UNIVERSITY OF GREENWICH

WELCOME TO

soterweb®

ADVANCED SYSTEM INTELLIGENCE

Setting up your Organisational Profile

Contractors Perspective

PROCEDURE PURPOSE

This procedure will provide guide an organisation (contractors or consultant) who have been assigned as the system administrator to manage their own organisational data on SOTERweb.
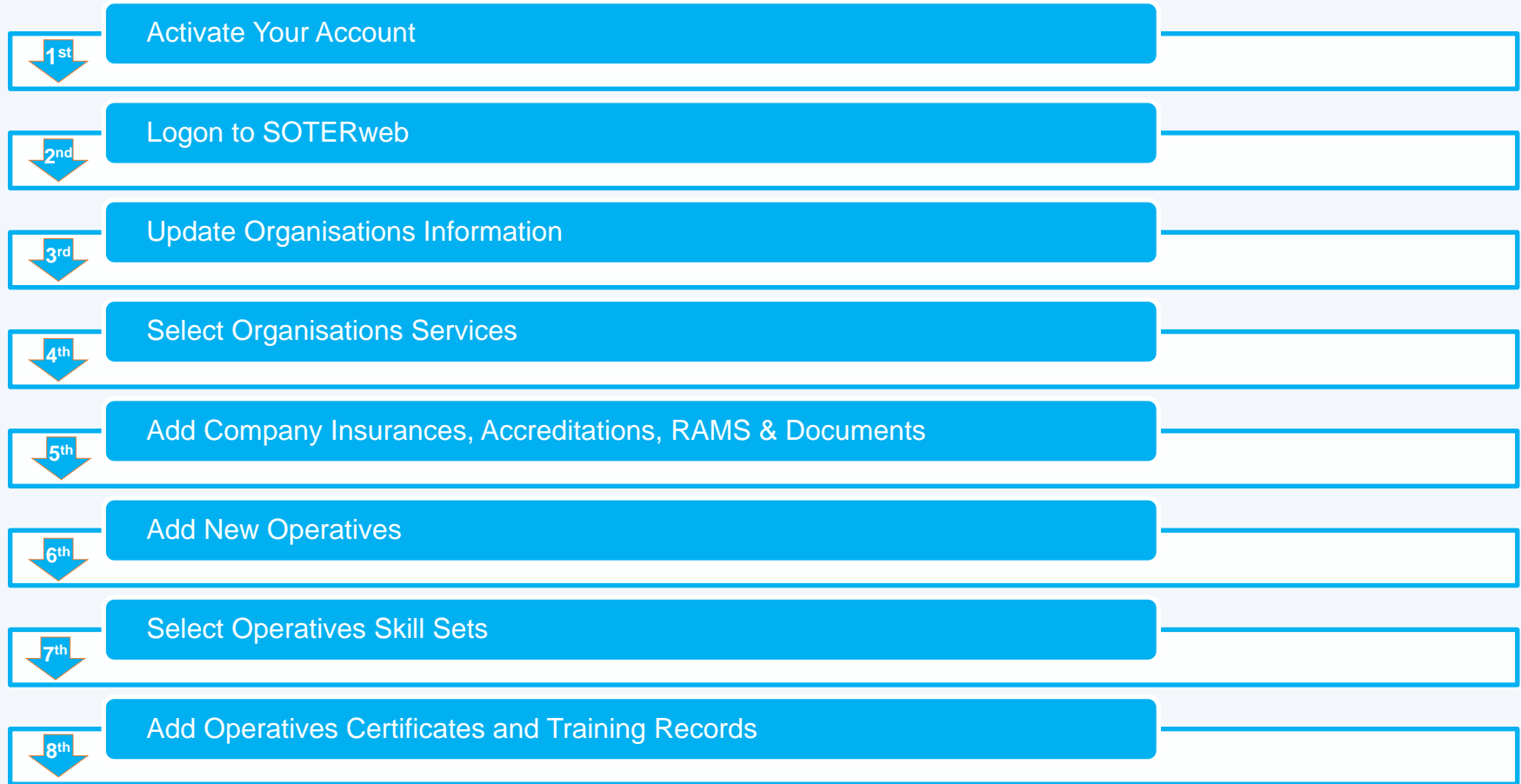
PREREQUISITES

The University should have set the Organisation up on the system and added at least one individual with a profile of either a Admin (External Contractor) or Admin (External Consultant).

HELP SUPPORT

Name	Role	Email	Telephone	Mobile
Rik Hutchins	System Developer	Rik@montgomeryandcoupers.co.uk	0845 163 0134	0790 303 9694
Paul Lambert	Health, Safety & Compliance Manager	P.D.Lambert@greenwich.ac.uk.	0208 331 7983	0746 454 5714

Completing tasks on behalf of your organisation on SOTERweb

Process – Overview

1st Activate Your Account

2nd Logon to SOTERweb

3rd Update Organisations Information

4th Select Organisations Services

5th Add Company Insurances, Accreditations, RAMS & Documents

6th Add New Operatives

7th Select Operatives Skill Sets

8th Add Operatives Certificates and Training Records

![soterweb ADVANCED CAFM INTELLIGENCE]

University of Greenwich URL link

Click Link or copy it into the SOTERweb web browser

https://uog.soterweb.org.uk/

Step 1 – Activate your Account

Step:	1	2	3	4
			1st Stage Verification	
Process:	The Client will add base data to the system including one individual assigned as your Primary Contact. This will trigger an email to allow them to activate their account and complete organisation information.	Click the **embedded link** within the system generated email to activate your account.[1]	Update **password**[2] Enter the **4 digit** security code. Press **save**.	Arrive at SOTERweb's Home Page
Supporting Icon:	Add Individual Save	Save	Save	
Communicated:	Automated Email			

Notes

- [1] For security reasons the activation link will last up to 24hrs. Expired links can be re-issued by your Client system administrator.
- [2] The format of the password is user definable although it is typically set as more than 12 characters in length, it must contain at least 1 lower and upper case, 1 number and at least one special character which are !£$%&()#.

