DAMSTRA
TRACK • MANAGE • PROTECT

USER RESOURCE

COMPANY PORTAL

Disclaimer

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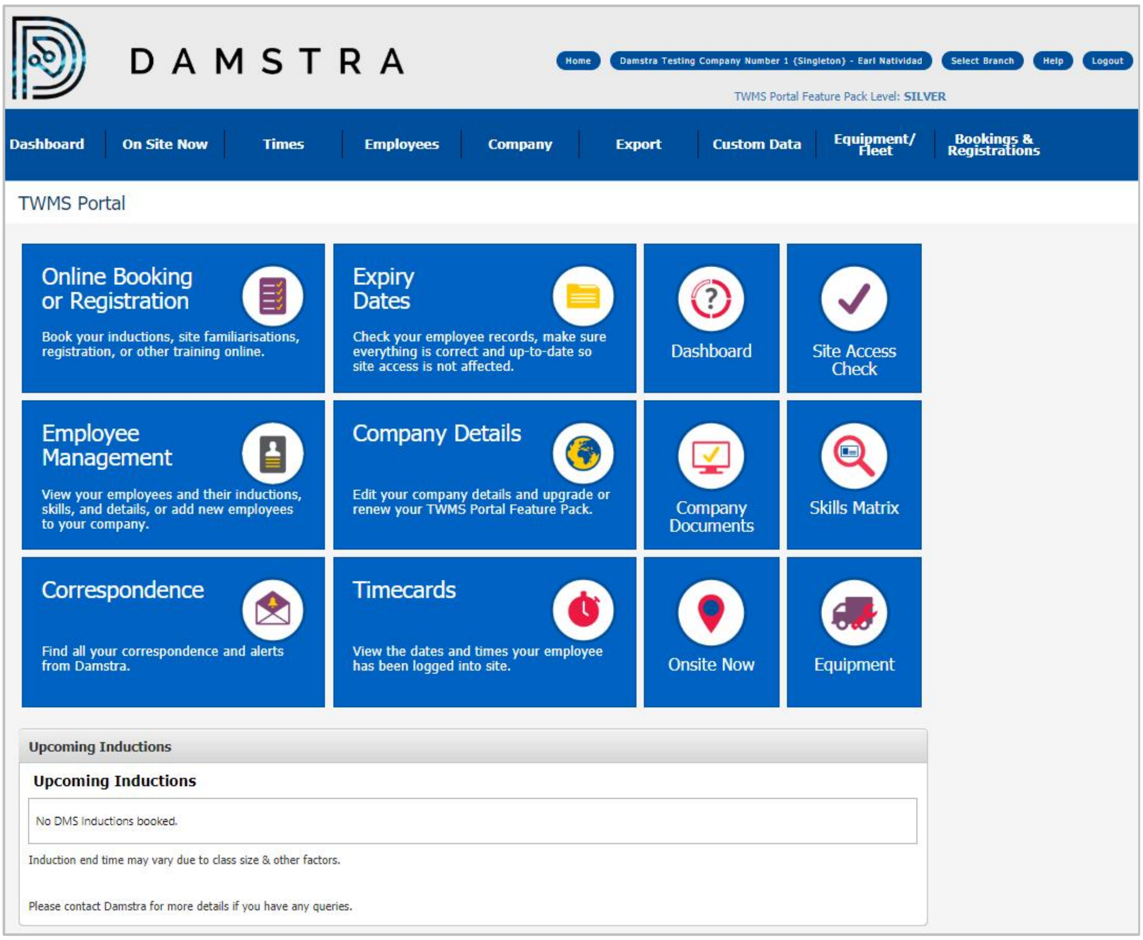
Company Portal User Resource

Company Portal Overview

After having registered your company, you will get an online, round-the-clock access to your employee and company information, and records via Damstra Technology's Company Portal. In this system, you will be able to:

- See what site your employees are on and keep track of work status onsite.
- Manage your employee's qualifications, compliance and skills online.
- Manage your company details, documents and compliances.
- View upcoming information that will expire.
- Access this information free of charge.



Features

1. **Home** – This displays the tabs and tiles that you can select to manage information of your company or of your employees.
2. **Account field** – This presents your Parent Company name, the branch, and your name. Clicking this allows you to edit your branch information.

3. **Select Branch** – This lets you select the branch of your company as your filter in managing company and employee data.
4. **Dashboard** – This page lets you view the expiry of your Company Portal account, recent employee shift activity, people on site now, fatigue alerts, quick reports, and upcoming inductions.
5. **On Site Now** – This page shows the list of active sites, employees who are on site now, and employees who have been on site within the last 24 hours.
6. **Times** – Click this when you want to search for employee timecards.
7. **Employees** – This tab lets you manage your employees regarding their skills, inductions, site access, transfers, and expiries.
8. **Company** – This tab lets you edit your branch information, manage branches and login accounts, and view documents/correspondences.
9. **Export** - This page allows you to export information about your employees and the times they worked. There are two different types of exports available: Employee List and Time Export.
10. **Custom Data** – This tab allows you to: create sites that are used only by your company and only for your records; create inductions that can be used for entering data for your employees and company; and assign company created inductions to employees of your company.
11. **Equipment/Fleet** – This page allows you to add new equipment/fleet, and view in-progress and approved registrations.
12. **Bookings & Registrations** – This allows you to book your inductions, site familiarisations, registrations, or other training online.
13. **Expiry Dates** – This page lets you check whether your employee records are correct and up-to-date. This is also found under "Employees".
14. **Site Access Check** – This shows the inducted employees in your worksite. This is also found under "Employees".
15. **Employee Management** – This allows you to add new employees and view your employees' profiles. This is also found under "Employees".
16. **Company Details** – This allows you to edit your company details and upgrade or renew your TWMS Portal Feature Pack. This is also found under "Company" as "Edit Company Details".
17. **Company Documents** – This page shows you essential information about your documents (expiry date and amount). You may also upload new company documents here. This is also found under "Company".
18. **Skills Matrix** – This allows you to customise your skills matrix report to meet your site-specific requirements. This is also found under "Employees" as "Skills Search".
19. **Correspondence** – This shows all the automated e-mails and alerts sent by Damstra to your company. This is also found under "Company".
20. **Timecards** – This lets you view the dates and times your employee has logged onto site. This is also found under "Times".

