

### ***I can't login to my account.***

- Confirm that you are on the correct Website ([www.cqnadvantage.com](http://www.cqnadvantage.com))
- If you know your username and e-mail, click on 'Forgot Password'
- If you do not know your username or e-mail used, please contact the Help Desk

### ***I need to login to the account, but I don't have a login***

- If another Individual set up the account, contact them to add you.
- If none of the Administrators are still with the company, please send us an e-mail confirming that and request to be added.

### ***How do I send a Contractor an Access Code?***

- Hover over the 'Contractors' Tab and when the menu appears, click on 'Manage Access Codes'. Please note that only Administrators have the ability to Generate Access Codes.
- When the new page loads, click on 'Click here to create a new Access Code'
- Complete the required fields and click 'Create and Send Access Code'

### ***How do I know if a Contractor has used an Access Code that we sent them?***

- Hover over the 'Contractors' Tab and when the menu appears, click on 'Manage Access Codes'
- When the new page loads, a list with all Contractors who you have generated Access Codes will appear. The 'Status' column will advise as to if the Contractor has used the Access Code or not.

### ***Some of our Contractors are saying that they haven't received the Access Codes we sent them?***

- Confirm their e-mail address as you may have sent the code to the wrong person in the Company.
- Have the company check their junk mail
- Contact the help desk and we will manually send out the Access Code to the correct individual.

### ***How do I create a new Template?***

- Hover over the 'Contractors' Tab and when the menu appears, click on 'Manage Templates'
- When the new page loads, click on 'Click here to create a new Template'
- Fill out all required fields, and click 'Add Template'

### ***How do I change the name of a Template I already created?***

- On the 'Manage Templates' page, find the Template you would like to change and click on 'Edit this Template' from the options on the right hand side.

### ***How do I add Questions to a Template?***

- On the 'Manage Templates' page, find the Template you would like to change and click on '0 Questionnaire Questions' from the options on the right hand side. Alternatively you can select 'Customize Questionnaire' from the 'Contractors' tab.
- When the new page loads, select your section, the page and then check the radio box to the left of each question you choose to add. At the bottom of the page, click 'Save Changes to Template'. Repeat this for each Page you choose to add questions from.

### ***How do I specify which documents I want attached to a Template?***

- On the 'Manage Templates' page, find the Template you would like to change and click on 'Specify Documents' from the options on the right hand side. Alternatively you can select 'Specify Required Documents' from the 'Contractors' tab.

- When the new page loads, specify your questionnaire, Choose your document type from the drop down menu, enter any required parameters and click 'Add to Required Documents'

### **What is 'Document Verification'?**

- Document Verification is a service available for an additional cost. With this service, you will specify verification points for each document you require to be uploaded (Ex. Minimum policy amount, effect and expiry dates, etc.). CQN will check each document uploaded by the Contractor for each specified verification point. Any document that is missing information will be rejected and a notice will be sent back to the Contractor explaining why.

### **How do I view my Contractors information?**

- Click on 'My Contractors' from the 'Contractors' Tab.
- Your Contractors will appear in 1 of 6 tabs depending on where they are in the process, and how you have classified them.
- Click on the appropriate tab and click on the Contractor name to view their 'Status'.
- When the 'Status' page loads, you will see their Progress, and general information.
- You can then choose to view their Questionnaire, Documents, CAM Report, Approval History, etc. from the menu on the left.

### **How do I use CAM (Contractor Assessment Matrix)?**

- Click on 'Configure Contractor Assessment Matrix' from the 'Contractors' tab.
- When the new Page loads, select your template
- Click the radio button to the left of each criteria option that you would like to use. Set applicable values and severity. Click 'Save Configuration'.
- To run the CAM Report, Click on 'My Contractors' from the 'Contractors' Tab.
- Choose your desired Contractor, when the 'Status' page loads click on 'Create / View CAM Reports' from the menu on the left.
- A new page will load listing the previously saved reports, and giving you the option to Create a new Report.