Step 2 – Logon to SOTERweb

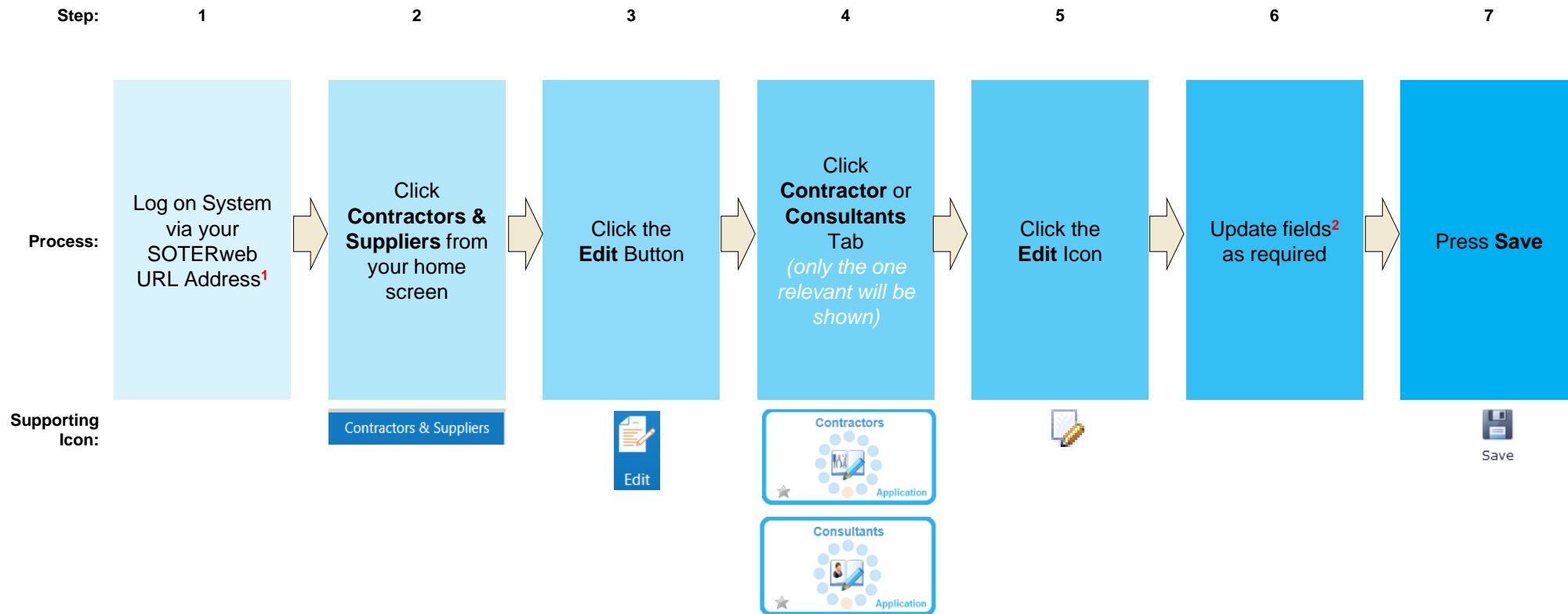| Step:	1	2	3	5
			1st Stage Verification	
Process:	From your web browser enter the required SOTERweb URL address e.g. https://uog.soterweb.org.uk/[1]	Click **Logon**	Enter your **password**. Enter the **4 digit** code. Press **Login**	Arrive at the SOTERweb Home Page
Supporting Icon:		Login		

Notes

- [1] The designate URL to the Client's system.

Step 4 – Select Organisation Services
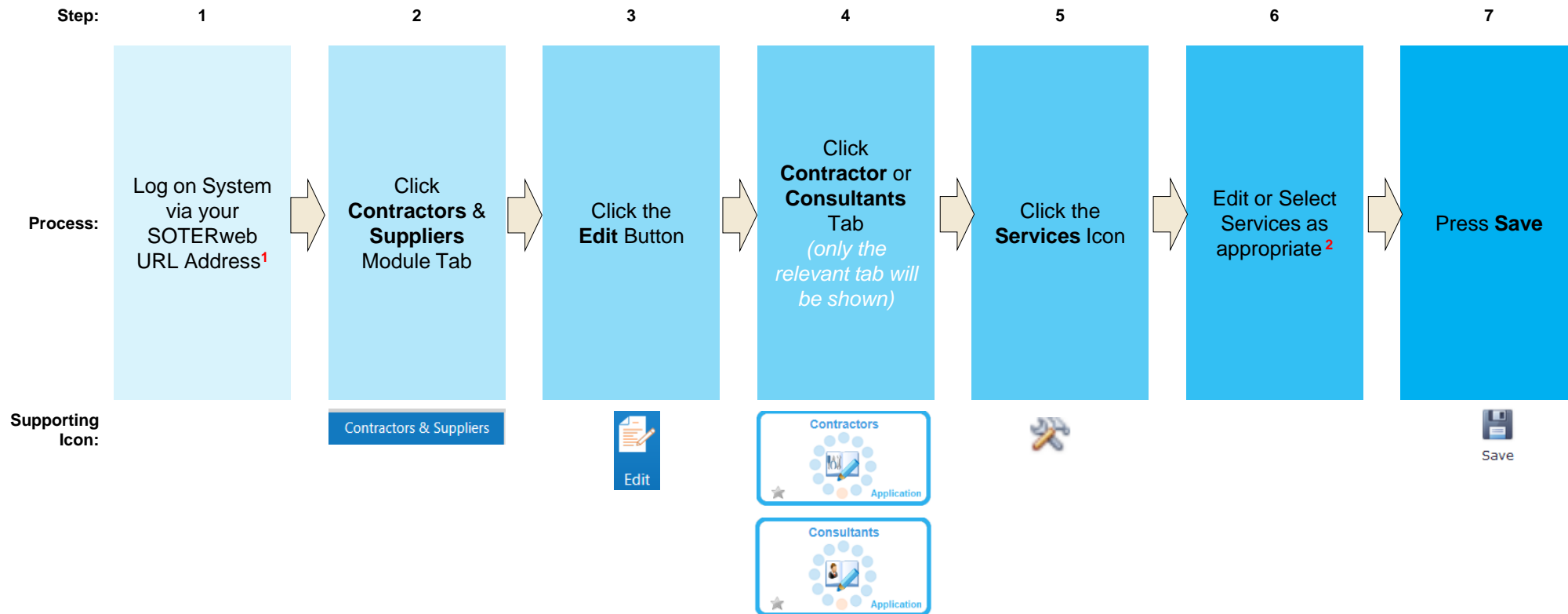
Step:	1	2	3	4	5	6	7
Process:	Log on System via your SOTERweb URL Address[1]	Click **Contractors** & **Suppliers** Module Tab	Click the **Edit** Button	Click **Contractor** or **Consultants** Tab *(only the relevant tab will be shown)*	Click the **Services** Icon	Edit or Select Services as appropriate [2]	Press **Save**
Supporting Icon:		Contractors & Suppliers	Edit	Contractors / Consultants			Save

