



Your People. Our Passion

Self Management Vault Contractor - Portal



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Self Management Introduction

Once you are Prequalified within Contractor Portal the ongoing process of 'Self Management' can begin.

This guide focuses on the steps of :

- Adding and managing users
- Adding and managing workers
- Adding and managing licences
- Adding and managing subcontractors
- And Adding and managing insurances

Add & Manage Users

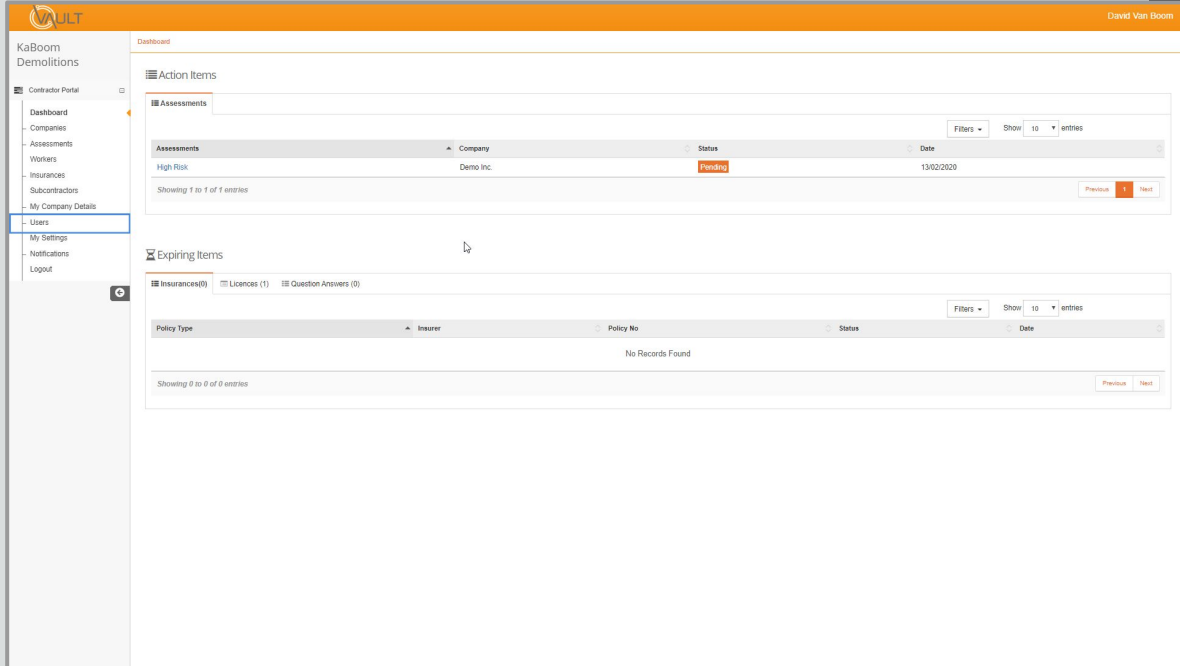
Add & Manage Workers

Add & Manage Licences

Add & Manage Subcontractors

Add & Manage Insurances

Self Management Introduction Cont.



The screenshot displays the 'Contractor Portal' interface for 'KaBoom Demolitions'. The left-hand navigation menu includes 'Dashboard', 'Companies', 'Assessments', 'Workers', 'Insurances', 'Subcontractors', 'My Company Details', 'Users' (highlighted with a blue box), 'My Settings', 'Notifications', and 'Logout'. The main content area is titled 'Dashboard' and features a 'Users' section. This section contains a table with columns for 'Assessments', 'Company', 'Status', and 'Date'. A single entry is visible: 'High Risk' assessment for 'Demo Inc.' with a status of 'Pending' and a date of '13/02/2020'. Below this table, there is a section for 'Expiring Items' with tabs for 'Insurances(0)', 'Licences (1)', and 'Question Answers (0)'. The 'Insurances' tab is active, showing a table with columns for 'Policy Type', 'Insurer', 'Policy No', 'Status', and 'Date'. This table is currently empty, displaying 'No Records Found'.

A portal User is anyone that has access to edit and manage information within your Contractor portal application. For example, any administration personnel.

