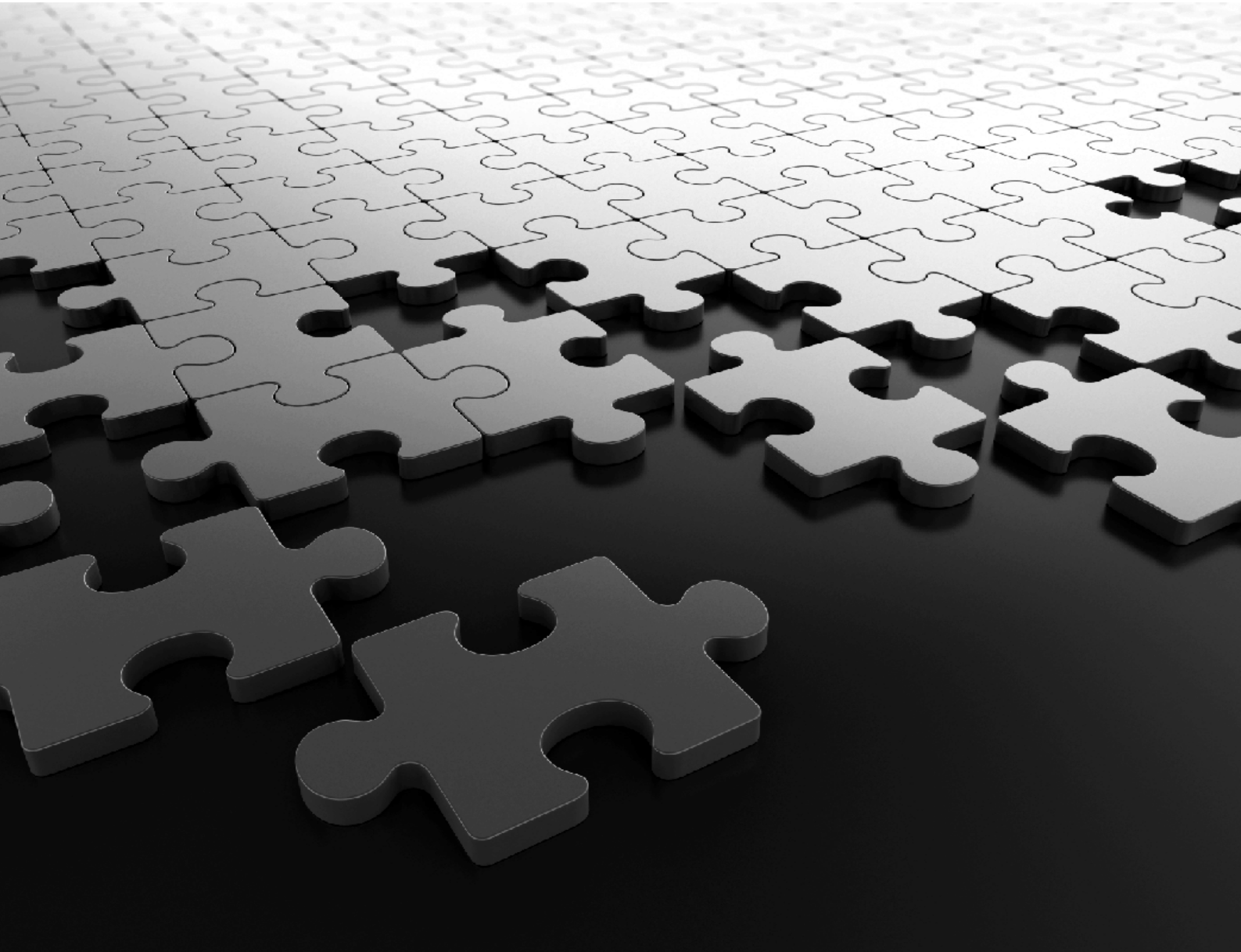


# **COSEC Contractor Self Service User Manual**



## **COSEC Contractor Self Service**

### **User Manual**



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This is a general documentation for all variants of the product. The product may not support all the features and facilities described in the documentation.

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## Warranty

For product registration and warranty related details visit us at:  
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*Version 18*

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# Introduction

The Contractor Self Service (CSS) module is available with CWM module to provide the worker related service via contractor. To do any activity, a contractor should have CSS login page as a first entry page.



The CSS account of Contractor must be activated from COSEC Web application > CWM module > Contractor > Contractor Profile > Account Information.

The Contractor can login into Contractor Self Service (CSS) module using the mode selected by the System Administrator in **Login Authentication Mode** — **Password**, **Password OR OTP** or **Password Then OTP**. Refer **Login Authentication Mode** in User Guide, **Admin Module> System Configuration> Global Policy> Login> Login Authentication Mode**.