21. **Equipment** – This shows you past/upcoming inspections and allows you to book an inspection. This is also found as "Equipment/Fleet" in the top menu.

Adding New Employees

Note:

This is only required if your Employees have not been added to your Company Portal account before.

To complete this, you will need:

- Each employee's contact details
- Each employee's emergency contact person's details
- A passport style photo per employee
- Photo identification per employee

Before proceeding through the process of adding new employees, it is important to note the requirements in uploading photos and photo identification cards.

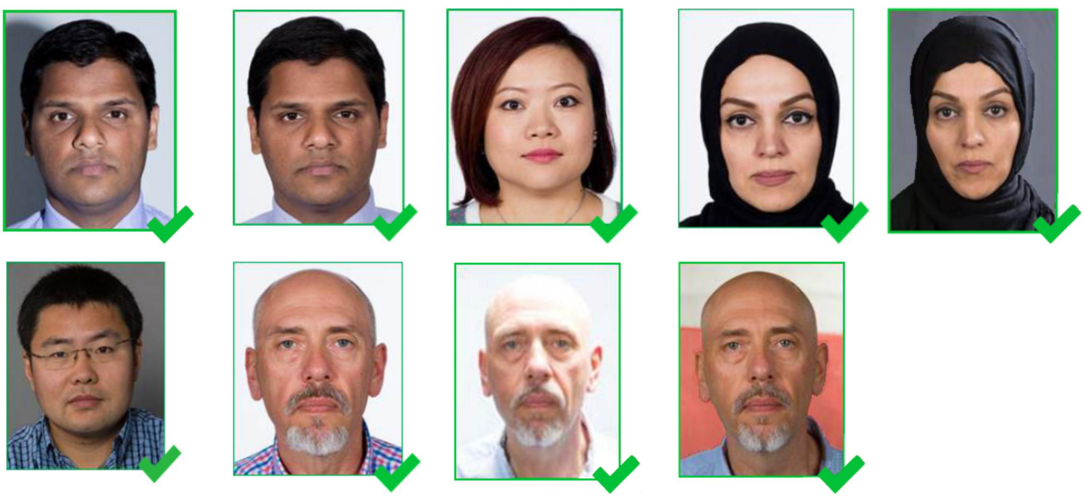
Profile Photo Requirements

To add a new employee in the Company Portal, a photo must be provided for identification purposes. Therefore, the photo should meet all the requirements listed below:

- Good-quality, colour image
- Eyes open and clearly visible
- No "red-eye" and no reflections on glasses or face.
- Show no head coverings (e.g. hat or sunglasses) except for religious purposes.
- Images must be JPG, JPEG, PNG, BMP, PDF, DOC, DOCX, or TIF and a maximum of 2MB each.

Otherwise, registration of your employee will be declined, and upload of another digital photo meeting the said requirements shall be made again.

Acceptable Photos



Unacceptable Photos

Reflection off glasses

Head tilted to side

Hair obscuring face

Side on to camera

Head covering obscuring eyes

Photo Identification Card Requirements

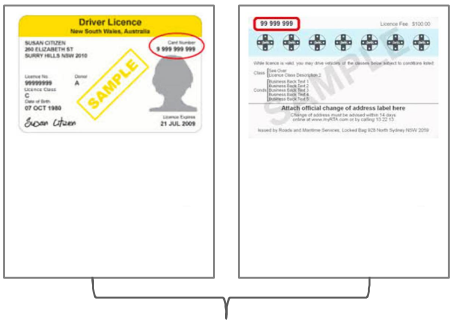
A proof of identification must be uploaded in the Company Portal to confirm the new employee being submitted and to approve their booking or registration. This can be a driver's licence, passport, photo card ID, or an authorised photo ID such as the Marine Licence – Victoria Australia.

To avoid this document being declined, you must meet the following requirements:

- Images must be JPG, JPEG, PNG, BMP, PDF, DOC, DOCX, or TIF and a maximum of 2MB each.
- Do not upload multiple photo identifications in one file.
- **For contractor registrations**, driver's licences should be no more than 2 years expired; passport and photo card IDs should be up-to-date.
- **For online bookings,** all photo IDs should not expire on or before the induction.
- Upload the front and back of each photo ID in one file or in separate files.

Acceptable Photos

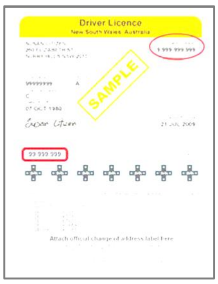
Front and Back in one file



Front and back in two separate files

Unacceptable Photos

Multiple documents in one file



Illegible information/details

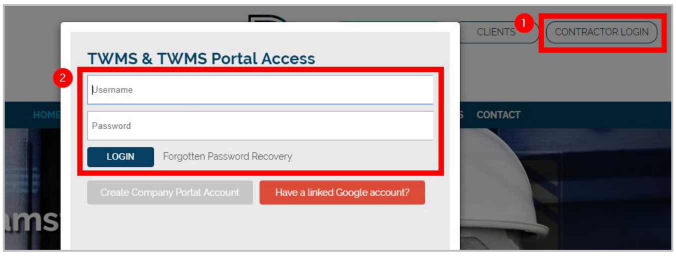
Note:

Most sites require a driver's license as a pre-requisite to induction. This is listed in the Letter of Competency to be included as supporting documentation.

