

**UNIVERSITY OF
GREENWICH**

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soterweb[®]
ADVANCED SYSTEM INTELLIGENCE

Setting up a New Contractor

Client Perspective

PROCEDURE PURPOSE

This procedure will guide the University of Greenwich representative through the steps to set up a new contractor or consultancy on SOTERweb.

PREREQUISITES

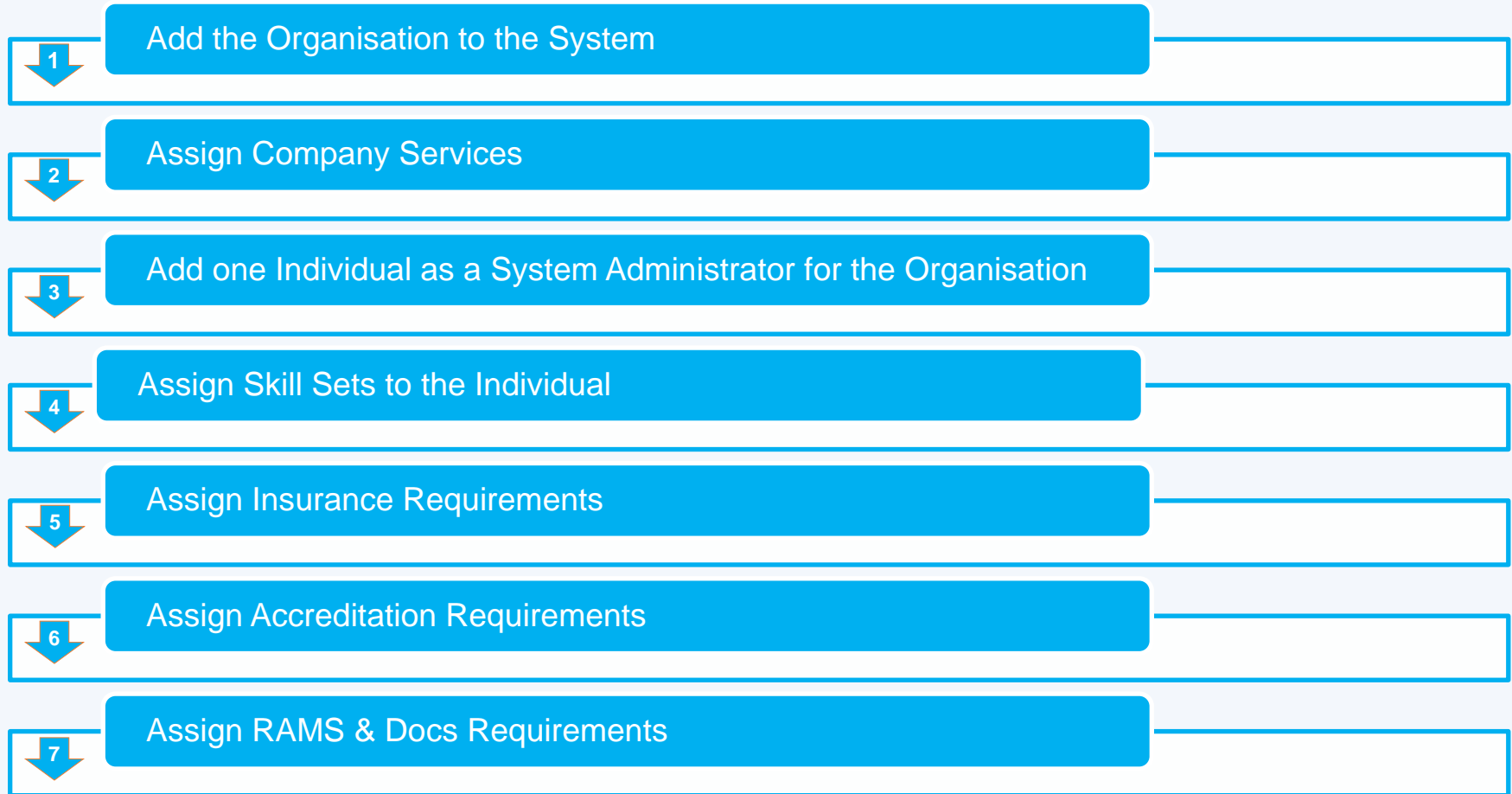
Individuals completing these tasks will need to have a Administrator (Internal) profile.