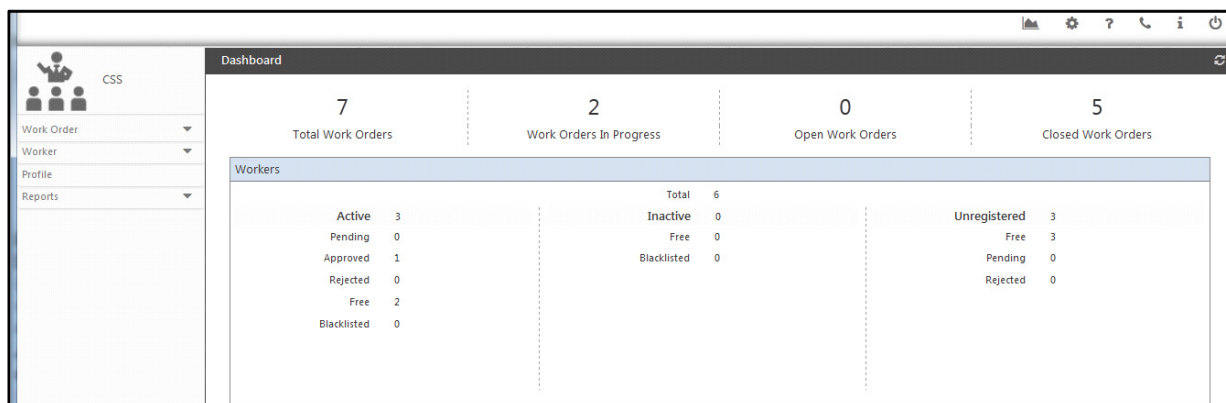


If the password is not set, then the contractor will be redirected to the Set Password screen where the new password can be set for the contractor.

The contractor can enter OTP only that number of times as configured by the System Administrator in **Maximum OTP Generation Attempts**. Refer the User Guide, **Admin Module> System Configuration> Global Policy> Password Policy> Maximum OTP Generation Attempts**.

The contractor's account may get locked for invalid attempts of login using Password and/or login using wrong OTP as configured by the System Administrator in **Password Policy**. For more information refer **Password Policy** in User Guide, **Admin Module> System Configuration> Global Policy> Password Policy**.

The COSEC CSS home page appears as shown below:



The **Menu Bar** at the top right side of window consist of following Icons:

- **Account Settings:** Enables the user to change the password or to set the preferred language and Theme for the login user i.e. contractor.
- **Help:** Gives the information about the CSS Application.
- **Contact:** Gives the contact details of Matrix Comsec Pvt. Ltd.
- **About:** Gives the details regarding CSS module version and variant.
- **Logout:** Enables to log out from the application.

The Company **LOGO** at the left bottom of the page is displayed only if the Administrator has set any logo.

## CSS Dashboard

Dashboard will display the basic information of respective Contractor's Work Orders & Workers for CSS module.

- Total Work Orders- Total Sum of Open + In Progress + Closed Work Orders.
- Work Orders In Progress- Total Sum of Work Orders whose status is as "Work Order Start Date < = Current Date < Work Order End Date".
- Open Work Orders- Total Sum of Work Orders whose status is as "Work Order Start Date > Current Date".
- Closed Work Orders- Total Sum of Work Orders who status is as "Work Order End Date +1 = Current Date".

Clicking on any link will redirect to Work Order List Page.

### Workers

- Total- Sum of all Active + Inactive workers.

**Active-** Total number of active workers.

- Pending- Total number of pending workers.
- Approved- Total number of approved workers.
- Rejected- Total number of rejected workers.
- Free- Total number of free workers.
- Blacklisted- Total number of blacklisted workers.

**Inactive-** Total number of inactive workers.

- Free- Total number of free workers.
- Blacklisted- Total number of blacklisted workers.

**Unregistered-** Total number of un-registered workers.

- Free- Total number of free workers i.e. workers to whom no work order is assigned.
- Pending- Total number of pending workers whose induction approval is pending or in-progress.
- Rejected- Total number of rejected workers.

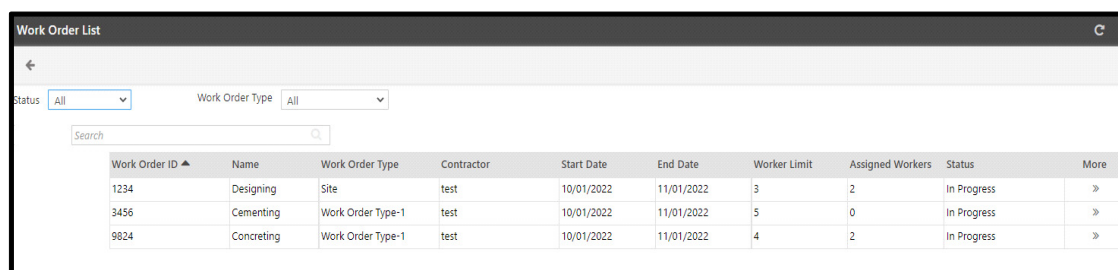
To know more about Active, Inactive and Unregistered workers

Clicking on any link will redirect to Worker List Page.

The Latest values on Dashboard are updated on clicking the Refresh  button.