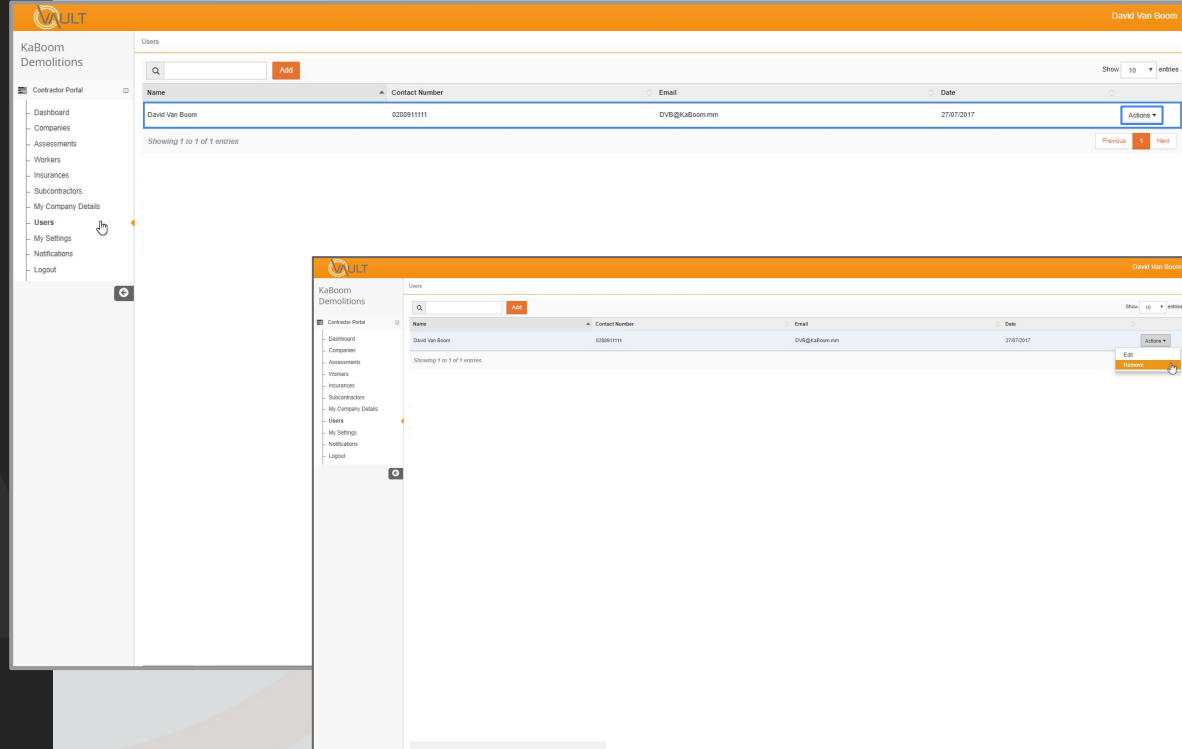
So adding a New user gives that person permissions and access to action all of the tasks contained within this video tutorial.

All users are listed within the Users register, which can be found in the left-hand menu bar.

Self Management Users

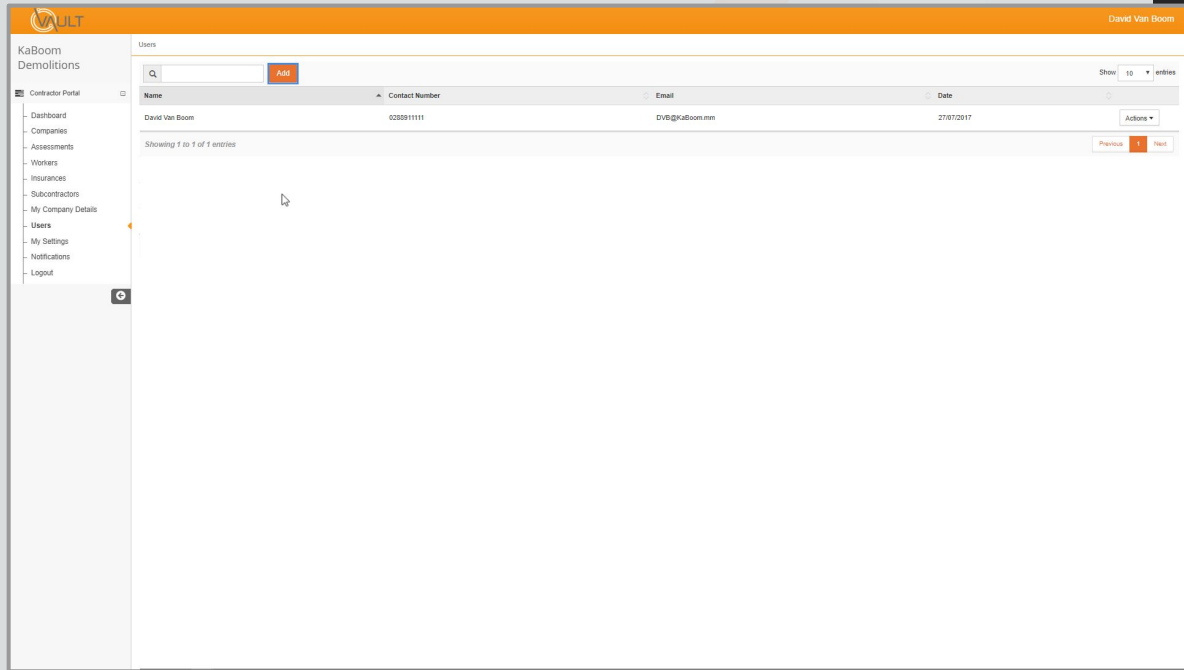
All existing user details will be displayed and can be edited or removed.

Note: removing a user does not delete them completely it just makes them inactive keeping any required historical data for reporting purposes.



Self Management

Adding a User



Adding a new user is done simply by **clicking 'Add'** and completing all fields.

Note that selecting Save sends an email to this new user allowing them to set up their own password access to your portal.