Notes

- [1] Individual must have a profile of either Admin (External Contractor) or Admin (External Consultant).

- [2] Only select services where you can evidence your organisation has the necessary competences e.g. skills, experience, training and where necessary qualifications, licenses or registration etc. Selected services will form the basis of the question set assigned to the Client's Smart Induction which your operatives will be expected to complete. You could be asked to provide evidence of your competences.

Step 5a – Add Insurance Certificates

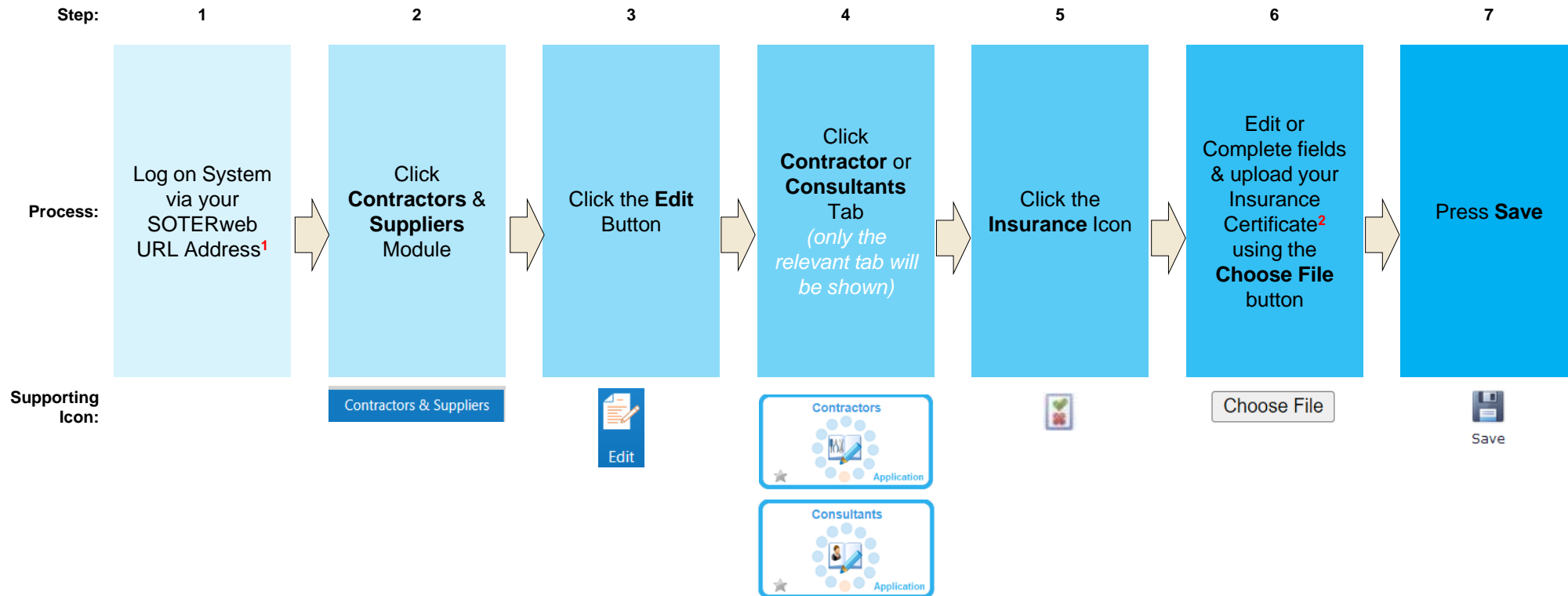| Step:	1	2	3	4	5	6	7
Process:	Log on System via your SOTERweb URL Address**1**	Click **Contractors** & **Suppliers** Module	Click the **Edit** Button	Click **Contractor** or **Consultants** Tab *(only the relevant tab will be shown)*	Click the **Insurance** Icon	Edit or Complete fields & upload your Insurance Certificate**2** using the **Choose File** button	Press **Save**
Supporting Icon:		Contractors & Suppliers	Edit	Contractors Application / Consultants Application		Choose File	Save

Notes

- **1** Individual must have a profile of either Admin (External Contractor) or Admin (External Consultant).
- **2** Complete the following fields 1. Name of insurance provider, 2. Certificate reference number, 3. Value (note minimum expected level is provided), 4. Expiry date. Additional comments can also be added if desired. After completing all fields upload a copy of the certificate (pdf only) via the Choose File button.

