


BNG Conserve™ – Contractor Dashboard – User Instructions

Enter the Contractor Dashboard via Conserve™ “Log in” tab, by entering your user name and password.

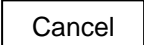
You are now in your (Contractor) Dashboard.

Click on the  icon for user instructions.

- a. To make changes to the contractor details click on the  button.

It will take you to the “Contractor Information” page.

- b. Make the necessary changes then click on the  button.

Note: If you change your mind, or have made an error, then click on the  button.

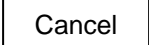
Address Tab

1. The “Address” Tab displays the street and postal (P O Box) addresses of the contractor.

2. To make changes to the addresses, click on Select.

It will take you to the appropriate “Address” page.

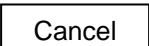
3. Make the necessary changes then click on the  button.

Note: If you change your mind, or have made an error, then click on the  button.

4. To add additional addresses (e.g. site addresses), click on the  button.

It will take you to the address data entry page.

5. Enter new address details, then click on the  button.

Note: If you change your mind, or have made an error, then click on the  button.

Insurances Tab

1. Click on the “Insurances” Tab. The Insurances Tab lists all the insurances the contractor has, and the details of these are displayed in tabulated form.

2. To view / save / print the appropriate certificates of currency (or equivalent) of the insurances, click on the icon.

3. To make changes to any particular insurance, click on Select.

It will take you to the Insurance Detail page.

4. Make the necessary changes then click on the button.

Note: If you change your mind, or have made an error, then click on the button.

5. To include an attachment (e.g. renewed Insurance Certificate of Currency), click on the Button.

This will take you to your computer directories, where a scanned copy of the attachment is to be located.

Note: Your attachments must be scanned and saved on an appropriate directory on your computer system, prior to entering / amending data in Conserve™.

6. To add new insurances, click on the button.

This will take you to the Insurances page.

7. To enter "Insurance Type", click on the drop down menu and select the insurance type.

Note: If the Insurance Type you need is not in the drop down menu, contact BNG Contractor Services Pty Ltd on:

Tel: (02) 8883 1501

Fax: (02) 8883 1502

And request for inclusion of the Insurance Type. The required Insurance Type will be included in the system within 24 hours.

8. Enter all other details.

9. To upload a copy of the certificate of currency (or equivalent documentation), click on the Button, and follow previous instructions.

10. Click on the button after all data has been entered.

Note: If you change your mind, or have made an error, then click on the button.

Employees Tab

1. Click on the "Employees" tab. The Employees Tab lists all employees of the contractor registered into the system and displays each employee's details.

Note: The Employee ID is unique to each employee in the system and is automatically generated during the registration process.

2. To make changes to any employee's details, click on Select.

It will take you to the Employee Dashboard.

General Tab

- a. Click on the "General" Tab. It displays employee details.
- b. Make the necessary changes then click on the button.

Note: If you change your mind, or have made an error, then click on the button.

Certifications Tab

- c. Click on the "Certifications" Tab. It displays a data entry page to add additional qualifications that an employee might attain as well as a table showing the type of qualifications the employee currently has.
- d. To view / save / print the employee qualifications, click on the appropriate icon.
- e. To add additional qualifications, click on the drop down menu for "Certification Type" and select accordingly. (E.g. Cert IV).
- f. Then click on "Certification" box and type in the qualification. (E.g. Workplace Trainer and Assessor).
- g. Then click on "Issuing Authority" box and type in the institution that issued the qualification (E.g. Blacktown TAFE)
- h. Click on the "Never Expires" box if the qualification is valid indefinitely. If the qualification is valid for a fixed period then type in the "Valid From" and "Valid To" dates in the boxes.

Note: Qualifications such as Construction Industry OHS Induction Certificate; Forklift Licenses; Welder Qualifications; Boiler Maker Qualifications etc. will fall under "Trade Qualifications".

- i. To upload a copy of the certificate / qualification click on the button, and follow previous instructions.
- j. Click on the button after all data has been entered.

Note: If you change your mind, or have made an error, then click on the button.

Induction Tab

- k. Click on the "Inductions" Tab. It displays information of all the inductions the employee has undertaken for various clients.
- l. To view, save or print employee induction certificate / license of the appropriate client, click on Certificate. The induction certificate / license will be displayed.

- f. To add qualifications, click on the drop down menu for “Certification Type” and select accordingly. (E.g. Cert IV)
- g. Then click on “Certification” box and type in the qualification. (E.g. Workplace Trainer and Assessor).
- h. Then click on “Issuing Authority” box and type in the institution that issued the qualification (E.g. Blacktown TAFE)
- i. Click on the “Never Expires” box if the qualification is valid indefinitely. If the qualification is valid for a fixed period then type in the “Valid From” and “Valid To” dates in the boxes.