Repeat this process until all required users are set up.

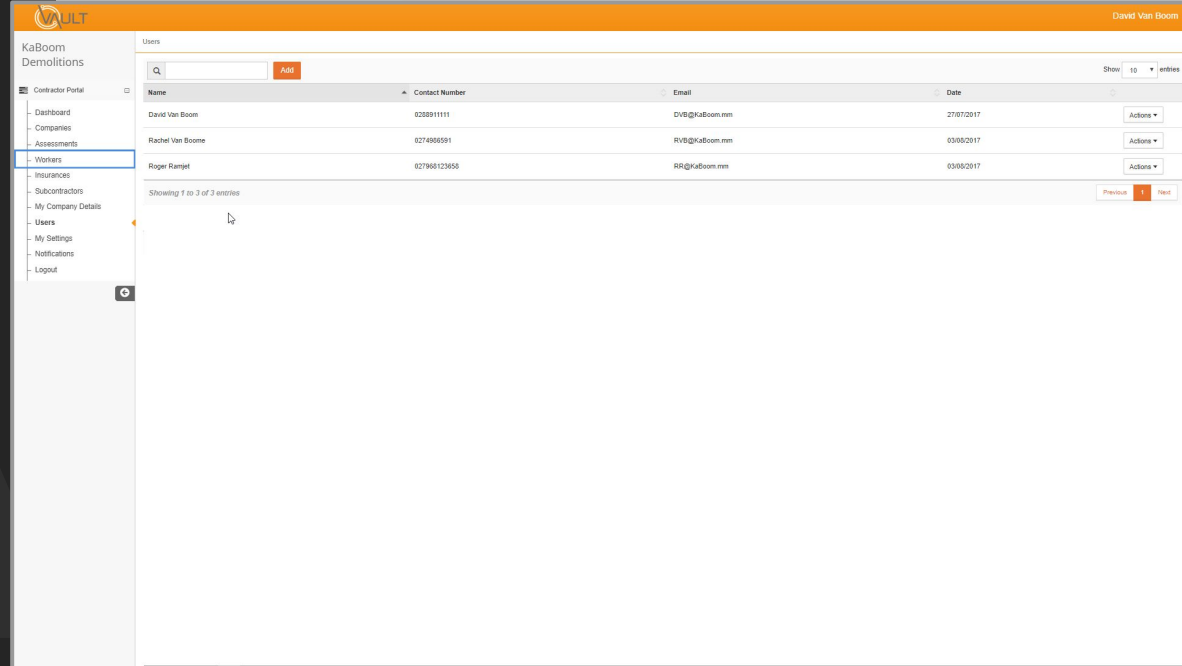
Self Management

Adding a Worker

Once adding users is completed, you can start setting up any workers you wish to load into Contractor Portal.

A worker is anyone how will be performing activities for any company you've been contracted too.

Again, all existing workers can be found via the left menu bar in the 'Workers' register,