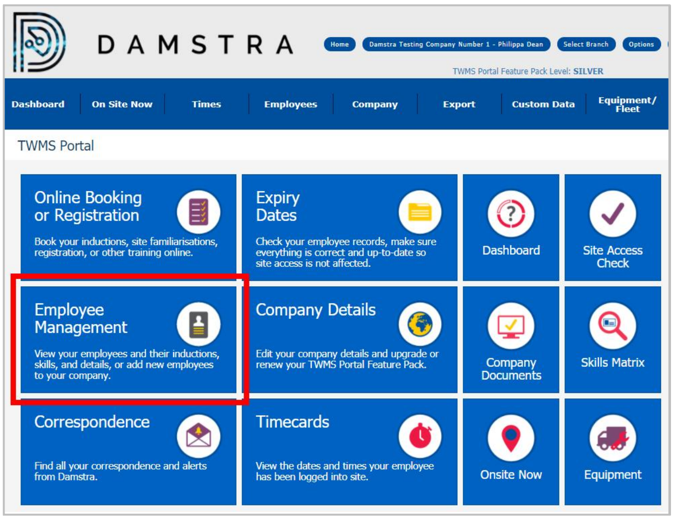
Steps in Adding New Employees

1. Go to the Damstra Technology website (www.damstratechnology.com).

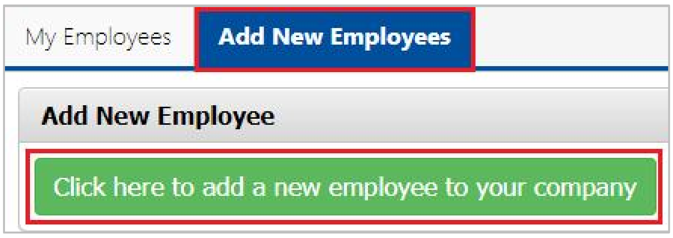
2. Click **Contractor Login** and enter your **Username** and **Password** provided to you in the email confirming your Company's registration with Damstra Technology. Then click **Login**.



3. Click on the **Employee Management** tile on the Dashboard of the Company Portal once logged in.

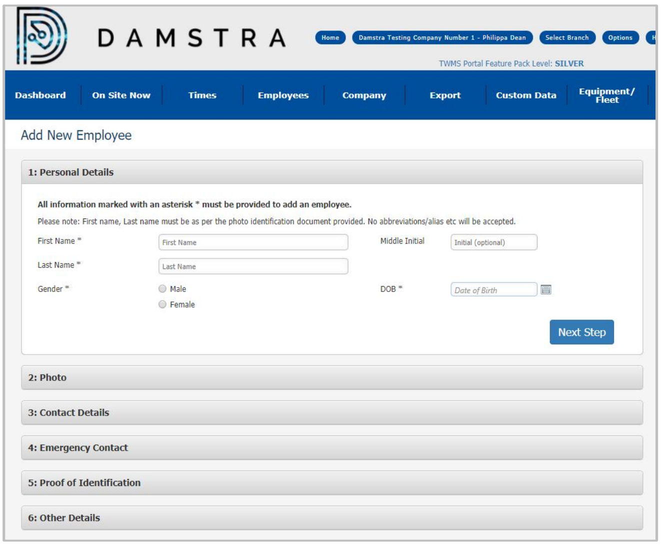


4. Click the **Add New Employee** tab and then the green button **Click here to add a new employee to your Company.**



5. Enter all details within the Add New Employee online form.
   - Personal Details
   - Photo
   - Contact Details
   - Emergency Contact
   - Proof of Identification
   - Other Details

> **Note:**
>
> The accordioned steps will not open out until the prior step is filled in.



6. Once all details are entered, click the green **Submit** button.

7. You may now repeat the above process of Adding an Employee for additional employees, as required.

Damstra Technology will now verify the new employee submission/s within 24 hours. Provided all details have been entered correctly for each employee, you will receive an email confirming the employee has been successfully verified and is now ready to be registered to work at your worksite.

Registering or Booking Employees

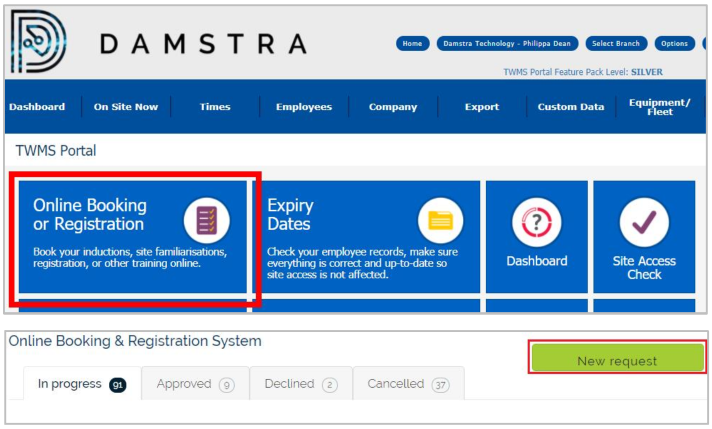
> **Note:**
>
> This is required to be completed for each employee, for each site that they will need to work on.

To complete this, you will need:

- To know the worksites your employees will be required to work on for the project
- To know what jobs/roles/tasks each employee will be likely to be completing within each worksite
- Copies of all relevant qualifications/licences/tickets/training records as evidence of competence for the employee to do these jobs/roles/tasks
- Company Insurances
- A credit card to complete payment of fees

1. Go to the Damstra Technology website (www.damstratechnology.com). Click **Contractor Login** and enter your **Username** and **Password** provided to you in the email from Damstra confirming your Company's registration with Damstra. Then **Login**.

2. From within the Company Portal, click **Online Booking or Registration** then click the **New request** button.

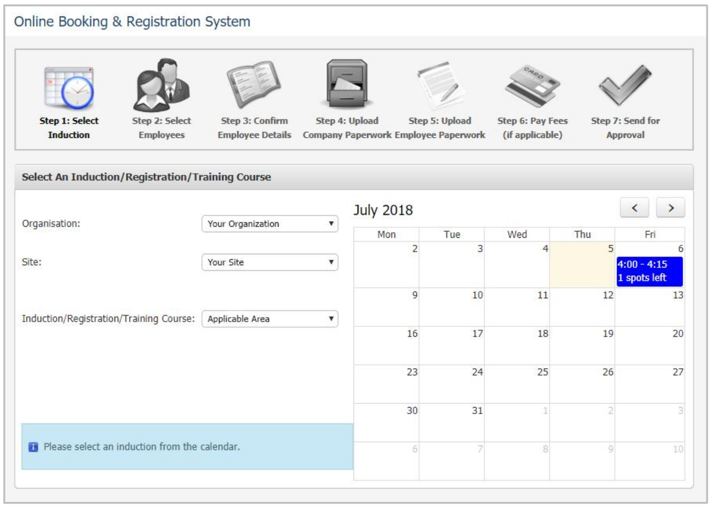


3. Choose your organisation from the **Organisation** dropdown list.

4. Choose from the dropdown list the worksite that you/your employees need to be registered/inducted for.

5. Choose the applicable area on the site from the dropdown list within **Induction/Registration/Training Course.**

6. Choose from the **Calendar view** what date and time you would like your employee/s to complete their **Induction/Registration/Training Course** for the applicable site location. The blue slots are available, the red slots are not available.



