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.

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.

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.

Company Information	EHS Requirements	Document Upload	Employee List

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.

[Save Profile]

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.

Company Information   EHS Requirements   Document Upload   Employee List

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   Choose File   No file chosen

                                                              Document Expiry Date:

                                                              [_____] 🔲

                                                                              Upload

Current workers compensation insurance documents

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

Certificate of Insurance coverage   File Successfully Uploaded   Choose File   No file chosen

                                                              Document Expiry Date:

                                                              [_____] 🔲

                                                                              Upload

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   Choose File   No file chosen

                                                                              Upload

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.

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.

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).
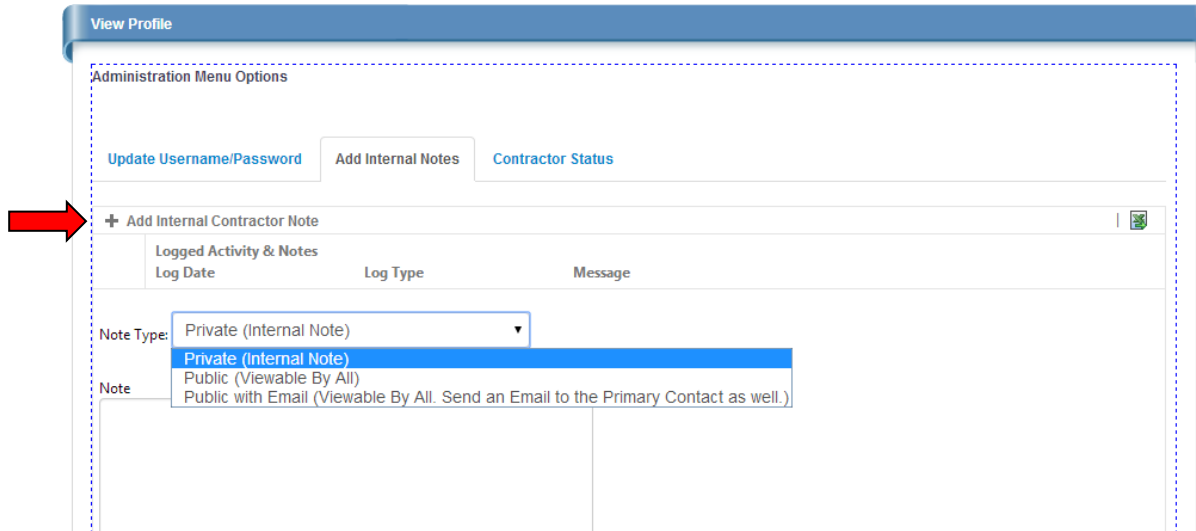
Adding Internal Notes

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).

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.

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.

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!