



Your People. Our Passion

Vault Contractor Overview

Vault Contractor



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Vault Contractor Overview

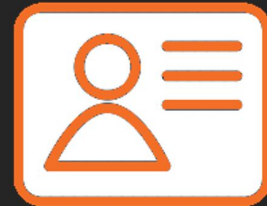
Introduction

Vault Contractor is your one stop shop for contractor management.

In this guide, we are going to explore the basic functionality of Vault Contractor to provide some understanding and context of its use, prior to you moving onto the more task specific tutorials in the Vault Contractor series.



Vault Contractor



Vault Contractor Overview

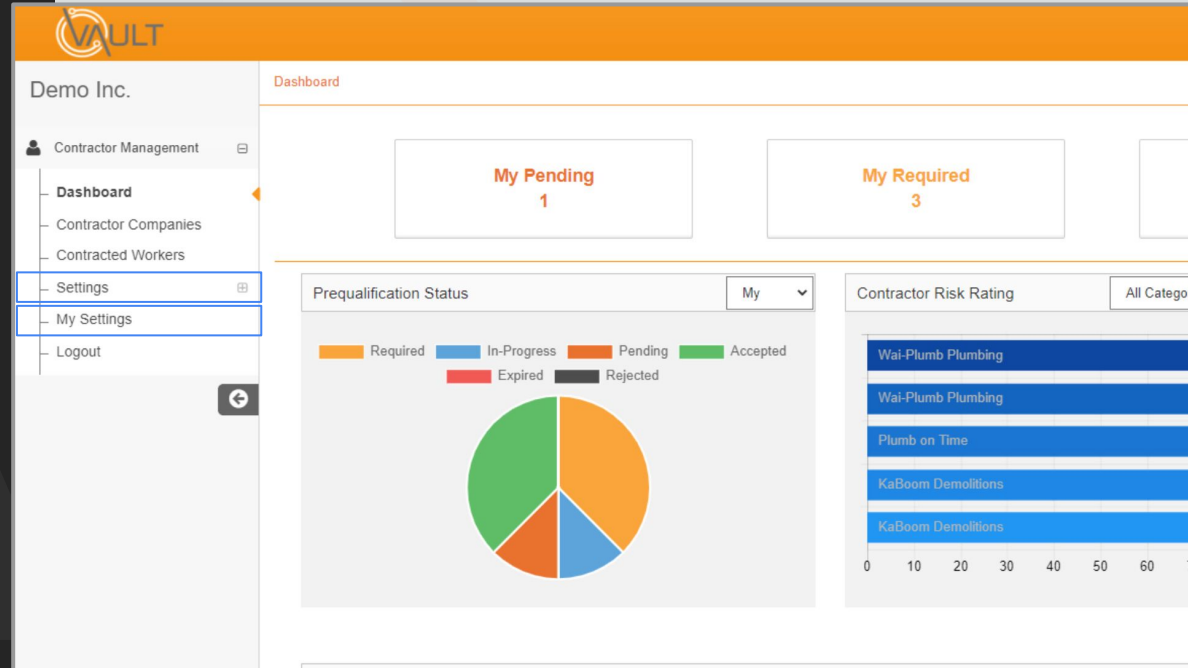
Introduction

But before we get into its functionality, we need to cover Vault contractors setup.

This Setup is comprised of two functional categories:

- The “Settings” category, which refers to your overall Vault Contractor system settings
- “My settings” category which refers to your own personal system settings.

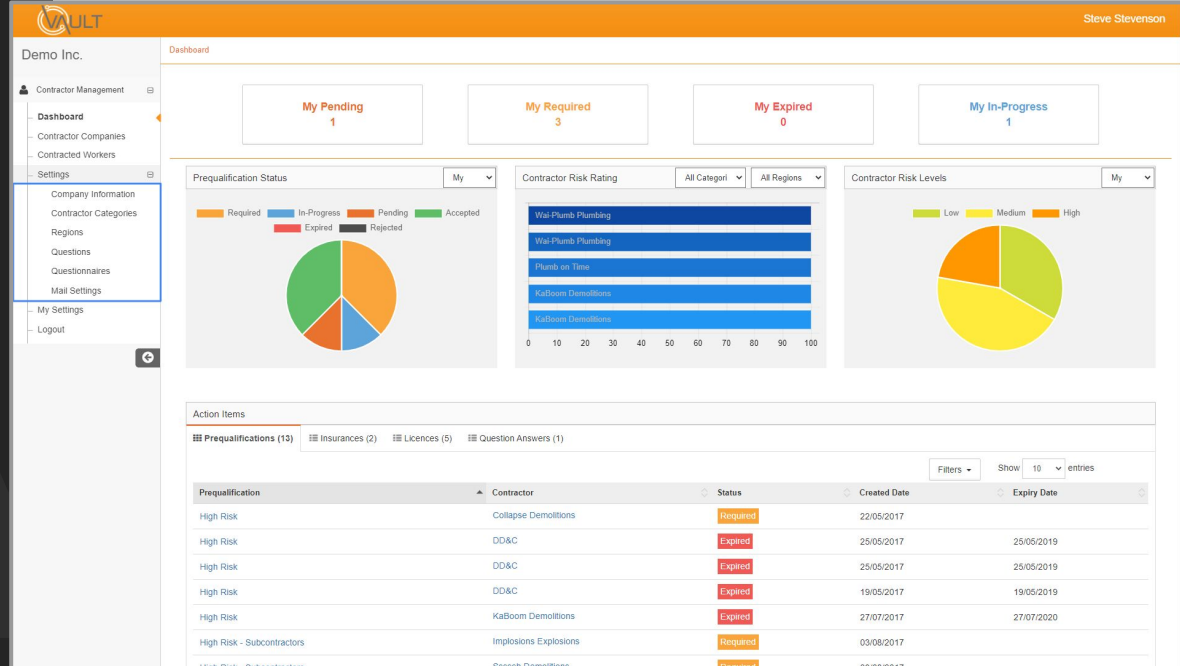
As you can see, these settings options are accessed via the profile icon in the top menu.



Vault Contractor Overview

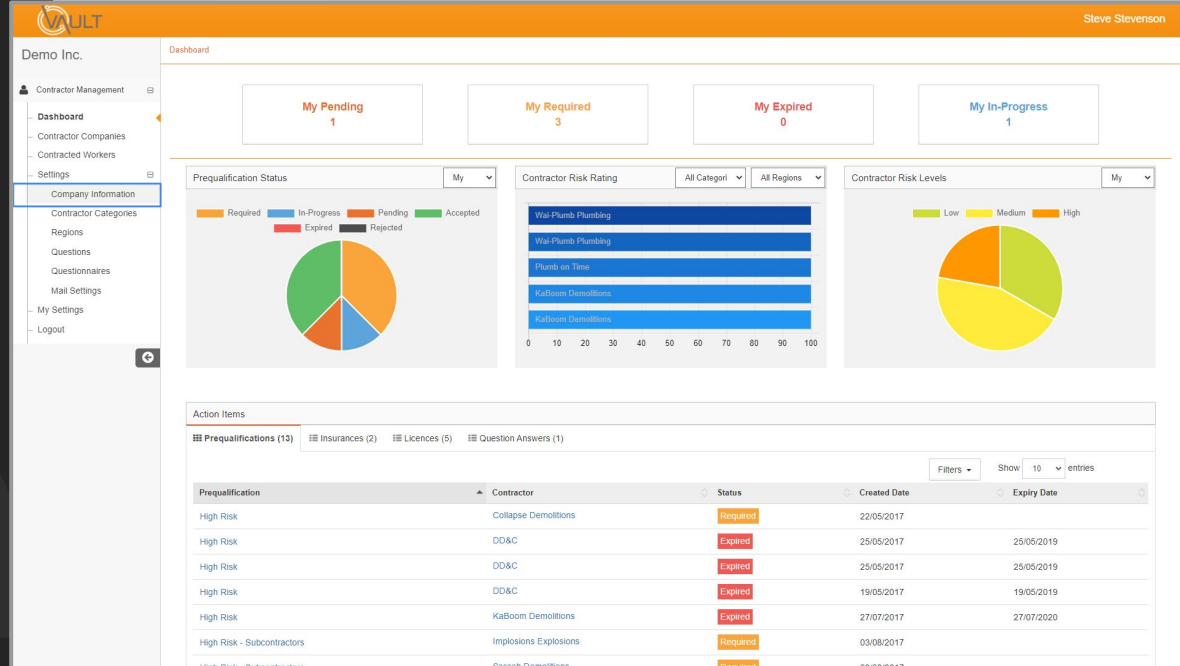
Settings Menu

The Settings menu displays all your Systems basic setup functions.