# Work Order List

This page provides a list of all Work Orders assigned to the logged in Contractor. The Contractor can view lists based on the filters provided. To view a Work Order List, go to **Contractor Self Service > Work Order > Work Order List**



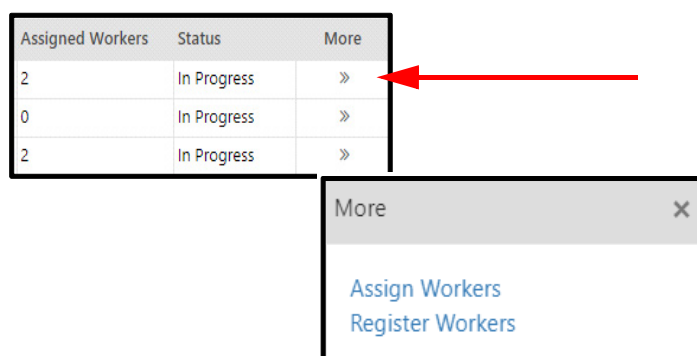
The screenshot shows the 'Work Order List' interface. At the top, there are filters for 'Status' (set to 'All') and 'Work Order Type' (set to 'All'). Below the filters is a search bar. The main table lists work orders with columns: Work Order ID, Name, Work Order Type, Contractor, Start Date, End Date, Worker Limit, Assigned Workers, Status, and More. The table contains three rows of data.

Work Order ID	Name	Work Order Type	Contractor	Start Date	End Date	Worker Limit	Assigned Workers	Status	More
1234	Designing	Site	test	10/01/2022	11/01/2022	3	2	In Progress	»
3456	Cementing	Work Order Type-1	test	10/01/2022	11/01/2022	5	0	In Progress	»
9824	Concreting	Work Order Type-1	test	10/01/2022	11/01/2022	4	2	In Progress	»

Configure the following filters to view all or specific Work Orders:

- Status
- Work Order Type

Select any work order in the list. The corresponding **Work Order** page is displayed. Click the **More** » icon against a Work Order to perform the following actions:



- **Assign Workers** - Redirects to the *Worker Assignment* page to assign workers for the selected work order. See [“Worker Assignment”](#)
- **Register Workers** - Redirects to the *Worker Profile* page to register new workers. See [“Worker Profile”](#)

# Work Order

This page enables to view details of Work Orders such as validity, worker limit etc of the logged in contractor.

To view a Work Order, go to: **Contractor Self Service > Work Order > Work Orders**

Work Order

ID \*

333

Name \*

Monday Work order

Type

Work Order Type-1

Validity \*

14/09/2020

21/09/2020

Total Assigned Worker

1

Description

250 chars

General

Associated Contractor \*

111

Manoj

Site In-Charge

4

Hardik

Approval Stage \*

1

Approval Stage-1

Max Worker Limit \*

12

Check Limit While Assigning Worker

☒

Skill-Wise Worker Limit

Search

Skill ID ▲	Name	WorkerLimit	
1	Skill-1	12	<div></div>

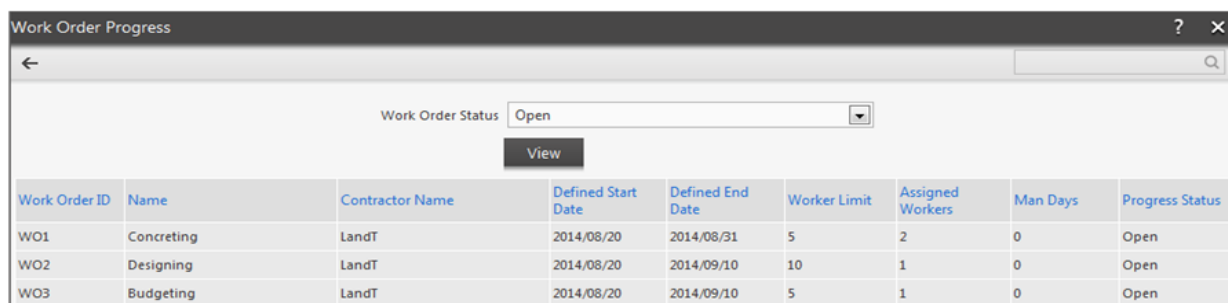
Enter the Work Order ID or select a Work Order from the grid list to view its details.



# Work Order Progress

The Work Order Progress page provides the progress detail of work orders for the respective logged in contractor.

To view the work order progress select **Work Order Progress** option under **Work Order** from the Contractor Self Service page. The page appears as shown below:



The screenshot shows a web application window titled "Work Order Progress". At the top, there is a search bar and a "Work Order Status" dropdown menu set to "Open". Below the dropdown is a "View" button. The main content is a table with the following data:

Work Order ID	Name	Contractor Name	Defined Start Date	Defined End Date	Worker Limit	Assigned Workers	Man Days	Progress Status
WO1	Concreting	LandT	2014/08/20	2014/08/31	5	2	0	Open
WO2	Designing	LandT	2014/08/20	2014/09/10	10	1	0	Open
WO3	Budgeting	LandT	2014/08/20	2014/09/10	5	1	0	Open

