



Add a Member of Staff



SOTERweb : Estate Facilities Management System

Permits

ID	Permit	Manager	Resolver	Mobile No	Organisation	Project	Location	Start	Expiry	E	T	Req.	Status
17	17	Tony Gray	Richard Nutt...	07784 095 9499	Montgomery an...	Project 4596...	AF Facility 03	11/02/2020 11...	13/06/2021 15...	No	AutF...	New	Notified
16	16	Alan Yellow	Richard Nutt...	07784 095 9499	Montgomery an...	Project 4596...	Brookford Dst...	11/02/2020 11...	11/02/2020 11...	No	AutF...	New	Notified
15	15	Simon Hill	Richard Nutt...	07784 095 9499	SOTERweb Ltd.	Project 4596...	Sliver Diner...	11/02/2020 12...	11/02/2021 14...	No	AutF...	New	Notified
14	14	Alan Yellow	Richard Nutt...	07784 095 9499	Montgomery an...	Project 4596...	Cookridge Ch...	22/01/2020 12...	22/01/2021 14...	No	AutF...	New	Request
13	13	Tony Gray	Richard Nutt...	07784 095 9499	Montgomery an...	Project 4596...	AF Facility 03	11/02/2020 11...	11/02/2021 15...	No	AutF...	New	Notified
12	12	Alan Yellow	Richard Nutt...	07784 095 9499	Montgomery an...	Project 4596...	Brookford Dst...	11/02/2020 11...	11/02/2020 11...	No	AutF...	New	Notified
11	11	Simon Hill	Richard Nutt...	07784 095 9499	SOTERweb Ltd.	Project 4596...	Sliver Diner...	11/02/2020 12...	11/02/2021 14...	No	AutF...	New	Notified
10	10	Alan Yellow	Richard Nutt...	07784 095 9499	Montgomery an...	Project 4596...	Cookridge Ch...	22/01/2020 12...	22/01/2021 14...	No	AutF...	New	Request
9	9	Tony Gray	Richard Nutt...	07784 095 9499	Montgomery an...	AF Facility 03	AF Facility 03	11/02/2020 11...	11/02/2021 15...	No	AutF...	New	Notified
8	8	Alan Yellow	Richard Nutt...	07784 095 9499	Montgomery an...	Sliver Diner...	Brookford Dst...	11/02/2020 11...	11/02/2021 15...	No	AutF...	New	Notified
7	7	Simon Hill	Richard Nutt...	07784 095 9499	SOTERweb Ltd.	Platform M...	Brookford Dst...	11/02/2020 11...	11/02/2021 15...	No	AutF...	New	Notified
6	6	Alan Yellow	Richard Nutt...	07784 095 9499	Montgomery an...	Sliver Diner...	Cookridge Ch...	11/02/2020 12...	11/02/2021 14...	No	AutF...	New	Request
5	5	Alan Yellow	Richard Nutt...	07784 095 9499	Montgomery an...	Roof Access	Cookridge Ch...	22/01/2020 12...	22/01/2021 14...	No	AutF...	New	Request

Contractor Request Permit → Confirm Permit Request → Contractor Confirms Questions → Review Questions & Documents → Start/Finish Work → Close Permit



Add a Member of Staff

PROCEDURE PURPOSE

This procedure will guide you through the process to Adding, Reviewing, Editing a Member of Staff, including assigning skill sets and certifications.

PREREQUISITES

1. Your SOTERweb profile must be a system Admin (External Contractor) or Admin (External Consultant) dependent upon your organisations profile.

