## INITIAL DOCUMENT UPLOAD:

1. Web Administrator to:
   1. Complete Updates below and test module on dev. Site
   2. When stable – transfer to Live Site. **(Due: Beginning Dec)**
   3. In the short term allow for Calendar to accept any expiry date (don’t lock). Once docs are loaded the calendar will be relocked as it currently is.
   4. Turn Off Email Notification until all approved and running.
2. Administration to methodically check company details and upload documents **(Due: COB 2017)**
3. Accounts to approve each Company once completed by Administration **(Due: COB 2017)**
4. Accounts to Notify Web Administrator on completion.
5. Web Administrator to Lock Past Calendar Dates & Turn on Notifications.

## AGREED ONGOING ADMINISTRATION PROCESS

1. Construction Manager
   1. Communicates to Administration that a new company is to be set up.
   2. Provides
      1. Company Nickname
      2. Company Email Address
      3. Name of Owner/Representative of Company
      4. Email of Owner/Representative of Company (Can Be the same as Company)
2. Administration Creates New Company
   1. Adds Nickname Field
   2. Adds Email Filed
3. Administration Creates Owner/Representative of Company
   1. Adds Owner/Representative Name
   2. Adds Owner/Representative Email
   3. Adds Leading Hand or Company Administrator permission to User **(Note: This step will work only for Cape Cod & will not be a part of the Subscription process)**
   4. Adds “security” permission to User
4. The System generates emails:
   1. Informs Accounts of a new company being added.
   2. Introduction letter to New Company with instructions.
   3. Compliance Emails – relating to documentation & WHS
      1. Notifications when approval required
      2. Notifications when non-compliance is outstanding

## UPDATES FOR COMPANY PROFILES MODULE

**PERMISSIONS FOR ACC ACCOUNTS:**

1. Check permissions of accounts. I added all permissions for Users & Company but I think hard coding is stopping full permissions for them. We could complete all tasks using my login but not Nicoles.

**APROVAL SYSTEM:**

1. “Pending Approval” flag remains after all docs are approved.
2. The Licence text information should be locked until reopened for renewal at Sub-Contractor Level and CC Accounts Level. Override at General Managers Level
3. Rejection Not work – goes to a “stuff up” page
4. When Doc is rejected – allow for note to be added as to reason

**DEVELOPMENT CHANGES:**

1. Add downloadable forms to the following:
   1. Subcontractors Details Form
   2. Period Trade Contract
   3. Subcontractors Statement
2. Prefill prior to download
3. Don’t Filter Insurance & Contracts Documents based on business entity. Instead this will be directed by additional questions asked when setting up Users/Companies
4. Add additional questions when setting up New Users/Companies:
   1. Do you subcontract to them?
   2. Do you employ them directly?
   3. Do you outsource their employment (Employment Company)?
5. Remove Edit Button from Register. Edit is done once entered into company profile.
6. Under trade Details Heading
   1. Add “None of These” to Top of Licence Type Drop Down Menu. (Eg. Works for Cape Cod but completes tasks do not fall under Licence Catagories – Labourer, Driver, Deliveries, etc)
   2. If “None of These” is selected then no Entity Licences are required.
   3. If A Licence Category is selected for **COMPANY/TRUST/PARTNERSHIP** – show a list of users within the entity that hold a Supervisors Licence or Individual Contractor’s Licence for Category. Show their expiry dates. Highlight Red if Expired. Both an Entity Licence and Individual Licence required
   4. If A Licence Category is selected for **SOLE TRADER** – Allow for Reference to the Individual Contractor Licence. Show their expiry dates. Highlight Red if Expired.
7. Under Business Details Heading - Add additional Company Categories to drop down menu:
   1. CONSULTANTS/EXTERNALS
   2. GUEST
   3. INTERNAL STAFF
   4. INSPECTOR/CERTIFIER
   5. ON SITE TRADE
   6. SUPPLIER
   7. WEB DEVELOPMENT
   8. UNALLOCATION
8. Add two additional headings:
   1. Company Licence – allows for upload of doc.
   2. Additional Licences
      1. Asbestos Licence
      2. Other Licence (Add Button – allows for free text in Licence type field)

**MANAGEMENT REPORT:**

1. Filter Management Report to include only:
   1. CONSULTANTS/EXTERNALS
   2. INSPECTOR/CERTIFIER
   3. ON SITE TRADE
   4. SUPPLIER
   5. UNALLOCATION

**NOTIFICATIONS:**

1. Set Landing page notifications for Accounts & Companies