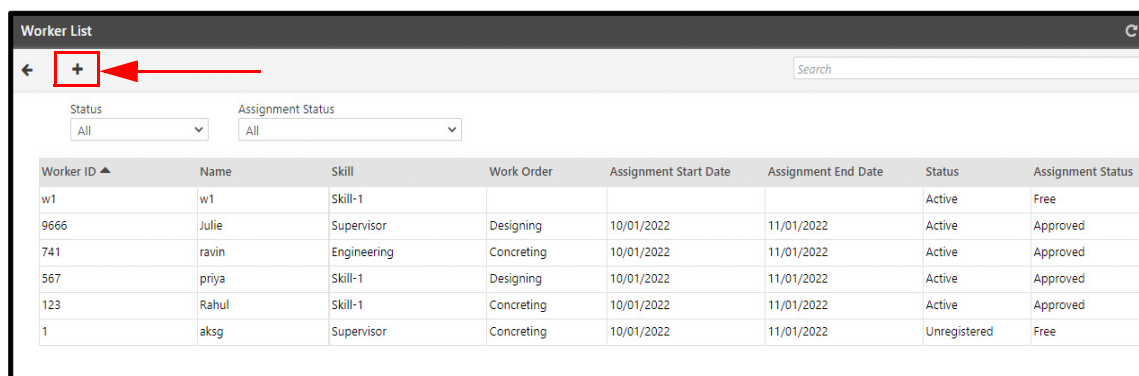
**Work Order Status-** Select the work order status from the options of *All*, *Closed*, *In Progress* and *Open* from the drop down list.

Based on the status selected, the progress is shown for all filtered work orders in the grid, with details such as **Defined Start Date**, **Defined End Date**, **Worker Limit**, **Assigned Workers**, **Man Days** & **Progress Status**.

# Worker List

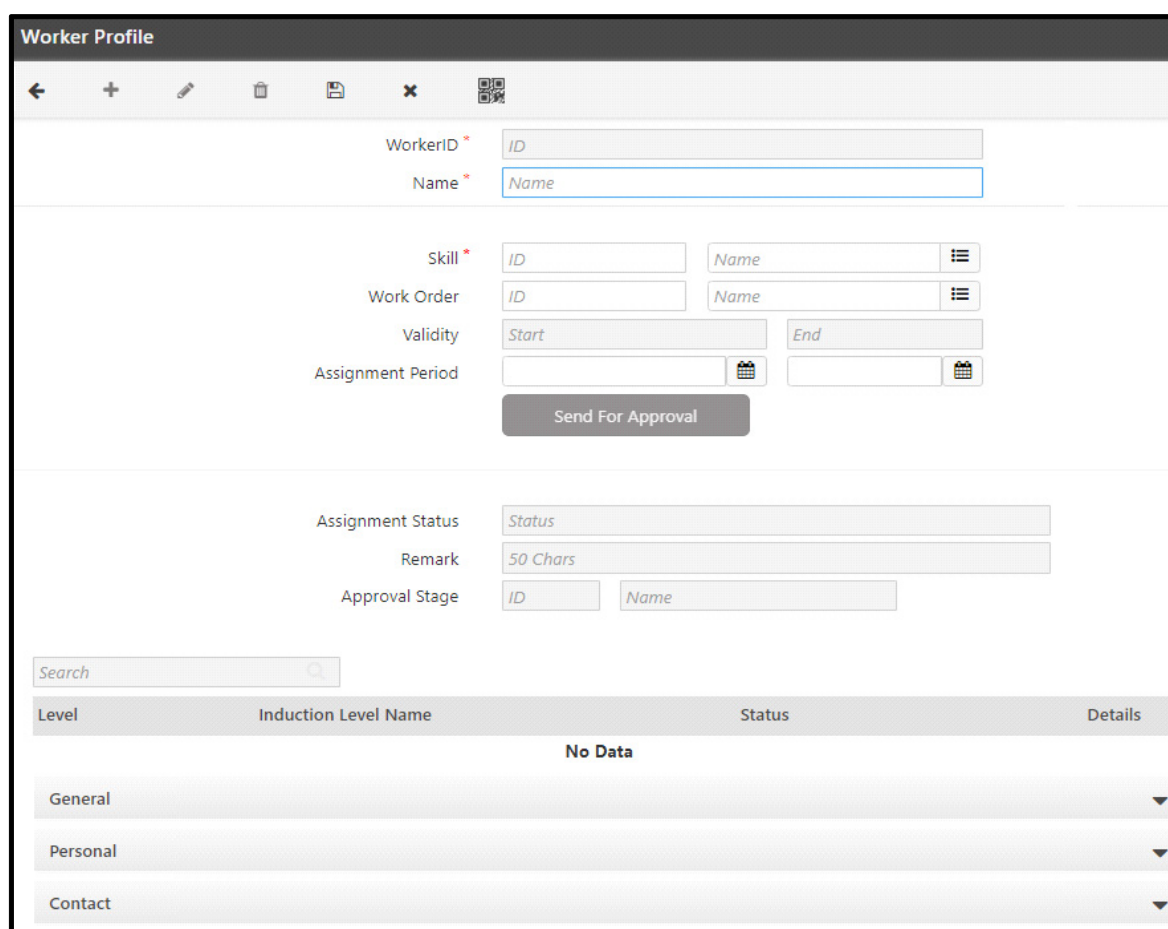
The Worker List page provides the detail of assigned workers against respective logged in contractor.

