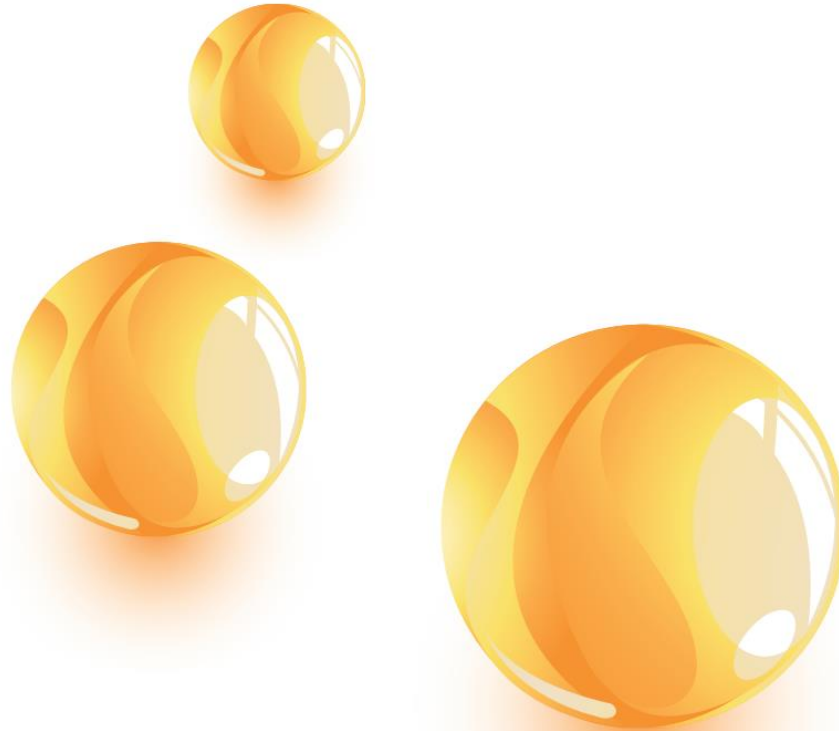


Permit to Work Module – 3rd Party Verification



PROCEDURE PURPOSE

This procedure will guide you through the introduction of the 3rd Party Verification process within SOTERweb's Permit to Work Module.