Add a Member of Staff

Go to

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



Add a Member of Staff

Access-IT

 Login

SOTERweb : Estate Facilities Management System

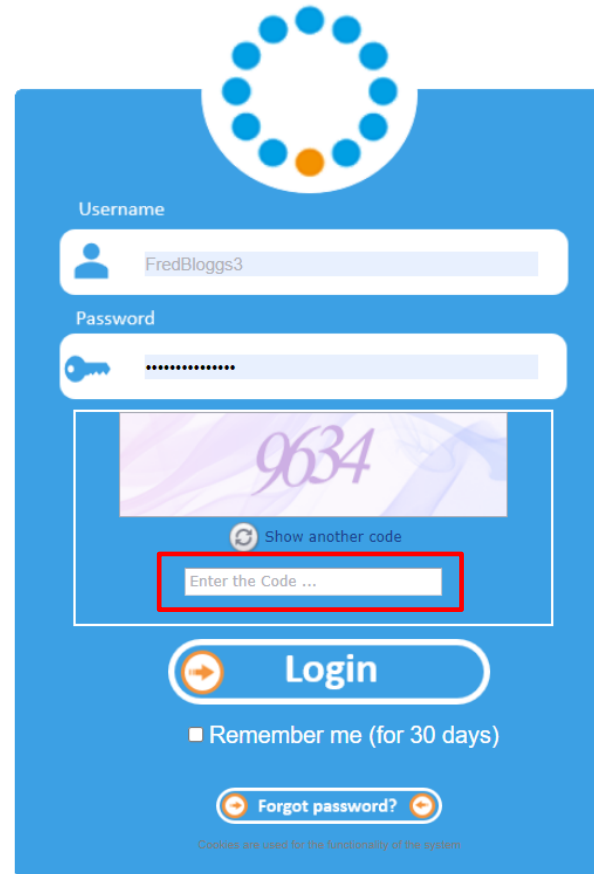
WEB PORTAL



Click **Login**

Log in – 1st stage

Log In SOTERweb



Username

FredBloggs3

Password

9634

Show another code

Enter the Code ...

Login

Remember me (for 30 days)

Forgot password?



Cookies are used for the functionality of the system

Enter

1. Username – typically your email address
2. Password
3. Validation Code – a security feature
4. Click remember me (if you wish)
5. Press LOGIN

Log in – 2nd stage verification

SOTERweb Authentication Code 6272 - University of Greenwich - SOTERweb

 University of Greenwich <information@soterweb.org.uk>
To  Richard Hutchins

Reply Reply All Forward

Wed 04/05/2022 18:33

Dear FredBloggs3

You have been sent this Code **6272** by email which will expire at **04/05/2022 19:32:38** to allow you to access to the University of Greenwich SOTERweb system.

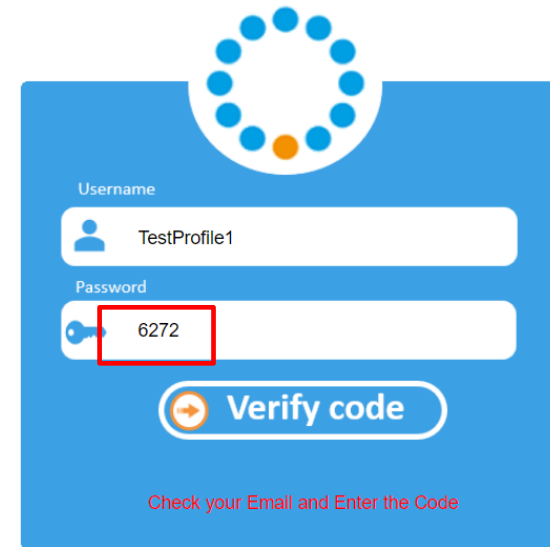
Regards

University of Greenwich

SOTERweb the Computer Aided Facilities Management System (CAFM) operated by University of Greenwich [Click to Login](#)

Do not reply to this email. If you require further information please contact your University of Greenwich SOTERweb system administrator.

Log In SOTERweb



The login interface features a blue background with the SOTERweb logo at the top. It contains two input fields: 'Username' with the value 'TestProfile1' and 'Password' with the value '6272'. The '6272' is highlighted with a red box. Below the fields is a 'Verify code' button with a right-pointing arrow icon. At the bottom, there is a red text prompt: 'Check your Email and Enter the Code'.

Enter

1. Digit code – sent to your system held email address
2. Press Verify Code



From the Home Screen

Login Accepted



Step 1 – Click the **CONTRACTORS & SUPPLIERS** tab

Organisation



Edit

Company Group

Login Accepted



Step 2 – Click **Edit** Button

Organisation



Step 3 – Select **My Organisation** Tab

Grid view

soterweb[®] Estate Facilities Management System

Organisations

Add Record Active Records Export XLSX Export PDF Filter Row Refresh Data Exit Screen

Enter text to search...

ID	Code	Name	Telephone	Email	Asbestos	RAMs R...	Type	Primary C...	Em/Outof...	Managed By
1	SOTERweb001	SOTERweb Contractor Management Services Demo Database	03773 695 6239	jonathan.hill@soter.org.uk	No	No	Organisation	10	2	

Page 1 of 1 (1 Items)

You will arrive at the grid view screen showing your organisation

Grid view

soterweb[®] Estate Facilities Management System

Organisations

Enter text to search...

ID	Code	Name	Telephone	Email	Asbestos	RAMs R...	Type	Primary C...	Em/Outof...	Managed By	
1	SOTERweb001	SOTERweb Contractor Management Services Demo Database	03773 695 6239	jonathan.hill@soter.org.uk	No	No	Organisation	10	2		

Page 1 of 1 (1 Items)

Click the People icon



Associated Individuals



Enter text to search...

