CBRE

CBRE Pulse Connect

Contractor Portal: New Registration, Qualification and Setup

Vendor Administrator Guide

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Contractor Portal: New Registration, Qualification and Setup

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Introduction

As the Vendor Administrator of a company who wishes to perform works at CBRE managed properties, CBRE would like to introduce you to our contractor portal, Pulse Connect.

Pulse Connect has been developed with the aim of achieving the following:

- Allow for central uploading and expiry tracking of contractor insurance information.
- To provide CBRE and its clients with a level of comfort that contractors working at CBRE managed properties have appropriate systems in place with regards to management of health, safety, environment and general compliance.

In order to get started, each Vendor has been required to nominate a "Vendor Administrator", who will become the key point of contact for the vendor in regards to the Pulse Connect system. The following user guide is designed for use by this Administrator, providing instructions on how Vendors successfully complete the following on the Pulse Connect system:

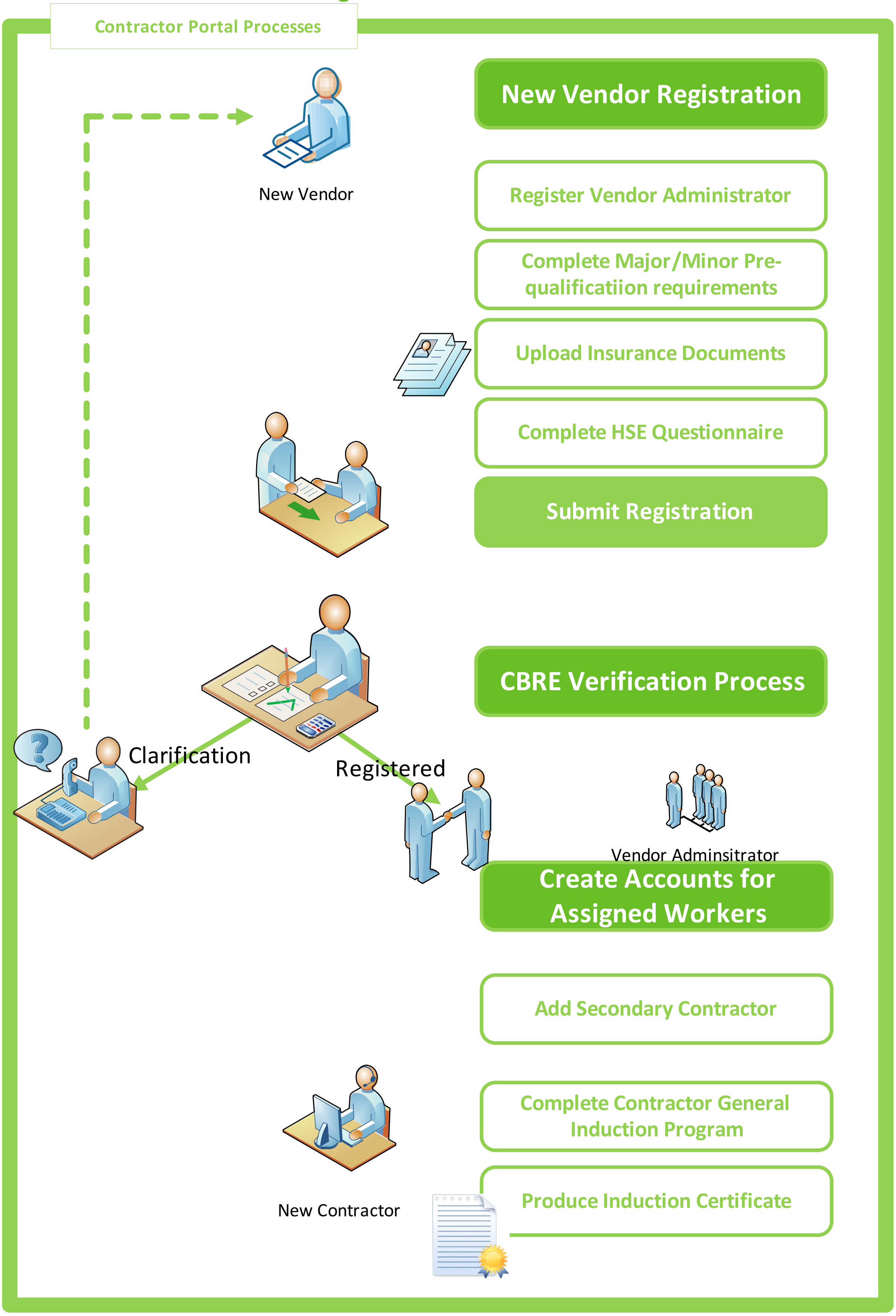
- Complete a series of pre-qualification questions, which cover a range of health, safety, environmental and compliance topics. The purpose of these pre-qualification questions is to confirm that the vendor has appropriate procedures in place to manage health, safety and environmental risk/legislative requirements.
- Upload evidence confirming the vendor has appropriate insurance in place (i.e. workers compensation, public liability and professional indemnity).
- Create secondary accounts for Assigned Workers (see definition below) to allow them to complete the online CBRE General Contractor Induction.
- Assign a work assignment to an Assigned Worker.