Vault Contractor Overview

Company Information



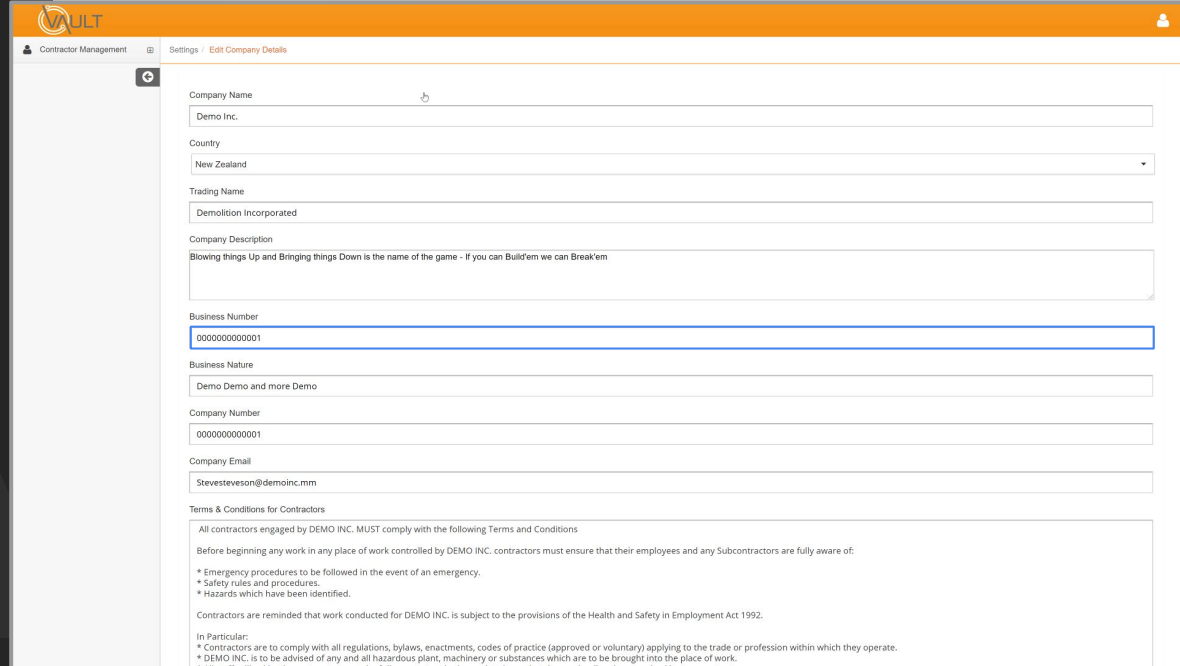
Vault Contractor Overview

Company Information

Check or update all your company information to ensure its accuracy,

Take special note that the business number is correct as this number also relates to a unique system ID across all Vaults Core systems.

If this is not correct please log a support ticket as soon as possible.



VAULT

Contractor Management Settings / Edit Company Details

Company Name
Demo Inc.

Country
New Zealand

Trading Name
Demolition Incorporated

Company Description
Blowing things Up and Bringing things Down is the name of the game - If you can Build'em we can Break'em

Business Number
0000000000001

Business Nature
Demo Demo and more Demo

Company Number
0000000000001

Company Email
Stevesteverson@demoinc.mm

Terms & Conditions for Contractors

All contractors engaged by DEMO INC. MUST comply with the following Terms and Conditions

Before beginning any work in any place of work controlled by DEMO INC. contractors must ensure that their employees and any Subcontractors are fully aware of:

- * Emergency procedures to be followed in the event of an emergency.
- * Safety rules and procedures.
- * Hazards which have been identified.

Contractors are reminded that work conducted for DEMO INC. is subject to the provisions of the Health and Safety in Employment Act 1992.

In Particular:

- * Contractors are to comply with all regulations, bylaws, enactments, codes of practice (approved or voluntary) applying to the trade or profession within which they operate.
- * DEMO INC. is to be advised of any and all hazardous plant, machinery or substances which are to be brought into the place of work.



Vault Contractor Overview

Company Information Cont.

The company email will be the default address where all system related communication will be sent. This also provides you with a contact point for your Contractor company.

Load the terms & Conditions that all contractors must agree to prior to commencing any work for your company.....and will be presented to the contractor prior to answering the prequalification questionnaire.

Note that it's important to review your T&C's on a regular basis to ensure their validity.

Trading Name

Demolition Incorporated

Company Description

Blowing things Up and Bringing things Down is the name of the game - If you can Build'em we can Break'em

Business Number

000000000001

Business Nature

Demo Demo and more Demo

Company Number

000000000001

Company Email

Steveveson@demoinc.mm

Terms & Conditions for Contractors

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- * Emergency procedures to be followed in the event of an emergency.
- * Safety rules and procedures.
- * Hazards which have been identified.

Contractors are reminded that work conducted for DEMO INC. is subject to the provisions of the Health and Safety in Employment Act 1992.

In Particular:

- * Contractors are to comply with all regulations, bylaws, enactments, codes of practice (approved or voluntary) applying to the trade or profession within which they operate.
- * DEMO INC. is to be advised of any and all hazardous plant, machinery or substances which are to be brought into the place of work.
- * All staff utilised by the contractor are to be fully competent in the work to be undertaken, or be directly supervised by a competent person.
- * Any accident or incident which harms or might have harmed any person in the place of work (in addition to being recorded, notified and investigated as required under sections 7 (2), 25, 26 of the Health and Safety in Employment Act 1992) is to be reported to DEMO INC.
- * All safety clothing/equipment required to minimise the risk of harm is to be provided, made accessible to, and used by any person engaged in the work being undertaken for DEMO INC.
- * Insurances required to operate as a business and cover any losses caused by the contractor are current and satisfy minimum legal requirements.
- * Issued Contractor Passports are to be worn by inducted employees and shown to DEMO INC. staff upon request, when not in use Passports must be retained by the contractor in a secure location.

Save

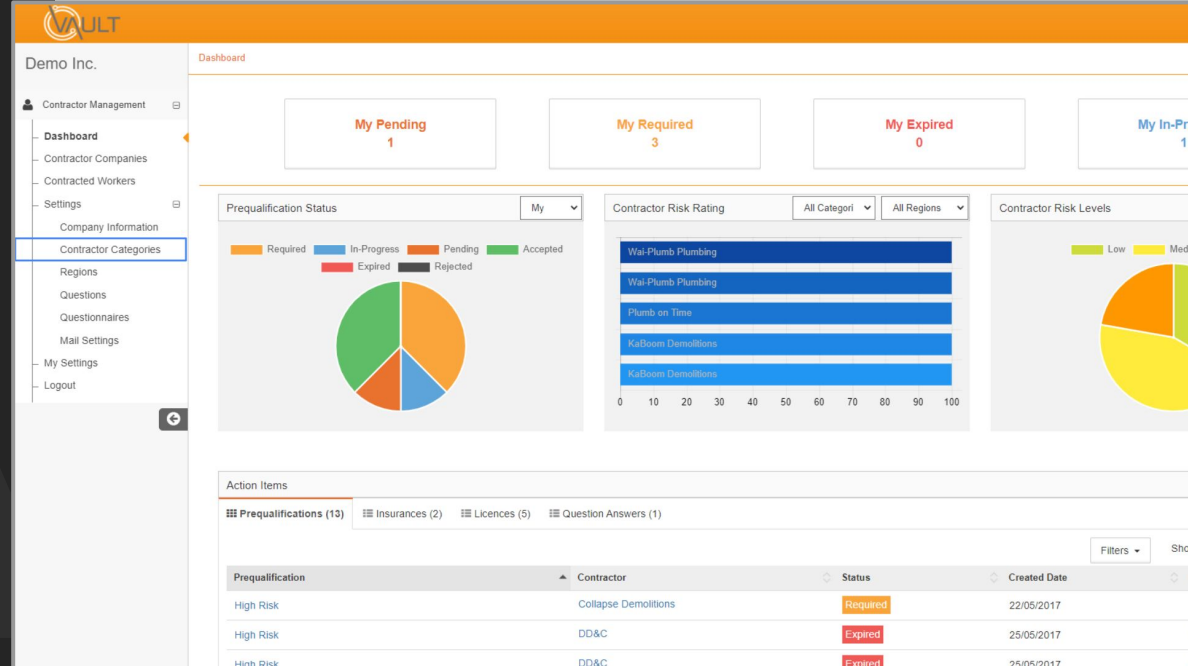
Cancel



Vault Contractor Overview

Contractor Categories

Contractor categories are the individual category types that a contractor can be assigned to dependent on the functions or tasks they perform.