Contact ID	Name	Job Title	Location	Mobile No	Email	Profile	Induction	Ind Expiry Date	Primary	EM/Out of Hours	
327	Abbie	Assistant Heal...	Essex		afletcd@essex.ac.uk	Power User (Internal)	No Induction ...	15/12/2021			
223	ACCESS IT SCREEN	Mobile Engineer	Head Office	07744 695 8499	jonathan.hill@soter.org.uk	ACCESS IT SCREEN	No Induction ...	02/12/2019	Primary Contact		
5	Administrator Internal	Administrator ...	Head Office	07744 695 8499	jhill@qtg.co.uk	Administrator (Internal)	No Induction ...	24/07/2019	Primary Contact		
7	Alan Brown	IT	Head Office	07744 695 8499	jhill@qtg.co.uk	Power User (Internal)	No Induction ...	01/01/3000			
12	Ann Yellow	Administrator	Head Office	07744 695 8499	jhill@qtg.co.uk	Power User (Internal)	No Induction ...	12/12/2018			
240	Clare Mason					User (External)	No Induction ...	29/01/2020			
239	Diane Purseglove	Services	Nottinghamshire			Power User (Internal Limited)	No Induction ...	29/01/2020	Primary Contact		
14	George Walsh	Administrator ...	Head Office	07744 695 8499	jhill@qtg.co.uk	Power User (Internal)	No Induction ...	12/12/2018			
153	Jamie Bond	Health and Sa...	Head Office	07744 695 8499	jonathan.hill@soter.org.uk	Power User (Internal)	No Induction ...	30/07/2019			
331	Lab Technician (Permit Issuer)				richardphutchins@gmail.com	Power User (Internal)	No Induction ...	23/03/2022			
152	Mark White	Occupational ...	Head Office	07744 695 8499	jonathan.hill@soter.org.uk	Power User (Internal)	No Induction ...	30/07/2019	Primary Contact		
154	Noel Green	Senior Techni...	Head Office	07744 695 8499	jonathan.hill@soter.org.uk	Power User (Internal)	No Induction ...	30/07/2019			
245	Organisation System Administra...	Organisation ...	HQ	07790 665396	jhill@qtg.co.uk	Administrator (System)	No Induction ...	18/07/2040			
13	Phillip Brown	Administrator	Head Office	07744 695 8499	jhill@qtg.co.uk	Power User (Internal)	No Induction ...	12/12/2018			
17	Rik Hutchins demo admin	Health & Safe...	Head Office	07744 695 8499	rik@montgomeryandcoupers.co...	Administrator (Internal)	No Induction ...	14/01/2019	Primary Contact		
8	Rob Red	Property Man...	Head Office	07744 695 8499	jhill@qtg.co.uk	Power User (Internal)	No Induction ...	11/12/2018			
138	Stephen Little	Project Manag...	Head Office	07744 695 8499	jonathan.hill@soter.org.uk	User (External with Asset Re...	No Induction ...	06/05/2019	Primary Contact		
328	Stuart		Essex		sh18041@essex.ac.uk	Power User (Internal)	No Induction ...	15/12/2021			
9	Sue Mallett	H&S Complian...	Birkenshaw HQ	07775010540		Administrator (Internal)	No Induction ...	12/12/2018	Primary Contact		
16	Susan Hill	H&S Complian...	Head Office	07744 695 8499	jhill@qtg.co.uk	Administrator (Internal)	No Induction ...	14/01/2019	Primary Contact		
15	Test Profile 1	Health and Sa...		07744 695 8499	rik@montgomeryandcoupers.co...	Administrator (Internal)	Full Induction	22/07/2023	Primary Contact	Em/Out of Hours	
151	Test Profile 2	Consultant	Head Office	07744 695 8499	rik@montgomeryandcoupers.co...	Administrator (Internal)	No Induction ...	29/07/2019			
11	Tony Grey	Contracts Man...	Head Office	07744 695 8499	jhill@qtg.co.uk	Power User (Internal)	No Induction ...	12/12/2018			
3	Tracey Dransfield	Business Dev...		07588238174	tracey.dransfield@gmail.com	Administrator (Internal)	No Induction ...	01/01/3000	Primary Contact		

You will arrive at the grid view screen showing a list of people already on the system.
Click the add button icon.