To view the worker list select **Worker List** option under **Workers** from the Contractor Self Service page. The page appears as shown below:



Worker ID	Name	Skill	Work Order	Assignment Start Date	Assignment End Date	Status	Assignment Status
w1	w1	Skill-1				Active	Free
9666	Julie	Supervisor	Designing	10/01/2022	11/01/2022	Active	Approved
741	ravin	Engineering	Concreting	10/01/2022	11/01/2022	Active	Approved
567	priya	Skill-1	Designing	10/01/2022	11/01/2022	Active	Approved
123	Rahul	Skill-1	Concreting	10/01/2022	11/01/2022	Active	Approved
1	aksg	Supervisor	Concreting	10/01/2022	11/01/2022	Unregistered	Free

Click on **Add** icon. The Worker Profile page opens. The new worker can be added from this page.



WorkerID \*

Name \*

Skill \*

Work Order

Validity

Assignment Period

Assignment Status

Remark

Approval Stage

Level	Induction Level Name	Status	Details
No Data			
General			▼
Personal			▼
Contact			▼

To know about the addition of workers, Refer ["Worker Profile"](#).

The Worker list Page enables to search the Worker detail by his ID, Name, Skill or Work Order from the search box.

The worker list can be filtered on the basis of **Status** and **Assignment Status**

- The Status options are All, Active, Inactive and Unregistered.
- The Assignment Status options are All, Pending, Approved, Rejected, Free and Blacklisted.

# Worker Profile

Worker Profile page provides the basic detail of workers. The contractor can add the workers using his CSS login.

To add the workers to the system, Login to Contractor Self Service account. Go to **Worker > Worker Profile**. The page appears as shown below:

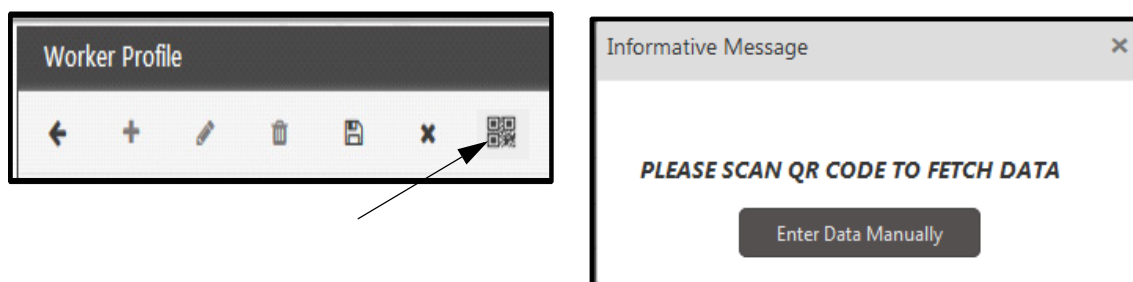
Level	Induction Level Name	Status	Details
1	Induction Level-1	Approved	<a href="#">Details</a>

Click on **New** button to add a new worker.

**WorkerID:** The ID will be generated by the system automatically.

You can also scan the QR code of worker's Aadhar card to fetched the basic details like, Name, Address, DoB etc. and filled into the respective fields automatically as available in the Aadhar Card.

Click on the Icon and the pop-up will open as shown below.



Scan the worker's Aadhar Card QR through the QR Code scanner or click on the **Enter Data Manually** button to enter the details manually into a pop-up window.

Once the Aadhar Card is scanned and information is received by COSEC Server, the fetched details including Aadhar Number will display as shown below.

The screenshot shows a pop-up window titled "Fetched User Data" with a close button (X) in the top right corner. The window contains the following fields:

- Aadhaar No.: 126713582135
- Name: Woker test
- Gender: Female (dropdown menu)
- Date Of Birth: 15/09/1987 (calendar icon)
- Address: A2-92-Sanidhya Township, Behin
- Street: d Dasalad, Ajwa Road, Vadodara
- City-Pincode: Vadodara - 390019
- State: Gujarat
- Country: India
- Father/Spouse Name: Roopnarayan Singh

At the bottom of the window are two buttons: "OK" and "Cancel".

User can edit the details if required.



*The Aadhar Card Number must be unique from existing workers to configure a new one.*

Click on the **Ok** button to Save the details or **Cancel** to cancel the configuration.

Once saved, the fetched details will be placed into the fields of respective sections.

If the Admin has configure QR Code scanning optional then, the above step can be skipped and the details can be added manually as describe below.

**Name:** Enter the name of the worker.

**Skill-** Select the skill from the pick-list to be assigned to the worker.

**Work Order-** Select a work order from the pick-list which shows the list of work orders of the logged in contractor, which is to be assigned to the worker.

**Validity-** This is the auto generated field which shows the work order validity period.

**Assignment Period-** Select the assignment period to be allotted to the worker.

**Worker Profile**

WorkerID \*

Name \*

Skill \*  Supervisor Skills

Work Order  Electrical Maintenance

Validity

Assignment Period

Click on **Save** button to save the worker profile. The worker profile will be listed in the grid. The WorkerID is auto-generated on saving the worker's profile. And the assignment status is shown as Free.