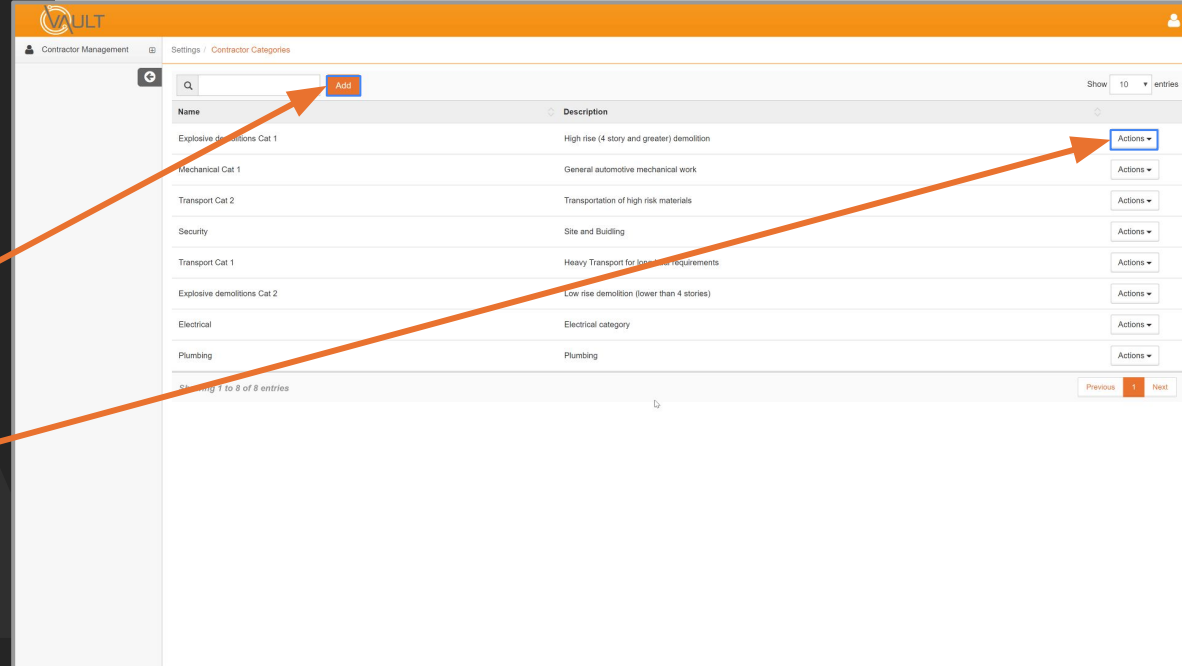
Vault Contractor Overview

Contractor Categories Cont.

These are set up by you in accordance with your companies requirements and are displayed in the register with their Name and Description.

From here you can add a new category

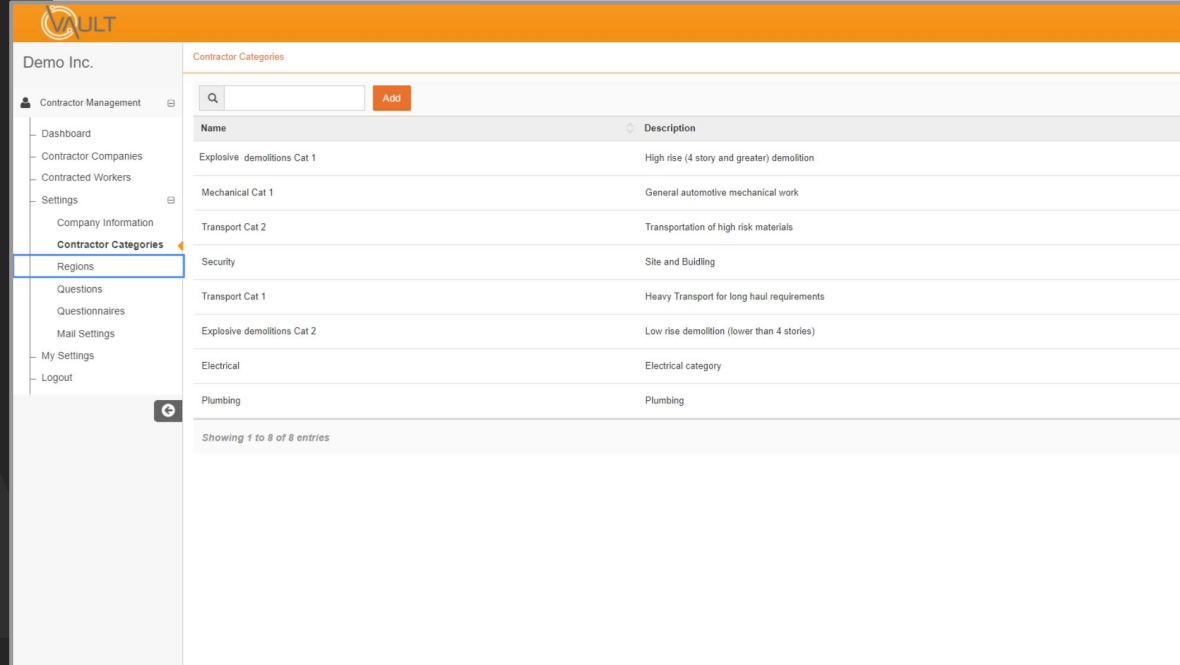
or Edit any existing category and also clone or remove if required.



Vault Contractor Overview

Regions

Regions allows you to set up the regional areas or designations for your business.



The screenshot displays the Vault Contractor Overview interface. On the left is a sidebar menu for 'Demo Inc.' with options: Contractor Management, Dashboard, Contractor Companies, Contracted Workers, Settings, Company Information, Contractor Categories (highlighted), Regions (highlighted with a blue box), Questions, Questionnaires, Mail Settings, My Settings, and Logout. The main content area is titled 'Contractor Categories' and features a search bar and an 'Add' button. Below this is a table with two columns: 'Name' and 'Description'. The table contains eight entries. At the bottom, it states 'Showing 1 to 8 of 8 entries'.

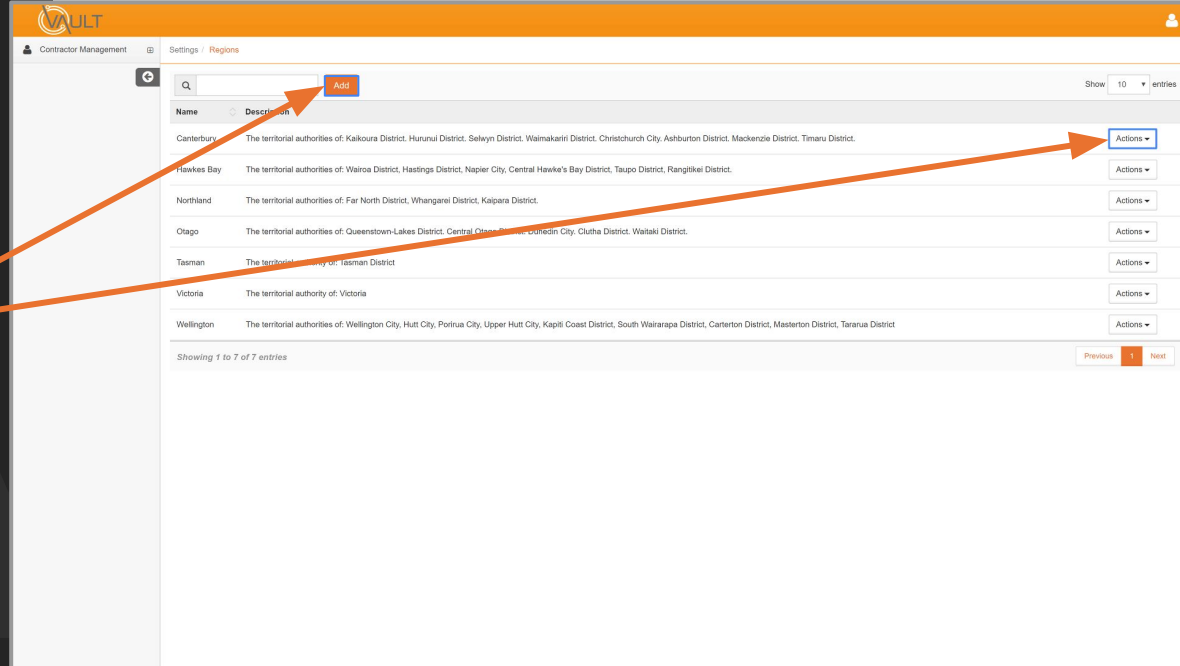
Name	Description
Explosive demolitions Cat 1	High rise (4 story and greater) demolition
Mechanical Cat 1	General automotive mechanical work
Transport Cat 2	Transportation of high risk materials
Security	Site and Building
Transport Cat 1	Heavy Transport for long haul requirements
Explosive demolitions Cat 2	Low rise demolition (lower than 4 stories)
Electrical	Electrical category
Plumbing	Plumbing

Vault Contractor Overview

Regions

And once more can be viewed, cloned or removed, or add new Regions.