HELP SUPPORT

Name	Role	Email	Telephone	Mobile
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Setting up a new Contractor or Consultancy on SOTERweb

7 Steps - Adding a Contractor or Consultancy to SOTERweb

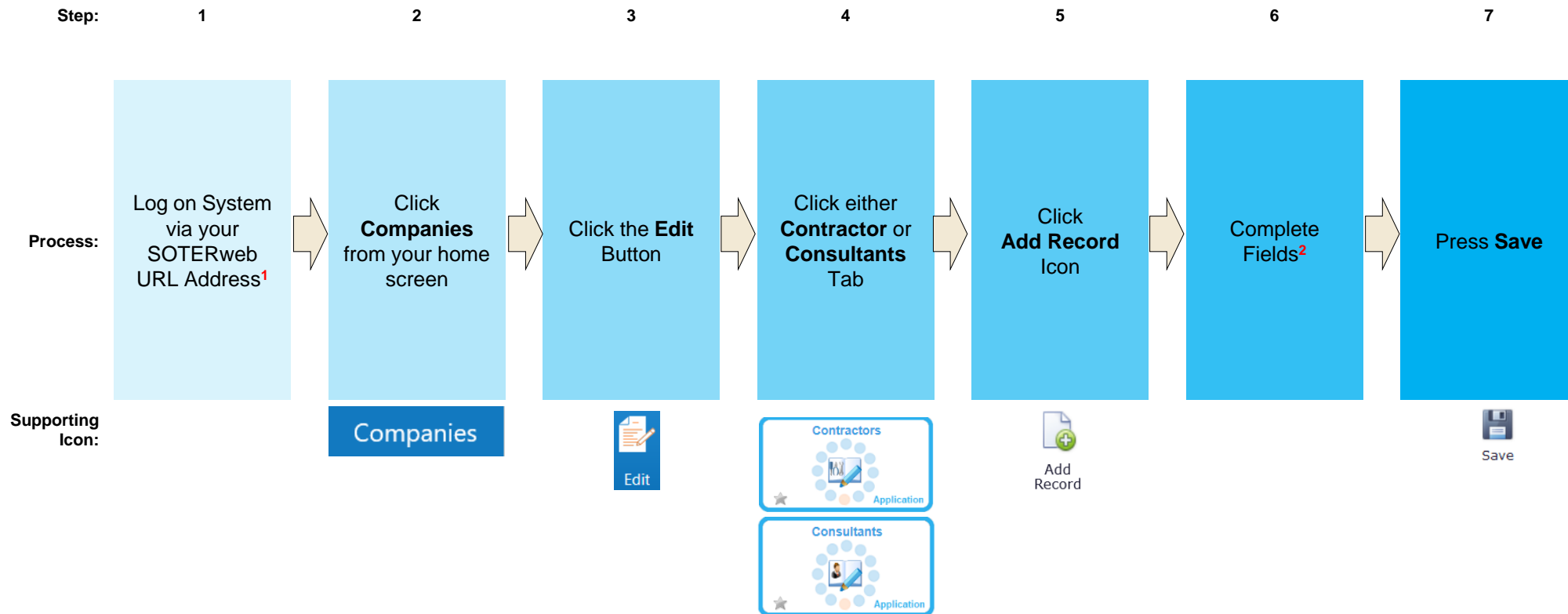


University of Greenwich URL link

Click [Link](#) or copy it into the SOTERweb web browser

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

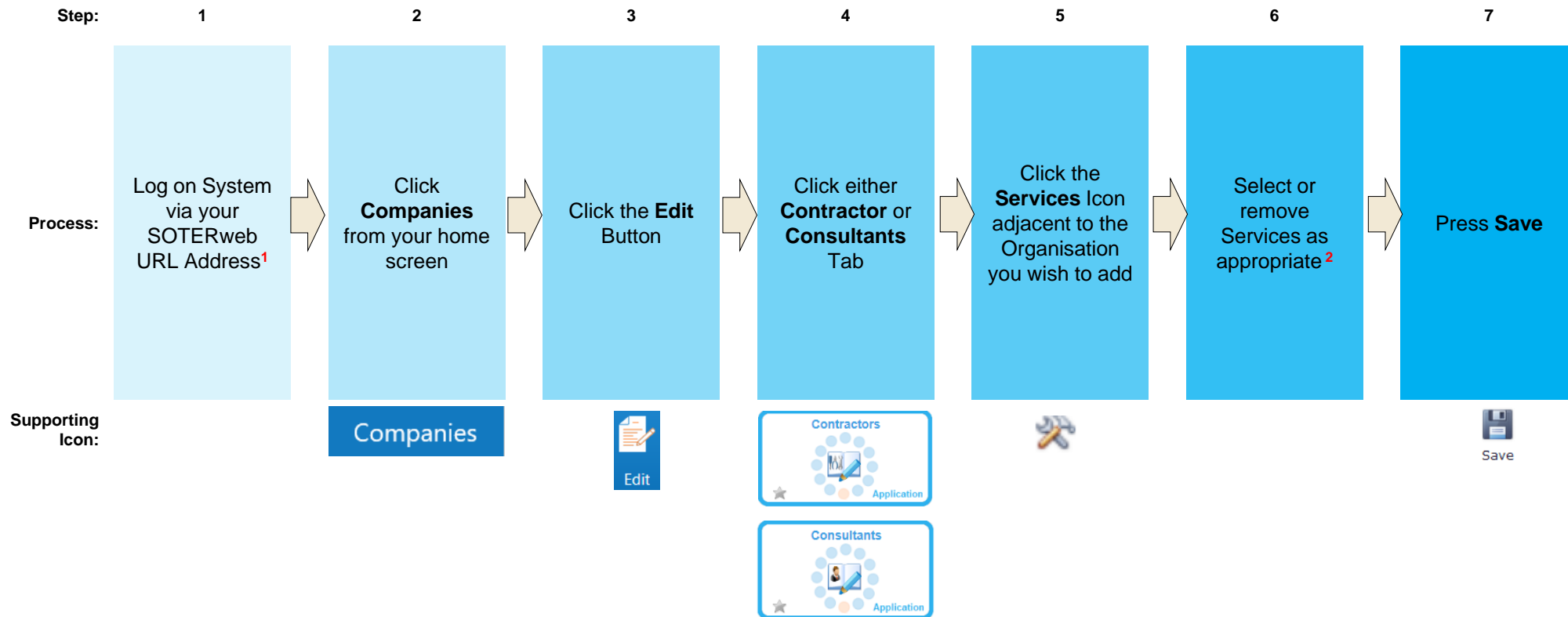
Step 1 – Add a Contractor or Consultant to the System



Notes

- ¹ To add a new contractor or consultant requires the Administrator (Internal) profile.
- ² Mandatory fields 1. Company Name, 2. Company Email Address. Add a YES in the field if running the Smart Induction. If using the Access IT module add a YES in the field if the contractor is likely to frequently need access out of normal business hours. Add a YES in the field if the contractor is likely to influence design or undertake intrusive work which may disturb asbestos. Add YES in the field if you wish the contractor to acknowledge the presence of RAMS each time they log in.

