



D A M S T R A

Add Contractor
Company

Safety



[DISCLAIMER]

This presentation document has been prepared by Damstra Technology Limited ("Damstra") and is intended for off line demonstration, presentation and educational purposes.

The information is not version controlled and as such is subject to change without notice.

Damstra does not accept any responsibility or obligation to inform users of this presentation of such changes.

This includes any copies of this presentation taken and modified outside of the Damstra domain.

Add Contractor Company Introduction

Before Contracted Workers can be added to Damstra Safety, the Company that they belong to must be added to the 'Contractor Company Register'.

This is found under 'People' in the 'Menu Bar'.

John Smith

Fernside Electrical Limited



Add Contractor Company

Add record

The Contractor Company Register stores and displays records of all Contractor Companies that your Organisation may contract to.

To add a new Contractor Company to the Register, **click** the 'Add' button.

This will load a 'short form' which collects the minimum, mandatory information required to add a new Company.

The screenshot shows the DAMSTRA Contractor Companies Register interface. The header includes the DAMSTRA logo and navigation icons. The main content area displays a table of contractor companies with columns for ID, Company, Contact Number, Contact Person, Contact Email, Contractor Manager, Vendor Number, and Trading Name. The table lists several companies, including Wai-Plumb Plumbing, Plumb on Time, DD&C, Zane Bettridge Excavation Limited, Hamilton Steel Supplies Limited, RiteSkills Agency Limited, Aston Freightlines Limited, Estella Holdings Limited, Pinton Salvage Limited, and Neil Trent Joinery Limited. An 'Add' button is visible in the top right corner of the table area. The left sidebar contains filters and search options, including 'My Filters', 'Managed By Lee Jenkins', and a search bar. The bottom right corner features a 'Help' button.

ID	Company	Contact Number	Contact Person	Contact Email	Contractor Manager	Vendor Number	Trading Name	Actions
208	Wai-Plumb Plumbing	+64215489781	Hauku Rimene	hauku@waipumb.mm	Martin Daniels		Wai-Plumb Plumbing NZ	Actions
116	Plumb on Time	0217456329	Peter Plum	Plum@plumbontime.mm	Martin Daniels		Not Available	Actions
84	DD&C	0274444124	Deedee Cotton	deedee@DDNC.mm	Martin Daniels		DD&C	Actions
82	Zane Bettridge Excavation Limited	03 5551341	Damian Hope	dhope@zbx.nz	Lee Jenkins	788		Actions
81	Hamilton Steel Supplies Limited	07 5877789	David Hollis	dhollis@hss.nz	Alan Humphries	319		Actions
80	RiteSkills Agency Limited	09 5549787	Debbie Lombard	debbielombard@riteskills.nz	Susan Lobb	727		Actions
79	Aston Freightlines Limited	07 5459877	Sally Webb	swebb@astonfreightliners.nz	Susan Lobb	311		Actions
78	Estella Holdings Limited	02 55549733	Paul Telford	pauhtelford@estella.au	Alan Humphries	944		Actions
77	Pinton Salvage Limited	03 33446578	Margaret Lessie	mlessie@pintons.au	Alan Humphries	162		Actions
76	Neil Trent Joinery Limited	06 5554646	Neil Trent	Neil@trentjoinery.nz	Lee Jenkins	190		Actions

Add Contractor Company

Short form

Populate the form, completing all fields as you go including:

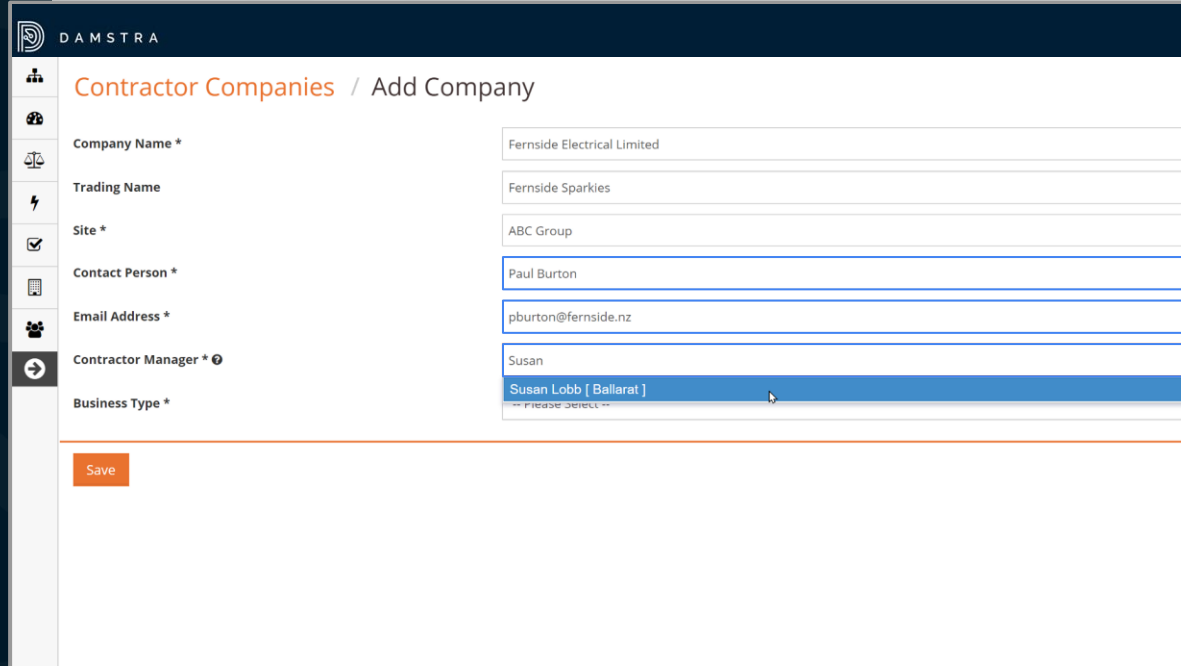
- The Company Name
- The Trading Name of the business, which may be different to the Company Name
- The site that would typically work with this Company. If a Company is used across the whole organisation, the Company can be loaded at the global level.