Step 5a – Add Insurance Certificates via Email Automation.
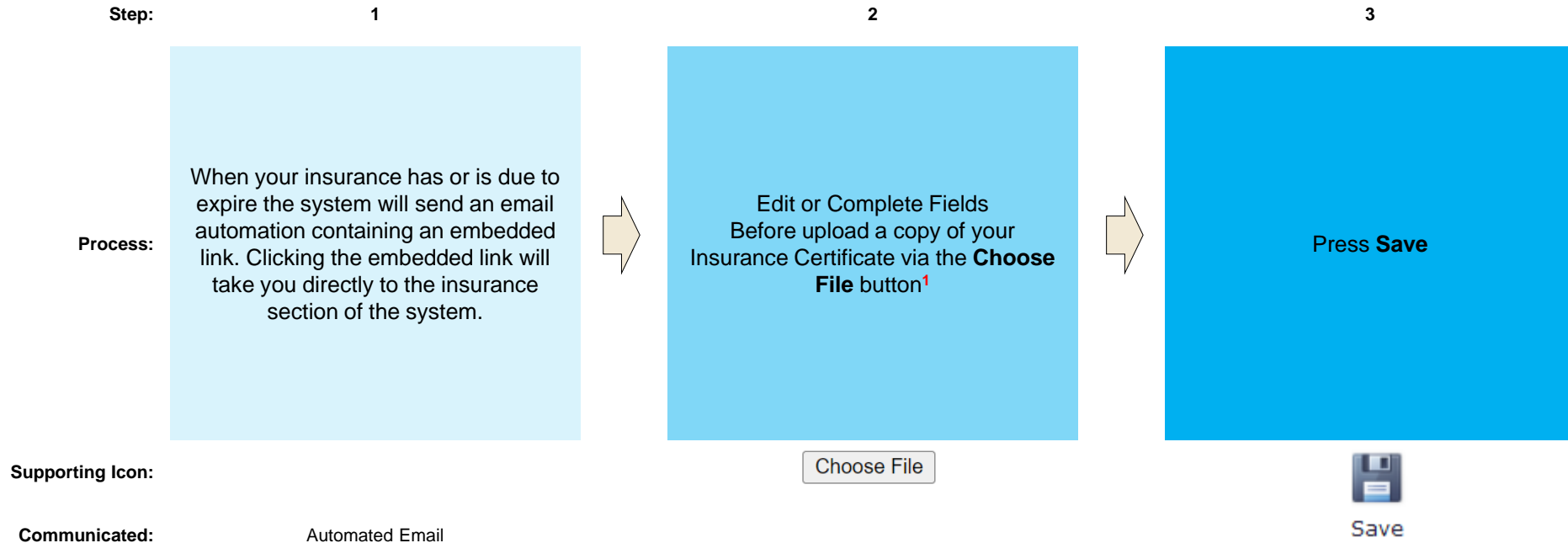
Step:	1	2	3
Process:	When your insurance has or is due to expire the system will send an email automation containing an embedded link. Clicking the embedded link will take you directly to the insurance section of the system.	Edit or Complete Fields Before upload a copy of your Insurance Certificate via the **Choose File** button[1]	Press **Save**
Supporting Icon:		Choose File	Save
Communicated:	Automated Email		

Note

- [1] Complete the following fields – 1. Name of insurance provider, 2. Certificate reference, 3, Value (note minimum expected level is provided), 4. Expiry date. Additional comments can also be added if desired. After completing all fields upload a copy of the certificate (pdf only) via the Choose File button.
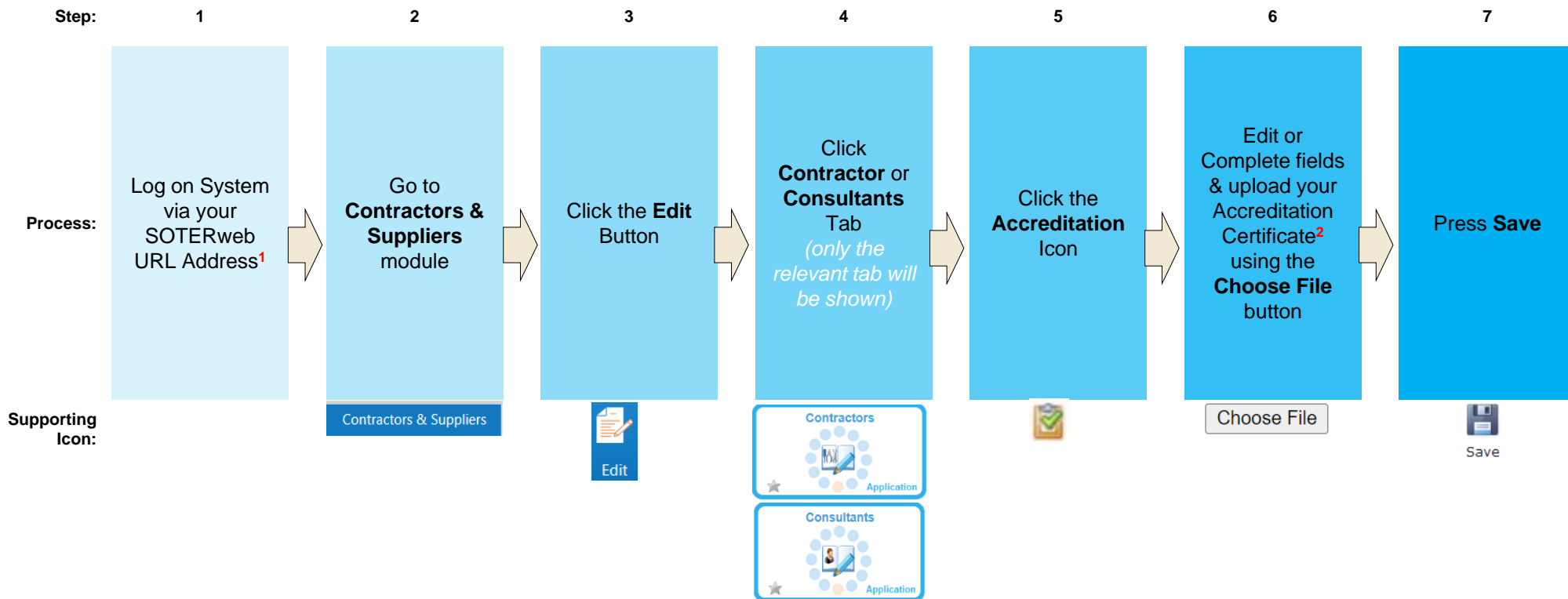
Step 5b – Add Accreditation Certificates