Terminology

Assigned Worker	A secondary user created by the Vendor Administrator for the purposes of being assigned work. An Assigned Worker must complete the General Contractor Induction in order to be assigned work. An Assigned Worker may be an employee of the registered Vendor, or may be a third party engaged to conduct works on behalf of the vendor.
Vendor	A vendor is a person or company that provides goods or services. Purchase Orders (and Service Orders) are used as a means of creating a contractual relationship. A Vendor must be a "Registered Vendor" on the Pulse Connect system so as to be eligible for engagement and assignment of work.

Vendor Administrator	The person identified by the Vendor to be the key point of contact for Pulse Connect, responsible for completing the registration, pre-qualification and establishment of secondary user accounts. The Administrator must have a working knowledge of the Vendor's health, safety environmental and compliance procedures.
Work Assignment	A Work Assignment allows the Vendor to assign some or all of his duties to Assigned Workers in order to fulfil the contract. The CBRE Pulse Tech System will automatically create a Work Assignment document wherever a new Purchase Order is issued to a contractor.

Overview of Contractor Registration and Qualification



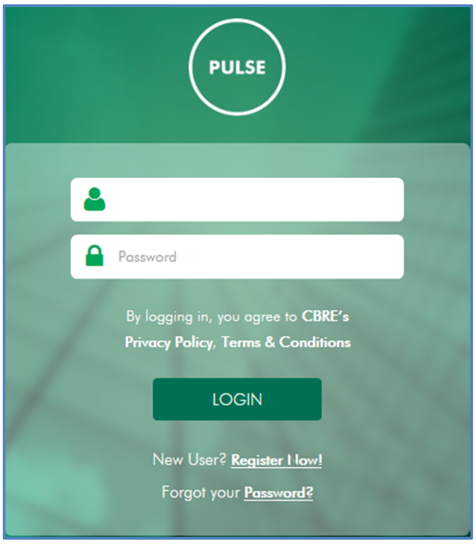
Register Vendor Administrator

Prior to commencement of Vendor Administrator registration, the Vendor must have contacted CBRE and identified a Vendor Administrator. CBRE will then establish a Pulse Connect account for the Vendor Administrator and send them an email which includes a link to the Pulse Connect portal. If this has not occurred, please contact CBRE (at PulseConnect@cbre.com.au) to advise CBRE of the selected Vendor Administrator.

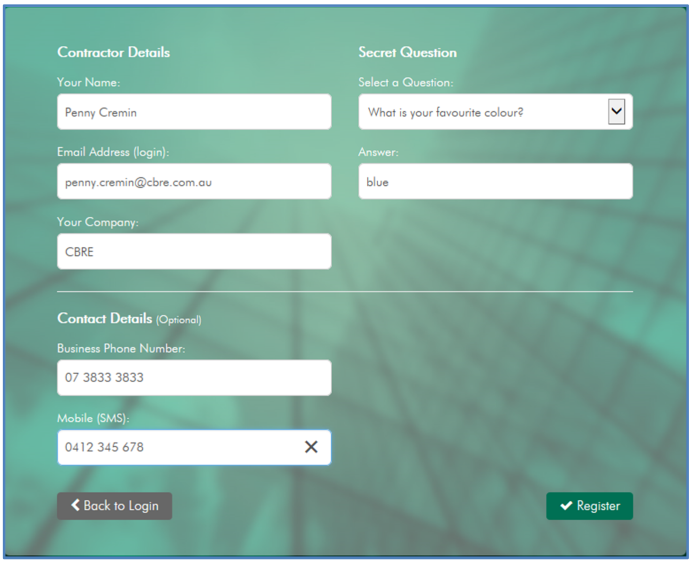
Once the Vendor Administrator has received an email with a link to Pulse Connect, they must register their company via the following steps:

Steps:

1. In a web browser, log in to the CBRE Pulse Connect Portal using the following address: https://pulseconnect.cbre.com.au
2. In the Pulse Connect login screen, click "New User? Register here" link. This will open the new Contractor Registration screen.