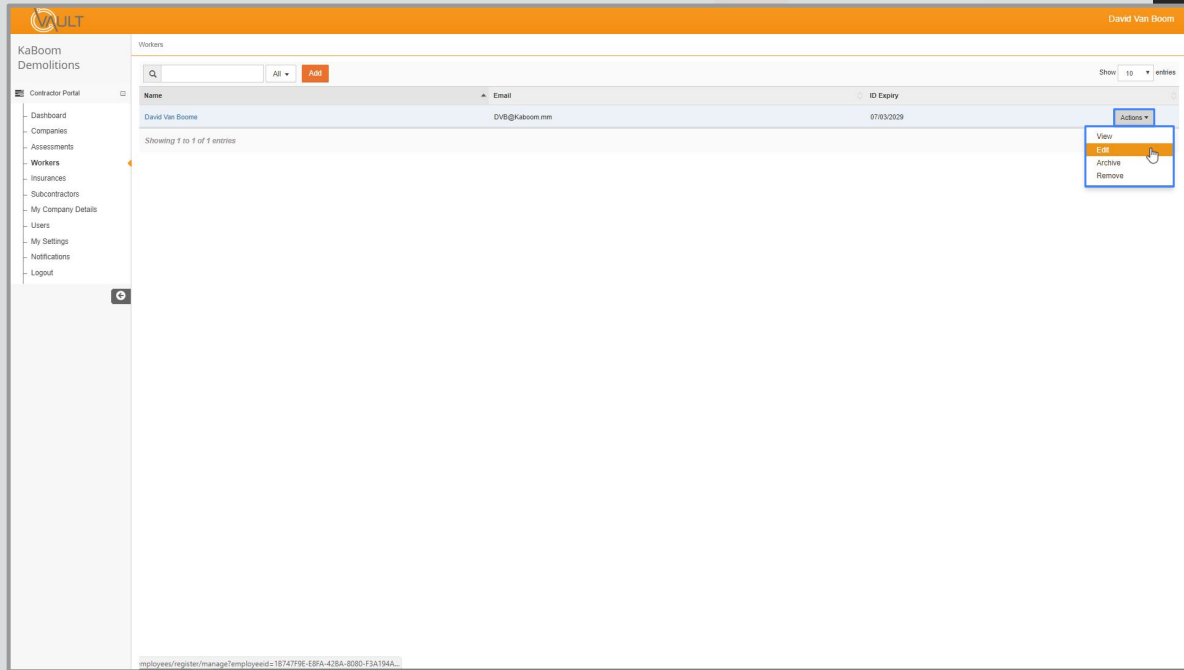


The screenshot shows the 'Users' register in the Contractor Portal. The left sidebar contains a menu with options: Dashboard, Companies, Assessments, Workers (highlighted), Insurances, Subcontractors, My Company Details, Users, My Settings, Notifications, and Logout. The main content area displays a table of users with columns for Name, Contact Number, Email, and Date. There are three entries listed. At the bottom of the table, it says 'Showing 1 to 3 of 3 entries'. Navigation buttons for 'Previous', '1', and 'Next' are visible.

Name	Contact Number	Email	Date	Actions
David Van Boom	0268911111	DVB@KaBoom.nm	27/07/2017	Actions
Rachel Van Boome	0274066591	RVB@KaBoom.nm	03/08/2017	Actions
Roger Ramjet	027968123456	RR@KaBoom.nm	03/08/2017	Actions

Self Management

Adding a Worker Cont.



From here you can 'view', 'edit', 'archive' and 'remove' all workers.

Archiving differs from remove, in that although both make the worker inactive, archiving means that you can retrieve all worker information without Vault assistance.



Self Management

Adding a Worker Cont.

Add a new worker and complete all the mandatory worker detail fields.

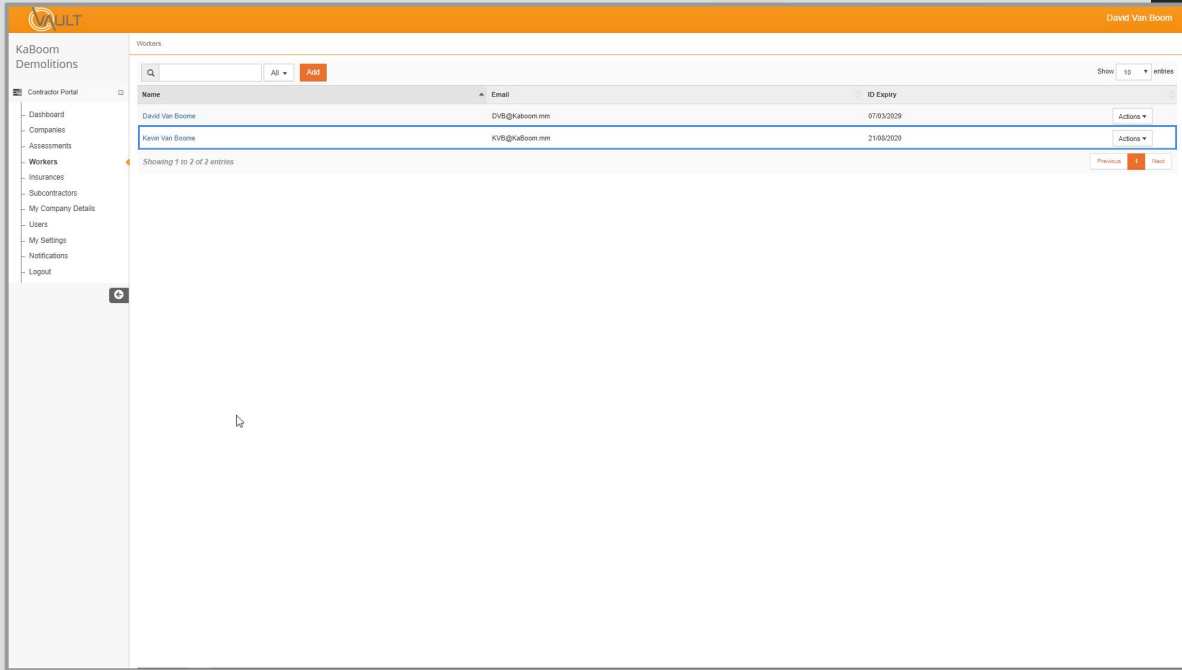
Ensure to correctly select the companies that this worker is going to be doing work for. This gives that company full access to view these worker details.

It's best practice to upload a scanned copy of the photo identification stated in the details.

The screenshot displays the 'KaBoom Demolitions Contractor Portal' interface. On the left is a sidebar menu with options: Dashboard, Companies, Assessments, Workers, Insurance, Subcontractors, My Company Details, Users, My Settings, Notifications, and Logout. The main content area is titled 'Portal / Worker / Add'. At the top, there are checkboxes for 'Mido Inc.' (checked) and 'Demo Inc.'. Below this, a section 'Companies that this worker will work for' contains a table with columns for First Name, Middle Name, Last Name, and Contact Number. The table has three rows: 'Kevin', 'Bucky', and 'Van Boome'. Below the table, there are fields for 'Contact Email' (KV@KaBoom.mm), 'Select Identification Type' (Driving Licence), 'Driver Licence Number' (PQ1236598), 'Driver Licence Version Number' (4), 'Driver Licence Expiry' (21/09/2020), and an 'Upload a copy of your identification' section with a file upload button. A file selection dialog is open, showing a folder named 'New folder' with various files, including 'no-driver-licence sample.jpg'. The dialog has 'Open' and 'Cancel' buttons. The bottom of the form has a 'Save' button.

