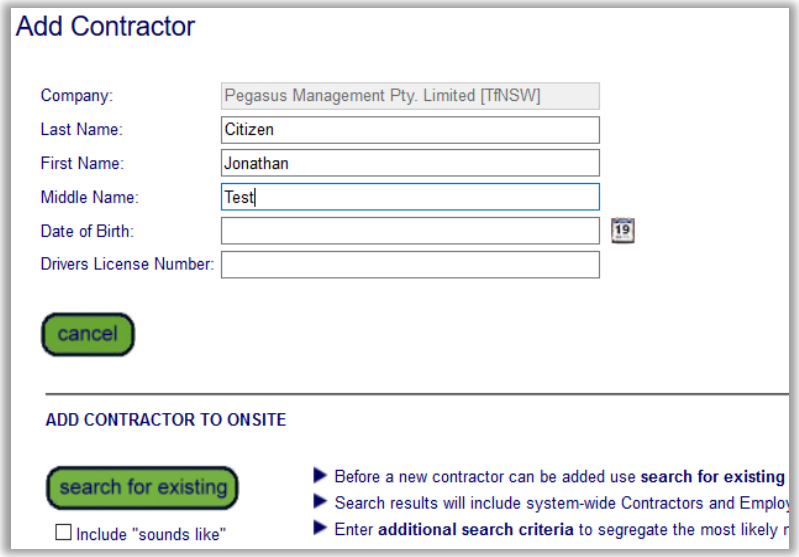
Type in Company name you wish to add the contractor against and search, or filter by company groups, if this is enabled. Or do empty search to show all companies.



Select 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.



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.



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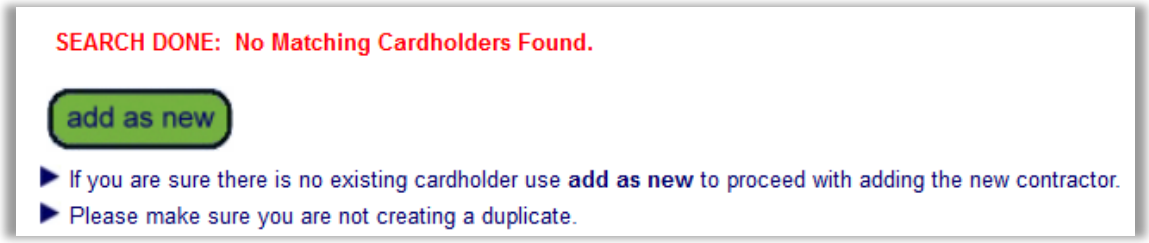
If there are no matching cardholders, click “add as new”.



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*)

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”

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”.