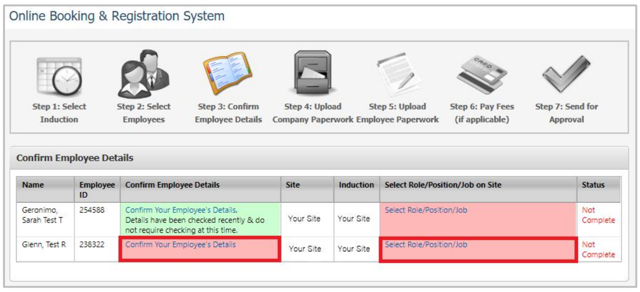
Note:

- Choosing the date and time slot **does not** confirm your employee will be able to attend this session. You must submit all required documentation and meet all requirements in this registration process successfully before your employee will be confirmed to attend an On Site induction/orientation for a worksite.
- If this is an online registration, the calendar will disappear when the worksite is chosen.

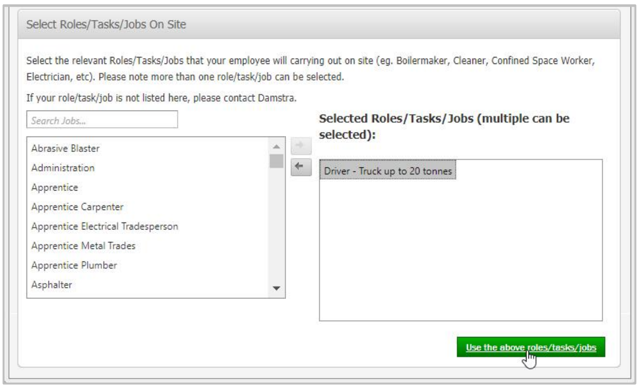
7. **Tick the box** confirming all information you will provide in this upcoming booking/registration process is true and correct, to your knowledge.

8. Scroll down the page and **tick the box/es** next to the name of the employee/s you would like to be registered for this site and that you would like to attend the previously selected On Site induction/orientation, pending all requirements are met. Then, click the green **Continue to Next Step** button.

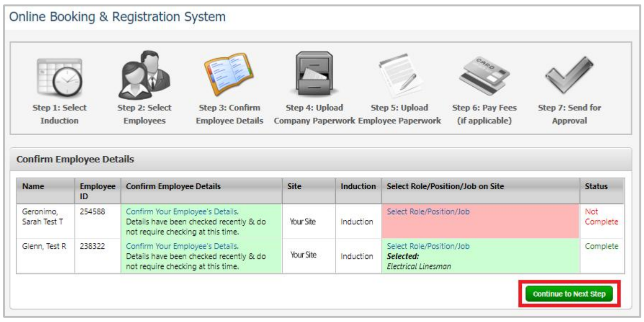
9. Click the **Confirm Your Employee's Details** hyperlink, review and/or amend the Employees details. If no changes were required, click the **Close Without Submitting** button. If changes were required, click the **Submit Changed Details** button.



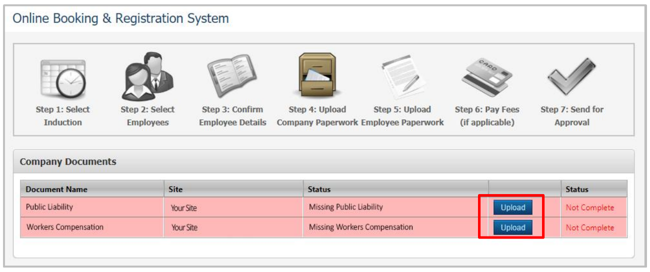
10. Click the **Select Role/Position/Job** hyperlink. Within the pop-up window, either use the search bar or scroll through the list to locate the roles/positions/jobs that the employee is likely to work within on this site. Click on a chosen item from the list and click the right arrow button to add the selection. Once one or multiple are selected, click the **Use the above roles/tasks/jobs** button.



11. Once all the items on screen have changed to highlighted in green, click the **Continue to Next Step** button.



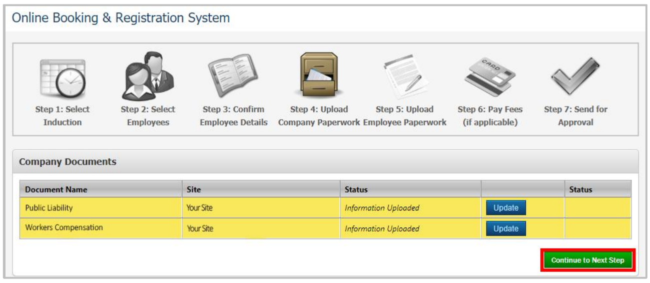
12. Click the **Upload** button and follow the instructions within the pop-up window completing all fields to upload your Company Contract. Click the **Close this window** hyperlink, once uploaded successfully.



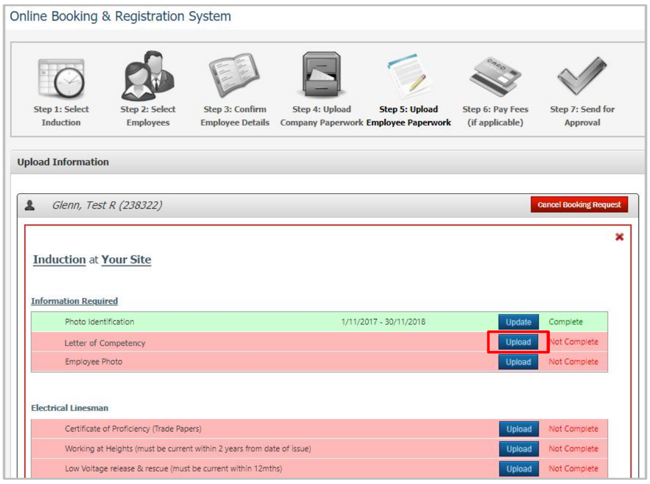
Note:

When the screen refreshes, you will notice the document requirement is now highlighted yellow. This means the document is now pending verification from Damstra Technology to confirm it meets all requirements. Once this document is verified by Damstra, you will not need to re-upload this document for any further employee registrations you complete, other than when the contract passes its expiry date and requires renewal.

