



Administrator Instructions for *Link2CDMS* Contractor Document Management System

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Administrator Instructions for Link2CDMS

Getting Started

When you first access the Link2CDMS Administrator page, you'll see a navigation toolbar across the top. *In order to access the Administrator's module, an administrator-specific login will have already been created for you.* To login to your administrator account on Link2CDMS click on the **LOGIN** button. You will need to enter:

- Your Affiliate ID (identifying the company/organization which you represent)
- The email address which was used to register your account
- Your account password.

Then click **Login**.

Viewing Your Approvals Dashboard

Upon logging in you will be directed to the **Administration** tab which provides access to an overview of your applicant statuses as it relates to their applications to become a qualified supplier of contracted services.

You can also refine the view by specifying the status of the contractor application using the **Status** drop-down filter.





Approvals

Approvals
approve or reject profiles

Reset Export to excel

		Status	Primary Contact Email	Company	Last Modified	
		All				
>	View	Update	Incomplete	unsafe@contractor.com	Oakwood Carpentry	02/07/2014 10:51:13 PM Delete
>	View	Update	Incomplete	linda@houseofhope.com	ABC Company	26/06/2014 10:58:49 AM Delete
>	View	Update	Expired Information	george.bell@AltaVista.com	Alta Vista Forestry	25/05/2014 4:00:10 PM Delete
>	View	Update	Approved	sam.pull@generic.com	ABC Company	25/05/2014 3:41:11 PM Delete
>	View	Update	Expired Information	mike@ewr.com	Environmental Waste Removal Inc	25/05/2014 2:30:53 PM Delete
>	View	Update	Expired Information	Joe@jsconstruction.com	Joe Smith Construction	25/05/2014 1:41:47 PM Delete
>	View	Update	Incomplete	martha@cambellfoods.ca		Delete

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Clicking on the **View** button located alongside any of the listed contractor organizations provides you with access to the Contractor's view, within which you can review or edit information provided by the contractor.

You can enter or update information about the contracting company by clicking on the **Company Profile** tab. The contractor's qualification status will be updated accordingly when you enter information here.

Items marked with a red asterisk (*) are mandatory fields. After entering any information remember to click **Save Profile**.

All contractor lists are exportable using the Microsoft Excel icon in the top right corner.


View Profile

Administration Menu Options

[Update Username/Password](#) [Add Internal Notes](#) [Contractor Status](#)

Company Information [EHS Requirements](#) [Document Upload](#) [Employee List](#)

Once you have filled out the appropriate fields please click "Save Profile" and then navigate to the "EHS Requirements" profile tab listed above this text. ***NOTE*** All fields marked with a red asterisk (*) must be filled in.

[Save Profile](#) 

Company Information

Company Name: *

Alternate Name/Doing Business As: *

Address: *

Postal Code: *

City: *

Province/State:

Company Description

Since 1976, Oakwood Carpentry (formerly Spishack & Sons LLC) have been providing Commercial and Residential carpentry services in Haliburton, Ontario.

Services including Plumbing, Electrical, Lighting, Drywall, Painting and Deck Building.

Primary Contact

Primary Contact Name: * Primary Contact Title: *

Primary Contact Phone: * Primary Contact Fax: *

Primary Contact Email: *

Secondary Contact

Secondary Contact Name: Secondary Contact Title:

Additional tabs in this section include the [EHS Requirements](#) page which presents information (as required by you, the employer) as it relates to contractor health and safety practices and history.

The requirements listed can be customized – contact your Link2CDMS customer service representative for assistance.

Once you have filled out the appropriate fields under "EHS Requirements", please click "Save Profile" and then navigate to the "Document Upload" profile tab listed above this text. ***NOTE*** All questions on this page must be answered.

EHS Requirements

Number of employees

0
 1-7
 8-25
 26-50
 > 50

Will the contractor be performing any of the following tasks?

Administrative tasks including subject matter experts, consultants, trainers, temporary administration help, programmers and technical support not required to physically interact with any company owned equipment other than standard office tools.

Yes
 No

Are the activities to be conducted on site by the contractor deemed critical safe work or construction?

Critical safe work
 Construction
 N/A

Has your company received any EHS governmental convictions or charges in the previous three (3) years?

Yes
 No

Has your company had any serious incidents and injuries in the last three years?

Yes
 No

What percentage of a supervisors time is spent on safety?

0%
 1-10%
 11-25%
 26-50%
 51-100%

The **Document Upload** tab presents an interface page where contractors can submit required documents as part of the qualification process. The expected documents will be listed, as well as a field to specify the certification expiry date for any documents that are uploaded.

The document listing can also be tailored to your specifications – contact your Link2CDMS customer service representative for further information.

Once you have uploaded the appropriate documents, please click "Save Profile" and then navigate to the "Employee List" profile tab listed above this text.
 NOTE All fields marked with a red asterisk (*) must be filled in.