Step:	1	2	3	4	5	6	7
Process:	Log on System via your SOTERweb URL Address[1]	Go to **Contractors & Suppliers** module	Click the **Edit** Button	Click **Contractor** or **Consultants** Tab *(only the relevant tab will be shown)*	Click the **Accreditation** Icon	Edit or Complete fields & upload your Accreditation Certificate[2] using the **Choose File** button	Press **Save**
Supporting Icon:		Contractors & Suppliers	Edit	Contractors / Consultants		Choose File	Save

Notes

- [1] Individual must have a profile of either Admin (External Contractor) or Admin (External Consultant).

- [2] Complete the following fields – 1. Name of accreditation provider, 2. Certificate reference, 3. Expiry date. Additional comments can also be added if desired. After completing all fields upload a copy of the certificate (pdf only) via the Choose File button.

Step 5b – Add Accreditation Certificates via Email Automation

Step: 1   2   3

Process:

When an accreditation has or is due to expire the system will send an email automation containing an embedded link. Clicking the embedded link will take you directly to the accreditation section of the system.

Edit or Complete Fields Before adding a copy of your Accreditation Certificate via the **Choose File** button[1]

Press **Save**

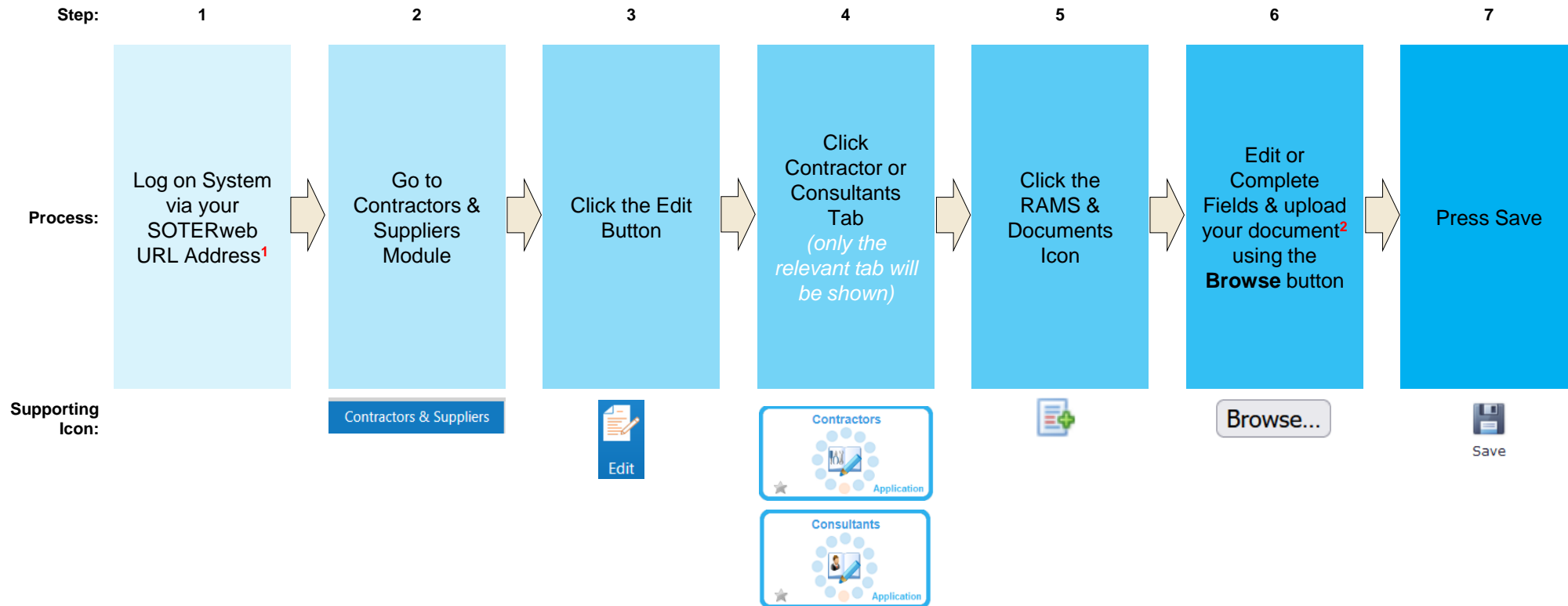**Supporting Icon:**

Choose File

Save

Communicated: Automated Email

Note

- [1] Complete the following fields – 1. Name of accreditation, 2. Certificate reference 3. Expiry date. Additional comments can also be added if desired. After completing all fields upload a copy of the certificate (pdf only) via the Choose File button.