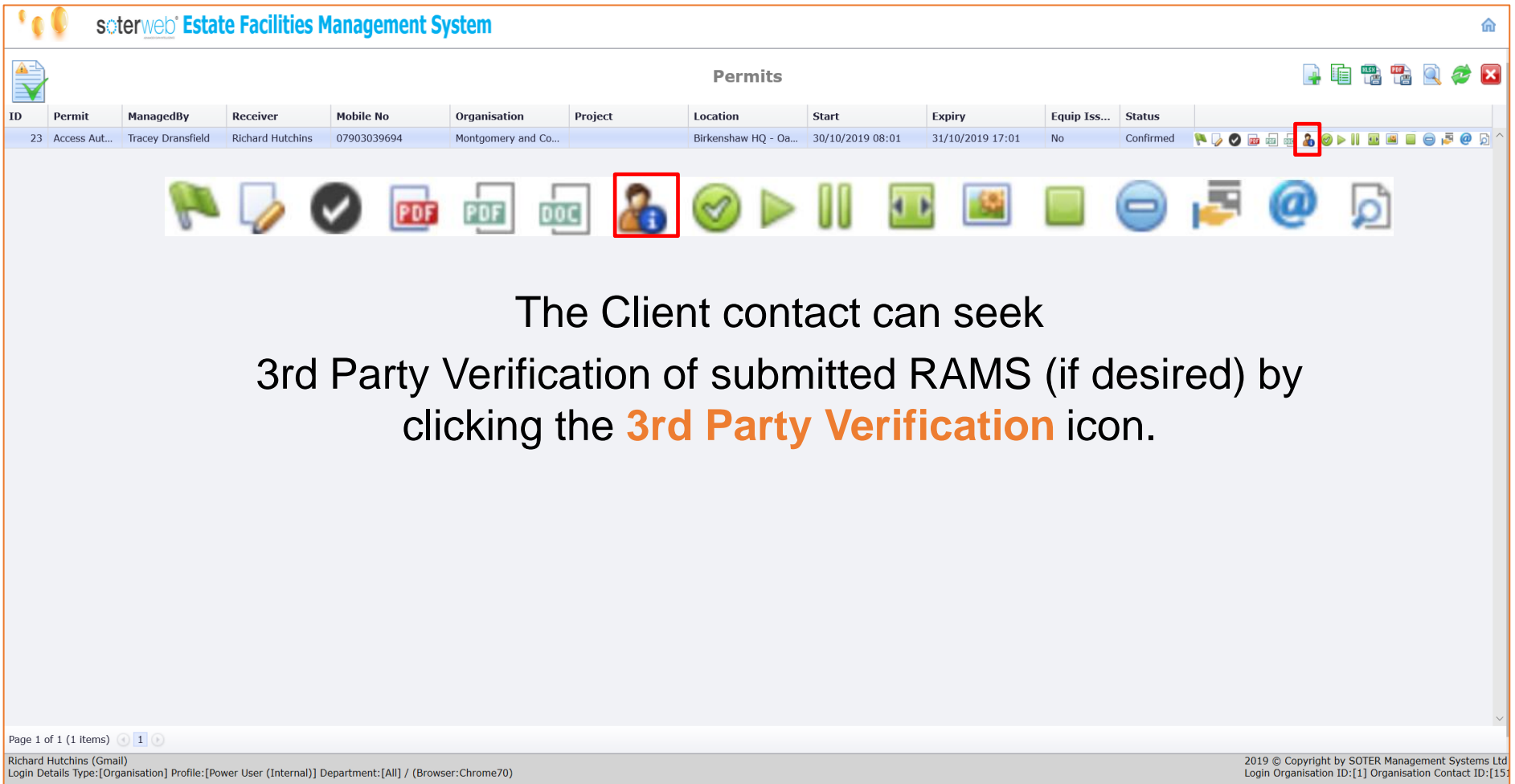
PREREQUISITES

1. Client representatives should have a profile of either an Administrator or Power User.

HELP SUPPORT

Name	Role	Email	Telephone	Mobile
Rik Hutchins	System Developer	Rik@montgomeryandcoupers.co.uk	0845 163 0134	0790 303 9694

3rd Party Verification



The screenshot displays the 'Permits' section of the soterweb Estate Facilities Management System. A table lists permit details, and a toolbar below it contains various action icons. One icon, representing a person with an information symbol, is highlighted with a red box, indicating the '3rd Party Verification' function.

ID	Permit	ManagedBy	Receiver	Mobile No	Organisation	Project	Location	Start	Expiry	Equip Iss...	Status
23	Access Aut...	Tracey Dransfield	Richard Hutchins	07903039694	Montgomery and Co...		Birkenshaw HQ - Oa...	30/10/2019 08:01	31/10/2019 17:01	No	Confirmed

Page 1 of 1 (1 Items)

Richard Hutchins (Gmail)
Login Details Type:[Organisation] Profile:[Power User (Internal)] Department:[All] / (Browser:Chrome70)

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Login Organisation ID:[1] Organisation Contact ID:[153

The Client contact can seek
3rd Party Verification of submitted RAMS (if desired) by
clicking the **3rd Party Verification** icon.

3rd Part Verification



Permit Third Party Approval

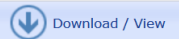


Approval By - eMail


rik@montgomeryandcouper.co.uk

Document

RA/MS



PTW - Pressure Systems - Cleckheaton Distribution Depot : TEST - Permit Third Party Document Approval

 SOTERweb Demo <demo@soterweb.org.uk>
To: Richard Hutchins
Cc: jhill@qtg.co.uk

Dear Colleague

You are requested to provide Third Party Approval for the RAMS associated with the following Permit

- **Permit:** 57 PTW - Pressure Systems
- **Location:** Cleckheaton Distribution Depot : TEST
- **Work Description:** TEST
- **Anticipated Start Date:** 15/09/2022 07:55
- **Anticipated Completion Date:** 15/09/2022 11:55

[CLICK HERE TO VERIFY THE DOCUMENT\(S\)](#)

Regards

SOTERweb Demo

SOTERweb the Computer Aided Facilities Management System (CAFM) operated by SOTERweb Demo [Click to Login](#)

Do not reply to this email. If you require further information please contact your SOTERweb Demo SOTERweb system administrator.

By adding an **email address** in the field as seen and clicking **save** the system will send an email automation with an embedded link to allow the RAMS to be reviewed by the chosen 3rd Party.

The 3rd Part Verification Screen

Permit Third Party Approval

Approval By - eMail: rik@montgomeryandcoupers.co.uk

Approval Comments: Addiitonal Comments Go in Here

Document: RA/MS

Approve Record, Reject Record, Exit Screen, Download / View

The 3rd Party can

1. Using an embedded link within the email they can **Download** and **View** the RAMS without logging onto the system.
2. They can provide comments back to you as they see fit.
3. They can **Approve** or **Reject** the RAMS. Either way you will be notified via email.

Approve work

The screenshot displays the 'Permits' section of the soterweb Estate Facilities Management System. A table lists permit details, and a toolbar below it contains various icons for document management. The 'Approve Document' icon, which shows a document with a checkmark, is highlighted with a red box. The text below the screenshot explains that users must click this icon to approve documents from their perspective.