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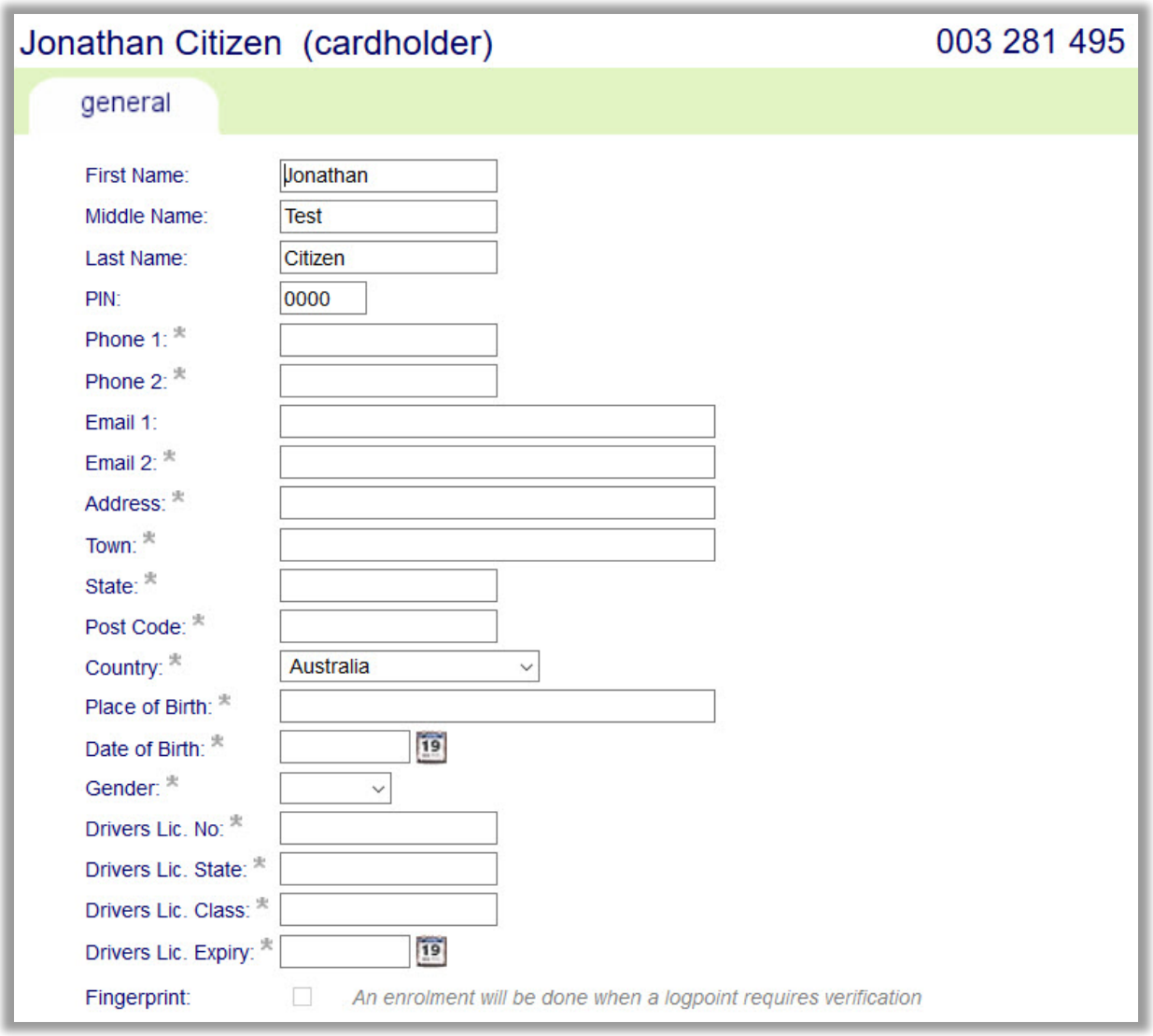

Once all details are entered in here, at the bottom of the screen select either “save” to add this one entry, or “save & add new” to restart the process for an additional contractor you wish to add for the same company (*after completing Step Two*).