Step 5c – Add RAMS & Documentation

Step:	1	2	3	4	5	6	7
Process:	Log on System via your SOTERweb URL Address[1]	Go to Contractors & Suppliers Module	Click the Edit Button	Click Contractor or Consultants Tab *(only the relevant tab will be shown)*	Click the RAMS & Documents Icon	Edit or Complete Fields & upload your document[2] using the **Browse** button	Press Save
Supporting Icon:		Contractors & Suppliers	Edit	Contractors / Consultants Application		Browse...	Save

Notes

- [1] Individual must have a profile of either Admin (External Contractor) or Admin (External Consultant).
- [2] Complete the following fields – 1. Type of document, 2. Details, 3. Reference, 4. Expiry date. After completing all fields upload a copy of the certificate (pdf only) via the Browse button.

Step:	1	2	3
Process:	When your RAMS or other H&S document has or is due to expire the system will send an email automation containing an embedded link. Clicking the embedded link will take you directly to the H&S section of the system.	Edit or Complete Fields Before uploading a copy of your Accreditation Certificate via the **Browse** button[1]	Press **Save**
Supporting Icon:		Browse...	Save
Communicated:	Automated Email		

Note

- [1] Complete the following fields – 1. Type of document, 2. Details, 3. Reference, 4. Expiry date. After completing all fields upload a copy of the certificate (pdf only) via the Browse button.
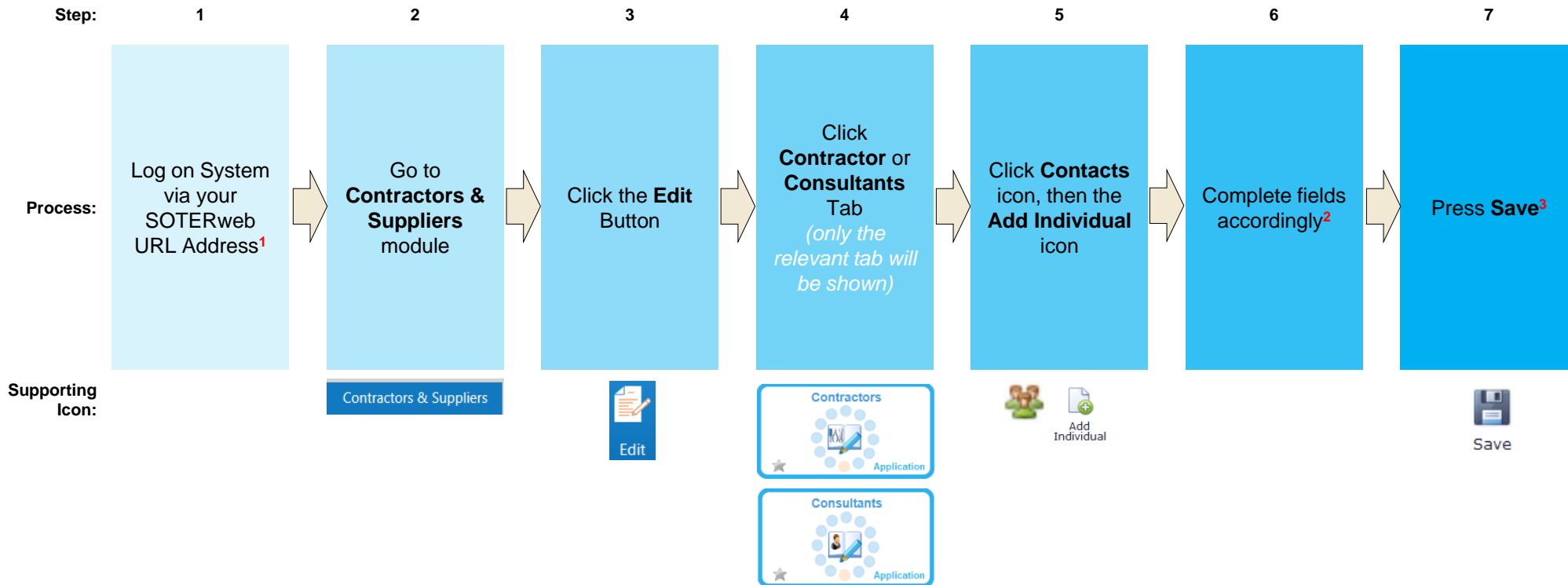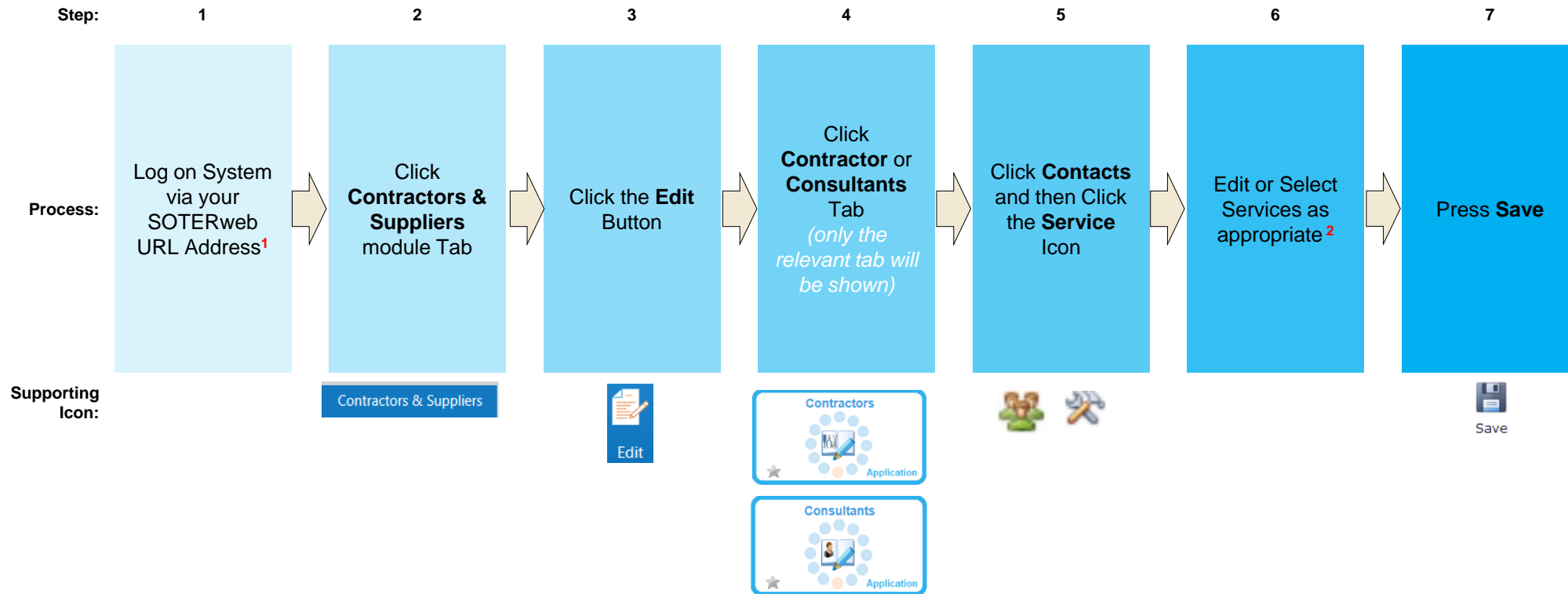
Step 6 – Add Operatives