Self Management

Adding a Worker Cont.



The screenshot displays the 'KaBoom Demolitions Contractor Portal' interface. On the left is a sidebar menu with options: Dashboard, Companies, Assessments, Workers (selected), Insurances, Subcontractors, My Company Details, Users, My Settings, Notifications, and Logout. The main content area is titled 'Workers' and features a search bar, a filter dropdown set to 'All', and an 'Add' button. Below this is a table with columns for Name, Email, ID Expiry, and Actions. Two workers are listed: David Van Boome (DVB@kaboom.com, 07/03/2029) and Kevin Van Boome (KVB@kaboom.com, 21/06/2028). The second row is highlighted. At the bottom of the table, it says 'Showing 1 to 2 of 2 entries' with 'Previous' and 'Next' buttons.

Name	Email	ID Expiry	Actions
David Van Boome	DVB@kaboom.com	07/03/2029	Actions
Kevin Van Boome	KVB@kaboom.com	21/06/2028	Actions

Once updated the new worker details will display in the worker register.

And again, repeat this process for as many workers as are required.

Self Management

Adding a Licence

After adding your worker, next add any additional licences that may be required.

To do this, first we need to edit the worker you wish to add an additional licence to by clicking 'Actions', then 'Edit'.

The screenshot shows the 'KaBoom Demolitions' Contractor Portal. The user 'David Van Boom' is logged in. The 'Workers' section is active, displaying a table with three workers. An 'Actions' dropdown menu is open for the worker 'Stewart Graham', showing options: View, Edit, Archive, and Remove.

Name	Email	ID Expiry
David Van Boome	DVB@KaBoom.mm	8/13/2024
Kevin Van Boome	KVB@KaBoom.mm	21/08/2026
Stewart Graham	Stewart@KaBoom.mm	06/03/2025

Showing 1 to 3 of 3 entries

Self Management

Adding a Licence Cont.

The screenshot shows the 'Licences' tab for a worker named David Van Boome. The left sidebar contains a navigation menu with options like Dashboard, Companies, Assessments, Workers, Insurances, Subcontractors, My Company Details, Users, My Settings, Notifications, and Logout. The main content area is divided into two sections: 'Personal Details' and 'Licences'. The 'Personal Details' section includes fields for First Name (David), Middle Name, Last Name (Van Boome), Contact Number (021 123 4567), Contact Email (DVB@kaboom.mm), Select Identification Type (Driving Licence), Driver Licence Number (PQ6598741), Driver Licence Version Number (4), and Driver Licence Expiry (07/03/2029). There is also a field for uploading a copy of the identification. The 'Licences' section displays a table with columns for Licence Type, Licence Number, Expiry Date, Comments, Files, and Active. A single licence is listed: Driving licence, PQ6598741, 07/03/2029, No file, and Active. An 'Actions' button is visible next to the licence, with a dropdown menu showing options: View, Edit, and Remove.

KaBoom Demolitions

Workers / David

Personal Details Licences

☐ Demo Inc.
☐ Medo Inc.

Companies that this worker will work for

First Name
David

Middle Name

Last Name
Van Boome

Contact Number
021 123 4567

Contact Email
DVB@kaboom.mm

Select Identification Type
Driving Licence

Driver Licence Number
PQ6598741

Driver Licence Version Number
4

Driver Licence Expiry
07/03/2029

Upload a copy of your identification
Upload File (in jpg, png (or) pdf only)

Save

KaBoom Demolitions

Workers / David

Personal Details Licences

Search Add

Licence Type	Licence Number	Expiry Date	Comments	Files	Active	Actions
Driving licence	PQ6598741	07/03/2029		No file	✓	View Edit Remove

Showing 1 to 1 of 1 entries

Then **click** 'Licences' tab.

Here you can view, edit and remove existing licences using the 'Actions' button.



Self Management

Adding a Licence Cont.

Or to add a new licence, click 'add', and complete all fields.