**Worker Profile** ✓ Saved Successfully

WorkerID \*

Name \*

Skill \*  Supervisor Skills

Work Order  Electrical Maintenance

Validity

Assignment Period

ID	Name	Work Order	Status	Assignment Status
1	Vasim	WO5	Unregistered	Free
AP	Aakash		Active	Free
RG	Rutuja	WO4	Active	Approved



*The **unregistered free worker** is the one whose profile is created by CSS but not sent for induction approval or no work order is assigned.*

To send the free worker for induction approval, click on **Send for Approval** button.

Then the assignment status of worker changes to **Pending** as shown below.

**Worker Profile** ✓ Saved Successfully

Name \*

Skill \*  Supervisor Skills

Work Order  Electrical Maintenance

Validity

Assignment Period

Assignment Status

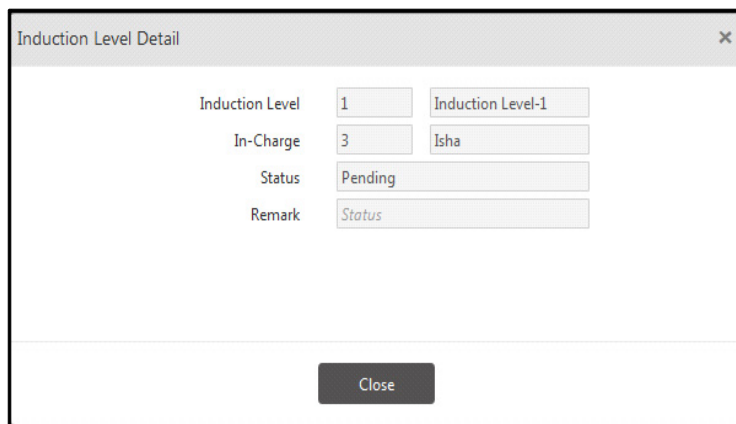
Remark

Approval Stage  Approval Stage- Techni

Level	Induction Level Name	Status	Details
1	Induction Level-1	Pending	<input type="button" value="⋮"/>
2	Induction Level-2	Pending	<input type="button" value="⋮"/>
3	Induction Level-3	Pending	<input type="button" value="⋮"/>

ID	Name	Work Order	Status	Assignment Status
1	Vasim	WO5	Unregistered	Pending
AP	Aakash		Active	Free
RG	Rutuja	WO4	Active	Approved

The Pending Induction levels will be listed in the grid. To view the incharge of the worker, click on Details button.



The image shows a dialog box titled "Induction Level Detail" with a close button (X) in the top right corner. Inside the dialog, there are four rows of data, each with a label on the left and a text input field on the right. The first row is "Induction Level" with the value "1" and a dropdown menu showing "Induction Level-1". The second row is "In-Charge" with the value "3" and a dropdown menu showing "Isha". The third row is "Status" with the value "Pending". The fourth row is "Remark" with the value "Status". At the bottom center of the dialog is a "Close" button.

Induction Level	1	Induction Level-1
In-Charge	3	Isha
Status	Pending	
Remark	Status	

Close



*The **unregistered pending worker** is the one whose induction level approval is in pending state or in progress.*

The **General**, **Personal** and **Contact** details of the worker can be specified in the respective tabs.

The relevant worker documents (e.g. driving license, PAN card etc.) can be uploaded and the configured custom fields of type Date and Text can also be updated from **General** tab.

## General:

General

Date Of Birth

Vehicle Registration No.

Driving License

Driving License Expiry

Passport No.

Passport Expiry

PAN

Aadhaar No.

Custom Fields

PF No

UAN

ESI No

Voter ID

Visa

Visa Expiry

Security Number \*

564265464232

ID Proof \*

photo

Nominee Name \*

Krishna

ID Proof


30 Char

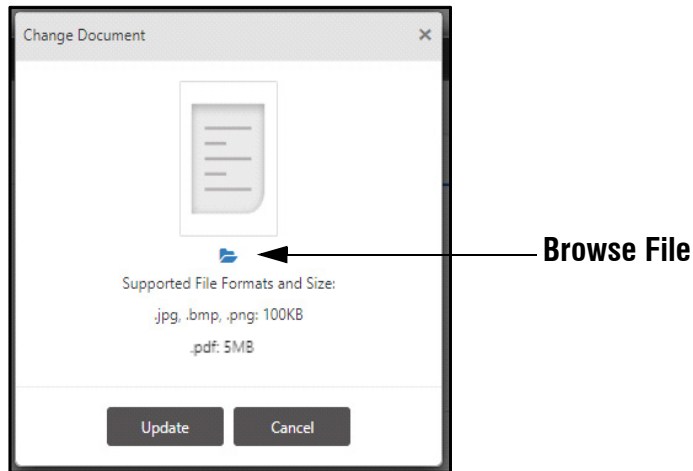
Address Proof

30 Char

Custom Fields are visible only after they are configured by your System Administrator. For example Security Number, ID Proof, Nominee Name.