Step:	1	2	3	4	5	6	7
Process:	Log on System via your SOTERweb URL Address[1]	Go to **Contractors & Suppliers** module	Click the **Edit** Button	Click **Contractor** or **Consultants** Tab *(only the relevant tab will be shown)*	Click **Contacts** icon, then the **Add Individual** icon	Complete fields accordingly[2]	Press **Save**[3]
Supporting Icon:		Contractors & Suppliers	Edit	Contractors Application / Consultants Application	Add Individual		Save

Notes

- [1] Individual must have a profile of either Admin (External Contractor) or Admin (External Consultant).

- [2] This is likely to include 1. Address, 2. Email address, 3. Contact telephone numbers, 4. A brief description of what services they provide, 5. User name (use email address if possible.

- [3] The system will automatically invite the individual to activate their account and if relevant an invitation to sit the Online Induction. They will also be issued with a User Guide similar to inform them how to logon the system and interact with Permit etc.
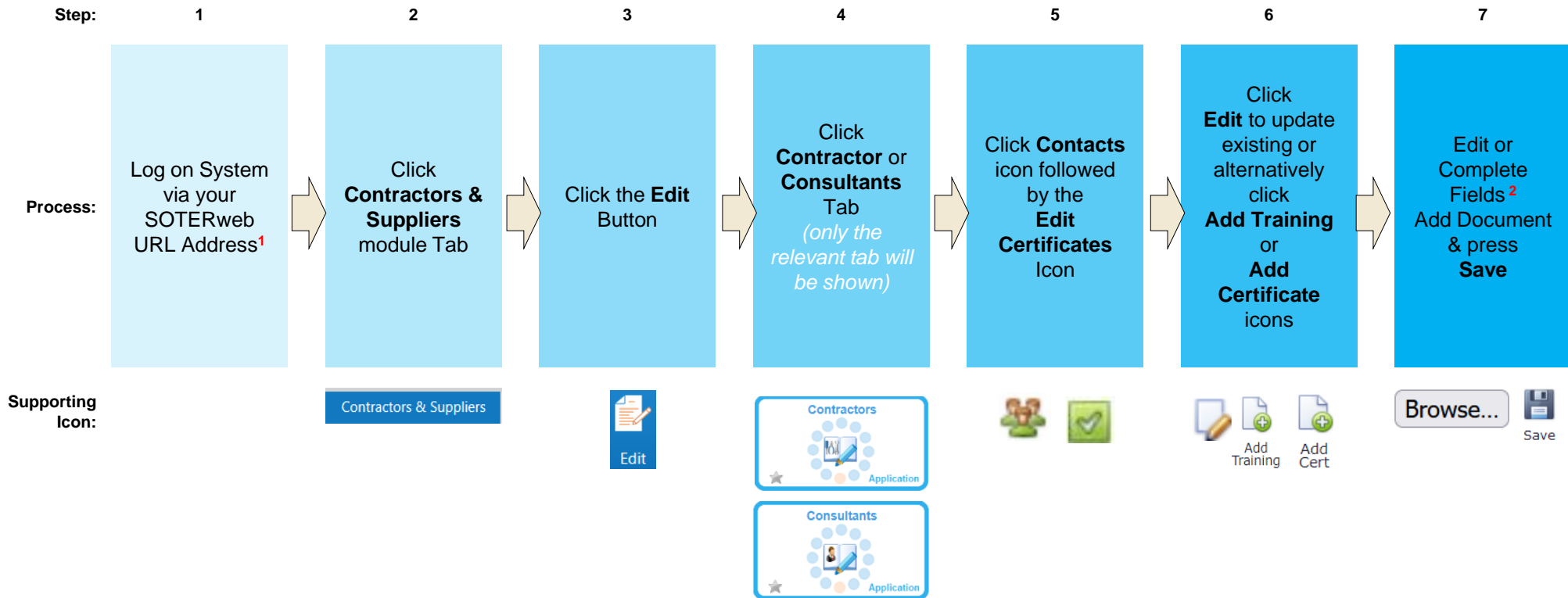
Slide 16