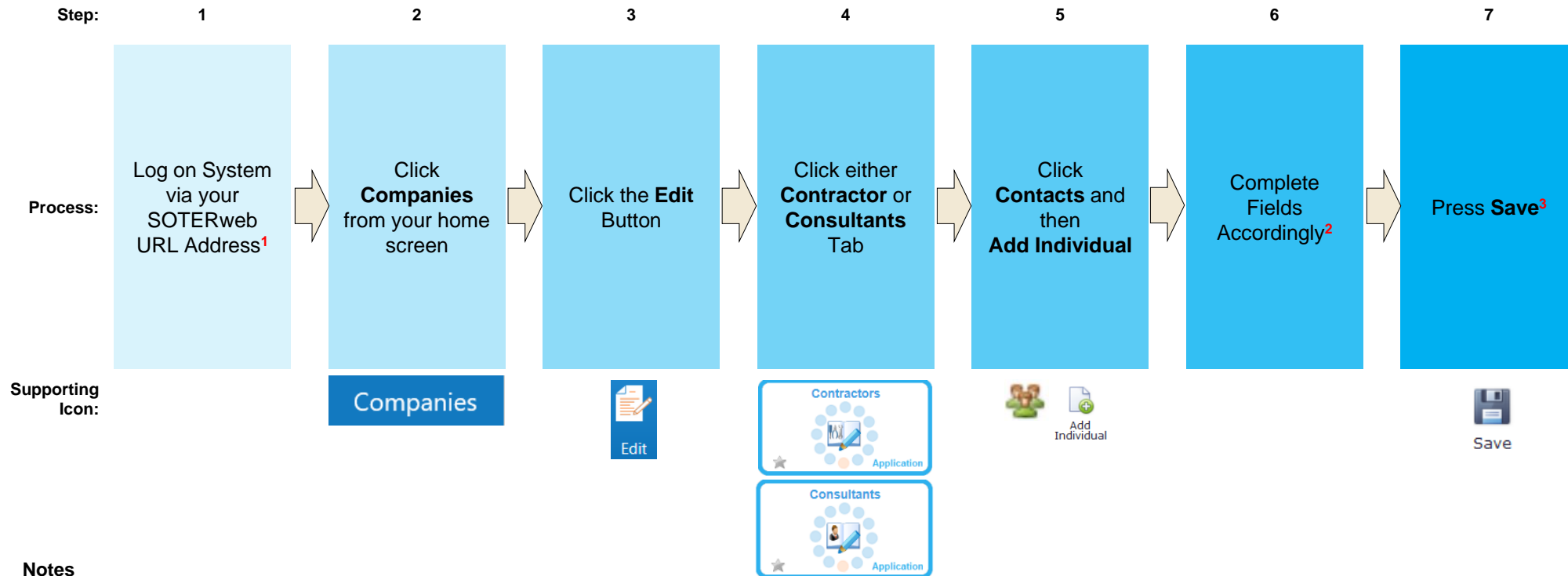
Step 2 – Assign Services



Notes

- ¹ To add or remove services to a contractor or consultant requires the Administrator (Internal) profile.
- ² Selected services will form the basis of the question set assigned to the Smart Induction. Consider whether the organisation has the necessary competences e.g. skills, experience, training and where necessary qualifications, licenses and registrations etc.

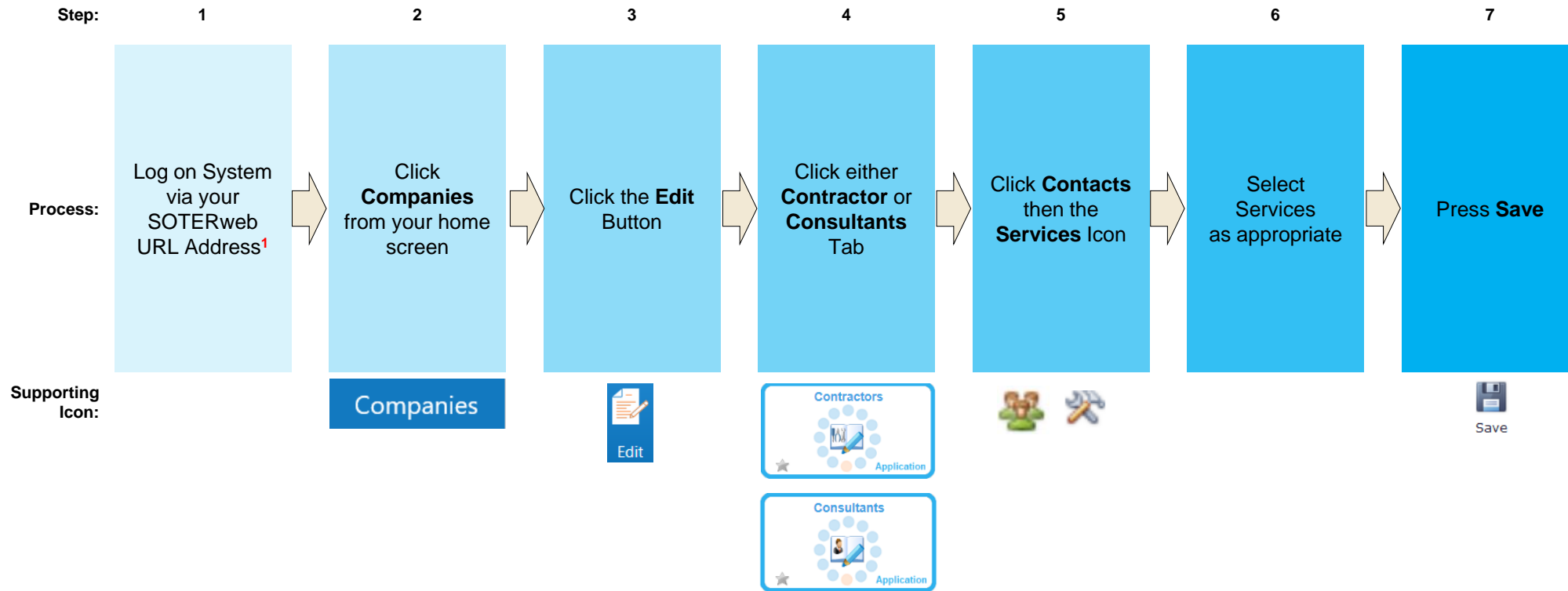
Step 3 – Add an Individual as the System Administrator for the Organisation