3. Enter all mandatory fields:
   a. Name
   b. Email Address
   c. Company Name
   d. Secret Question and Answer



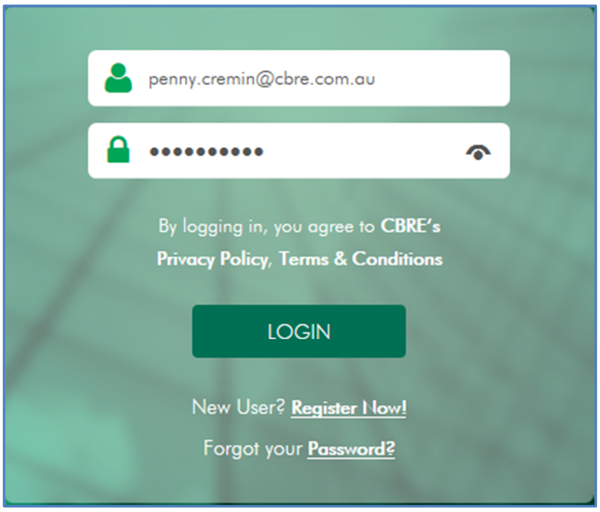
4. When complete, click the **Register** button
5. A message indicating successful registration will be displayed. Click the **Return to Login** button to complete this first part of the registration process.

Success message:

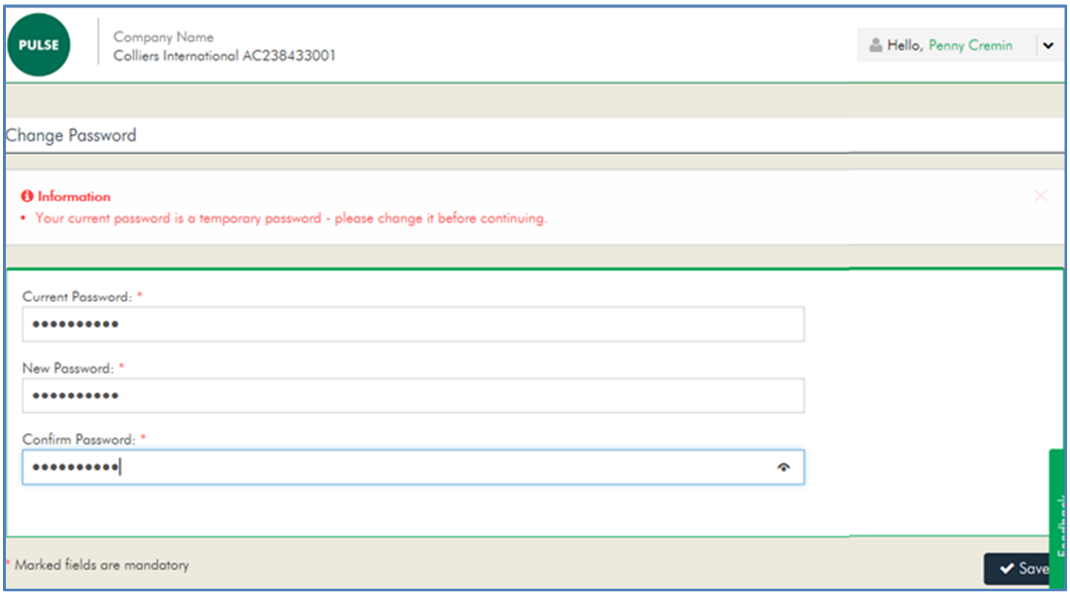
> You have successfully registered. An email has been sent to you with a temporary password. Use this password to log in for the first time.
>
> **Return to Login**

Register Vendor Administrator (Continued)

Steps:



6. In the CBRE Contractor Portal login screen, enter your email address in the Email field.
7. Enter your temporary password in the Password field. (Please refer to the email sent to you and copy-and-paste into the password field).
8. Click the Login button. This will open the My Details screen. You will be prompted to change your password on first login.
9. Enter your temporary password in the Current Password field.
10. Enter a new password in the New Password screen.
11. Re-enter the new password in the Repeat New Password screen.
12. Select and answer a secret question.
13. Click the Save button.



- Notes:
  1) You are able to update the editable fields in the My Details screen before saving all changes here.
  2) If you choose to logout at this stage, the next stage (answering the pre-qualification questionnaire) will be displayed automatically after re-logging in.
  3) Passwords must include at least three (3) of the following four (4) categories:
     a) English uppercase characters (A to Z).
     b) English lowercase characters (a to z).
     c) Numeric characters (0 to 9).
     d) Non alphanumeric characters (e.g. ! @ # $ % & *).
  4) For forgotten passwords, click the "Forgot Password" link and follow the instructions.