Once these are stipulated any user can then assign regions in which they work or have responsibility for to Contractor companies or to themselves.



Vault Contractor Overview

Contractor Questions

Contractor Questions are used in the building and formatting of Prequalification Questionnaires.



Vault Contractor Overview

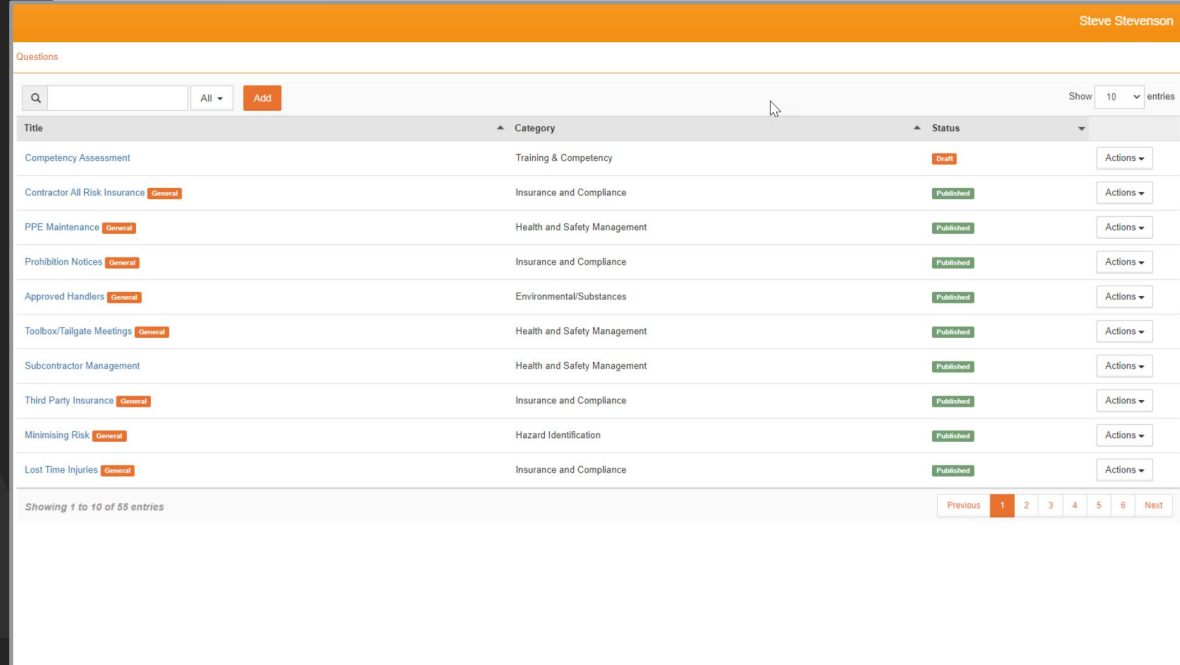
Contractor Questions

Contractor Questions are designated as one of two types:

General questions - which are pre built industry standard questions. These questions cannot be edited.

Custom Questions - which are built by you for the unique requirements of your business.

How to build and manage these questions is covered off in detail in Part 1 of the Creating Questionnaires series.



The screenshot displays the 'Questions' management interface in the Vault system. At the top right, the user 'Steve Stevenson' is logged in. The interface includes a search bar, a filter set to 'All', and an 'Add' button. A table lists ten pre-built 'General' questions, each with a title, category, status (all 'Published'), and an 'Actions' dropdown menu. The questions cover various safety and compliance topics. At the bottom, a pagination bar shows 'Showing 1 to 10 of 55 entries' and a set of numbered links from 1 to 6, with '1' being the active page.

Title	Category	Status	Actions
Competency Assessment	Training & Competency	Published	Actions
Contractor All Risk Insurance	Insurance and Compliance	Published	Actions
PPE Maintenance	Health and Safety Management	Published	Actions
Prohibition Notices	Insurance and Compliance	Published	Actions
Approved Handlers	Environmental/Substances	Published	Actions
Toolbox/Tailgate Meetings	Health and Safety Management	Published	Actions
Subcontractor Management	Health and Safety Management	Published	Actions
Third Party Insurance	Insurance and Compliance	Published	Actions
Minimising Risk	Hazard Identification	Published	Actions
Lost Time Injuries	Insurance and Compliance	Published	Actions

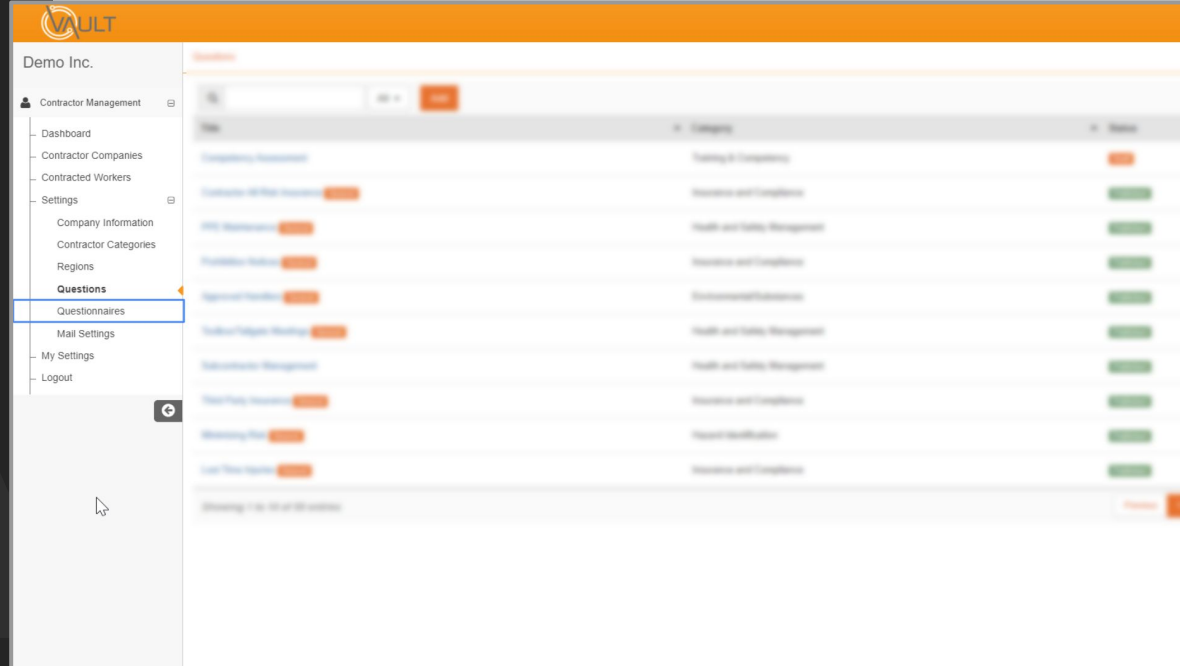
Showing 1 to 10 of 55 entries

Previous 1 2 3 4 5 6 Next

Vault Contractor Overview

Contractor Questionnaires

Contractor Risk Assessment Questionnaires are used to gather all the information required to Prequalify a contractor or subcontractor for your company.