13. Click the green **Continue to Next Step** button.



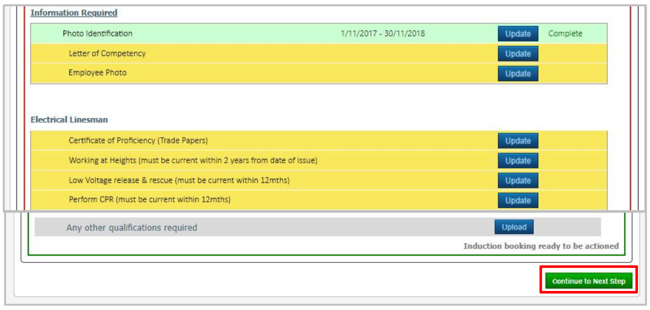
14. Within the **Upload Employee Paperwork** phase, several items of documentation will need to be provided per employee. **Upload** per employee all required documentations based on the previous selection of job roles.



Note:

These documents will only need to be uploaded once per employee while they are current documents, therefore, for site registrations they will already be loaded onto the employee's profile as evidence.

15. Once all document requirements have been uploaded, click the **Continue to Next Step** button.



16. Click the **Pay All Fees** button.

17. The price of the Induction will present onscreen. The induction fee per employee is valid for one year. Click the hyperlink for the 'Terms and Conditions' and read through to ensure you understand.

Repeat this process for the 'Privacy Policy'. Once satisfied, **tick the box** to confirm you have read and understand both.

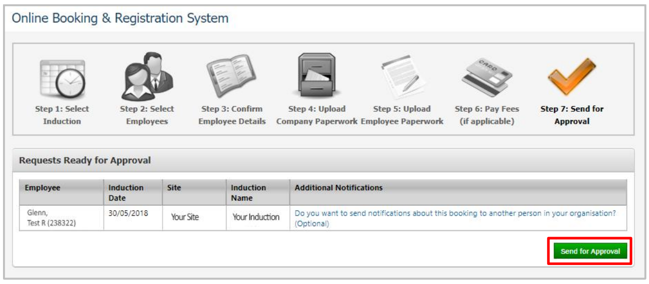
18. Click either **Proceed to Pay with Purchase Order** or **Proceed to Pay with Credit Card** and follow the steps onscreen to complete payment of the fee.

19. Click **Continue to Next Step**.

20. Lastly, review the details of the registration.

    If you would like to send a notification to another person, for example the employee themselves, you may click the hyperlink below **Additional Notifications**, type in the email address, click **Add Recipient** and close the pop-up window.

    Once satisfied everything is completed, click the **Send for Approval** button.



What happens next?

Processing an Online Registration

Damstra Technology reviews and verifies the registration/booking for the employee and ensures all documentation has been provided as per set requirement. This verification process will be completed **within a 24-hour period** at the most, but often it will be less. The company contact will receive an email advising when this has been completed.

Registration Approved

Once the registration/booking has been verified by Damstra Technology, an email will be sent to the company contact person confirming that all requirements have been met for the employee to attend the previously chosen date and time of the induction. The email will confirm the address & details of the induction.

Declined Documentation/Registration

If the submitted documentations or registrations are declined, you will receive an automated email outlining the reason. To submit amended item(s), log back into your company portal and re-upload the corrected documentation via the **Current Booking & Registration Requests in Progress page, In Progress tab.**

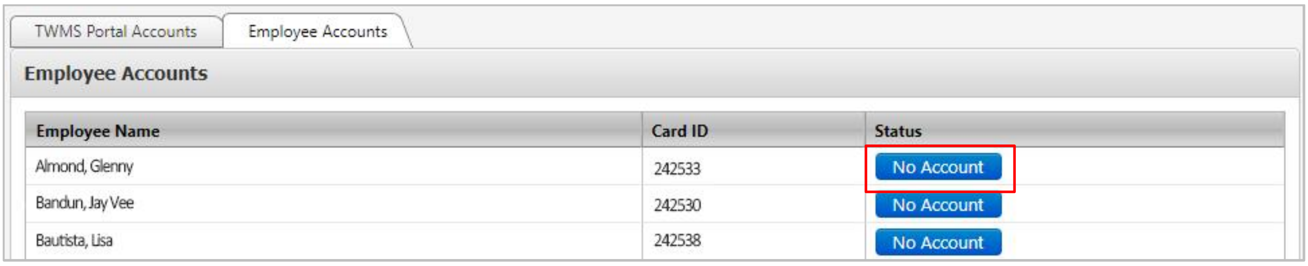
Attending the Induction

When the employee attends the induction at the chosen date and time, upon completion the facilitator will provide the employee with their Damstra Access Card, which is required to be used to log in and log out of the worksite.

Creating Employee Login Accounts

1. Click the **Company** tab, then select **Login Account Management**.

2. Click on **Employee Accounts** to view the employees have valid account, not verified account, and no account.



3. Click **No Account** next to the employee you wish to send a Username and Password to.

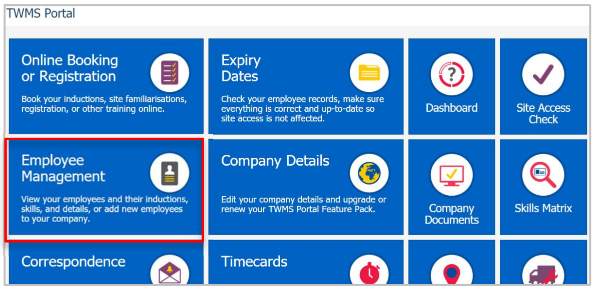
4. The employee email will pop; check if details are correct, then click **Create Account**.