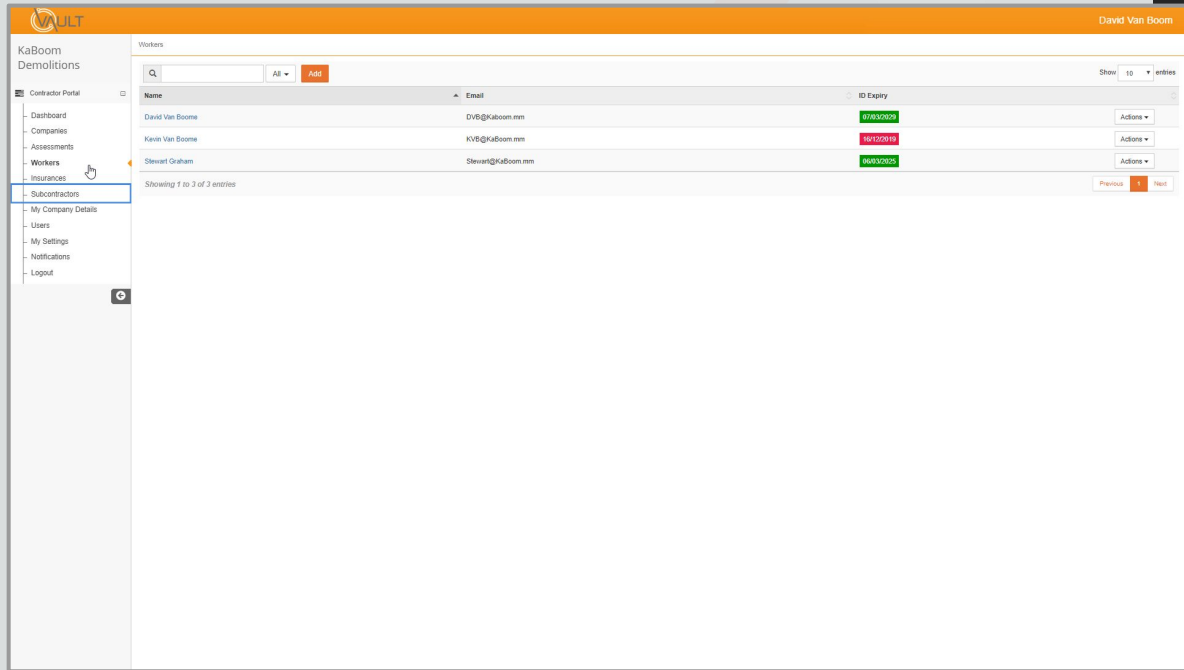
The image shows a screenshot of the KaBoom Demolitions web application. The main interface displays a table of licences under the 'Licences' tab. A table with one row is visible, showing a 'Driving licence' with the number 'PQ558741' and an expiry date of '6/16/2029'. The 'Add' button is highlighted in orange. An 'Add Licence' modal form is open in the foreground, containing the following fields:

- Licence Type:** A dropdown menu with 'Electrician' selected.
- Licence Number:** A text input field containing 'EC68871'.
- Issue Date:** A date input field with '27/08/2019'.
- Expiry Date:** A date input field with 'DDMMYYYY' and a checkbox for 'No Expiry'.
- Active:** A checkbox that is checked.
- Comments:** A text area.
- File:** A file upload field with a 'Browse' button and the instruction 'Upload file in jpg, png, pdf only'.

The modal form has 'Save' and 'Cancel' buttons at the bottom.

Self Management

Adding a Subcontractor



Now that your workers have been added, it's time to add any Subcontractors that will be engaged in work with you.

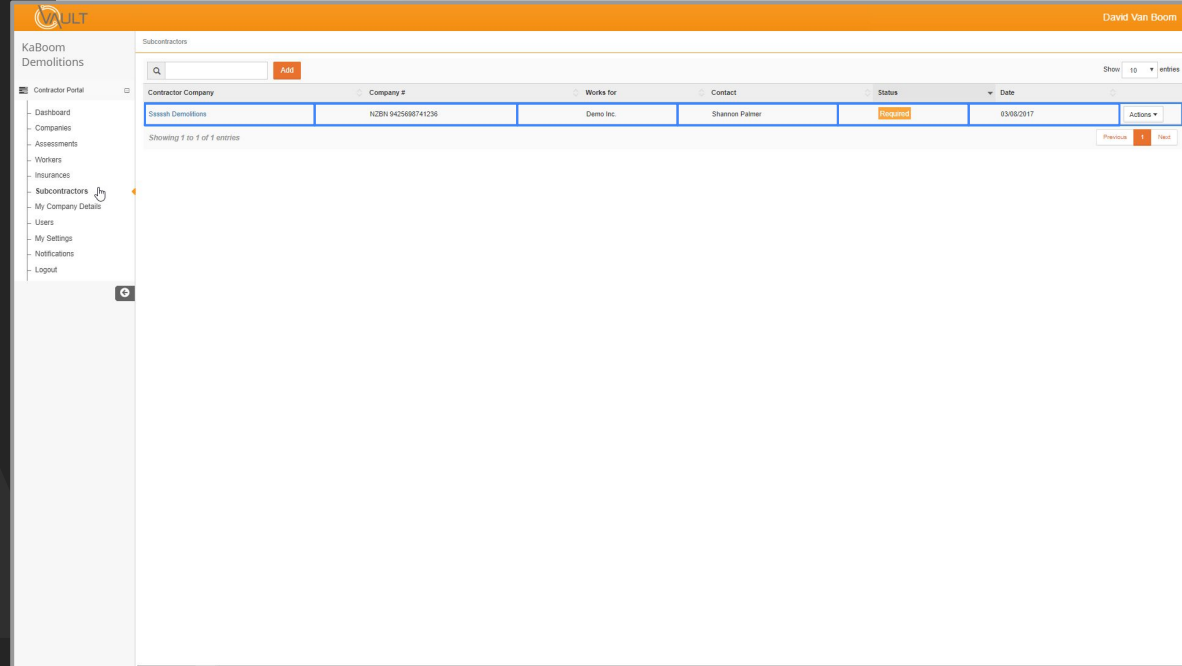
As with Users and Workers, Subcontractors have their own register within Contractor Portal also found in the left menu bar.