Notes

- ¹ To add or edit a contractor or consultant you requires the Administrator (Internal) profile.
- ² This should include 1. Name, 2. Role, 3. Email Address, 4. Contact Telephone Numbers, 5. Username (use their email address) and select an appropriate profile. Add one person to the contractors profile and assign them either the **Admin (External Contractor)** or **Admin (External Consultant)** profile. This will allow them to complete their own company details, add insurances and accreditation and add operatives under their company.
- ³ The system will automatically invite the individual to activate their account. They will be issued with a User Guide similar to this to guide them through the final stages of setting the organisation up.

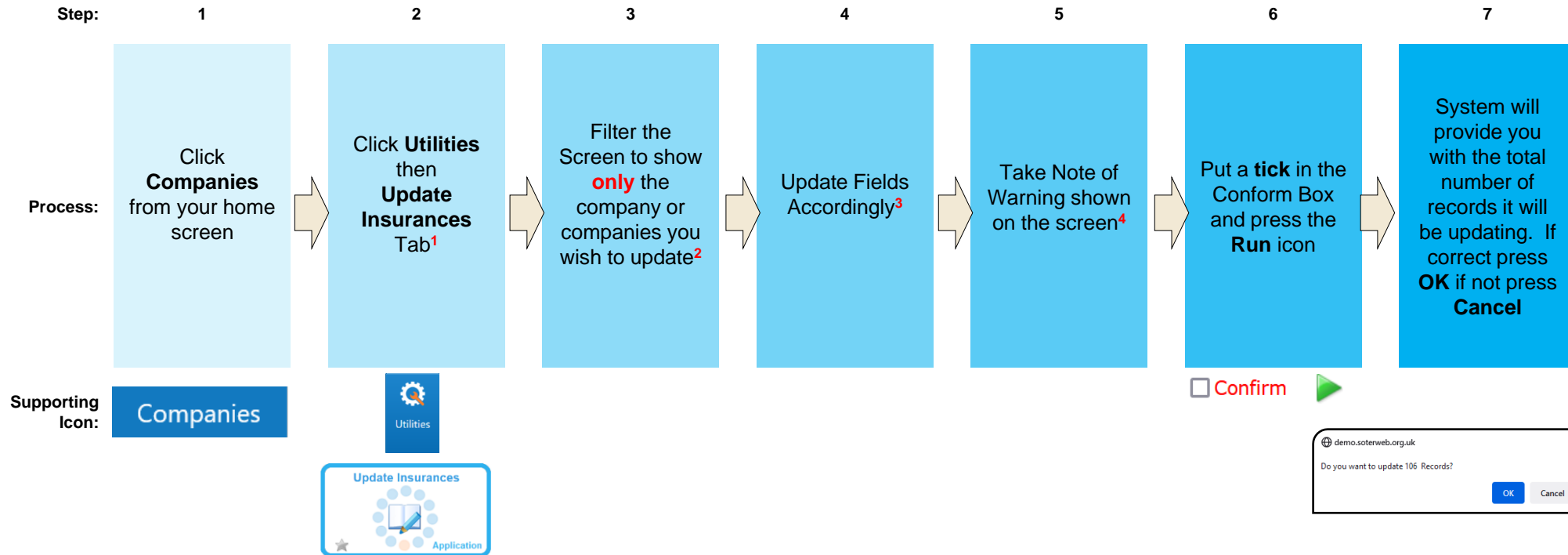
Step 4 - Assign Skill Sets to the Individual