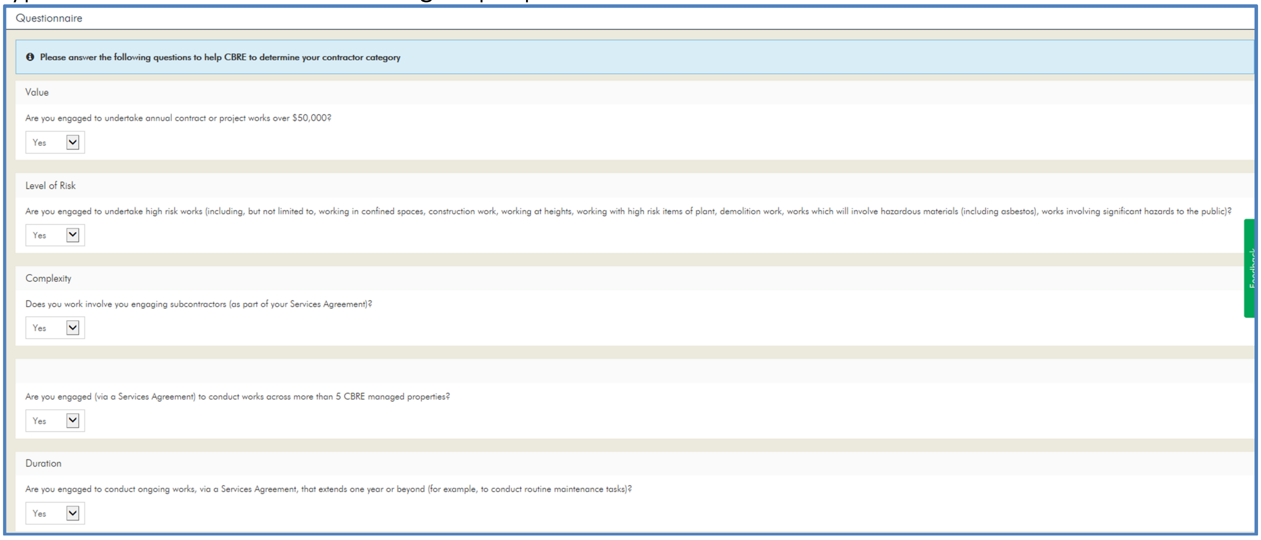
Assigning Major/Minor Contractor Status

Once you have complete the initial registration steps, the administrator will then be asked to answer five questions which will result in your company being assigned a status of "major" or "minor" contractor.

Steps:

1. Navigation to this screen will either be from clicking the **Save Change** button (after choosing a password, see previous page).
   OR
   When the Vendor Administrator re-logs in to Pulse Connect (if you have not completed this process).

2. The Administrator will be asked to answer a number of questions related to the value, level of risk and complexity of works that will be undertaken by their company and the type undertaken at CBRE managed properties.


Questionnaire

Please answer the following questions to help CBRE to determine your contractor category

Value

Are you engaged to undertake annual contract or project works over $50,000?

Yes

Level of Risk

Are you engaged to undertake high risk works (including, but not limited to, working in confined spaces, construction work, working at heights, working with high risk items of plant, demolition work, works which will involve hazardous materials (including asbestos), works involving significant hazards to the public)?

Yes

Complexity

Does you work involve you engaging subcontractors (as part of your Services Agreement)?

Yes

Are you engaged (via a Services Agreement) to conduct works across more than 5 CBRE managed properties?

Yes

Duration

Are you engaged to conduct ongoing works, via a Services Agreement, that extends one year or beyond (for example, to conduct routine maintenance tasks)?

Yes

3. Answer all questions. You will be unable to proceed to the pre-qualification stage until these questions have been answered.

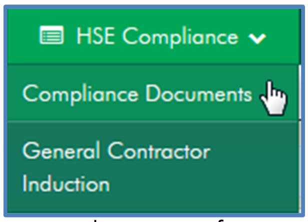
4. Once all questions have been answered, click the **Submit** button.

5. Click the hyperlink: "**Login**". This will display your welcome screen. The process is complete – the Vendor Administrator is now registered in Pulse Connect. The Administrator will now be able to upload insurance documents and complete the pre-qualification questionnaire.

➢ Notes:
   1) Answering "Yes" to one or more questions will automatically assign the vendor as a "major" contractor.
   2) Answering "No" to *all* questions will automatically assign the vendor as a "minor" contractor.