Vault Contractor Overview

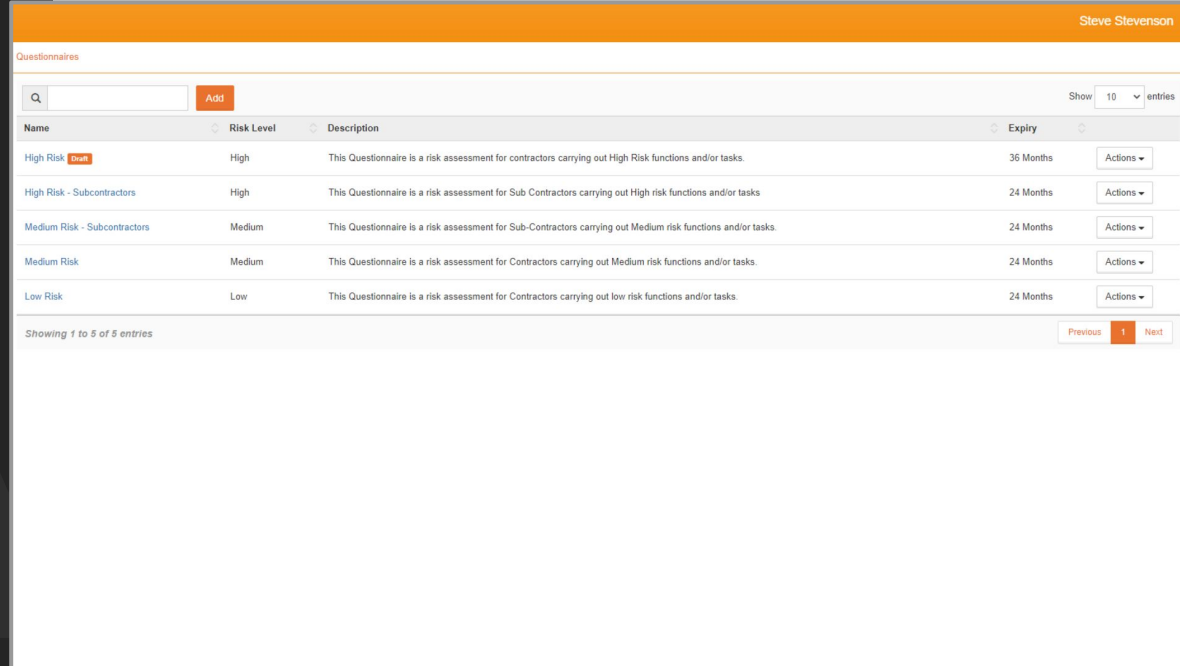
Contractor Questionnaires

Contractor Risk Assessment Questionnaires are used to gather all the information required to Prequalify a contractor or subcontractor for your company.

Existing Questionnaires are listed in the Questionnaires register:

With their applicable name, assessment risk level, description and expiry period.

Creating and managing these Questionnaires is covered off in detail in Part 2 of the Creating Questionnaires series.



The screenshot shows a web interface for managing contractor questionnaires. At the top right, the user 'Steve Stevenson' is logged in. Below the header, there is a search bar with a magnifying glass icon and an 'Add' button. To the right of the search bar, it says 'Show 10 entries'. The main content is a table with the following columns: Name, Risk Level, Description, and Expiry. There are five entries in the table, each with an 'Actions' dropdown menu. The entries are: 'High Risk' (with a red 'New' tag), 'High Risk - Subcontractors', 'Medium Risk - Subcontractors', 'Medium Risk', and 'Low Risk'. The descriptions for each entry are: 'This Questionnaire is a risk assessment for contractors carrying out High Risk functions and/or tasks.', 'This Questionnaire is a risk assessment for Sub Contractors carrying out High risk functions and/or tasks.', 'This Questionnaire is a risk assessment for Sub-Contractors carrying out Medium risk functions and/or tasks.', 'This Questionnaire is a risk assessment for Contractors carrying out Medium risk functions and/or tasks.', and 'This Questionnaire is a risk assessment for Contractors carrying out low risk functions and/or tasks.' respectively. At the bottom of the table, it says 'Showing 1 to 5 of 5 entries'. On the far right, there are 'Previous', '1', and 'Next' buttons.

Name	Risk Level	Description	Expiry	
High Risk New	High	This Questionnaire is a risk assessment for contractors carrying out High Risk functions and/or tasks.	36 Months	Actions ▾
High Risk - Subcontractors	High	This Questionnaire is a risk assessment for Sub Contractors carrying out High risk functions and/or tasks	24 Months	Actions ▾
Medium Risk - Subcontractors	Medium	This Questionnaire is a risk assessment for Sub-Contractors carrying out Medium risk functions and/or tasks.	24 Months	Actions ▾
Medium Risk	Medium	This Questionnaire is a risk assessment for Contractors carrying out Medium risk functions and/or tasks.	24 Months	Actions ▾
Low Risk	Low	This Questionnaire is a risk assessment for Contractors carrying out low risk functions and/or tasks.	24 Months	Actions ▾

Showing 1 to 5 of 5 entries

Previous 1 Next

Vault Contractor Overview

Mail Settings

The last option in the settings table is mail settings, *Mail Settings* displays the templates used for emails auto generated within Vault Contractor dependent on a given scenario.

The screenshot shows the Vault Contractor web application interface. The top navigation bar is orange with the Vault logo. The left sidebar is white and contains a menu for 'Demo Inc.' with options: Contractor Management, Dashboard, Contractor Companies, Contracted Workers, Settings, Company Information, Contractor Categories, Regions, Questions, Questionnaires, Mail Settings (highlighted), My Settings, and Logout. The main content area is white and displays a table of mail settings. The table has columns for Name, Mail Level, and Description. There are five rows of data, each representing a different mail template. The first row is highlighted in orange. Below the table, there is a button labeled 'Showing 1 of 5 mail settings'.

Name	Mail Level	Description
High Risk	High	This Questionnaire is a risk assessment for contractors working on High Risk facilities under water.
High Risk - Subcontractors	High	This Questionnaire is a risk assessment for Sub Contractors working on High Risk facilities under water.
Medium Risk - Subcontractors	Medium	This Questionnaire is a risk assessment for Sub Contractors working on Medium Risk facilities under water.
Medium Risk	Medium	This Questionnaire is a risk assessment for Contractors working on Medium Risk facilities under water.
Low Risk	Low	This Questionnaire is a risk assessment for Contractors working on Low Risk facilities under water.

Vault Contractor Overview

Mail Settings

If required, each of the default emails can be modified to more accurately reflect your business's communication requirements.

Simply **expand** the edit window and update the elements of the existing templates...or perform a complete rewrite using the standard formatting tools provided then save.

Vault Contractor Overview

Mail Settings

Contractor Management Settings / Mail Settings

Contractors Prequalifications Expiry Items

Add Contractor Add Contractor - No Prequalification Add Contractor - No Prequalification - Existing Company Add Contractor - to Manager Contact Change Authorize company Vault Import

☒ Use the default template [Reset to Default Template](#)

Subject
New Prequalification

Mail Content
<%name%> <%companyemail%> <%company%> <%portalink%>

Source B I U L Text Color Background Color Bulleted List Numbered List Indent Outdent Link Unlink

Styles Format Font Size A B Table Link

Hello <%name%>

A new pre-qualification has been assigned to you by <%company%> within Vault Contractor. To complete the pre-qualification process you will be required to:

- Complete Registration/login to Vault Contractor.
- Accept <%company%> Terms & Conditions.
- Complete the assigned pre-qualification.