Complete New Contact Screen

soterweb Estate Facilities Management System

SOTERweb Contractor Management Services Demo Database : Add New Contact

Name:

Job Title: Photograph:

Address:

Telephone Number:

Mobile Number:

Email: Induction Type/Expiry:

Default Building / Area / Location: Login Site Notifications: Notify at Login

Emergency Contact: Emergency Contact Number:

Media Contact: Other Info:

Login Username 8-50char: Password > 8 char:

User Profile/Department: Em/OutHours Contact

Contact Type: Primary-Contact Account Locked

Status: InActive Reason:

2FA Security Req'd:

Notes: Leave password field blank to retain existing password.

Note:

1. Complete available fields
2. Assign appropriate Profile.
3. User name must be unique – suggest using individuals email address.
4. The University will have decided whether the type of induction needed.
5. Set the Login Site Notifications field to Not Applicable.
6. If you keep the tick in the box ‘Send Activation Email’ before pressing ‘save’ the system will send an activation email to this individual inviting them to access the system for the first time and including a user guide.



Complete New Contact Screen



Montgomery & Coupers Ltd : Aidan Hutchins : Edit Details

Resend Activation Email 

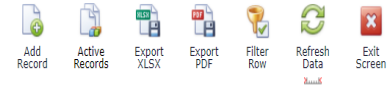
Name	<input type="text" value="Aidan Hutchins"/>	Photograph	<input type="button" value="BROWSE..."/>
Job Title	<input type="text" value="Engineer"/>		<input type="button" value="UPLOAD"/>
Address	<input type="text" value="46 Park Place, Leeds, LS1 2RY"/>		
Telephone Number	<input type="text" value="0845 163 0134"/>		
Mobile Number	<input type="text" value="0790 303 9694"/>		
Email	<input type="text" value="info@montgomeryandcoupers.co.uk"/>	Induction Type/Expiry	<input type="text" value="Full Induction"/> <input type="text" value="12/05/2022"/>
Default Building / Area / Location	<input type="text"/>	Login Site Notifications	<input type="text" value="Not Applicable"/> <input type="checkbox"/> Notify at Login
Emergency Contact	<input type="text" value="Julie Hutchins"/> <input type="text" value="Emergency Contact Number 0790392193"/>	Financial	<input type="text"/>
Media Contact	<input type="text" value="N/A"/>	Tax Status	<input type="text"/>
Other Info	<input type="text"/>	Other Info	<input type="text"/>
Login Username 8-50char	<input type="text" value="info@montgomeryandcoupers.co.uk"/>	Password > 12 char	<input type="text"/> <small>Note: Leave password field blank to retain existing password.</small>
User Profile/Department	<input type="text" value="User (External)"/> <input type="text" value="All"/>	2FA Security Req'd	<input type="text" value="Yes"/>
Contact Type	<input checked="" type="checkbox"/> Primary-Contact <input checked="" type="checkbox"/> Em/Out-hours Contact	InActive Reason	<input type="text"/>
Status	<input type="text" value="Active"/>		

Click the Exit  icon

Assigning Certification & Training Records



Montgomery & Coupers Ltd : Contacts



Enter text to search...

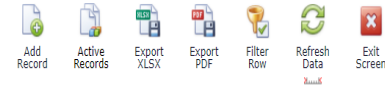
Contact ID	Name	Job Title	Location	Mobile No	Email	Profile	Induction	Ind Expiry Date	Primary	EM/Out of Hours	
7	Fred Bloggs 1	TEST PROFILE		07903039694	rik@montgomeryandcoupers.co.uk	Admin (External Consultant)	Smart Induction	04/05/2021			
44	Fred Bloggs 2	TEST PROFILE		07903039694	rik@soterweb.org.uk	Admin (External Consultant)	No Induction Re...	04/05/2021			
5	Jonathan Hill	SOTERweb Deve...	SOTERweb	07790 665 396	jhill@qtg.co.uk	User (External)	No Induction Re...	04/05/2021			
49	Rik Hutchins	Director		07903039694	rik@montgomeryandcoupers.co.uk	Admin (External Consultant)	Smart Induction	04/04/2021	Primary Contact	Em/Out of Hours	
4	Tracey Dransfield	SOTERweb Acco...		07588 238174	tracey@soterweb.org.uk	Administrator (Internal)	No Induction Re...	04/05/2021			

Click the Certification icon

Assigning Certification & Training Records



Montgomery & Coupers Ltd : Contacts



Enter text to search...