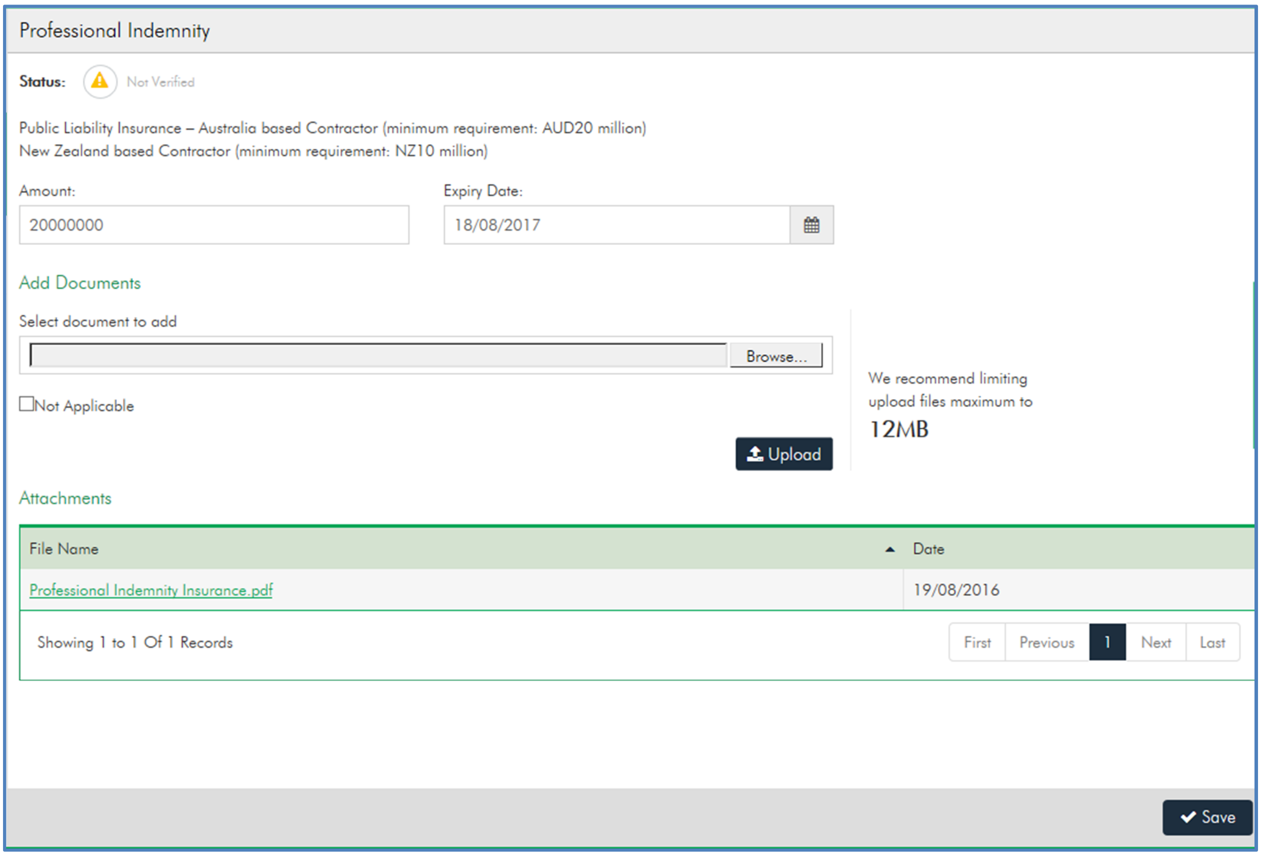
Upload Insurance Documents

Vendor Administrators are responsible for maintaining the currency of all required information. Delay in providing this information could restrict the company operators. For example, the company would be restricted from gaining access to the site to complete works.



Steps:

1. Navigate using: HSE Compliance > Compliance Documents. The documents section is displayed in the upper section of the screen.
2. Click the Documents Tab
3. Enter details, which may include amount and expiry date dependant on the type of insurance.
4. For each row required, click Browse button. Navigate to select your documents and click Open
5. Click the Upload button.
6. When complete, click the Save button. Your documents will then be displayed.



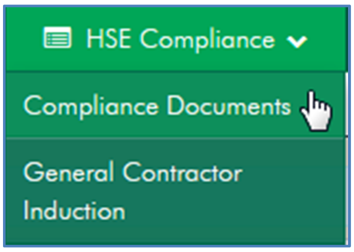
Complete Pre-qualification (HSE Compliance Questionnaire)

This questionnaire is designed to allow CBRE and its clients to assess whether the organisation has the minimum standard of health, safety and environmental capabilities required to work at a CBRE managed property.

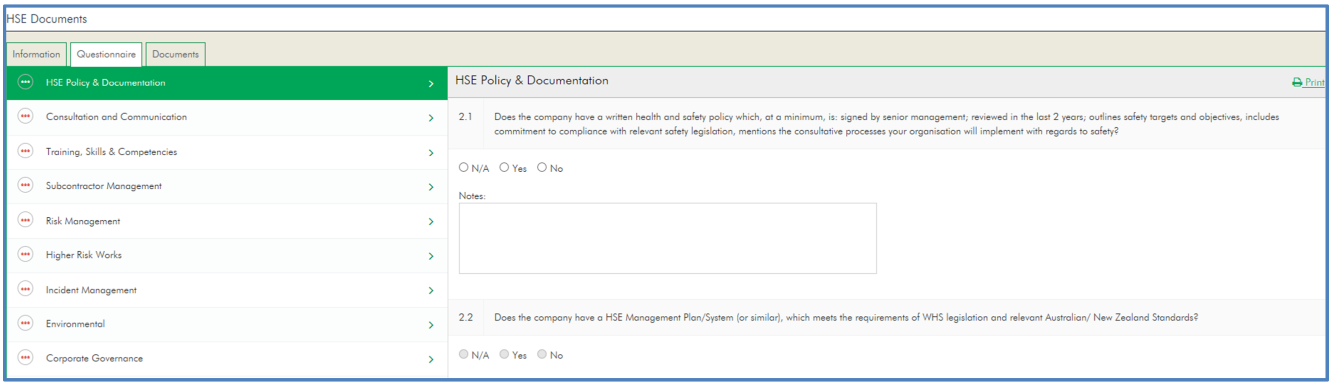
After uploading relevant insurance documents, this questionnaire will be completed by the Vendor Administrator via the following steps:

Steps:

1. Navigate using: HSE Compliance > Compliance Documents. Click the Questionnaire Tab

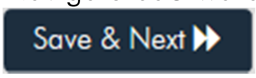


2. Address each question and support answers with additional notes as required.



3. Click the Save & Next button.

4. Navigate backward and forward through each screen using:



Or
click on the Tab Heading.

Complete Pre-qualification (HSE Compliance Questionnaire) Cont

All contractors will be required to address each question with a "Yes" or "No" and add notes as required. Some responses allow a "N/A". Ten sections make up the complete pre-qualification questionnaire and the table below details what sections are applicable to Major and Minor contractors.

No.	Section	Contractor Type
1	HSE Policy and Documentation	Major
2	Consultation and Communication	Major
3	Training, Skills and Competencies	Major / Minor
4	General	Minor
5	Subcontractor Management	Major
6	Risk Management	Major / Minor
7	High Risk Works	Major
8	Incident Management	Major / Minor
9	Environmental	Major
10	Corporate Governance	Major / Minor

Important Facts to Note

Regarding the questionnaire, some important points to note are as follows:

- Certain requirements imposed via the pre-qualification questions are considered to be compulsory by CBRE (for example, if you are a major contractor, your company must have a Health and Safety Policy). For that reason, if you click "no" to questions that are considered compulsory, you will be unable to continue until you have confirmed this compliance requirement is met. Warning messages will direct the Administrator to any incomplete sections of the questionnaire.
- At this stage, Vendors will not be required to upload evidence confirming they are meeting the compliance requirements imposed by each question. However, CBRE will be implementing an audit process whereby each Vendor may be asked to produce evidence that the questionnaire has been accurately and truthfully completed. If review of evidence determines responses provided by a Vendor to be inaccurate their pre-qualification will be automatically revoked.

Submit Pre-qualification Questionnaire for Verification

Click the Submit button
to complete the pre-qualification process. A notification will indicate that your Pre-qualification Questionnaire has been submitted. The new registration, compliance and pre-qualifications will now be verified by the CBRE.
Please read what happens next.

CBRE Verification - What Happens Next?

Feedback to Contractor

Now that the first stage of Vendor registration and pre-qualification has been completed by the Vendor Administrator, the submission of their responses and supporting documentation will be received by CBRE for verification. The Vendor will be contacted soon after to confirm the success or otherwise of their registration submission.

Where Clarification is Required

Where further clarification or additional data is required, the Vendor will be notified via email. The Vendor Administrator will then be required to update or amend the specific pre-qualification responses and reload any additional documentation that has been requested. The Vendor Administrator will only be required to respond to the specific pre-qualification question(s) in the clarification; all other responses will be disabled. The Vendor Administrator will then be able to re-submit the updated pre-qualification responses so that the verification process can be completed by CBRE.

Verification Successful

If, after verification, the Vendor has been deemed successful, they will receive a confirmation statement from t CBRE The Administrator will be able to see the "green tick" icon associated with their uploaded documents and HSE compliance questionnaire.

Upon successfully registering their company the vendor will begin to receive work assignments. In addition, the Vendor Administrator will be required to create secondary accounts for Assigned Workers. Assigned Workers will be required to complete the online General Contractor Induction and print an induction card (to be kept on them at all times when working at a CBRE managed property) before that worker can be assigned to undertake the work.

Create Accounts for Assigned Workers

Accounts for Assigned Workers must be created to allow persons conducting works on site to complete an online General Contractor Induction, as well as allowing them to be assigned to work packages. Creating these accounts for Assigned Workers will be completed by the Vendor Administrator. Vendors *will not* be able to create accounts for Assigned Workers until the Pre-qualification requirements are met.

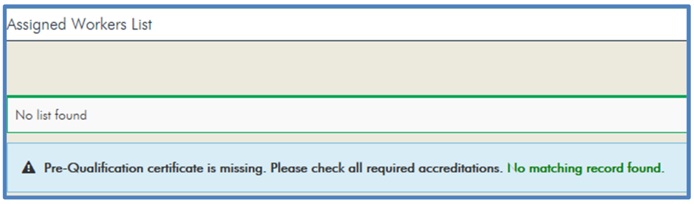
To create an account for an Assigned Worker, the Administrator must undertake the following steps.