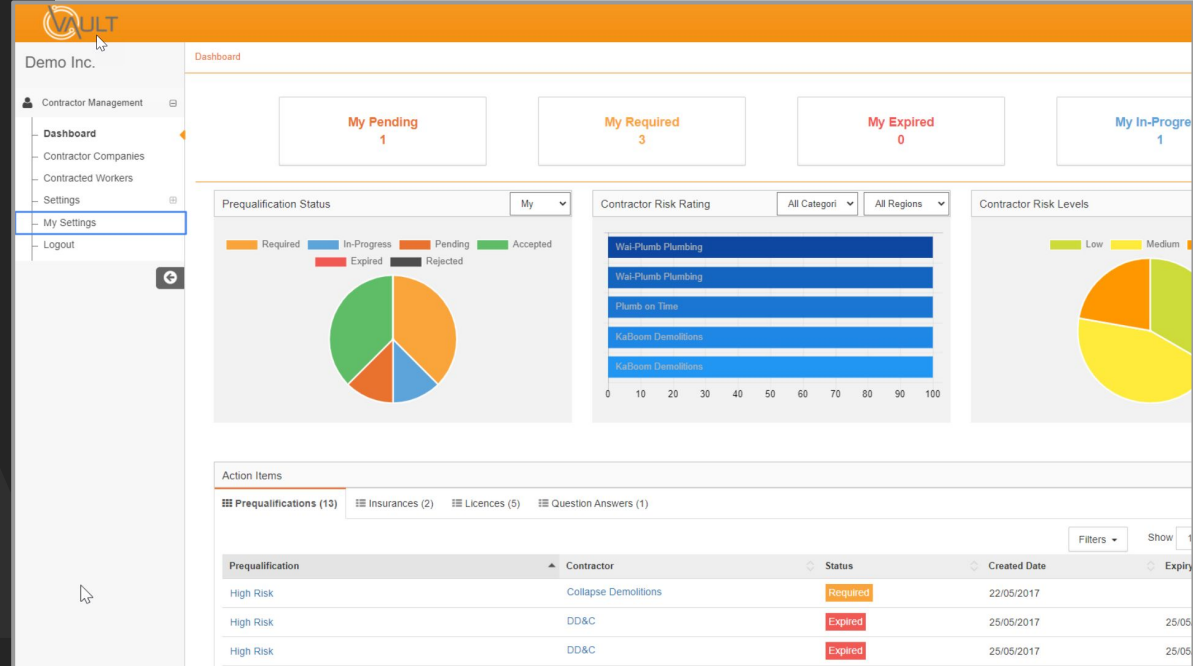
body table tbody tr td h3 strong

[Save](#)

Vault Contractor Overview

My Settings

The My Settings function allows you to set the basic configuration items for your personal iteration of Vault Contractor.



Vault Contractor Overview

My Settings

Those basic configuration items are:

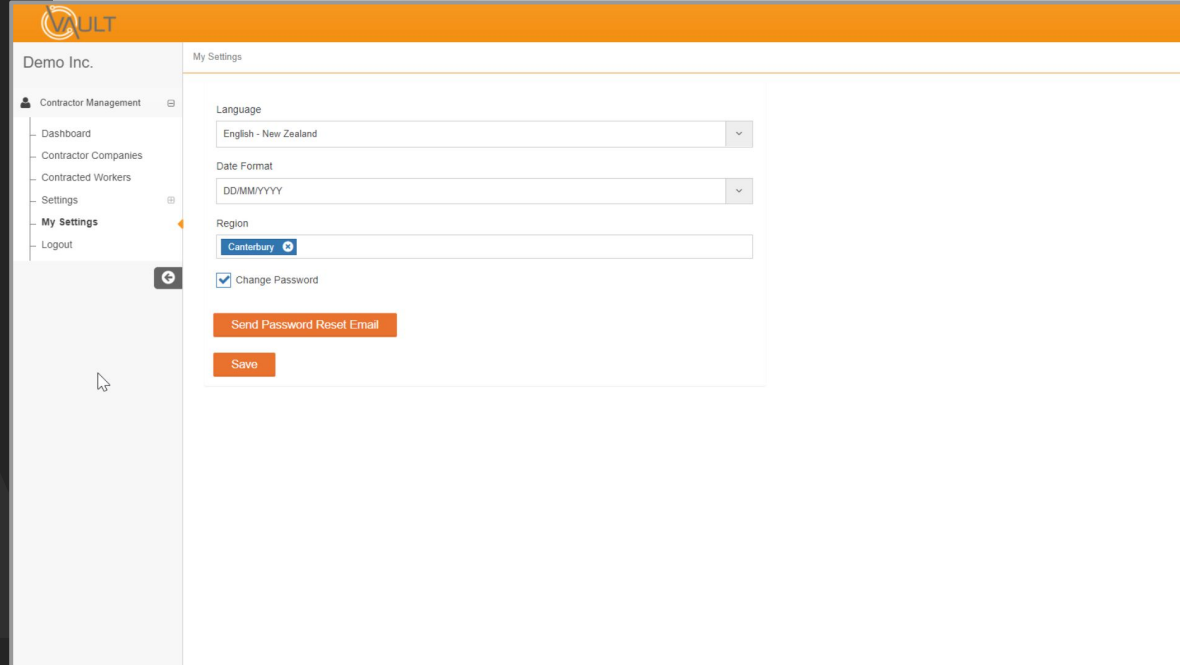
Language

Date formats

Region

the region sets your initial default contractor search within the set regional parameters.

If required you can also instigate a *password reset* process by sending a password reset email.



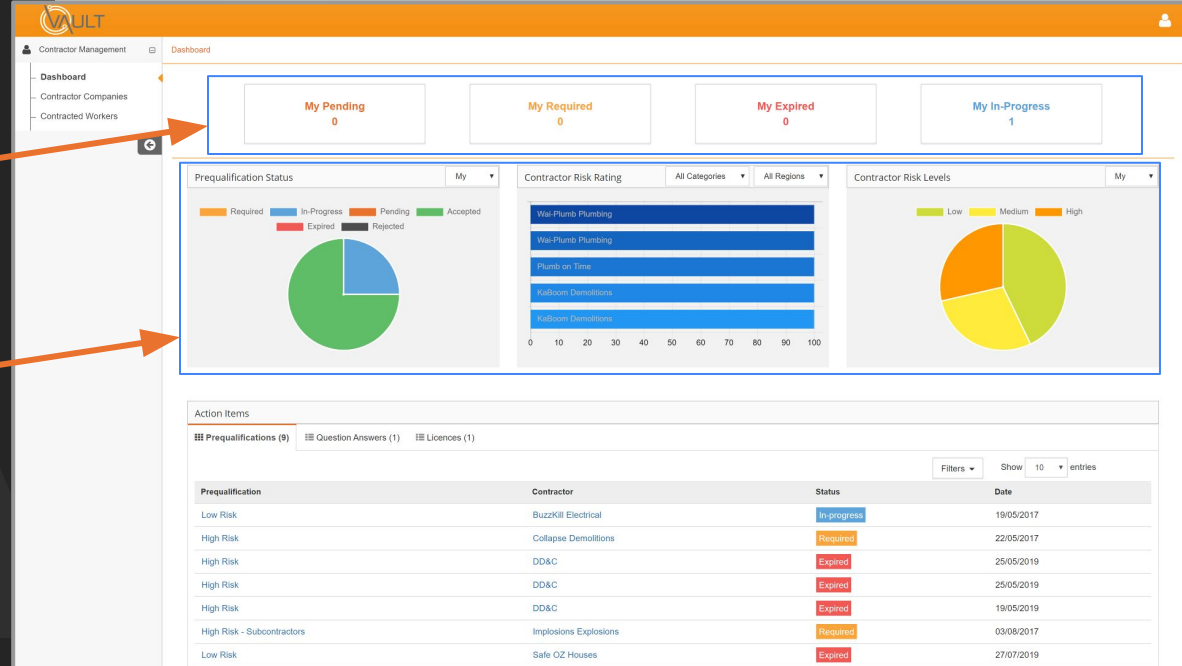
The screenshot displays the 'My Settings' page within the Vault Contractor Overview application. The interface features a dark sidebar on the left with a navigation menu containing 'Dashboard', 'Contractor Companies', 'Contracted Workers', 'Settings', 'My Settings' (highlighted), and 'Logout'. The main content area has an orange header bar with the 'VAULT' logo and the text 'Demo Inc.' and 'My Settings'. Below the header, the settings are organized into sections: 'Language' with a dropdown menu set to 'English - New Zealand', 'Date Format' with a dropdown menu set to 'DD/MM/YYYY', and 'Region' with a dropdown menu set to 'Canterbury'. A checkbox labeled 'Change Password' is checked. Below these settings are three orange buttons: 'Send Password Reset Email', 'Save', and a 'Logout' button. The overall design is clean and professional, with a focus on user configuration.

Vault Contractor Overview Dashboard

As previously mentioned, the dashboard organises most of your relevant information and tasks at a glance.

The My Actions tiles allow you direct access to all the current Prequalifications being actioned by contractors you are managing.