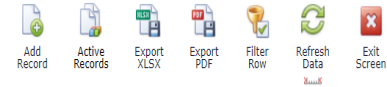
Contact ID	Name	Job Title	Location	Mobile No	Email	Profile	Induction	Ind Expiry Date	Primary	EM/Out of Hours	
7	Fred Bloggs 1	TEST PROFILE		07903039694	rik@montgomeryandcoupers.co.uk	Admin (External Consultant)	Smart Induction	04/05/2021			
44	Fred Bloggs 2	TEST PROFILE		07903039694	rik@soterweb.org.uk	Admin (External Consultant)	No Induction Re...	04/05/2021			
5	Jonathan Hill	SOTERweb Deve...	SOTERweb	07790 665 396	jhill@qtg.co.uk	User (External)	No Induction Re...	04/05/2021			
49	Rik Hutchins	Director		07903039694	rik@montgomeryandcoupers.co.uk	Admin (External Consultant)	Smart Induction	04/04/2021	Primary Contact	Em/Out of Hours	
4	Tracey Dransfield	SOTERweb Acco...		07588 238174	tracey@soterweb.org.uk	Administrator (Internal)	No Induction Re...	04/05/2021			

Click the Certification icon

Assigning Certification & Training Records



Montgomery & Coupers Ltd : Contacts



Enter text to search...

Contact ID	Name	Job Title	Location	Mobile No	Email	Profile	Induction	Ind Expiry Date	Primary	EM/Out of Hours	
7	Fred Bloggs 1	TEST PROFILE		07903039694	rik@montgomeryandcoupers.co.uk	Admin (External Consultant)	Smart Induction	04/05/2021			
44	Fred Bloggs 2	TEST PROFILE		07903039694	rik@soterweb.org.uk	Admin (External Consultant)	No Induction Re...	04/05/2021			
5	Jonathan Hill	SOTERweb Deve...	SOTERweb	07790 665 396	jhill@qtg.co.uk	User (External)	No Induction Re...	04/05/2021			
49	Rik Hutchins	Director		07903039694	rik@montgomeryandcoupers.co.uk	Admin (External Consultant)	Smart Induction	04/04/2021	Primary Contact	Em/Out of Hours	
4	Tracey Dransfield	SOTERweb Acco...		07588 238174	tracey@soterweb.org.uk	Administrator (Internal)	No Induction Re...	04/05/2021			

Click the Certification icon

Arrive at the Certification Screen



Aidan Hutchins Certificates



Enter text to search...

Type	Provider/Details	Cert/Ref No	Expiry Date	Statutory / Mandatory
------	------------------	-------------	-------------	-----------------------

No data to display

Click the Add  icon



Arrive at the Certification Screen



Aidan Hutchins : Certificate



Warning by Clicking Save You are acknowledging the documents, expiry dates and information are an accurate reflection.

Type	Emergency First Aid	<input type="text"/>		
Details	British Red Cross	<input type="text"/>	Reference	Certificate No. 89876545673
Expiry Date	13/05/2023	<input type="text"/>	Upload New Document (pdf) (Max 5mb File Size)	<input type="button" value="Browse..."/> F013.pdf
Statutory / Mandatory	Yes	<input type="text"/>	Status	Active <input type="text"/>

[Record: New](#)

Complete the Fields, Click Save, then Exit



Assigning Skill Set/s



Service Linked to Consultant Contact

Montgomery & Coupers Ltd



Save



Exit

Select	Description	Link Type	Status
<input type="checkbox"/>	Admin/Office Manager	Contact:Service	Active
<input type="checkbox"/>	Builder	Contact:Service	Active
<input type="checkbox"/>	Consultant	Contact:Service	Active
<input type="checkbox"/>	Designer	Contact:Service	Active
<input type="checkbox"/>	Director	Contact:Service	Active
<input type="checkbox"/>	Electrician	Contact:Service	Active
<input checked="" type="checkbox"/>	Engineer	Contact:Service	Active
<input type="checkbox"/>	First Aider	Contact:Service	Active
<input type="checkbox"/>	Gas Engineer	Contact:Service	Active
<input type="checkbox"/>	Labourer	Contact:Service	Active
<input type="checkbox"/>	Manager	Contact:Service	Active
<input type="checkbox"/>	Operative	Contact:Service	Active
<input type="checkbox"/>	Plant Operator	Contact:Service	Active
<input type="checkbox"/>	Sales/BDM	Contact:Service	Active
<input type="checkbox"/>	Scaffolder	Contact:Service	Active
<input type="checkbox"/>	Site Manager	Contact:Service	Active
<input type="checkbox"/>	Site Supervisor	Contact:Service	Active

Tick the most appropriate skill set/s that represent the individual. Press Save and Exit

END OF DOCUMENT