OS USER GUIDES – Part 3: Subcontractor Consultants & Company Portal

Internal Staff Help Centre – ASI OS Onboarding

Associates Working Through Their Own Company (End-to-End)

Staff Type Definitions

- **Associate Consultant (Working Through Own Company):** Independent consultant contracted via their registered company for tax purposes. They submit invoices via their business entity, not as individuals. They operate under a signed contract for a defined scope and period.

⚠ Note: Only the **Project Team (PD, PM, AM)** can carry out this process.

Step 1: Issuing the Invitation

Responsible: Project Team
- Go to **People Management > People Directory** - Click **Onboard a New User** - Complete Invitation Form: - Name (full name) - Personal email (for onboarding link) - Staff Type: **Associate Consultant** - ASI Role: **Associate Consultant** (pre-populated) - Location (affects payment) - Click **SUBMIT**

📧Onboarding link emailed to user (valid 24h).
🖊If expired: OS Support Team, IT team, Layth, or Adrian can resend.

Step 2: User Receives Invitation Email

Responsible: User
- Open personal email
- Find **"Welcome to Adam Smith International: Onboarding Email"**
- Click magic link → redirected to Onboarding Page

Step 3: Entering Personal Information

Responsible: User (Associate Consultant)

a. Personal Info - First/Last/Display Name - DOB, Marital Status, Gender - Nationality, Language - ID Type & Number (**Required**) - Travel/Health Insurance: Yes = upload required

b. Contact Info - Current & Permanent Address - City, State, Zip, Country - Phone Numbers - Email (pre-filled) - 🔗Check box if addresses match

c. Upload Documents - ID (Front & Back) OR Passport (**Mandatory**) - Profile Picture (Optional)

d. Create Signature - Draw or upload
- Update anytime
- Click **NEXT**

Step 4: Emergency and Health Information

Responsible: User (Associate Consultant) - **a. Emergency Contact**: Blood Group (**Mandatory**) - **b. Medical Declaration**: Indicate health issues (**Mandatory**) + Doctor's details - **c. Proof of Life**: Choose & answer a security question (**Mandatory**) - **d. Dependents (Optional)**: Add details if applicable - **e. Next of Kin (Optional)**: Name, Relationship, Contact - Click **NEXT**

Step 5: Upload Supporting Documents

Responsible: User

Required: - Academic Certificates (PDF/JPEG) - CV or Experience Letter

Optional: - Professional Certificates - Other Docs

Click **NEXT**

Step 6: Consent Forms & References

Responsible: User
- **Background Checks & Data Privacy:** - Background Verification Consent (optional) - Data Privacy Notice (**mandatory**) - Click ＋ → Read → Sign - Click **NEXT**

Step 7: Review & Submit

Responsible: User
- Review all info
- Edit if required
- Click **Submit** ✉Verification request sent to **service.desk@adamsmithinternational.com**

Step 8: Review and RDC Checks

Responsible: Service Desk (Eliza)
- Go to **People Management > People Directory** - Filter profiles awaiting verification
- Open profile → Click **RDC Checks** → RDC Login
- 🔗Mark user as Approved (checks conducted by Legal)

Step 9: Final Verification Checklist

Responsible: Project Team
- Tick all verification checkboxes
🖊Once complete, **Issue Contract** button appears

Step 10: Issue Contract

Responsible: Project Team
- In **People Directory**, open profile
- Click **Issue Contract** - Complete form: - Contract Template: **UK Subcontractor Associate Acknowledgement** (mandatory) - Contract Type: **Fixed Term** - Start Date / End Date - Line Manager - Principal Work Location - Project - Daily rate (if fixed/monthly/deliverables → specify in Special Conditions/ToR) - Upload/Edit Term Sheet (company details) - Upload ToR (text or JPEG) - Edit Schedule 1 + Special Conditions - Optional: Send for Review → Toggle ON → Add reviewers → Save Draft → appears under **My Approvals > Contract Review** - Assign Signatory or Self-sign (Project Director) - Line Manager signs after ASI Signatory if applicable 📧 Contract sent to ASI Signatory → then Subcontractor Consultant

Step 11: Signing the Acknowledgement

Responsible: Subcontractor Consultant
- Open email: **"Sign Contract and Complete your Onboarding"**
- Click magic link
- Sign forms: - Ethics & Compliance Declaration (**mandatory**) - Conflict of Interest Declaration (**mandatory**) - Expression of Wish (Optional) - Provide Bank Details
- Review & sign contract acknowledgement
- Click **I agree & submit**
- 🔗 Save Microsoft login details!

Step 12: Finalising Onboarding

Responsible: Subcontractor Consultant
- Select **Complete Onboarding using Microsoft 365 credentials** - Set up Microsoft Authenticator app
- Login via: - ASI email (primary) - Personal email (backup)

📧 Notifications sent to Service Desk + Line Manager
🔗 Onboarding Complete!

Company Portal Setup (Windows Devices)

This guide provides step-by-step instructions for installing and configuring the **Microsoft Company Portal** on a personal Windows device.

Definition

The Company Portal ensures devices comply with ASI's security standards and provides access to project tools, corporate apps, and email. Mandatory for all Core/Non-Core Users, Associate Consultants, and Subcontractor Consultants using personal devices.

Prerequisites

- Windows 10 or 11 Professional
- Device must be password-protected
- Antivirus + firewall enabled

- BitLocker enabled (Windows Pro only)
- OS must be up to date

Installation Steps

1. **Install Company Portal**
2. Go to: Microsoft Store – Company Portal
3. Click **Get** to install

4. If Store won't load, update Microsoft Store app

5. **Launch & Setup**

6. Open **Company Portal** app
7. Click **This device hasn't been set up for corporate use yet...**

8. Click **Next**

9. **Join Microsoft Entra ID**

10. Enter ASI email
11. Confirm connection to **adamsmithinternational.com**

12. Click **Join**

13. **Allow Device Management**

14. Tick **Allow my organisation to manage my device**
15. Sign in again if asked

16. Click **OK** and **Done**

17. **Complete Final Steps**

18. Select device type: **Microsoft Windows (desktops and laptops)**
19. Click **Done**
20. Click **Check Access** → may take 2 hours for policies

🔗You're all set when Company Portal says: *"Can access company resources"*
🖍If not compliant, follow the app's guidance.

📧For help: email **Service.Desk@adamsmithinternational.com** (Subject: *Company Portal Setup Help*)

Next Part: Part 4 – Change Log, Login, and Leave Management