The Pie Charts present a breakdown of all contractor companies registered within your Vault contractor relative to their Statuses and associated Risk Level, both at an individually assigned and global level



Vault Contractor Overview

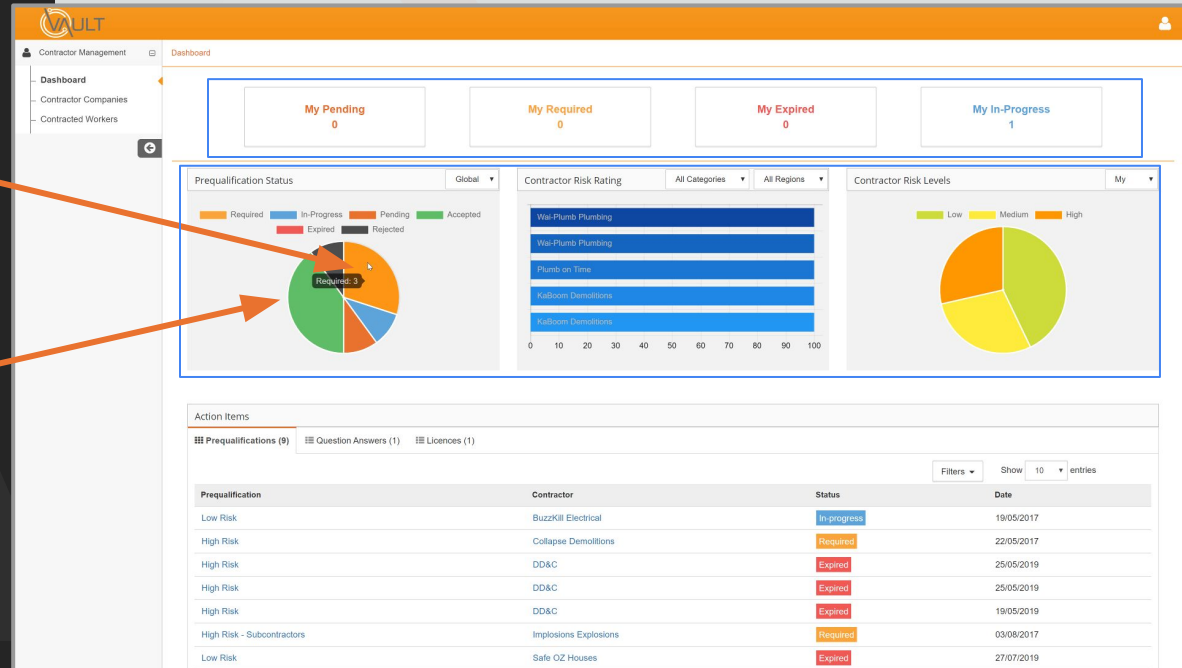
Dashboard Pie Charts

Each Segment of a pie chart represents the Number of contractors associated.

For example in the Prequalification status chart under My, there are currently 3 Contractors with a 'Required' status.

To See these Contractors simply click on the segment and you'll be taken to the Contractor Companies register, filtered by the status of Prequalification required.

Both Pie charts have this built in functionality to allow for direct quick and easy filtering of the Companies register.

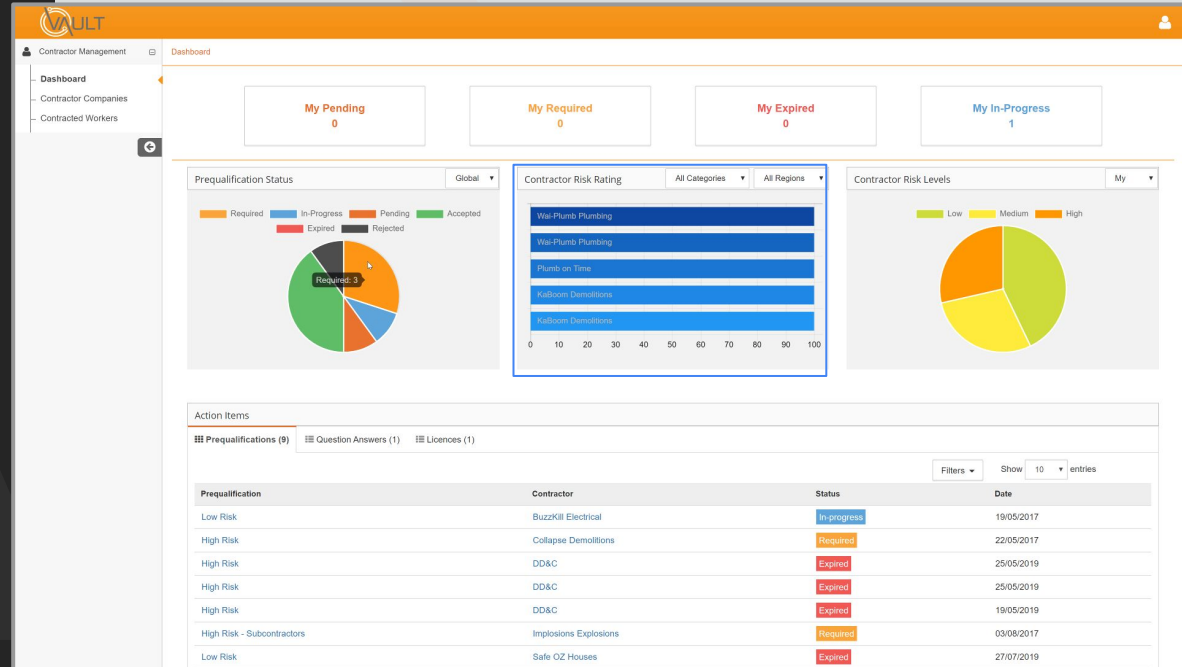


Vault Contractor Overview

Dashboard Bar Graph

The Bar graph displays the top 5 Accepted status Contractors by Prequalification score.

This allows you to filter by contractor region and category - your default region can also be set in my settings, as covered earlier in this video, making standard searches more convenient.

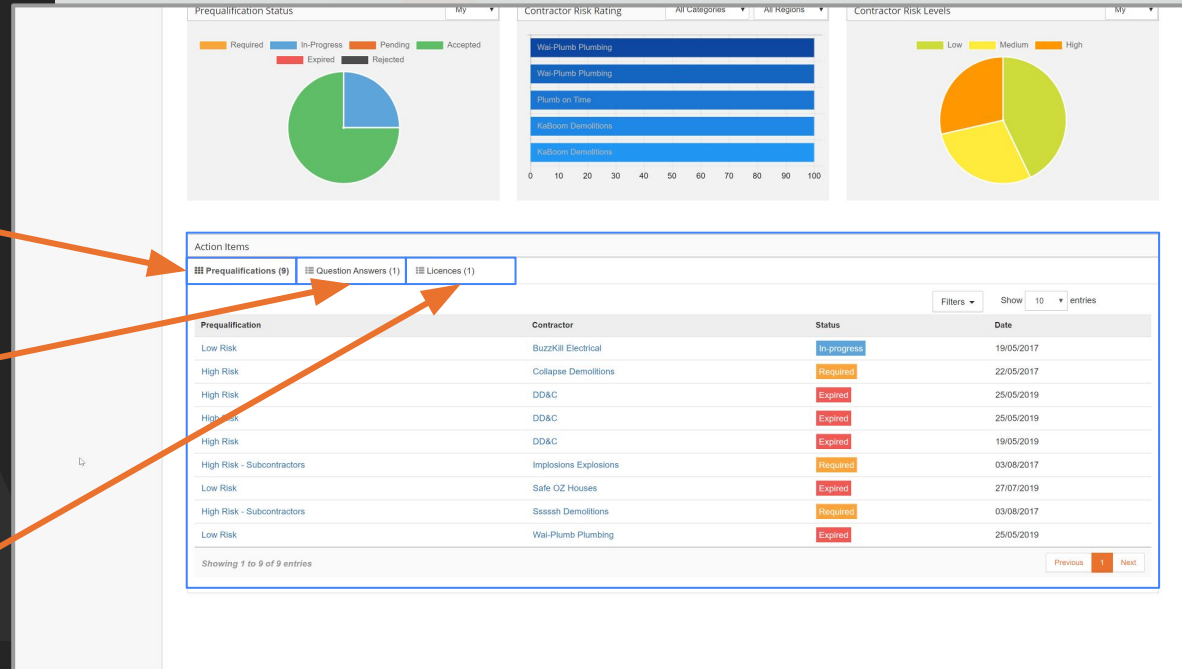


Vault Contractor Overview

Action Items

The Action Items table at the bottom of the page provides a quick, easy view of what items need action and is broken up into three tabs of data:

- Prequalifications shows all prequal's that require an action to be taken. Accepted and Rejected records are not shown as no actions are required for these statuses.
- Question Answers displays all 'expiring', 'expired' or 'revised' answers to the Prequalification questionnaire that require action.
- Licenses shows all 'expiring' or 'expired' License records for your Contractors.



Vault Contractor Overview

Contractor Companies

Another way to access all details relating to contractors is to go directly to the Contractor Companies register.

You can reorder the register by column type with a simple **click** on the column header or use the filter button.