The screenshot shows the 'Add Company' form in the DAMSTRA system. The form is titled 'Contractor Companies / Add Company'. It contains several input fields: 'Company Name *' (filled with 'Fernside Electrical Limited'), 'Trading Name' (filled with 'Fernside Sparkies'), 'Site *' (filled with 'ABC Group'), 'Contact Person *', 'Email Address *', 'Contractor Manager *' (with a help icon), and 'Business Type *'. A 'Save' button is located below the 'Business Type *' field. On the right side of the form, there is a search bar and a tree view of the organization structure. The tree view shows a hierarchy starting with 'ABC Group', which includes 'ABC Industries Australia', 'New South Wales', 'Rydalmere', 'Finance', 'Plant', and 'Rydalmere Plant'. Each level in the tree has a checkbox next to it, and the 'ABC Group' checkbox is currently selected.

Add Contractor Company

Short form cont.

- The name of the contact at the Company that your organisation liaises with
- Their email address
- The person at your organisation that manages the relationship with this company. Smart Search will help locate this person as you begin to type.



The screenshot shows the 'Add Company' form in the DAMSTRA system. The form is titled 'Contractor Companies / Add Company' and includes a sidebar with navigation icons. The main form area contains several input fields for company and contact information, followed by a dropdown menu for selecting a contractor manager. A 'Save' button is located at the bottom of the form.

Field	Value
Company Name *	Fernside Electrical Limited
Trading Name	Fernside Sparkies
Site *	ABC Group
Contact Person *	Paul Burton
Email Address *	pburton@fernside.nz
Contractor Manager * ⓘ	Susan
Business Type *	Susan Lobb [Ballarat]

Save

Add Contractor Company

Short form cont.

- And finally, under 'Business Type', **select** which type of legal entity the business falls under from the picklist.

Once all information has been entered, **click** 'Save'.

DAMSTRA

Contractor Companies / Add Company

Company Name * Fernside Electrical Limited

Trading Name Fernside Sparkies

Site * ABC Group

Contact Person * Paul Burton

Email Address * pburton@fernside.nz

Contractor Manager * ? Susan Lobb

Business Type *

-- Please Select --

-- Please Select --

Sole Trader

Partnership

Company

Trust

Government

Association

Unknown

Save

Add Contractor Company Full Record

The Company has now been successfully added to the Company Register, exposing additional fields of information across a number of new tabs.

Many of these new tabs relate to information we may want to record about a Company in the future, but in this video we'll go through recording initial, key information on the 'Company Details' and 'Insurances' tabs.

The screenshot shows the 'Edit Company - 214' page in the DAMSTRA system. The page has a dark blue header with the DAMSTRA logo and a sidebar with navigation icons. The main content area is titled 'Contractor Companies / Edit Company - 214' and features a tabbed interface with the following tabs: 'Company Details' (selected), 'Insurances', 'Governance', 'Files', 'Projects', 'Contracted Worker Reviews', 'Incentive Scheme', and 'Related'. The 'Company Details' tab is active, showing a form with the following fields:

Company Information	
Approved Company	☐
Company Name *	Fernside Electrical Limited
Trading Name	Fernside Sparkies
Site *	ABC Group
Registered for GST/VAT	☐
Business Type *	Company
Company Number	
Business Number	
Vendor Number	
Contractor Manager * ?	Susan Lobb
Address	

Add Contractor Company

Company Information

The 'Company Information' section records key, fundamental information about the Company itself.