Notes

- ¹ To add or edit an individuals skill sets requires the Administrator (Internal) profile.

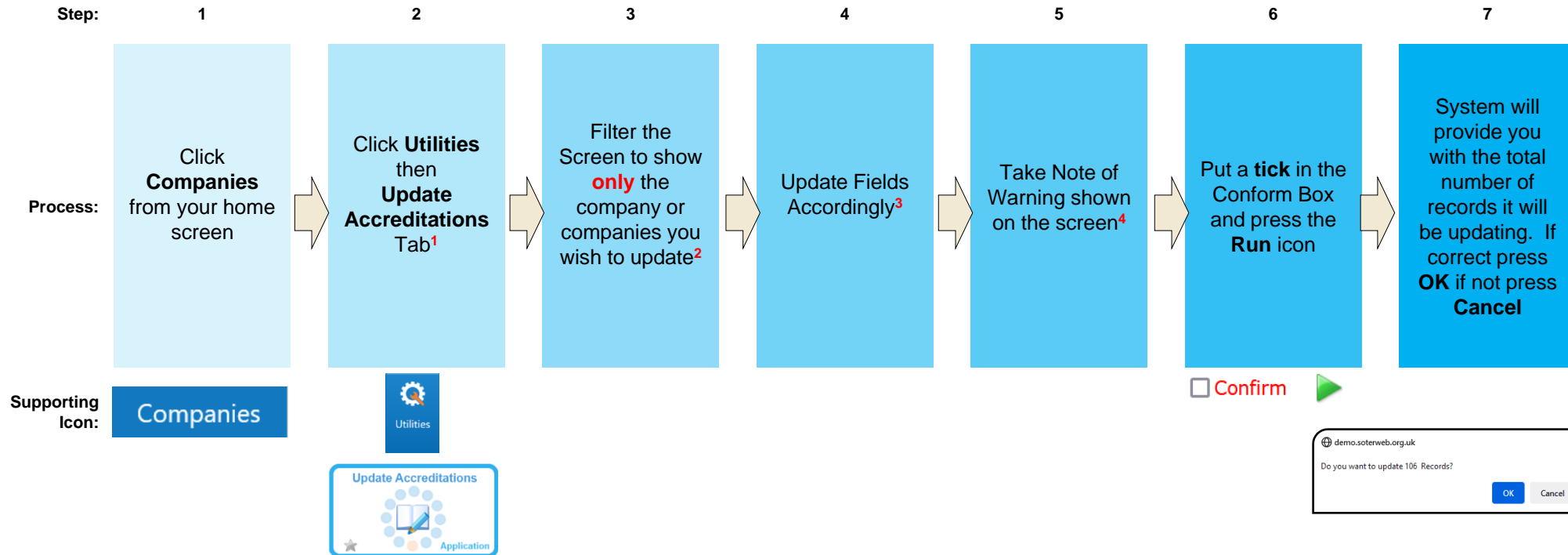
Step 5 – Assign Insurance Requirements



Notes

- ¹ To assign or edit insurance requirements requires the Administrator (Internal) profile.
- ² Changes will be made to all companies shown on the screen or pages.
- ³ Use the dropdown list to select the insurance to update. Select whether this accreditation is mandatory and level of cover required.
- ⁴ **Changes will be made to all Companies listed.** If the insurance already exists it will be updated, if it does not exist it will be added to their profile, if set to Inactive all active insurances of the same type will be set to Inactive.