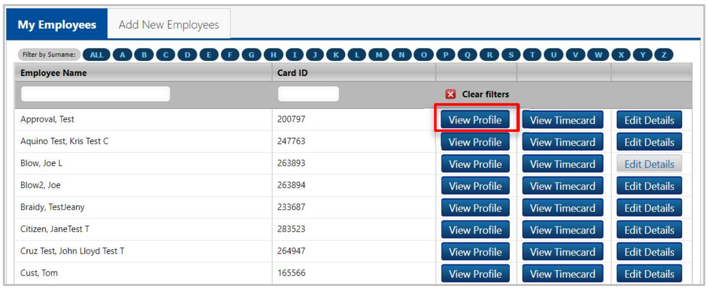
Note:

The employee will then receive an email that contains the Username and temporary password of your employee who you created an account for. These login credentials can be used to open their TWMS Mobile App (Employee Portal view) and their Employee Portal website.

Viewing Employee Details

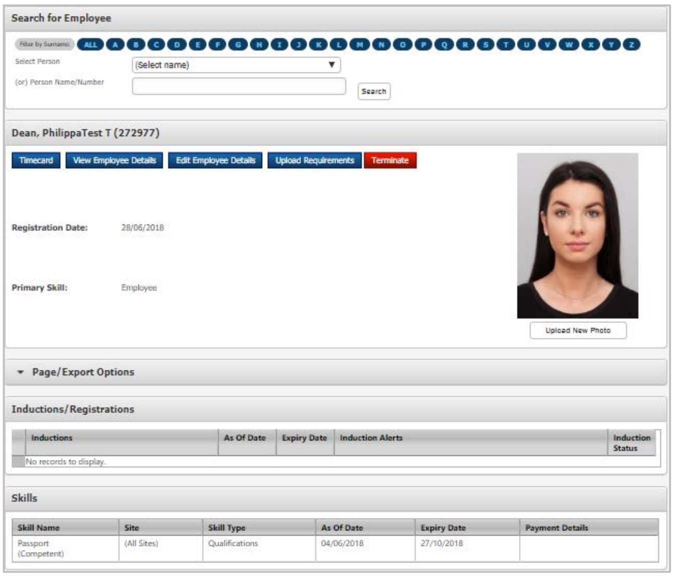
1. Select **Employee Management**, then click **View Profile.**





2. You will be taken into your employee's profile page where you can:

   - Edit and update your employee details and upload new qualifications,
   - Terminate employees that are no longer employed by your company, and
   - View documentation stored against employee profiles.

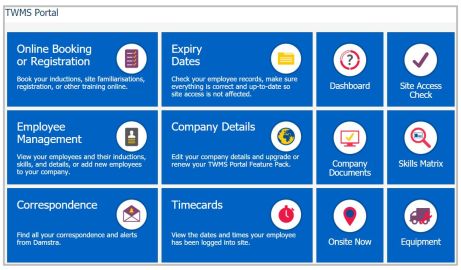


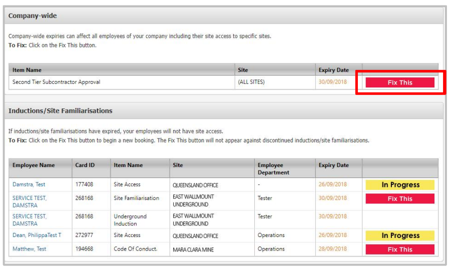
Checking Employees' Expiry Dates

Damstra will send your Company an email on the first day of every month, reminding you to check your documentation that is due to expire within the next 90 days. This information can also be found on the Expiry Dates page in your Company Portal.

1. Select **Expiry Dates** to view your company and contractor expiries:

   - Red Expiry Date = already expired
   - Orange Expiry Date = expiring within a month
   - Black Expiry Date = expiring within the next two months





2. Click on the **Fix This** button listed against each expiry. This feature allows you to:
   - Pay fees that have expired
   - Upload qualifications or documents that need to be updated
   - Create online training access codes

3. If no **Fix This** buttons appear, your company may have an account issue. To rectify account issues, contact service@damstratechnology.com.

> **Note:**
>
> If information is not updated prior to the expiry, this may result in your employee not being able to access worksite.

Employee Transfer

If your Employee has an existing Damstra profile, you will be required to complete an **Employee Transfer Request Form**. This form will need to be signed by your Employee to authorise the transfer of their profile and personal information to your Company.

There are two types of Transfers – **Transfer Employee** or **Link Profile.** A Linked Profile should be used when your Employee/s are working for multiple Companies and require Access to Site under different Companies.

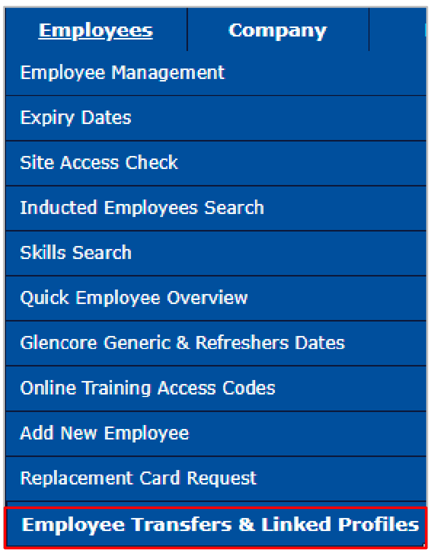
Employee Transfers cost $55.00. However, if a Contractor Registration is completed within 7 days of the Transfer – this fee is subtracted from the Induction/Registration Fee.

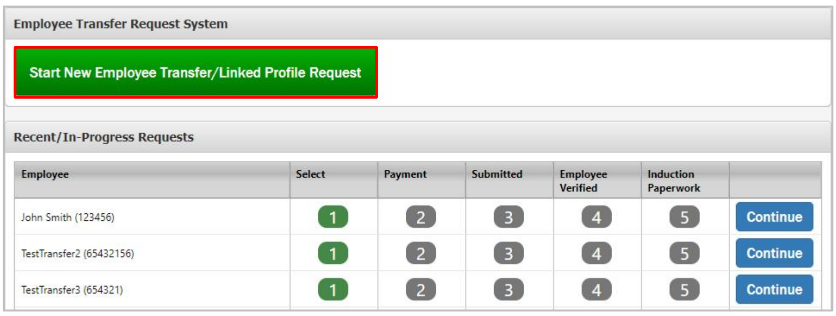
Any fees that are current on the profile at the time of Transfer, are “inherited” by the new Company.