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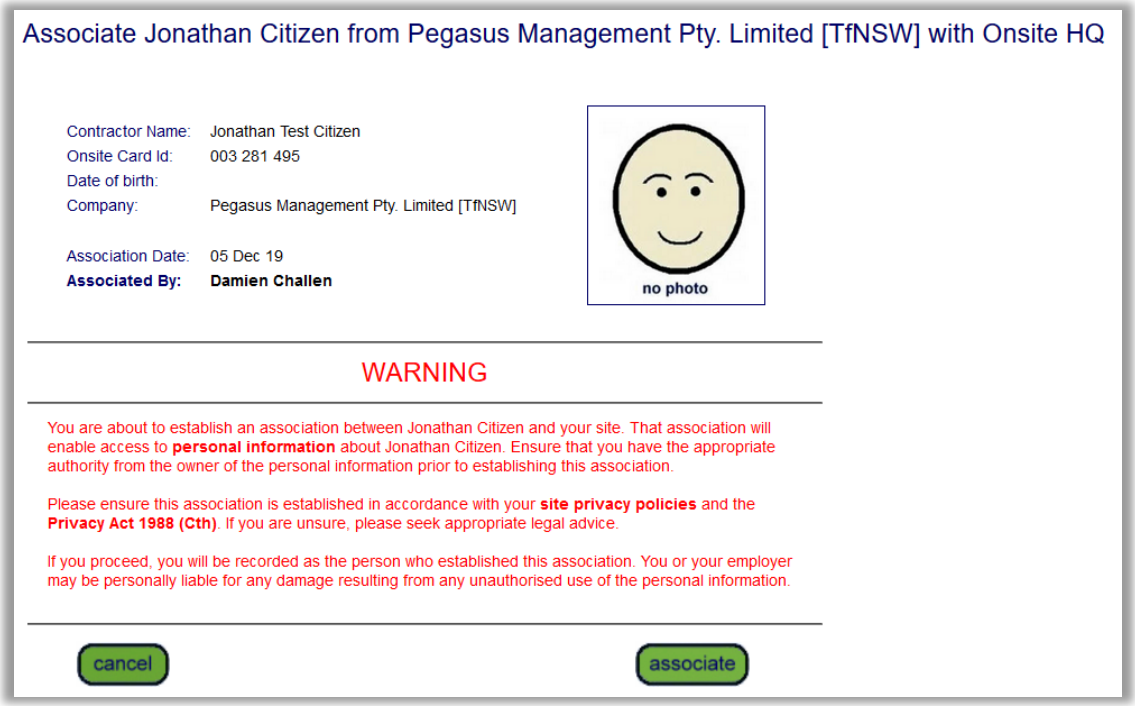
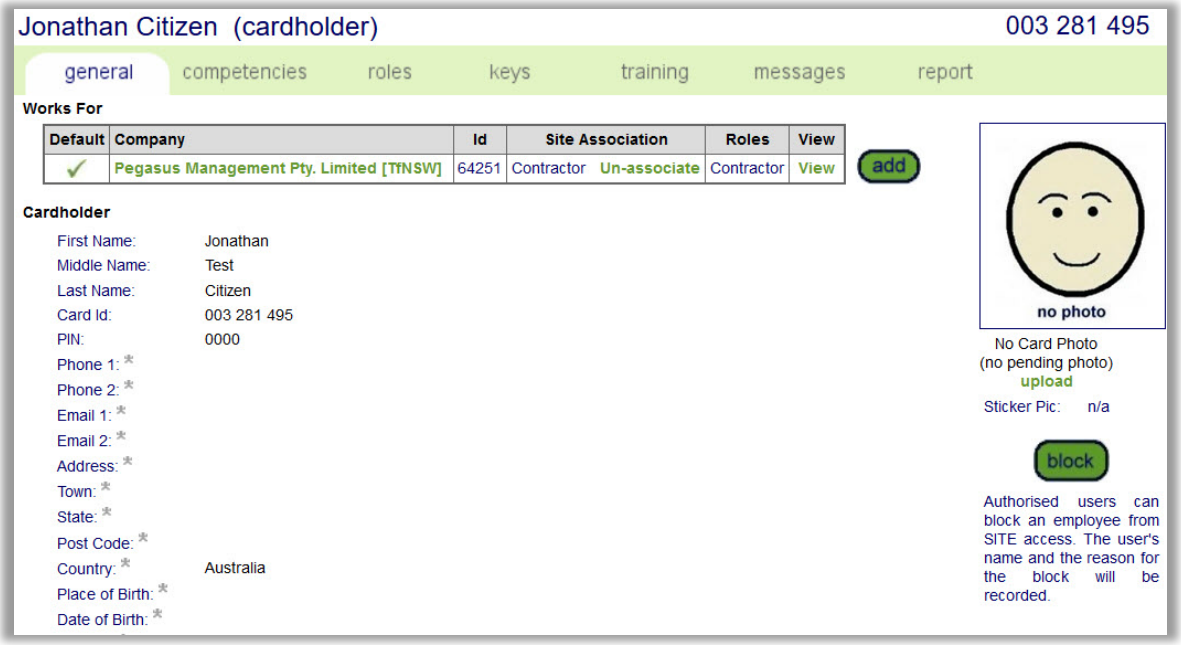
STEP TWO | Associating Contractors

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.