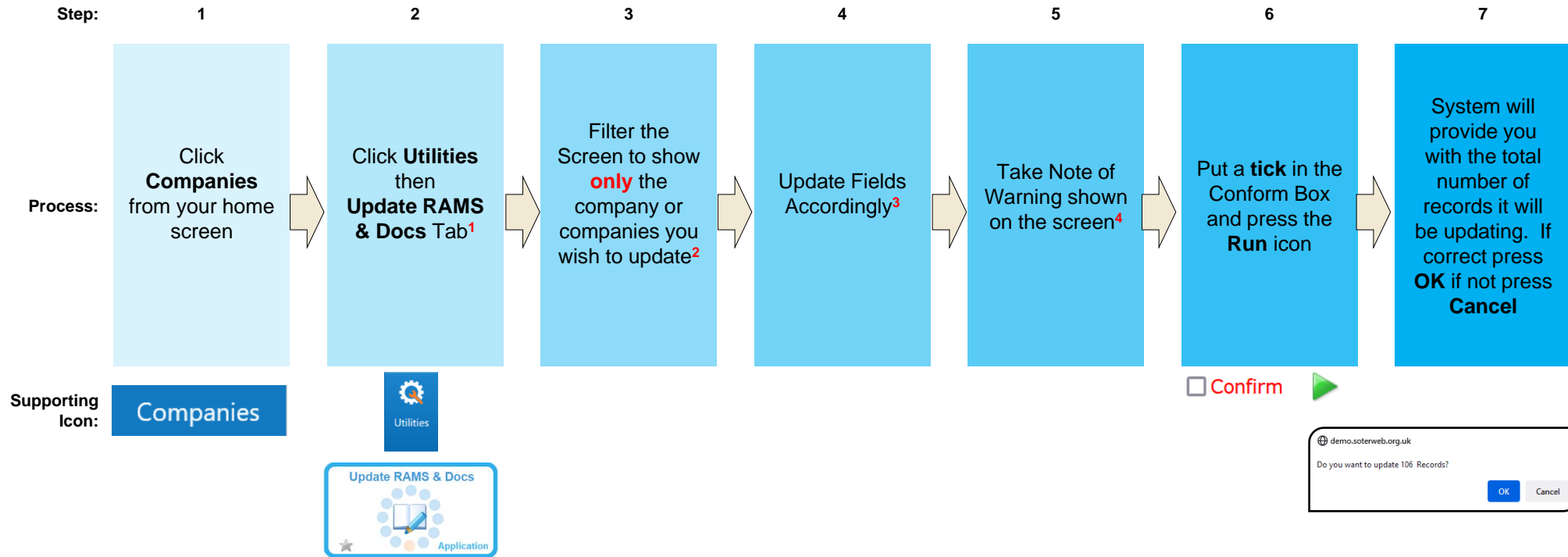
Step 6 – Assign Accreditation Requirements



Notes

- ¹ To assign or edit accreditation requirements requires the Administrator (Internal) profile.
- ² Changes will be made to all companies shown on the screen or pages.
- ³ Use the dropdown list to select the accreditations to update. Select whether this accreditation is mandatory.
- ⁴ **Changes will be made to all Companies listed.** If the accreditation already exists it will be updated, if it does not exist it will be added to their profile, if set to Inactive all active accreditations of the same type will be set to Inactive.

Step 7 – Assign RAMS & Docs Requirements



Notes

- ¹ To assign or edit RAMS & Documentation requirements requires the Administrator (Internal) profile.
- ² Changes will be made to all companies shown on the screen or pages.
- ³ Use the dropdown list to select the RAMS & Documentation to update. Select whether this RAMS & Documentation is mandatory.
- ⁴ **Changes will be made to all Companies listed.** If the document already exists it will be updated, if it does not exist it will be added to their profile, if set to Inactive all active documentation of the same type will be set to Inactive.

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