ID	Permit	ManagedBy	Receiver	Mobile No	Organisation	Project	Location	Start	Expiry	Equip Iss...	Status
23	Access Aut...	Tracey Dransfield	Richard Hutchins	07903039694	Montgomery and Co...		Birkenshaw HQ - Oa...	30/10/2019 08:01	31/10/2019 17:01	No	Confirmed

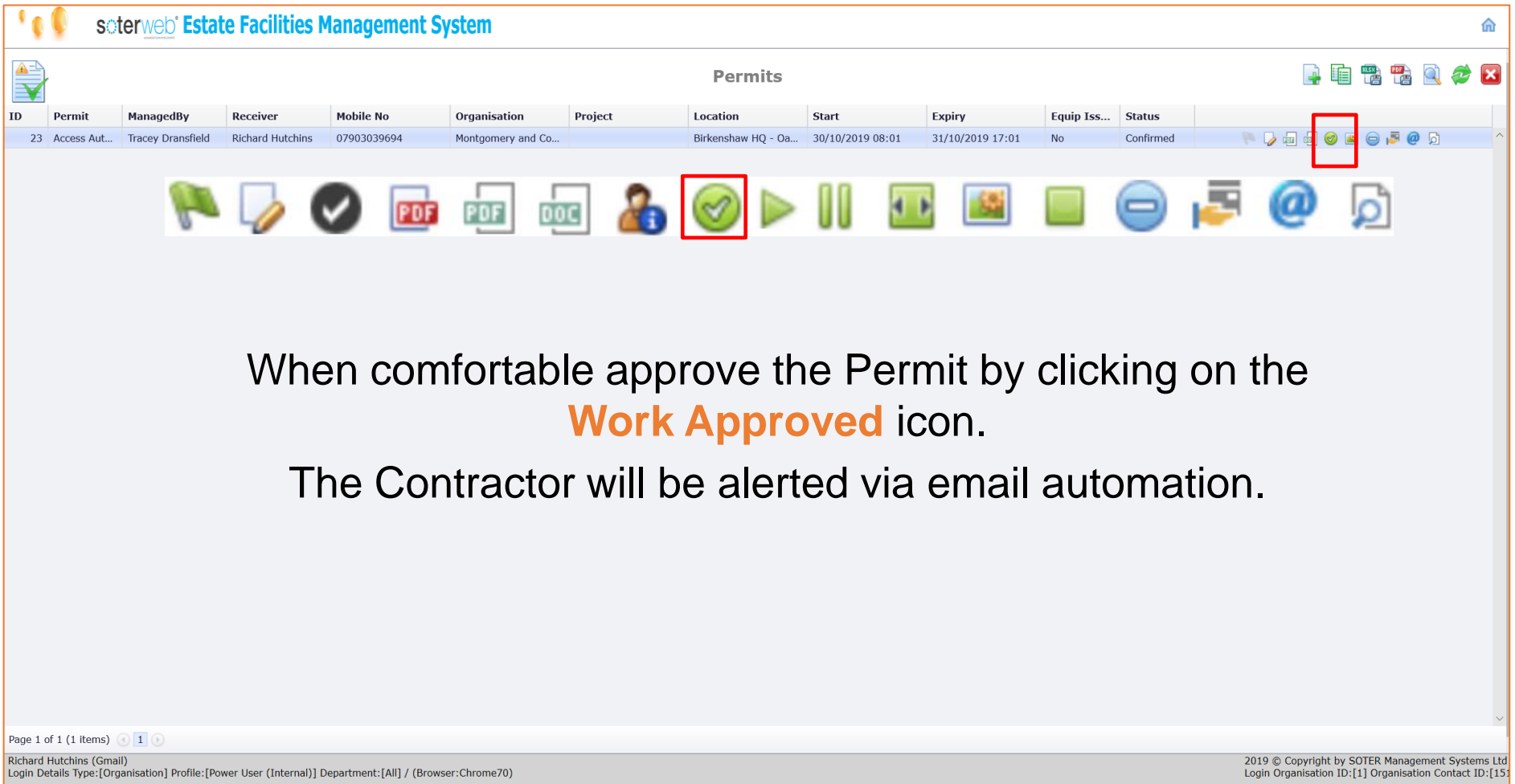
Page 1 of 1 (1 Items)

Richard Hutchins (Gmail)
Login Details Type:[Organisation] Profile:[Power User (Internal)] Department:[All] / (Browser:Chrome70)

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Login Organisation ID:[1] Organisation Contact ID:[15]

You will then need to Approve the documents from your perspective by clicking the **Approve Document** icon.

Approve work



The screenshot displays the 'Permits' section of the soterweb Estate Facilities Management System. A table lists permit details, with the first row highlighted. A red box highlights a green checkmark icon in the table's action column. Below the table, a toolbar contains various icons, with a green checkmark icon also highlighted by a red box.

ID	Permit	ManagedBy	Receiver	Mobile No	Organisation	Project	Location	Start	Expiry	Equip Iss...	Status	
23	Access Aut...	Tracey Dransfield	Richard Hutchins	07903039694	Montgomery and Co...		Birkenshaw HQ - Oa...	30/10/2019 08:01	31/10/2019 17:01	No	Confirmed	

Page 1 of 1 (1 Items)

Richard Hutchins (Gmail)
Login Details Type:[Organisation] Profile:[Power User (Internal)] Department:[All] / (Browser:Chrome70)

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Login Organisation ID:[1] Organisation Contact ID:[15]

When comfortable approve the Permit by clicking on the **Work Approved** icon.

The Contractor will be alerted via email automation.

END OF DOCUMENT