Steps:

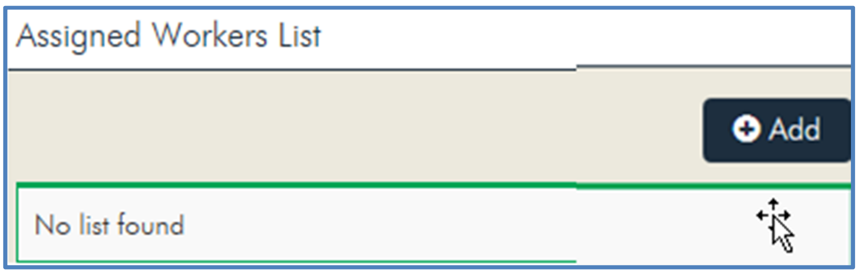
1. Navigate using: Additional Accounts > Secondary Contractors. The Secondary Contractor List screen will open.

2. When all pre-qualification requirements have been met, click the Add button. If the pre-qualification process is incomplete, the Administrator will not be able to add an Assigned Worker.

Example: Pre-qualification requirements are incomplete:



Example: where Pre-qualification requirements have been completed:



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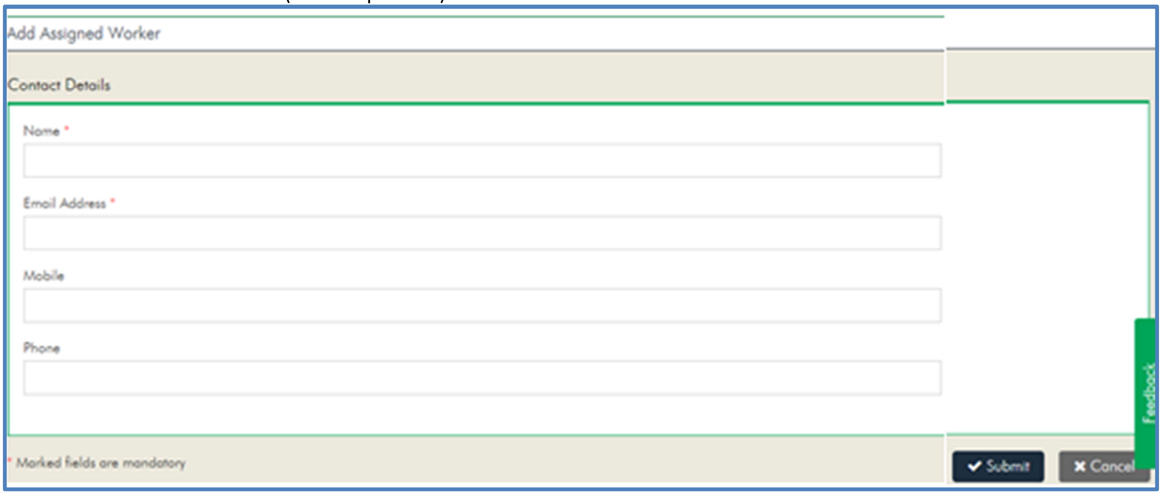
New Account Registration (Continued)

Steps:

3. Enter the details into each of the fields:
    a. Name (mandatory).
    b. Email Address (mandatory).
    c. Other details (as required)



4. When complete, click the **Submit** button. Note the "success" message that is displayed.
5. Once the Administrator has successfully created an account for an Assigned Worker, this new user will receive an email with log in and temporary password details.
6. In order for an Assigned Worker to receive a Work Assignment, they must have completed the online General Contractor Induction, answered a 20 question induction "quiz" and printed an induction card. The Vendor Administrator must ensure all Assigned Workers complete this induction process. For more information on how Assigned Workers complete this task, refer to the **"Pulse Connect – User Guide for Assigned Workers"** available on the overview page of the Pulse Connect system.

Success message:

> You have successfully saved a new Contractor. An email has been sent to the new user with a temporary password to use when logging in for first time