Self Management

Subcontractors Cont.

The subcontractors register displays:

- all current Subcontractors
- their Company Name
- company number
- the Company they are subcontracted for
- contact person
- status of current prequalifications
- and Created dates



The screenshot shows a web application interface for 'KaBoom Demolitions'. On the left is a sidebar menu with options: Dashboard, Companies, Assessments, Workers, Insurance, Subcontractors (highlighted), My Company Details, Users, My Settings, Notifications, and Logout. The main content area is titled 'Subcontractors' and features a search bar with an 'Add' button. Below this is a table with columns: Contractor Company, Company #, Works for, Contact, Status, and Date. A single entry is visible for 'Saweh Demolitions' with company number 'N28H 942568741236', working for 'Demo Inc.', contact 'Shannon Palmer', status 'Prequalified', and date '03/08/2017'. The status 'Prequalified' is highlighted in orange. At the bottom of the table, it says 'Showing 1 to 1 of 1 entries'. The top right corner of the interface shows the user 'David Van Boom'.

Contractor Company	Company #	Works for	Contact	Status	Date
Saweh Demolitions	N28H 942568741236	Demo Inc.	Shannon Palmer	Prequalified	03/08/2017

Self Management

Subcontractors Cont.

The screenshot shows the 'Subcontractors' management page in the KaBoom Demolitions system. The interface includes a sidebar with navigation links, a main content area with a table of subcontractors, and a top navigation bar. The table lists subcontractors with columns for Contractor Company, Company #, Works for, Contact, Status, and Date. A dropdown menu is open for the first entry, showing options: View, Archive, and Remove.

Contractor Company	Company #	Works for	Contact	Status	Date
Sasash Demolitions	NZBN 942588741236	Demo Inc.	Shannon Palmer	Accepted	03/08/2017

Showing 1 to 1 of 1 entries

The usual viewing of details, archiving and removal can also be actioned from this register.

Edit is not included in this functionality as once a Subcontractor has been added and accepted via prequalification it's their responsibility to manage their own information.

Self Management

Add a Subcontractor

Add a subcontractor and create the new subcontractor company by **clicking 'add'**, and completing all the mandatory company details with appropriate and accurate information.

The image displays two screenshots of the KaBoom Demolitions Subcontractors management interface.

Top Screenshot: Shows the 'Subcontractors' table with columns: Contractor Company, Company #, Works for, Contact, Status, and Date. A table entry for 'Seash Demolition' is visible. An 'Add' button is located in the top right corner of the table area.

Bottom Screenshot: Shows the 'Add' form for creating a new subcontractor. The form includes fields for: Company Name, Company #, Works for, Contact, Status, Date, Country, and Address. A 'Save & Send Request' button is at the bottom right.

Self Management

Add a Subcontractor Cont.

Ensure again to correctly select the companies that this Subcontractor is going to be doing work for, taking special note that the contact name and contact email relate to where and to whom this subcontractors prequalification will be sent.

Once saved the business number will relate to a unique system ID across all Vaults Core systems, which can only be modified by the Vault Support team.

Save & Send Request saves all the entered details into the Subcontractor register and starts the prequalification process for this subcontractor by sending a prequalification email request.

The screenshot shows the 'Subcontractors / Add' form in the Vault KaBoom Demolitions system. The form is titled 'Subcontractors / Add' and is located under the 'Contractor Portal' menu. The form fields are as follows:

- Companies that this worker will work for:** A checkbox list with 'Medo Inc.' and 'Demo Inc.' selected.
- Company Name:** 'Implosions Explosions' (highlighted in green).
- Country:** 'New Zealand' (selected from a dropdown menu).
- Business Number - Sole Trader? ():** 'NZBN 9423489725681' (highlighted in green).
- Contact Name:** 'Henry Russell' (highlighted in blue).
- Contact Email:** 'russ@impExp.mm' (highlighted in blue).
- Contact Number:** '02752498731' (highlighted in green).

At the bottom of the form, there are two buttons: 'Save & Send Request' (highlighted in orange) and 'Cancel' (highlighted in orange).

Self Management

Add Insurances

Finally, add any insurance policy details you might have in to the Insurances register which once again, can be found in the left menu bar.

The screenshot displays the 'KaBoom Demolitions' Self Management portal. The left sidebar menu is open, with 'Insurances' highlighted. The main content area shows a table of insurance policies. The table has columns for Type, Insurer, Amount, Policy No, Coverage, Start, Expiry, Media, and Status. Two entries are visible: 'Professional Indemnity Insurance' and 'Public Liability Insurance', both with an 'Active' status. The bottom of the page shows the URL: <https://cmtest.vaultintl.com/portal/insurances/register>.