### **How can I Approve a Contractor or view their Approval History?**

- Click on 'My Contractors' from the 'Contractors' tab, and select the required Contractor.
- When their Status page loads, click on 'Approval Status' from the menu on the left.
- A new page will load giving you the Contractors Approval Mitigation information, current approval status, approval history and the ability to change their approval.

### **What's the difference between a 'Discipline Approver' and a 'Contractor Approver'?**

- Contractor Approvers are the only Users that can make a Contractor Approved, Provisionally Approved or Not Approved.
- If no Contractor Approvers are set up, any Administrator can do Approvals.
- A Discipline Approver is either an individual or a group of Users that have to sign off on that Contractor before it can be looked at for Approval. Discipline Approver Groups are set up based on your organizations structure (ex. Discipline Approver Groups could be HSE, Procurement, etc.). At least 1 person from each group will have to sign off on the Contractor before it can be approved by a Contractor Approver.
- If no Discipline Approvers are set up, the Contractor will start in 'Ready' and can be approved at any time.

### **What is the point of the 'Not Set', 'In Progress', and 'Ready' tabs?**

- These tabs have been added to assist the Client in their Approval process. As some Clients have multiple groups (Discipline Approvers) that need to review the Contractor before approval, these tabs give the Client the opportunity to do so.

### ***Why are some of the Contractors in 'Not Set' and some in 'Ready'?***

- If you have Discipline Approvers set up for a specific Template, the Contractors in that template will always start in 'Not Set' as at least one User from each Discipline Approvers group will have to approve that Contractor before they can move to 'Ready'.
- If you have not set up Discipline Approvers for some of your Templates, all Contractors in those Templates will start in 'Ready' as they are not awaiting Discipline Approval.

### ***Why has a Contractor been moved from 'Approved' to 'Ready'?***

- Anytime a Contractor changes Services, or you manually change their Template they will lose their Approval. The reason this occurs is because you (the Client) would have approved them based on the information they previously provided, which has been changed. Doing this gives the Client an opportunity to review the Contractors current information based on the new Template.

### ***How do I know if I have any outstanding Mitigation Actions?***

- Click on 'My Mitigation Actions' from your 'Account Home' menu on the left.
- When the new page loads, you can choose to view by Outstanding, Completed, and Hidden.
- Click on any outstanding action to provide your notes and complete the action.

### ***How do I view a Contractors Mitigation?***

- Select the specified Contractor from the 'My Contractors' page, and when the 'Account Status' page loads click on 'Mitigation Register' from the menu on the left.
- When the Mitigation Register loads, choose either Approval or General from the drop down.
- All Exceptions will load, you can click on each to expand it and add/view actions.

### ***How do I assign Mitigation Actions?***

- On the Mitigation Register, choose either Approval or General from the drop down.
- All Exceptions will load, you can click on each to expand it and add/view actions.
- When assigning actions you will have the ability to assign them to either the Contractor or a User within your Client Organization. You can also assign a deadline.

### ***How do I set up Mitigation Exceptions?***

- Hover your mouse over the 'Contractors' tab and click on either 'Configure Approval Mitigation' or 'Configure General Mitigation'
- When the new page loads, select the template as mitigation is set up per Template.
- You can then select the Mitigation Modules you wish to use, or configure custom modules.

### ***What is the difference between Approval Mitigation and General Mitigation?***

- Approval Mitigation is designed to be used during your Approval Process. Ex. You would set flags for High Priority items that would affect your decision to approve a Contractor.
- General Mitigation is designed to be used after approval. Ex. You would set flags for things you would like the Contractor to have, but wouldn't affect your overall approval of them. Things that they can work on, while still being approved.
- Although that's how the above is designed, the approval process on CQN Advantage is done completely by the Client and because of that the Client can choose how they use their Mitigation tools.

***Please note that clicking on the CQN Advantage Logo in the top left corner at any time will bring you back to your 'View Account Status' Home page.***