If the company has cleared your approval process, tick the box.

Supply the Company's tax and/or Company Registration numbers, noting that the fields and terminology for these will vary depending on the Country selected for your organisation in Vault Settings

The screenshot shows the 'Edit Company - 214' form in the DAMSTRA system. The form is titled 'Contractor Companies / Edit Company - 214' and has a navigation bar with tabs: 'Company Details' (active), 'Insurances', 'Governance', 'Files', 'Projects', 'Contracted Worker Reviews', 'Incentive Scheme', and 'Related'. The 'Company Information' section is expanded, showing a list of fields with their current values and checkboxes for 'Approved Company' and 'Registered for GST/VAT'. The fields are: 'Company Name *' (Fernside Electrical Limited), 'Trading Name' (Fernside Sparkies), 'Site *' (ABC Group), 'GST/VAT Registration Number *' (123456789), 'Business Type *' (Company), 'Company Number' (2380021), 'Business Number' (9429031721067), 'Vendor Number' (empty), and 'Contractor Manager * ?' (Susan Lobb).

Company Information	
Approved Company	☒
Company Name *	Fernside Electrical Limited
Trading Name	Fernside Sparkies
Site *	ABC Group
Registered for GST/VAT	☒
GST/VAT Registration Number *	123456789
Business Type *	Company
Company Number	2380021
Business Number	9429031721067
Vendor Number	
Contractor Manager * ?	Susan Lobb

Add Contractor Company

Company Information cont.

Enter the Vendor Number for the company, if your organisation uses one.

Provide the Company's address details.

Optionally add any notes that might be relevant in the 'Notes' free-text field.

If the Company has completed your organisation's induction program, tick this check-box. Optionally, if the induction is only valid for a period of time, specify the date that the induction is valid until.

Business Number	9429031721067
Vendor Number	123
Contractor Manager * ⓘ	Susan Lobb
Address	45 Current Way Christchurch
Postal Address	PO Box 1342 Postal Centre
Notes	Contracted for general electrical work
Company / OHS Induction	☒ Use this checkbox to indicate that the contractor company has completed the Induction of the Company. The expiry
Valid Until	10/11/2021 
- Company Contact	
Contact Person *	Paul Burton
Phone No.	

Add Contractor Company

Company Contact

The 'Company Contact' section stores the details of who at the company your organisation interfaces with, and how.

Supply all mandatory and relevant information.

The screenshot shows a web form for adding a contractor company. The top section, 'Company / OHS Induction', includes a checkbox (checked) with the instruction: 'Use this checkbox to indicate that the contractor company has completed the induction of the Company. The expiry' and a 'Valid Until' date field set to '10/11/2021'. Below this is the 'Company Contact' section, which contains several input fields: 'Contact Person *' (Paul Burton), 'Phone No.' (03 3554377), 'Mobile No.' (0221332322), 'FAX No.' (empty), and 'Email Address *' (pburton@fernside.nz). The bottom section, 'Company Categories', features a grid of checkboxes for various services: Aircraft Engine Maintenance, Building, Electrical, Masonry, Transport, Asbestos Removers, Communications, Engineering, Painting, and Trenching.

Company / OHS Induction	
☒	Use this checkbox to indicate that the contractor company has completed the induction of the Company. The expiry
Valid Until	10/11/2021

Company Contact	
Contact Person *	Paul Burton
Phone No.	03 3554377
Mobile No.	0221332322
FAX No.	
Email Address *	pburton@fernside.nz

Company Categories	
☐ Aircraft Engine Maintenance	☐ Asbestos Removers
☐ Building	☐ Communications
☐ Electrical	☐ Engineering
☐ Masonry	☐ Painting
☐ Transport	☐ Trenching

Add Contractor Company

Company Categories

The 'Company Categories' section allows us to select which industry or other category this company belongs to. This selection will make it easy to find this company from the Company Register when searching for Companies of a particular category.

The options shown here will depend on the settings your organisation has selected in Vault Settings, help with which is available separately in the Support Portal.

The screenshot displays a web form for adding a contractor company. At the top, there is a 'Valid Until' field set to '10/11/2021'. Below this is a section titled 'Company Contact' with a minus icon. It contains fields for 'Contact Person *' (Paul Burton), 'Phone No.' (03 3554377), 'Mobile No.' (0221332322), 'FAX No.' (empty), and 'Email Address *' (pburton@fernside.nz). Below the contact section is a section titled 'Company Categories' with a minus icon. It contains a list of categories with checkboxes: 'Aircraft Engine Maintenance', 'Building', 'Electrical' (checked), 'Masonry', 'Transport', 'Asbestos Removers', 'Communications', 'Engineering', 'Painting', and 'Trenching'. At the bottom of the form is a 'Save' button.