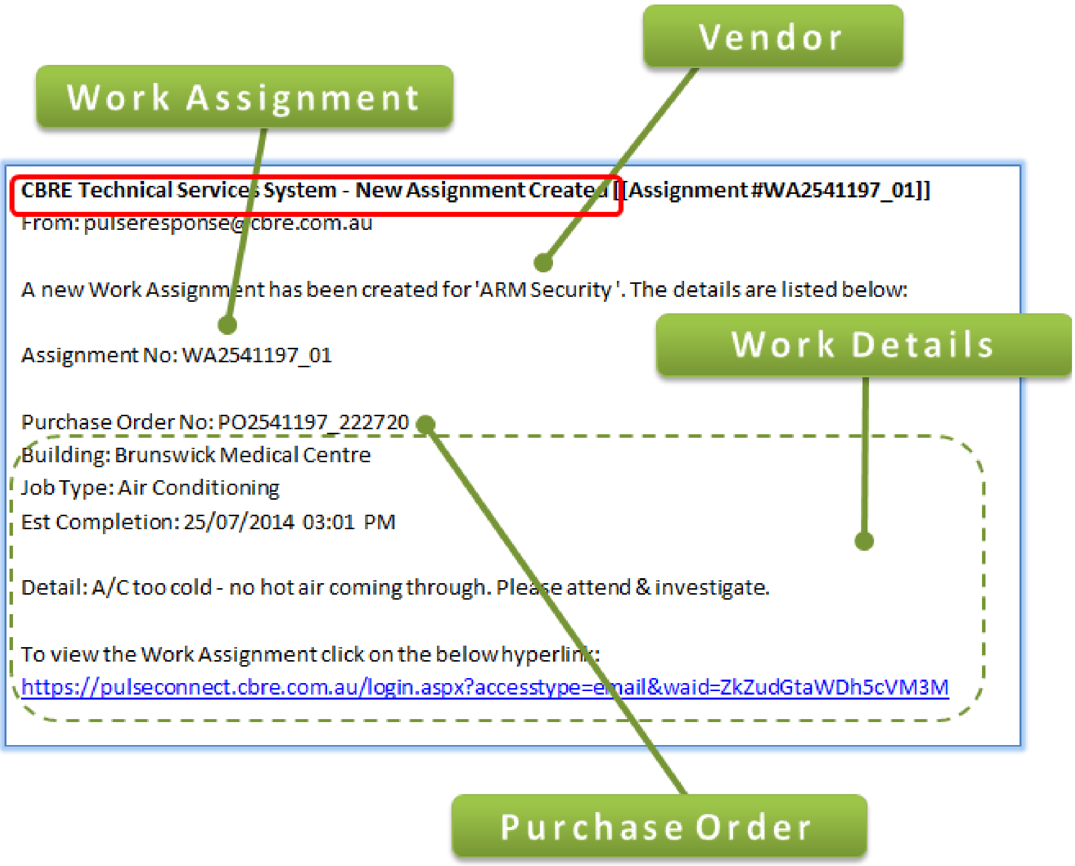
Work Assignment Process

When a Purchase Order has been "Sent" to the Vendor, a Work Assignment will be created automatically (in the CBRE Pulse Tech system) and an email sent to the Vendor Administrator.

An Assigned Worker is required to complete the online Contractor General Induction Program in order to receive Work Assignments.

Vendor Notification

Vendor Administrators will receive an email notifying them that a new Work Assignment has been created. See the example below:



- Notes:
  1) The Purchase Order will normally be "sent" electronically to the Vendor by a CBRE representative (e.g. Building Services, Facility Manager or Property Manager).

Vendor Administrator – Assign Work Assignment

Steps:

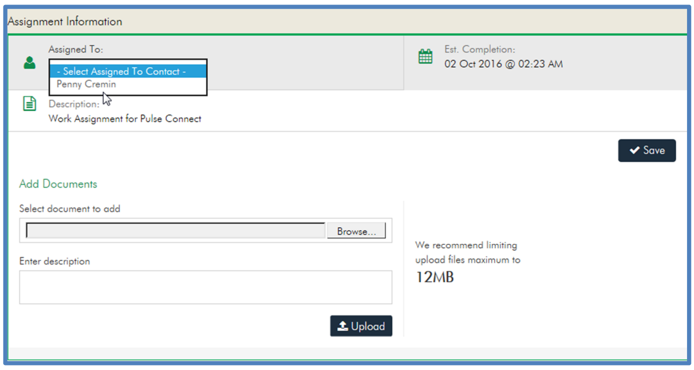
1. In a web browser, the Vendor receiving the Purchase Order will **log in** to the Contractor Portal using the following address:
   https://pulseconnect.cbre.com.au

2. Enter your **email address** in the Email field
3. Enter your **password** in the Password field and click the **Login** button.
4. Note, use the **Forgot Password** link and follow the prompts should you forget your password.

5. **Identify** the Work Assignment by either:
   a. Going to the (home page) Watchlist and select **xx New Work Assignments.**
      or
   b. Navigating to the menu items **Work Assignments** > **New Assignments.**

Steps:

6. Select an Assignment by clicking on the Assignment # link.



7. With the Work Assignment open, select the Assigned To drop-down list (list of Assigned Workers who have completed the General Contractor Induction) and select an Assigned Worker.

8. Click the Save button to complete this task. Note that the History Log will display who has been assigned to the Work Assignment.

- Notes:

This now completes the Vendor Administrators role in registration, pre-qualification, creating accounts for Assigned Workers and assigning works.

Once work has been assigned, the Assigned Worker will then receive an email notification of work having been assigned and will be required to log into the CBRE Contractor Portal to start, delay, resume and complete the Work Assignment. For instructions on this process, Assigned Workers should refer to the "Pulse Connect – User Guide for Assigned Workers".