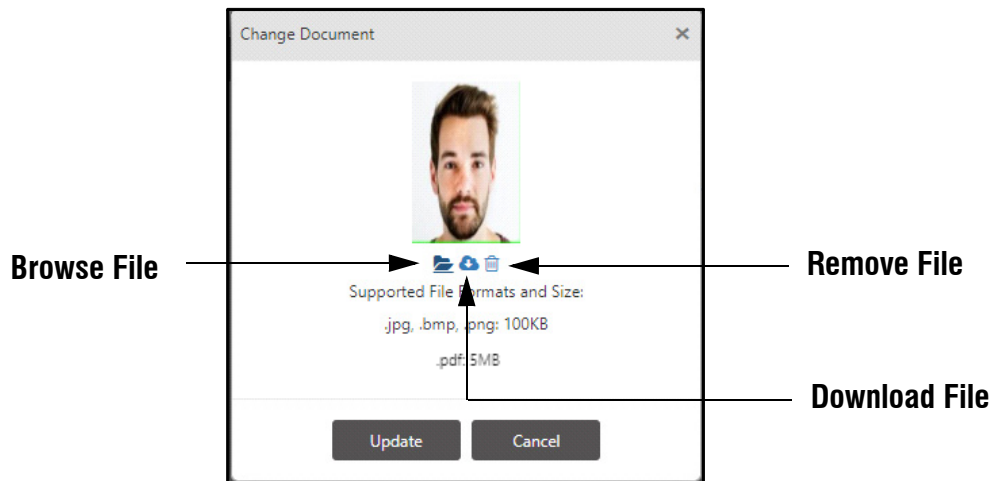



In certain parameters like Driving License, Passport No., PAN, Custom Fields etc, you can upload the documents by clicking **Upload**  button. Then **Change Document** pop-up appears as shown below.





Click **Browse File**  .

To upload, select the desired file as per the supported formats and size (.jpg, .bmp, .png, pdf) from your local PC.




After uploading the file, if you wish to upload a different file instead of the current uploaded file, click **Browse File**  again and select the desired file from your local PC. The previously uploaded file will get replaced with the new file.

To download the uploaded file, click **Download File**  .

To remove the uploaded file, click **Remove File**  .

Then click **Update**.

The document will be uploaded and can be previewed by clicking on **Preview**  button.



*If you are unable to edit Worker Basic Details, contact your System Administrator to provide the necessary rights.*

After the Induction approval of the worker by the administrator, the assignment status can be viewed by the contractor. If the induction levels are approved then the assignment status will be shown as **Approved**. In case the level is rejected, the status is marked as **Rejected**.

**Personal:**

Nationality		<input type="text"/>
Qualification		<input type="text"/>
Experience		<input type="text"/>
Gender	NA <input type="button" value="v"/>	
Blood Group	NA <input type="button" value="v"/>	
Height (cms)	<input type="text"/>	
Weight (kgs)	<input type="text"/>	
Medical History	<input type="text"/>	
Marital Status		NA <input type="button" value="v"/>
Father/Spouse Name		<input type="text"/>

**Contact:**

Phone		<input type="text" value="30 Char"/>
Mobile		<input type="text" value="32 Char"/>
Email		<input type="text" value="100 Char"/>
<b>Local</b>		
Address		<input type="text"/>
		<input type="text"/>
Street		<input type="text"/>
City-Pincode	<input type="text"/>	- <input type="text" value="Pincode"/>
State	<input type="text"/>	
Country	<input type="text"/>	

# Worker Assignment

The logged in contractor can assign the work order to multiple workers through CSS.

To assign the work order go to **Contractor Self Service > Worker > Worker Assignment**. The page appears as shown below:

The screenshot shows the 'Worker Assignment' window. On the left, there are input fields for 'Work Order' (ID and Name), 'Validity' (From and To dates), and 'Status' (a dropdown menu currently set to 'Open'). Below these are three tabs: 'Current Assignment', 'Unregistered Workers', and 'Past Assignments'. On the right, there is a search bar and a table of work orders.

Work Order ID	Name
WO1	Concreting
WO2	Designing
WO3	Budgeting

Select the work order from the grid on the right. The work order details including **Validity** and **Status** appear at the respective fields on the worker assignment page. The work order can also be selected through the picklist.

This screenshot shows the 'Worker Assignment' window after selecting work order WO1. The 'Work Order' fields now contain 'WO1' and 'Concreting'. The 'Validity' dates are '2014/08/20' to '2014/08/31', and the 'Status' dropdown is set to 'In Progress'. The work order table on the right has WO1 highlighted.




Work Order ID	Name
WO1	Concreting
WO2	Designing
WO3	Budgeting



To assign the new workers for the selected work order, click on **Edit** button. Click on **Current Assignment** tab. Select the workers from the picklist. The worker with the assignment details will appear in the grid.

This screenshot shows the 'Worker Assignment' window with the 'Current Assignment' tab selected. It displays the 'Assignment Period' (2014/08/21 to 2014/09/10) and a table of assigned workers. The 'Work Order' fields show 'WO3' and 'Budgeting'. The 'Validity' dates are '2014/08/20' to '2014/09/10', and the 'Status' is 'In Progress'.