Viewing, archiving or Removing the contractor record can be done via the Actions button

Links within the status and Company columns will also allow you to access related information.

Name	Categories	Regions	Status	Risk Level	Risk Score	
Buzzki	Electrical	--	In progress	Low	--	Actions
Collapse Demolitions	Explosive demolitions Cat 2	--	Required	High	--	Actions
DD&C	Transport Cat 2	Victoria	Accepted	High	100%	Actions
Implosions Explosions Sub	Explosive demolitions Cat 2	--	Required	High	--	Actions
Implosions Explosions	Explosive demolitions Cat 2	--	Rejected	High	--	Actions
KaBoom Demolitions	Explosive demolitions Cat 1, Transport Cat 2, Explosive demolitions Cat 2	Canterbury	Accepted	Low	100%	Actions
Plumb	Plumbing	Canterbury	Accepted	Low	100%	Actions
Safe OZ Houses	Electrical	--	Expired	Low	--	Actions
Sassah Demolitions Sub	Explosive demolitions Cat 1	--	Required	High	--	Actions
War Plumb Plumbing	Plumbing	Canterbury	Accepted	Medium	100%	Actions

Showing 1 to 10 of 10 entries

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Vault Contractor Overview

Company Details

Likewise if you **click** on the company name in the register you will be taken to the full Contractor company record, complete with all Basic company details,

The screenshot shows the 'Company Details' page for 'Wai-Plumb Plumbing' in the Vault Contractor Management system. The page is divided into a left sidebar with navigation links (Dashboard, Contractor Companies) and a main content area. The main content area has a top bar with 'Archive' and 'Remove' buttons. The 'Company Details' section contains a form with the following fields:

Name:	Wai-Plumb Plumbing
Type:	Contractor
Trading As:	Wai-Plumb Plumbing NZ
Country:	New Zealand
Business Number:	9424781365498
Business Nature:	Plumbing Contractor
Company Number:	NZBN 9424781365500
Incorporated Date:	01/01/2009
Physical Address:	44 Forth Street Forthnice -- Forthworth 4444
Postal Address:	44 Forth Street Forthnice -- Forthworth 4444
Contact Person(s):	Hauko Rimene Change
Email:	hauko@wailplumb.nz
Contact Number:	+64215489781
Login Link:	Create Login Link
Current Status:	Accepted
Contract Manager:	Steve Stevenson ▼
Allow Subcontractors:	Yes ▼

Below the form, there are four sections with expandable/collapsible icons:

- Prequalifications (2)
- Workers (0)
- Categories (1)
- Regions (1)

Vault Contractor Overview

Contractor Details Cont.

Prequalification information - from which you can again access the existing prequalification or initiate a new prequalification request & email by Selecting and Assigning New.

View all worker details for this company including first and last name, email, and contact number. You can also navigate directly to a worker by clicking their name.

View, manage and create the category or categories assigned to your contractor.

The screenshot displays the Vault Contractor Management interface. The left sidebar shows the navigation menu with 'Contractor Management' selected. The main content area is titled 'Contractor Companies - Wai-Plumb Plumbing' and includes 'Archive' and 'Remove' buttons. The 'Prequalifications (2)' section is highlighted with a blue box and an orange arrow. Below it, a table lists prequalification entries. The 'Workers (3)' section is also highlighted with a blue box and an orange arrow. The 'Categories (1)' section is highlighted with a blue box and an orange arrow. The 'Regions (1)' section is highlighted with a blue box and an orange arrow. The 'Contractor Relationships' and 'Subcontractors' sections are also visible.

Name	Manager	Status	Date	Actions
Low Risk	Steve Stevenson	Expired	25/05/2019	Actions
Medium Risk - Subcontractors	Steve Stevenson	Accepted	01/10/2021	Actions

Showing 1 to 2 of 2 entries

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Vault Contractor Overview

Contractor Details Cont.

Set a region for this company, by simply choosing a region and clicking Update or click Create New Region to add a new one. Note this can only be set once the company's prequal has been accepted.

And finally see any relationships this company has within contractor in the Contractor Relationships, and Subcontractors fields. If your company has any subcontractors view them under Subcontractors, and if your company is a subcontractor, you can view their contractor company under Contractor Relationships

The screenshot displays the 'Contractor Management' interface for a company named 'Wai-Plumb Plumbing'. The left sidebar shows a navigation menu with 'Dashboard', 'Contractor Companies', and 'Contracted Workers'. The main content area lists several sections: 'Company Details', 'Prequalifications (4)', 'Workers (3)', 'Categories (1)', and 'Regions (1)'. The 'Regions (1)' section is highlighted with a blue border and an orange arrow pointing to it from the text on the left. Below this, there is a 'Region' dropdown menu currently set to 'Canterbury', an 'Update' button, and a 'Create New Region' button. Further down, the 'Contractor Relationships' and 'Subcontractors' sections are also highlighted with blue borders and orange arrows pointing to them from the text on the left.

Vault Contractor Overview

Contractor Workers

If you wish to work directly with Contracted worker details just go straight to this detail via the Contracted Workers link in the left menu.

This will show a view of all existing contracted workers which can also be reordered using the column sort functionality.

Links within the Name and Company name columns will also allow you to access related information.

Worker Name	Contractor Company	ID Expiry	Actions
Catherine Crozier	DOMC	10/03/2022	Actions
Clayton Cotton	DOMC	16/06/2022	Actions
Dave McGowan	DOMC	28/07/2022	Actions
David Edgars	Wai-Plumb Plumbing	23/07/2025	Actions
David Van Boome	KaBoom Demolitions	21/03/2029	Actions
Deedee Cotton	DOMC	18/03/2021	Actions
Graeme Peters	DOMC	18/10/2019	Actions
Hauku Rimene	Wai-Plumb Plumbing	16/07/2026	Actions
Matthew Martin	Wai-Plumb Plumbing	16/07/2035	Actions
Rachel Van Boome	KaBoom Demolitions	22/07/2020	Actions

Showing 1 to 10 of 11 entries

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Vault Contractor Overview

Contractor Workers

This will allow you to access all details pertaining to this company with all the same functionality as previously shown.

The screenshot displays the 'Vault Contractor Management' web application. The left sidebar contains a navigation menu with 'Dashboard', 'Contractor Companies', and 'Contracted Workers'. The main content area is titled 'Contractor Companies / Wai-Plumb Plumbing' and features 'Archive' and 'Remove' buttons. The 'Company Details' section includes a form with the following information:

Name:	Wai-Plumb Plumbing
Type:	Contractor
Trading As:	Wai-Plumb Plumbing NZ
Country:	New Zealand
Business Number:	9424781365498
Business Nature:	Plumbing Contractor
Company Number:	NZBN 9424781365500
Incorporated Date:	01/01/2009
Physical Address:	44 Forth Street Forthnice -- Forthworth 4444
Postal Address:	44 Forth Street Forthnice -- Forthworth 4444
Contact Person:	Hauku Rimene Change
Email:	hauku@waiplymb.nz
Contact Number:	+64215489781
Login Link:	Create Login Link
Current Status:	Accepted
Contract Manager:	Steve Stevenson
Allow Subcontractors:	Yes

Below the details, there are four expandable sections: 'Prequalifications (2)', 'Workers (3)', 'Categories (1)', and 'Regions (1)'.

Vault Contractor Overview

Contractor Workers

OR you can use the Name Link to access all the basic details related to this worker, including viewing any licensing information loaded.

This concludes our look at Vault Contractor. Help with other Vault Contractor related topics is available in the support portal.

The screenshot displays the Vault Contractor Management interface. The top navigation bar is orange with the Vault logo. The left sidebar shows a menu with 'Contractor Management', 'Dashboard', 'Contractor Companies', and 'Contracted Workers'. The main content area is titled 'Contracted Workers' and features a search bar, a table of workers, and a detailed view of a selected worker.

Worker Name	Contractor Company	ID Expiry	Actions
Catherine Crozier	DD&C	10/03/2022	Actions
Clayton Cotton	DD&C	16/06/2022	Actions
Dave McGowan	DD&C	29/07/2022	Actions

The detailed view for 'Matthew' shows the following information:

- First Name: Matthew
- Middle Name: -
- Last Name: Martin
- Email: mmm@wajplumb.com
- Contact Number: +64274365987
- Contractor company: Waj Plumb Plumbing
- Driving Licence: Licence Number: PQ10101010, Version Number: 101, Expiry Date: 16/07/2035