Document Upload

Evidence of Workers Compensation Insurance

No file chosen

Document Expiry Date:

Current workers compensation insurance documents

	File Name	Expiry Date
Download	ClearanceCertificateinConstruction.pdf	July-31-14

Certificate of Insurance coverage

File Successfully Uploaded No file chosen

Document Expiry Date:

Current certificate of insurance coverage

	File Name	Expiry Date
Download	ClearanceCertificateinConstruction.pdf	October-24-14
Download	ContractorsInsuranceCo_Policy227-D37-00E.doc	April-04-16

Safe work program

No file chosen



You can add employees to the company profile by accessing the [Employee List](#) tab and selecting *Add Employees*. This will help you to identify who needs to be included as part of the qualification process.

In addition to the inclusion of employee information, individual certifications may be uploaded for each employee.

All employee lists are exportable using the Microsoft Excel icon in the top right corner.


Company Information EHS Requirements Document Upload **Employee List**

Once you have submitted the appropriate employee information, please click "Save Profile" and then ensure that all required information has been submitted in each of the previous profile tabs listed above. ***NOTE*** All fields marked with a red asterisk (*) must be filled in. Save Profile

 **+ Add Employees** | 

>		First Name	Last Name	Title	Email	Completed Contractor Orientation
		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
>	Edit Delete	Jim	Hannen	Painter	james.hannen@peelandchip.com	No Resend Online Course Invitation
▼	Edit Delete	Rutger	Rooter	Master plumber	rrooter@deepsix.com	No Resend Online Course Invitation

Certifications

 **+ Upload Certification**

Certifications & Training		File Name	Certification	Expiry Date
No Certifications Uploaded				

Specifying Contractor Approval Status

You can update the approval status information for any given contractor by clicking on the **Update** button located beside the contractor listing. Using the drop-down menu that will appear beneath that selection you can alter the status to *Approved*, *Pending Verification* or *Expired Information*. Click **Apply** to finalize the update.

Approvals

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All					
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> View Update	Incomplete	linda@houseofhope.com	ABC Company	26/06/2014 10:58:49 AM	Delete
ABC Company Profile Status					
Incomplete					
Apply Cancel					
> View Update	Expired Information	george.bell@AltaVista.com	Alta Vista Forestry	25/05/2014 4:00:10 PM	Delete
> View Update	Approved	sam.pull@generic.com	ABC Company	25/05/2014 3:41:11 PM	Delete
> View Update	Expired Information	mike@ewr.com	Environmental Waste Removal Inc	25/05/2014 2:30:53 PM	Delete
> View Update	Expired Information	Joe@jsconstruction.com	Joe Smith Construction	25/05/2014 1:41:47 PM	Delete

Additionally, you can update any contractor's status by using the **Administration Menu Options** located near the top of the screen (visible while specific contractor profiles).

View Profile

Administration Menu Options

Update Username/Password Add Internal Notes Contractor Status

Current Profile Status: **Incomplete**

Incomplete
Approved
Incomplete
Pending Verification
Expired Information
Inactive

Company Information EHS Requirements Document Upload Employee List

Once you have filled out the appropriate fields please click "Save Profile" and then navigate to the "EHS Requirements" profile tab listed above this text. ***NOTE*** All fields marked with a red asterisk (*) must be filled in.

Save Profile

Company Information

Company Name Oakwood Carpentry *

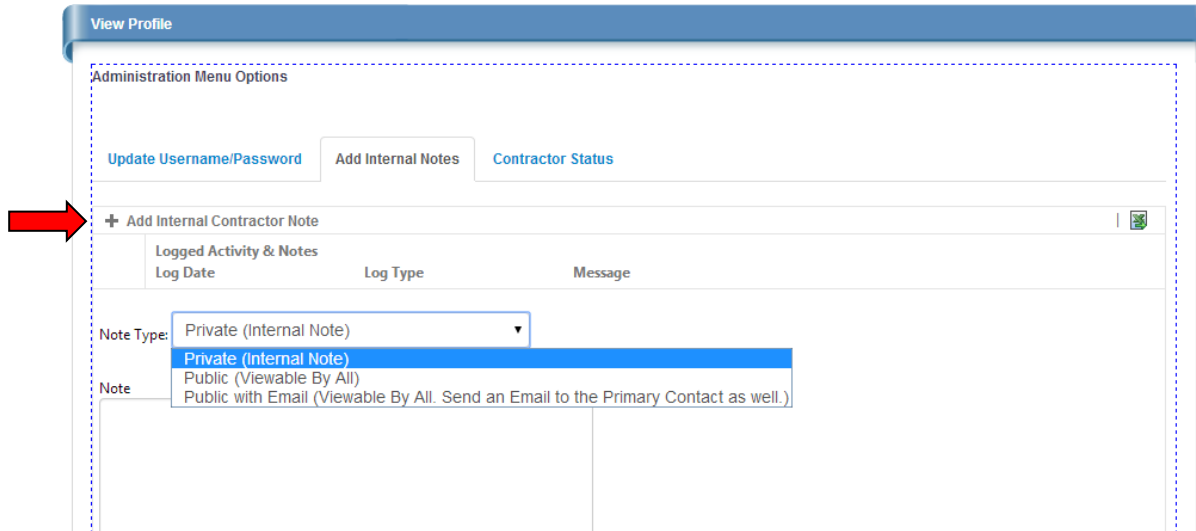
Spishack & Sons LLC *

Company Description

Since 1976, Oakwood Carpentry (formerly Spishack & Sons LLC) have been providing Commercial and Residential carpentry services in Haliburton, Ontario.