Note: Qualifications such as Construction Industry OHS Induction Certificate; Forklift License; Welder Qualifications; Boiler Maker Qualifications etc. will fall under “Trade Qualifications”.

- j. To upload a copy of the certificate / qualification click on the button, and follow previous instructions.
- k. Click on the button after all data has been entered.
- l. If the employee has more qualifications then repeat the process.

Note: If you change your mind, or have made an error, then click on the button.

Click on [Back to Dashboard](#). It takes you back to the Contractor dashboard.

Licenses Tab

1. Click on the “Licenses” Tab. It displays all the licenses and permits to operate that the contractor needs to be legally compliant to deliver services.
2. To view / save / print the appropriate license / permit click on the icon.
3. To make changes to the licenses / permit details click on [Select](#).

It will take you to the License / Permit page.

4. Make the necessary changes and click on the button.

Note: If you change your mind, or have made an error, then click on the button.

5. To include an attachment (e.g. renewed license / permit) click on the button and follow previous instructions.

6. To add a new License / Permit, click on the button.

It will take you to the License / Permit page.

7. Enter the necessary data and click on the Add License button.

Note: If you change your mind, or have made an error, then click on the Cancel button.

Sites Tab

To be considered if this feature is necessary or need to be improved.

Scores Tab

1. Click on the “Scores” Tab. This Tab displays the results of the contractor’s (Cat A and B Contractors only) Self Evaluation and Second Party Audits.

Note: This Tab will not display anything for Cat C contractors.

2. This Tab is visual only.
 3. The contractor’s OHS Management System Performance (Self Evaluation and Second Party Audit scores) maybe viewed / saved / printed from the Reports Tab.
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Action Item Tab

1. Click on the Action Items” Tab. This tab displays the actions necessary to improve the contractor’s (Cat A & B contractors only) OH&S management system, based on the self evaluation.

The table displays the following:

- **Action #:** The audit question (as numbered in the self evaluation tool) to which the respondent has given a “NO” answer.
- **Recommended Action:** This action is automatically generated by the system.
- **Target Date:** This is the target completion date for the recommended action, automatically set by the system at three (3) months from the date of the self evaluation.

- Action Date: The date the contractor intends to complete the action by.
- Proposed Action: This action is proposed by the contractor (as opposed to the recommended action) to meet the intent of the audit question.

Note: Page numbers at the bottom of the table to “navigate” to appropriate action items.

2. To enter “Action Date” and “Proposed Action”, click on Select.
3. Type in the proposed action in the “Proposed Action Text” box.
4. Type in the date by which you intend to complete the proposed action.
5. Click on the button.

Note: If you change your mind, or have made an error, then click on the button.

Notes Tab

1. Click on the “Notes” Tab. This tab displays a free text box where the contractor (or client) can type in any relevant information for future reference.

The typed notes will appear below the text box, in reverse chronological order.

2. To add notes, type the notes in the text box and click on button.

2nd Party Audits Tab

1. Click on the “2nd Party Audits” Tab. This tab displays information on 2nd Party Audits of the contractors’ (Cat A & B contractors only) OH&S management system by independent auditors from BNG Contractor Services Pty Ltd.

It displays information that includes (a) Audit Date (b) Name of the Auditor (c) Possible Scores (d) Actual Scores of the audit.

2. To view / save / print previous 2nd Party Audit report, click on the icon.

Reports Tab

1. Click on the “Reports” tab. A drop down menu that provides the following reports will be displayed:
 - Employee Details
 - Employee Inductions
 - OH&S Management System Performance
 - Self Evaluation Report
 2. Click on the required report from the drop down menu, then click on the Show Report button.
 3. Once the report is displayed, you can view the report, or save it as an Excel or Acrobat (PDF) file, for future use or print it.
 4. To save the report as an Excel or Acrobat (PDF) file, click on the drop down menu Select a Format. Then click on “Export”.
 5. Once the report is displayed in the format you selected, you can then save the report as required.
 6. To print the report, go to “File” on the tool bar and select “Print”.
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History Tab

1. Click on the “History” Tab. This tab displays a history of the Contractors Company Name; Trading Name; ABN and ACN changes. It displays the “old value”, “new value” and the date of change.
 2. This feature helps to keep track of contractor information (Name, ABN, ACN) changes that may arise from mergers, divestments etc.
 3. The table is populated when changes to contractor information is made using the Edit button.
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To Conduct Self Evaluation

1. Click on “[Click here to start Self Evaluation](#)”. This will take you to the self evaluation page.
2. Read the instructions in red, type in your name in the text box, then click on Start Self Evaluation Button. This will take you to the self evaluation questions.

3. Complete the self evaluation by answering each question by clicking on the “Yes”, “No” or “Not Applicable” buttons as appropriate. Move to the next question by clicking on the

Next

 button.
4. If you make a mistake you can go to the previous question by clicking on the

Previous

 button.
5. Read the “Guidelines” to assist you in answering the questions.