About Service Provider Management

Does your organization have a regulatory obligation to account for contractors and suppliers when they are on-site? Do you spend too much time managing contractor and supplier information, insurances, access rights, safety, security, and inductions? If you answered yes to any of these questions the Service Provider Management Add-on makes it easy for your organization to manage these responsibilities.
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Introduction

What are Service Providers?

Service Providers are external organizations or individuals who provide a service to your organization. They may be contractors, suppliers, sub-contractors, sole-traders or consultants. Service Provider’s consist of:

1. The **Organization Profile**: meaning the legal name of the Service Provider organization.
2. The **Members Profile**: meaning the profiles of the people that are employed by a Service Provider organization to deliver a service or product to your organisation.

How does WhosOnLocation help you manage Service Providers?

Organizations that use contractors and suppliers will, in most situations, be required by policy or regulation to do the following:

- Keep a record of the names of contracting and supplier organizations.
- Keep a record of the names of those people that come onto your site (s) that work for these contractor and supplier organizations.
- Ensure they have been ‘inducted’ and understand site risks, permanent hazards, rules and operating procedures for the tasks they perform etc…
- Ensure that when they arrive on-site they are aware of any ‘current’ hazards.
- Ensure an accurate record is kept of when these contractors and suppliers arrive and depart from your site (s).

WhosOnLocation makes the management of the above tasks easy. We take away the hassle by giving you easy to use tools to maintain accurate contractor records, to manage the presence of contractors onto site, and to report on all contractor and supplier activity, both real-time and historically.
Current features available with the Service Provider Management Add-on

Note: The ‘current’ feature-set is fluid, meaning it is being updated regularly. We do our very best to keep our users informed of where our product is going in terms of our development roadmap. We publish this openly under an article titled: Roadmap in the Resources section of the Helpdesk. If there is any feature you want us to consider supporting please do not hesitate to advise us via the helpdesk or by dropping us your idea at helpdesk@whosonlocation.com

Current Features

Organization Management Features
- Manage profiles for each contractor organization
- Manage contractor categories and groups
- Manage access rights
- Manage access rights to WolMobile app

Members (People) Management Features
- Manage contractor profiles
- Manage access rights
- Manage induction records
- Manage role types
- Manage photo
- Manage contact details
- Manage access rights to WolMobile app

Contractor Presence Management Features
- Receptionists can search for an approved contractor and sign them in or out
- Contractors can sign in using a Visitor Kiosk
- Contractors can be issued Visitor Passes
- Contractors can scan in using ID Card or Token (Barcode and RFID Supported) Requires Identity Management Add-on
- Contractors can sign in or out using their mobile (cell) phone. Requires WolMobile Add-on

Acknowledgement (Hazard warning) Notice Management Features
- Requires Acknowledgement Notices Add-on to be activated
- Administrators can create and publish acknowledgement notices (hazard warnings)
- Notices can be acknowledged via a kiosk, WolMobile, Location Manager (receptionist) or directly by an employee after logging into Wol.
- Reporting and Auditing on who acknowledged what notice.

Identity Management
- Requires Identity Management Add-on to be activated
- Setup and create tokens that can be used by employees to scan into and out of a location using a kiosk.
- Report on when a token (card) was used.
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GeoLocation Services

- Requires WolMobile Add-on
- Employees and contractors can ‘send’ their current GeoLocation using WolMobile or activate a ‘follow me’ feature which allows the user’s location to be updated as they move.
- Report users can view a map displaying employees and contractors location

Dashboards

- Requires Dashboards Add-on to be activated
- Create custom dashboards to display key people presence management statistics.
- Total Number of people onsite (Employees, Contractors, Visitors)
- Names of people on-site
- GeoLocation of employees off-site
- GeoLocation of contractors and employees off-site

Getting Started Today!

We detail all steps to get you started in the Service Provider Management Tutorials in the Helpdesk but in summary:

1. The first thing to do is have your Account Owner activate the Service Provider Management Add-on.
2. Any Administrator can then grant themselves and/or colleagues with Service Provider Management User Role rights (there are 3 levels see below).
3. Next have a user who is granted the Service Provider Administrator role rights setup your organization’s unique Categories, Groups, and Contact Roles settings.
4. Now you can start building your Organization and members list. We cover off how to do this in the Service Provider Management tutorial – but you should find this easy. If any user requires assistance we recommend referring to the Helpdesk and review the respective tutorial or they can email helpdesk@whosonlocation.com for assistance.
5. Once you have your list of contractors and suppliers completed they can start signing into and out of your organization’s site (s). Presence records will start to build up allowing you to report on their presence. Other advanced features like hazard notices, custom sign-in question workflows can then be designed (if not done earlier).

Who can access Service Provider Management?

Administrators can assign one or many people with Service Provider Manager user rights meaning the burden of maintaining accurate and current records can be spread across multiple users if required.

There are 3 levels of User Rights:

1. Administrator: The same rights as a Service Provider Manager plus this user can manage Settings.
2. Manager: This user can manage any Service Provider Organization or member and make them Active.
3. Coordinator: This user can only manage Service Provider Organizations and Members that are part of the same User Access Group as the Coordinator.
F.A.Q Service Provider Management

Question: How many Contractors and Supplier organization profiles can we create?
Answer: Unlimited with no impact on your license fee

Question: How many Contractors and Supplier people profiles can we create?
Answer: Unlimited with no impact on your license fee

Question: How many kiosks are we allowed to setup at each site so contractors and suppliers can sign in and out?
Answer: Unlimited with no impact on your license fee.

Question: Can we import a list of Contractor/Supplier companies (organizations) and people (members) as we already have a spreadsheet list of them?
Answer: Yes. You can add Contractor/Supplier companies (organizations) and people (members) manually or via the import tool. We cover how to do both in the Helpdesk tutorial.

Question: How are License Plans affected by Contractor and supplier sign-ins?
Answer: Like visitor sign-ins, Contractor and Supplier (member) sign-ins are treated as ‘guests’ and are part of the License Plan limit (or in the case of our Professional and Enterprise Plans – there is no limit).

Question: Can we create unique questions for contractors and suppliers (members) to answer when they sign in or out?
Answer: Yes. You can display different questions for visitors and members to answer. You can even create different question workflows for different kiosks.

Question: Can contractors and suppliers (members) sign-in to and out of a site by scanning a card or other token on a kiosk?
Answer: Yes. You would need the Identity Management Add-on activated. We support both Barcode and most HID compatible RFID tokens.

Question: Does it cost to issue our contractors and suppliers (members) with WolMobile access on their phone?
Answer: No. But you would need the WolMobile Add-on activated. WolMobile does use data so the user’s phone must have a data plan. All associated data charges and costs are born by the owner of the phone and any limits on data usage are as per the user’s mobile data plan.

If you require any other assistance please refer to the Helpdesk, or email helpdesk@whosonlocation.com