Adding Internal Notes

In addition to having the ability to change/update the contractor's username and/or password from the [Administration Menu Options](#), you also have the option to [Add Internal Notes](#). These notes can serve as a private log of comments or be used as supplemental communication to all (including the primary contact within the contractor's organization).



The screenshot shows the 'View Profile' interface. At the top, there is a blue header bar with the text 'View Profile'. Below this, a dashed blue box encloses the 'Administration Menu Options' section, which contains three buttons: 'Update Username/Password', 'Add Internal Notes', and 'Contractor Status'. Below the menu options is a section titled '+ Add Internal Contractor Note' with a red arrow pointing to a plus sign icon on the left and a small Excel icon on the right. Underneath this is a table with the following structure:

Logged Activity & Notes		
Log Date	Log Type	Message
Note Type: Private (Internal Note) [dropdown arrow]		
Note [text input field]		

The dropdown menu for 'Note Type' is open, showing three options: 'Private (Internal Note)' (highlighted in blue), 'Public (Viewable By All)', and 'Public with Email (Viewable By All. Send an Email to the Primary Contact as well.)'.

Notes may also be added from the [Administration](#) overview page by clicking on the arrow located immediately to the left of the contractor name. From here you can add the same type of internal note – in addition you have the ability to log an [Incidental](#) report should any type of violation, hazard or accident be observed.

All notes are exportable using the Microsoft Excel icon in the top right corner.

Approvals

[Click here for Contractor Instructions](#) | [Click here for Administrator Instructions](#)

Approvals
approve or reject profiles

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All				
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Profile Log

+ Add Notes

Logged Activity & Notes

Log Date	Log Type	Message
12/08/2014 10:49:50 AM	Client Message	Received a complaint from bystanding public regarding colourful language used by your workers on our primary worksite.
03/07/2014 9:12:17 AM	Client Message	You did not provide all of the names of your staff who came onsite on July 2nd, 2014!
03/07/2014 8:41:31 AM	Internal System Log	Login
03/07/2014 8:36:09 AM	Profile Status Change	Profile Status: Pending Verification
03/07/2014 8:35:43 AM	Private Note	Jim Hannen's Ladder Safety Certificate doesn't have an expiry date.

Page size: 5 11 items in 3 pages

Incidentals

+ Add Incidental

Logged Incidentals

Incidental Date	Description	Attachment
2014-05-11	Electric wires were left exposed! This is a huge hazard.	Download
2014-06-20	The plumbing work has been shoddy over the years. The boiler room plumbing is getting out of control!	Download

View	Update	Status	Primary Contact Email	Company	Last Modified	Delete
>		Incomplete	linda@houseofhope.com	ABC Company	26/06/2014 10:58:49 AM	Delete
>		Expired Information	george.bell@AltaVista.com	Alta Vista Forestry	25/05/2014 4:00:10 PM	Delete
>		Approved	sam.pull@generic.com	ABC Company	25/05/2014 3:41:11 PM	Delete
>		Expired Information	mike@ewr.com	Environmental Waste Removal Inc	25/05/2014 2:30:53 PM	Delete
>		Expired Information	Joe@jsconstruction.com	Joe Smith Construction	25/05/2014 1:41:47 PM	Delete
>		Incomplete	martha@cambellfoods.ca			Delete

Notifications

When an uploaded document reaches its expiry date, an email notification is automatically delivered to the primary contact for the contractor organization indicating that the document must be updated.

When an employee certification reaches its expiry date, an email notification is automatically delivered to both the primary contact for the contractor organization **and** the specific employee in question.

Deleting Contractor Profiles

You may also click on the **Delete** button beside any contractor name to remove this profile from your database. You will be prompted to confirm that you do in fact wish to permanently remove the contractor's information before it is erased.

Approvals

[Click here for Contractor Instructions](#) | [Click here for Administrator Instructions](#)

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>	View	Update	Expired Information	Joe@jsconstruction.com	Joe Smith Construction	25/05/2014 1:41:47 PM Delete
>	View	Update	Incomplete	martha@cambellfoods.ca		Delete

If you have any questions about using the Administrator Module you can reach us directly at: support@link2cdms.com.

Thank you for using the Link2CDMS Contractor Document Management System!