Worker ID	Name	From	To	Assigned Days	Assignment Status	Edit	Delete
S1	Saumya	2014/08/20	2014/09/10	22	Approved		
dinnni	dineshnair	2014/08/21	2014/09/10	21	Free		

To change the assigned days click on **Edit** button. Then specify the from and to date. For example: 2014/08/21 is changed to 2014/08/22 and 2014/09/10 is changed to 2014/09/08 Then click on **Save** button to save the changes in date.

Worker ID	Name	From	To	Assigned Days	Assignment Status	Edit	
S1	Saumya	2014/08/20	2014/09/10	22	Approved		
dinnni	dineshnair	2014/08/21	2014/09/10	21	Free	 	

Worker ID	Name	From	To	Assigned Days	Assignment Status	Edit	
S1	Saumya	2014/08/20	2014/09/10	22	Approved		
dinnni	dineshnair	2014/08/22	2014/09/08	18	Free		

Click on **Save** button from the menu bar to save the assignment of worker to the work order.

The **Unregistered** Workers tab shows the total count of (Unregistered + pending) workers who are respectively assigned against the selected work order.

Unregistered Workers						
ID	Name	From	To	Assigned Days	Assignment Status	
4	Sushma	2014/08/27	2014/09/03	8	Pending	

The **Past Assignments** tab shows the workers who were previously assigned the selected work order.

Past Assignments					
Worker ID	Name	From	To	Assigned Days	Assignment Status
No Data					

# Profile

---

Profile page provides the basic details of logged in Contractor. The Contractor can edit his own details from profile page.

To edit the profile select **Profile** option from the Contractor Self Service page. The page appears as shown below:

**Edit Profile**

Contractor: C01 HPCL  
End Validity Date: 05/31/2017

**General**

Service Tax No.    
PAN    
PF No.    
ESI No.    
License No.

**Contact**

Contact Person 1   
Mobile   
Email   
Contact Person 2   
Mobile   
Email

**Update**

The **General** details which can be edited are

- Service Tax No.
- PAN
- PF No.
- ESIC No.
- License No.

If required, you can upload these documents also.

The **Contact** details which can be edited are:

- Contact Person1 & Contact Person2
- Mobile no. of both contacts
- Email ID of both contacts

Click on **Update** to save the edited Profile details.

# Reports

## Worker Details

Worker Details Report shows the workers detail against work order for respective logged in contractor.

Select the Assignment Status as optional parameter from the options of All,Pending,Approved,Rejected,Free and Blacklisted.

Select the Work Orders either All or randomly from the work order picklist.




Click on Generate Report.

Worker Details




?

←

Back



Find...



1 of 1

100%

Main Report

Organization 2  
Worker Details

Page 1 of 1

Run by: LandT

Date:2014/08/14 16:57

Worker ID	Name	Skill	Work Order ID	Assignment Start Date	Assignment End Date	Assignment Status	Assignment Status
CWM1	Jatin	Engineering skills	Concreting	2014/08/20	2014/08/29	Active	Approved
CWM2	Amit	Supervisor Skills	Concreting	2014/08/25	2014/08/28	Active	Approved
S1	Saumya	Finance skills	Budgeting	2014/08/20	2014/09/10	Active	Approved
W1	Sunil	Supervisor Skills	Designing	2014/08/24	2014/09/08	Active	Approved

## Work Order Man Days




Work Order Man Days Report shows total sum of workers against work order for respective logged in contractor.

Select the filter options for work orders from the drop down list. Click on Generate Report.


Work Order Man Days



←

Back

Find...



1 of 1

100%

Main Report

Organization 2

Page 1 of 1

Work Order Man Days

Run by: LandT

Date: 2014/08/14 16:57

Work Order ID	Name	Worker Limit	Assigned Workers	Approved Workers	Man Days
WO1	Concreting	5.00	2	2	
WO2	Designing	10.00	1	1	
WO3	Budgeting	5.00	1	1	

## Daily Summary

Daily Summary Report shows the workers daily attendance summary against work order for respective logged in contractor.

Select the date range for which the daily attendance summary is to be viewed.

Select the filter options for work orders and workers from the drop down list.

Click on Generate Report.

The screenshot shows a web application window titled "Daily Summary". It includes a "Back" button, a search bar, and a "Main Report" tab. The report content is as follows:

ORGANISATION 1.		Page 1 of 1
Organization-Wise Daily Summary From 2014/08/13 To 2014/08/21		
Run by: System Admin		Date: 2014/08/21 14:37
Worker ID	Name	Attendance Status
2014/08/18		
Work_order	WO	Contractor-1
111.		
Worker20	Worker 20 permanent	P-H
2014/08/19		
Work_order	WO	Contractor-1
111.		
Worker20	Worker 20 permanent	F-A
2014/08/20		
Work_order	WO	Contractor-1
111.		
Worker20	Worker 20 permanent	F-F
2014/08/21		
Work_order	WO	Contractor-1
111.		
Worker20	Worker 20 permanent	ABS



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