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



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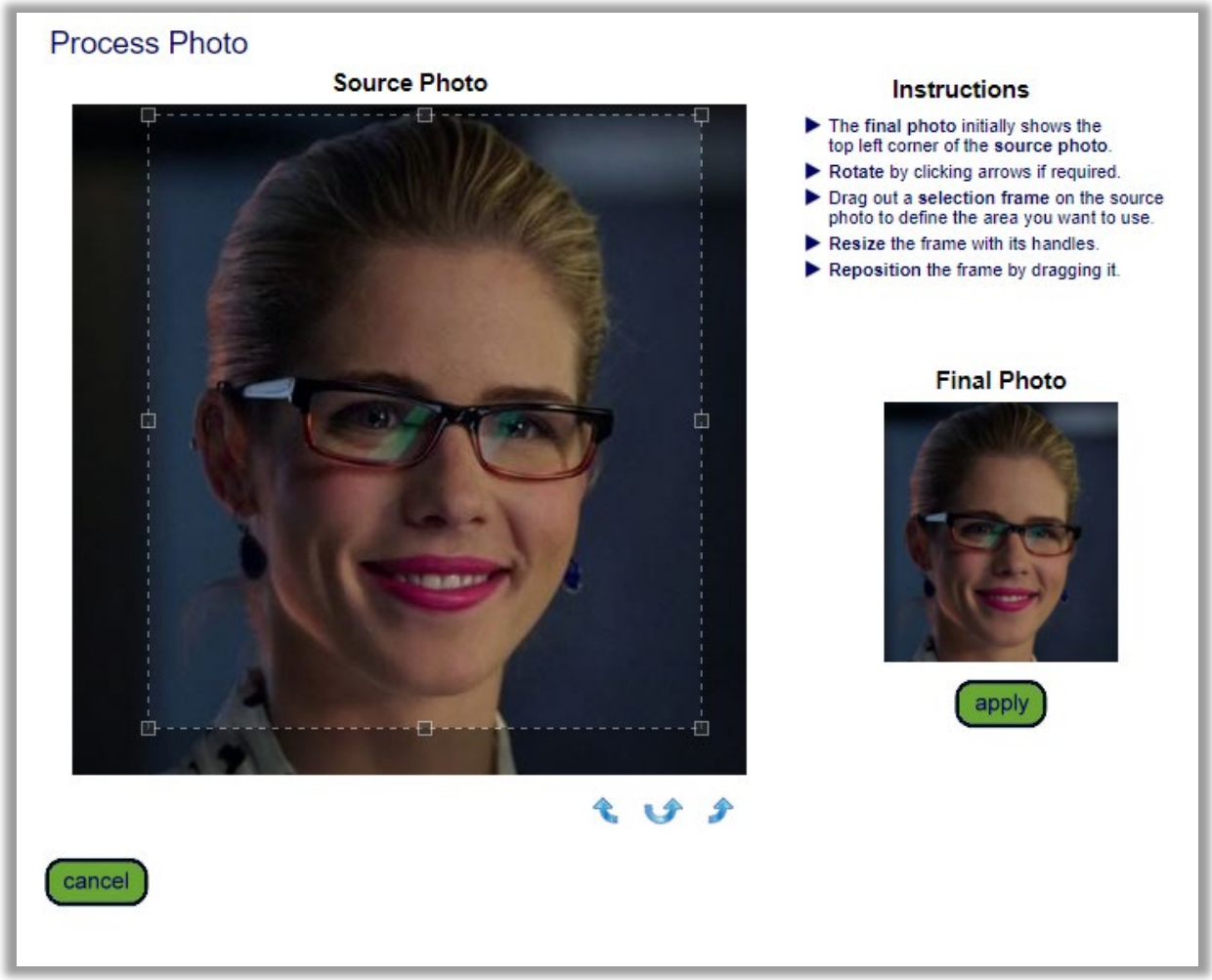
STEP THREE | Adding a Photo to a Contractor

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”

Crop as necessary and click ‘apply’



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