How to do it?

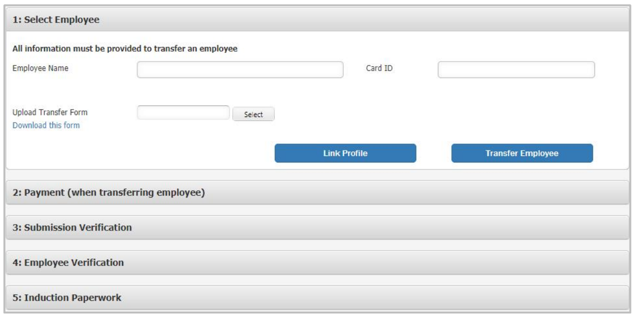
1. On the Home page, click **Employees** and **Employee Transfers & Linked Profiles.**

2. Then, click the **Start New Employee Transfer/Linked Profile Request** green button.





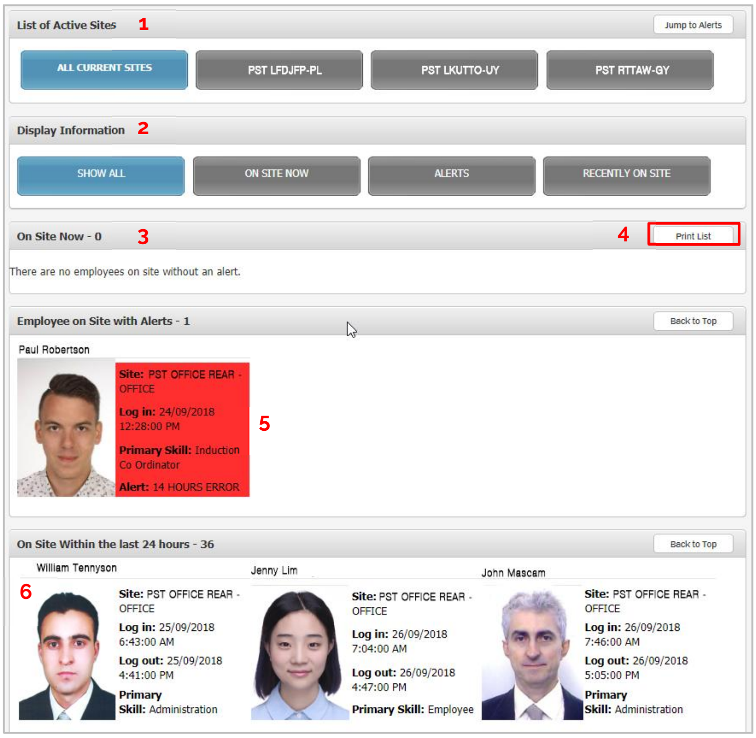
4. Follow the prompts on screen to complete all necessary steps and then submit the transfer.



Viewing On Site Now

On Site Now is a helpful function within the Company Portal for monitoring who is on your Site/s with a live view. This is a convenient tool. if you need to know if someone is at work.

By clicking On Site Now, you will be able to see the following:



1. **List of Active Sites** - The sites that your employees have logged in at within the previous two weeks will be listed at the top of the page. This means that the list may change over time.

2. **Display Information** - This box allows you to filter what you see on the page. By default, the page will **Show All**, however, you can select the type of information shown on this page by clicking on any of the buttons in this box (only one may be selected at a time).

3. **On Site Now** – This shows all employees of your company that are currently logged on at any site or have been within the last 24 hours. Each tile shows the Employee's:
   - Photograph
   - Name
   - Site they logged on at
   - Primary skill
   - Log on time
   - Alert (if generated)
   - Log out time if the employee has finished that shift.

4. **Print List** - A list of employees currently on site can be viewed by clicking the **Print List** button.

5. **Alerts** - Employees that have had alerts generated when logging on or working will be shown under the **alerts in red**. The alert message that the employee generated will also be shown on their entry.

6. **Employee Tile** - The employee's details can be viewed by clicking on their tile which will load the Employee Details page.

Searching for Employee Timecards

The Employee Timecards page shows times and locations that your employees have worked.

1. Click the **Timecards** tile.

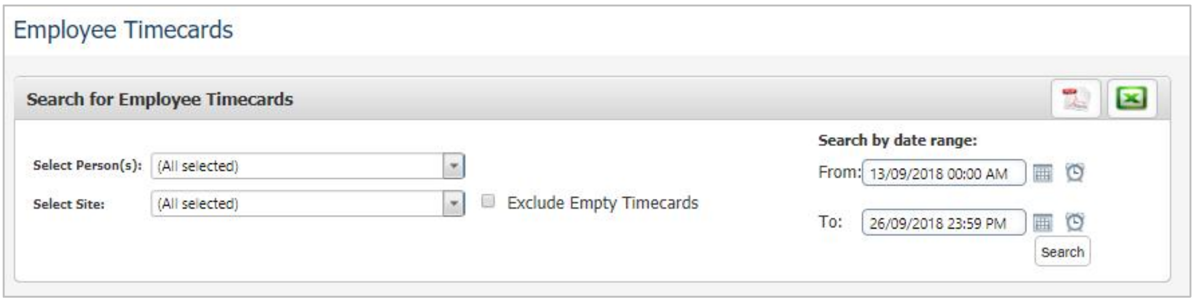
2. Set the search parameters by selecting the:

   2.1. Employees you would like to view from the **Select Person(s)** dropdown - This list only shows active (non-terminated) employees by default. Terminated employees can be selected by ticking the "Include Old Employees" checkbox.