Company Categories	
☐ Aircraft Engine Maintenance	☐ Asbestos Removers
☐ Building	☐ Communications
☒ Electrical	☐ Engineering
☐ Masonry	☐ Painting
☐ Transport	☐ Trenching

Add Contractor Company

Add Insurance

The 'Insurances' tab records details about insurance policies that the Company holds, along with the details about their insurance broker.

Any existing policies are displayed in the 'Insurances Information' section.

To add the details of a policy, click the 'Add' button and fill-in the form. Note that the policy types available for selection will depend on the options your organisation has selected in Vault Settings.

DAMSTRA

Contractor Companies / Edit

Company Details Insurances Governance Files

Insurances Information

Search: [] Add

ID	Policy Type	Insurer
Showing 10 entries Showing 0 to 0 of 0 entries		

Broker Details

Broker Name

Broker Contact Person

Email

Phone

Address information

Save

Add New Insurance

Policy Type *
Please Select
Asbestos Liability
Aviation Liability
Carriers Liability
Contract Works
Dangerous Goods
Employers Liability
Fidelity
Industrial Special Plant
Industrial Special Risks
Marine Liability
Motor Vehicle
Other Insurance
Personal Accident and Illness
Product Liability
Professional Indemnity
Public Liability
Transit
Workers Compensation

Insurer *

Policy Amount *

Policy Number *

Policy Coverage *

Start Date *

Expiry Date *

Active

Policy Documentation

Add File Add URL

ID	Title	File Name
No data available in table		

Showing 5 entries | Showing 0 to 0 of 0 entries

Save Insurance Cancel

Help

Add Contractor Company

Add Insurance cont.

To store a copy of a related file in your System, **click** 'Add File' to locate the file on your Computer, in which case Vault will store a copy.

Or to link to a file stored elsewhere, **click** 'Add URL' and **enter** or **paste** the file's address.

Once all policy details have been entered, **click** 'Save Insurance' and **repeat** this procedure for any other insurance policies you'd like to record.

The screenshot shows a web application interface with a modal window titled "Add New Insurance". The background shows a sidebar with "Contractor Companies" and "Edit" options, and a main area with tabs for "Details", "Insurances", "Governance", and "Files". The "Insurances" tab is active.

The "Add New Insurance" form contains the following fields:

- Policy Type ***: Public Liability
- Insurer ***: InsureCo
- Policy Amount ***: 10000000
- Policy Number ***: PLI0001214454
- Policy Coverage ***: Third party injury, damage, loss
- Start Date ***: 10/11/2020
- Expiry Date ***: 10/11/2022
- Active**: ☒
- Policy Documentation**: A large text area with a diagonal line pattern.

At the bottom of the form, there are two buttons: "Add File" and "Add URL". Below these buttons is a table with the following data:

ID	Title	File Name	
11466	Fernside - Public Liability Insurance Policy.doc	Fernside - Public Liability Insurance Policy.doc	Delete

Below the table, there is a "Show" dropdown set to "5", a "entries" label, and a "Showing 1 to 1 of 1 entries" label. At the bottom of the modal, there are two buttons: "Save Insurance" and "Cancel".

Add Contractor Company Broker Details

Additionally, if the Contractor Company's broker details are relevant to your Organisation, you may record these in the 'Broker Details' section below.

Once all information is entered, **click** 'Save' to return to the Company Register.

The Company is now stored in Vault and Contracted Workers from this company may now be added via the Contracted Worker register. You can find help with this in the Support Portal.

The screenshot displays the 'Edit Company - 214' page in the DAMSTRA system. The 'Insurances' tab is active, showing a table of insurance policies. Below this, the 'Broker Details' section is visible, containing form fields for Broker Name, Broker Contact Person, Email, Phone, and Address Information. A 'Save' button is located at the bottom left of the form, and a 'Cancel' button is at the bottom right. A 'Help' button is also present in the bottom right corner of the page.

Contractor Companies / Edit Company - 214

Company Details **Insurances** Governance Files Projects Contracted Worker Reviews Incentive Scheme Related

Insurances Information

Search: [] Active Deactivated All [Add]

ID	Policy Type	Insurer	Policy Amount	Policy Number	Policy Coverage	Start Date	Expiry Date	Media	Status	Actions
23	Public Liability	InsureCo	10000000	PLI0001214454	Third party injury, damage, loss	10/11/2020	10/11/2022		Active	

Show 10 entries | Showing 1 to 1 of 1 entries

Broker Details

Broker Name: [Broker Co]

Broker Contact Person: [John Smith]

Email: [johnsmith@brokerco.nz]

Phone: [03 5551234]

Address Information: [123 Example St, Christchurch] [I]

[Save] [Cancel]

[Help]