Type	Insurer	Amount	Policy No	Coverage	Start	Expiry	Media	Status
Professional Indemnity Insurance	AM	1000000.00	8 32654812457	Professional Indemnity Insurance	15/06/2019	15/06/2021		Active
Public Liability Insurance	AM	1000000.00	PLJ 35588412740	Public Liability Insurance	20/11/2019	20/11/2021		Active

Self Management

Add Insurances Cont.

The screenshot displays the Vauld portal interface for 'KaBoom Demolitions'. The user is logged in as 'David Van Boon'. The 'Insurances' section is active, showing a table of insurance policies. The table has columns for Type, Insurer, Amount, Policy No, Coverage, Start, Expiry, Media, and Status. Two policies are listed: Professional Indemnity Insurance and Public Liability Insurance, both with an 'Active' status. A dropdown menu is open for the 'Actions' button of the first policy, showing options like 'Edit', 'Renew', and 'Deactivate'. The left sidebar contains navigation links for various portal features.

Type	Insurer	Amount	Policy No	Coverage	Start	Expiry	Media	Status
Professional Indemnity Insurance	AMI	10000000.00	IS 12654812457	Professional Indemnity Insurance	15/06/2019	15/06/2021		Active
Public Liability Insurance	AMI	10000000.00	PLI 30598412740	Public Liability Insurance	20/11/2019	20/11/2021		Active

Any previous insurance policies you initially added when filling out the prequalification questionnaire will be shown in the register, and can be renewed or deactivated using the actions button.



Self Management

Add Insurances

To add a new Insurance policy click 'Add' and fill in the details,

first by choosing the policy type from the picklist.

You can choose other to manually type in an insurance type if the options from the picklist do not apply.

Then fill in the rest of the mandatory fields, before clicking Save.

The screenshot displays the 'Insurances' management page in the KaBoom Demolitions system. The page features a sidebar with navigation links: Dashboard, Companies, Assessments, Workers, Insurances (selected), Subcontractors, My Company Details, Users, My Settings, Notifications, and Logout. The main content area shows a table of existing insurance policies with columns for Type, Insurer, Amount, Policy No, Coverage, Start, Expiry, Media, and Status. Two policies are listed: Professional Indemnity Insurance and Public Liability Insurance, both with an 'Active' status. Below the table, a modal window titled 'Add Insurance' is open, providing a form to add a new policy. The form includes a 'Policy Type' dropdown menu with options like Professional Indemnity Insurance, Public Liability Insurance, Workers Compensation Insurance, and Other. It also has fields for 'Coverage', 'Start Date', and 'Expiry Date', and a 'Drop files to upload' section for policy documentation. The 'Save' button is at the bottom right of the modal.

Type	Insurer	Amount	Policy No	Coverage	Start	Expiry	Media	Status
Professional Indemnity Insurance	AM	1000000.00	8 32654812457	Professional Indemnity Insurance	15/06/2019	15/06/2021		Active
Public Liability Insurance	AM	1000000.00	PLJ 36598412740	Public Liability Insurance	20/11/2019	20/11/2021		Active

Showing 1 to 2 of 2 entries

Buttons: Previous, Next

Modal Form Fields:

- Policy Type* (Dropdown)
- Select Policy Type (Text input)
- Coverage* (Text area)
- Start Date* (Date input)
- Expiry Date* (Date input)
- Drop files to upload (Policy Documentation)
- Save button

Self Management

Add Insurance Broker.

The screenshot displays the 'Vault' system interface for 'KaBoom Demolitions'. The top navigation bar is orange with the 'VAULT' logo and the user name 'David Van Boon'. The left sidebar contains a 'Contractor Portal' menu with options like Dashboard, Companies, Assessments, Workers, Insurances, Subcontractors, My Company Details, Users, My Settings, Notifications, and Logout. The main content area is titled 'Insurances' and features a table with columns: Type, Insurer, Amount, Policy No, Coverage, Start, Expiry, Media, and Status. The table lists three insurance entries: Professional Indemnity Insurance, Public Liability Insurance, and Workers Compensation Insurance. An 'Add/Edit Broker' button is visible in the top right of the table. A modal window titled 'Add/Edit Broker' is open, showing fields for Broker Name, Broker Contact Person, Email, Phone, and Address Information, with a 'Save' button at the bottom.

Type	Insurer	Amount	Policy No	Coverage	Start	Expiry	Media	Status
Professional Indemnity Insurance	AMI	10000000.00	IS 32654812457	Professional Indemnity Insurance	15/06/2019	15/06/2021		Active
Public Liability Insurance	AMI	10000000.00	PLU 30596412740	Public Liability Insurance	20/11/2019	20/11/2021		Active
Workers Compensation Insurance	AMI	2000000	32654812457	Workers Compensation Insurance	05/04/2020	05/04/2021		Active

To Add Insurance broker details **click** on “Add/Edit Broker”, and fill in the form.

Then **click** “Save”.

Click this button again to edit your Broker information.

Note: If you need to remove this information simply clear out the fields and **click** “Save” again.