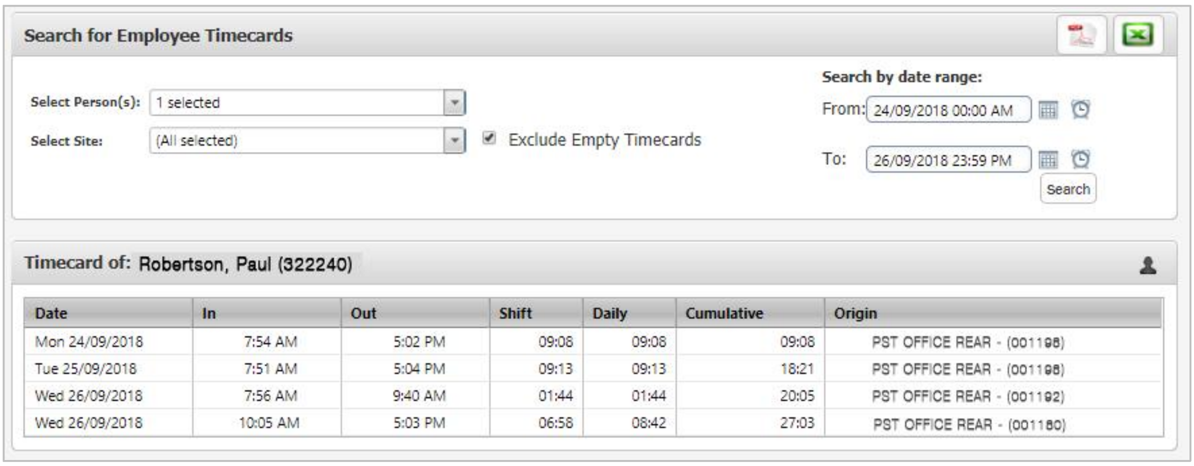
   2.2. Locations - select sites you would like to view from the **Select Site** dropdown. This search works on a per shift basis, i.e. An employee's **out punch** time from a site that has been not been selected will be shown if the **in punch** of that shift is from a site which was selected.

   2.3. Date range used for the search – Change this by using the two date/time pickers.

   2.4. Exclude Empty Timecards - Select this to remove timecards of employees who have not worked within the date range selected.



3. Each employee will be displayed in a separate box that shows:
   - All dates in the range selected
   - Punch times (punches that have been edited by site will be displayed with blue text)
   - Shift total (time between in & out punches)
   - Daily total (time for all shifts in that day)
   - Cumulative total (running total of all times in the date range)
   - Location & department that the employee works in



Note:

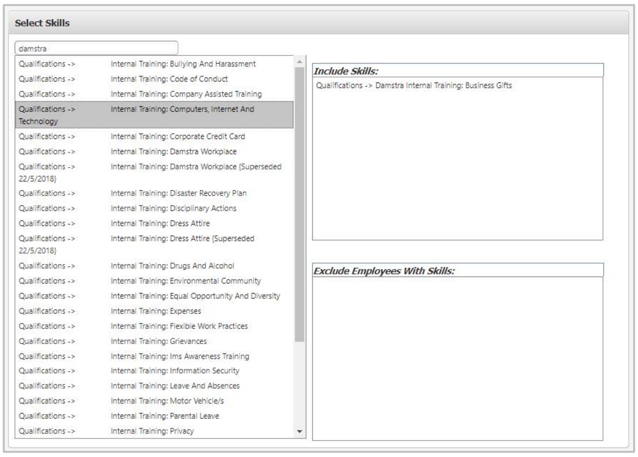
- Any alerts that have been generated from a punch will be displayed with a yellow exclamation mark. The alert can be displayed by hovering your mouse over the symbol.
- The timecards shown can be exported to a PDF document using the export button on the page. Empty timecards will not be shown in the exported file.

Running a Skills Matrix Report

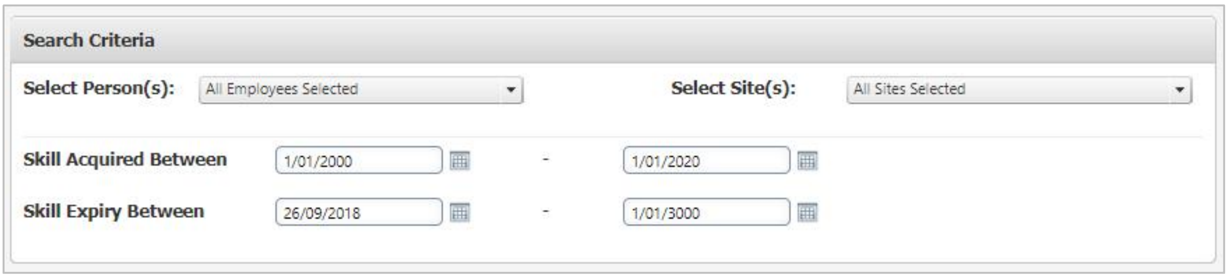
This is done by going to the **Employees** tab then selecting **Skills Search** in the list.

1. Select skills from the list using the scroll bar. You may also search for the skill by typing its keywords.

2. To add the selected skill, drag it to the **Include Skills** destination field. You may also do the same to the **Exclude Employees With Skills** field if you wish to further filter your selection.



3. Set your parameters by selecting person/s, selecting the site/s, and setting the date range (skill acquired between and skill expiry between).



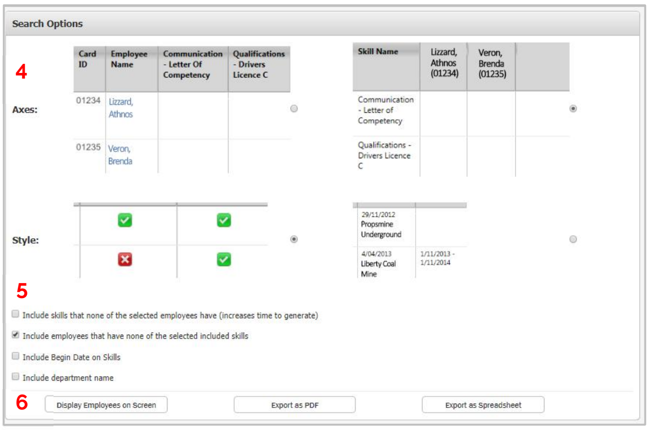
Note:

You may select multiple skills from the list and add them all at once by dragging them to the destination fields.

4. Choose your display options by clicking the radio buttons of **Axes** and **Style**.

5. Tick the boxes of the details to be included in the report.

6. Click **Display Employees on Screen** to view the skills matrix report on screen. This can also be exported to a PDF or Spreadsheet document using the export buttons on the page.



Need help?

If you are unsure of what to do or simply need a helping hand through this process, reach out to one of Damstra Technology's friendly team at service@damstratechnology.com or phone 1300 722 801 in AUD or 0800 722 801 in NZ.