Step 7 – Add Operative Skill Sets

Step:	1	2	3	4	5	6	7
Process:	Log on System via your SOTERweb URL Address[1]	Click **Contractors & Suppliers** module Tab	Click the **Edit** Button	Click **Contractor** or **Consultants** Tab *(only the relevant tab will be shown)*	Click **Contacts** and then Click the **Service** Icon	Edit or Select Services as appropriate [2]	Press **Save**

Supporting Icon:

Contractors & Suppliers — Edit — Contractors (Application) / Consultants (Application) — Save

Notes

- [1] Individual must have a profile of either Admin (External Contractor) or Admin (External Consultant).
- [2] Only select services where you can evidence the individual has the necessary competences e.g. skills, experience, training and where necessary qualifications or registration etc. Selected services will form the basis of the question set assigned to the Smart Induction which the operative will be expected to complete. You may also be asked to provide evidence of their competence.
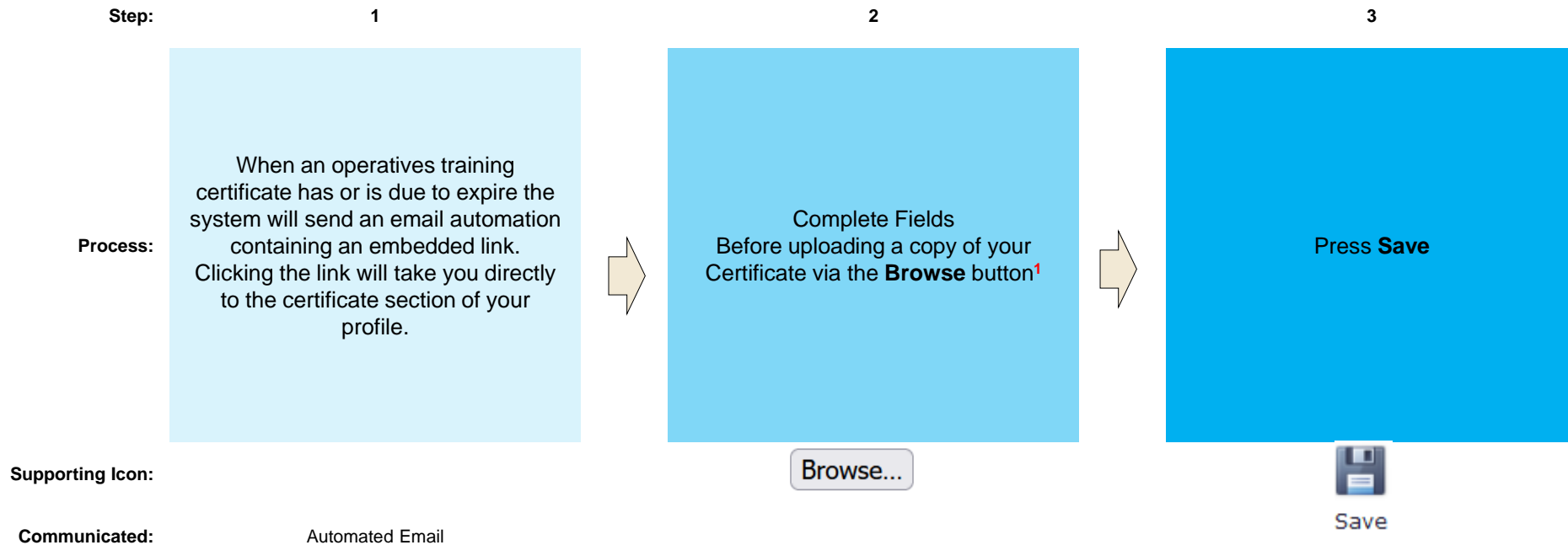
Step 8 – Add Operatives Training and Certificates

Step:	1	2	3	4	5	6	7
Process:	Log on System via your SOTERweb URL Address[1]	Click **Contractors & Suppliers** module Tab	Click the **Edit** Button	Click **Contractor** or **Consultants** Tab *(only the relevant tab will be shown)*	Click **Contacts** icon followed by the **Edit Certificates** Icon	Click **Edit** to update existing or alternatively click **Add Training** or **Add Certificate** icons	Edit or Complete Fields [2] Add Document & press **Save**
Supporting Icon:		Contractors & Suppliers	Edit	Contractors / Application — Consultants / Application		Add Training Add Cert	Browse... Save

Notes

- [1] Individual must have a profile of either Admin (External Contractor) or Admin (External Consultant).
- [2] Complete the following fields 1. Type, 2. Details, 3. Reference, 4. Expiry date. After completing all fields upload a copy of the certificate (pdf only) via the Browse button.

Step 8 – Add Operative Certification via Email Automation

Step:	1	2	3
Process:	When an operatives training certificate has or is due to expire the system will send an email automation containing an embedded link. Clicking the link will take you directly to the certificate section of your profile.	Complete Fields Before uploading a copy of your Certificate via the **Browse** button[1]	Press **Save**
Supporting Icon:		Browse...	Save
Communicated:	Automated Email		

Note
- [1] Complete the following fields - 1. Type, 2. Details, 3. Reference, 4. Expiry date. After completing all fields upload a copy of the certificate (pdf only) via the Browse button.

END OF DOCUMENT