

WELCOME TO

soterweb[®]
ADVANCED SYSTEM INTELLIGENCE



Site Access Request



Access Request

PROCEDURE PURPOSE

This procedure will guide the Client administrator through the process of the Site Access Request process.

PREREQUISITES

1. You should have the Administrator (Internal) profile.

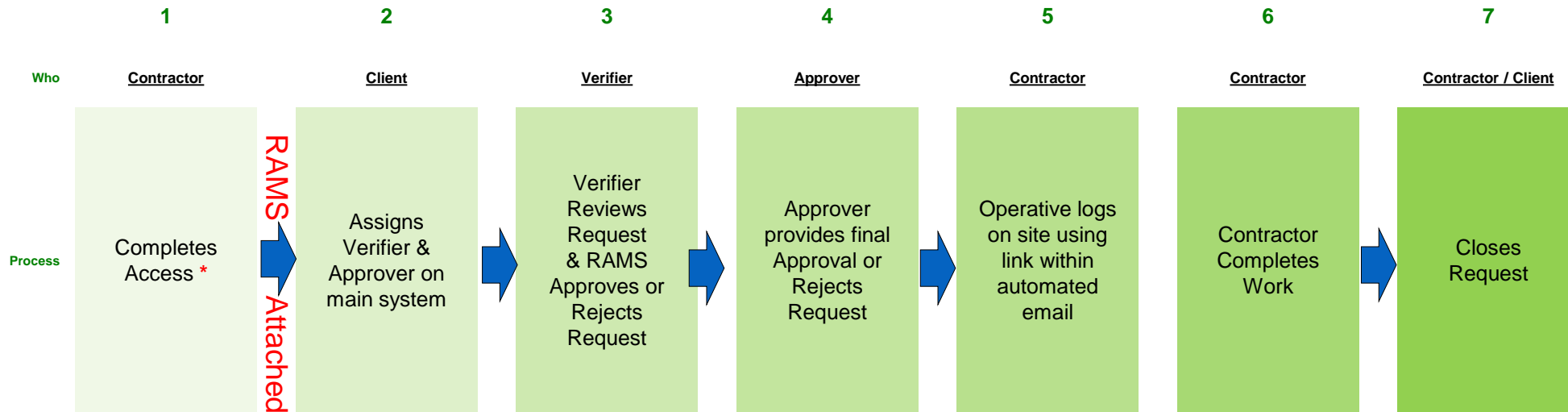
HELP SUPPORT

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

Contents

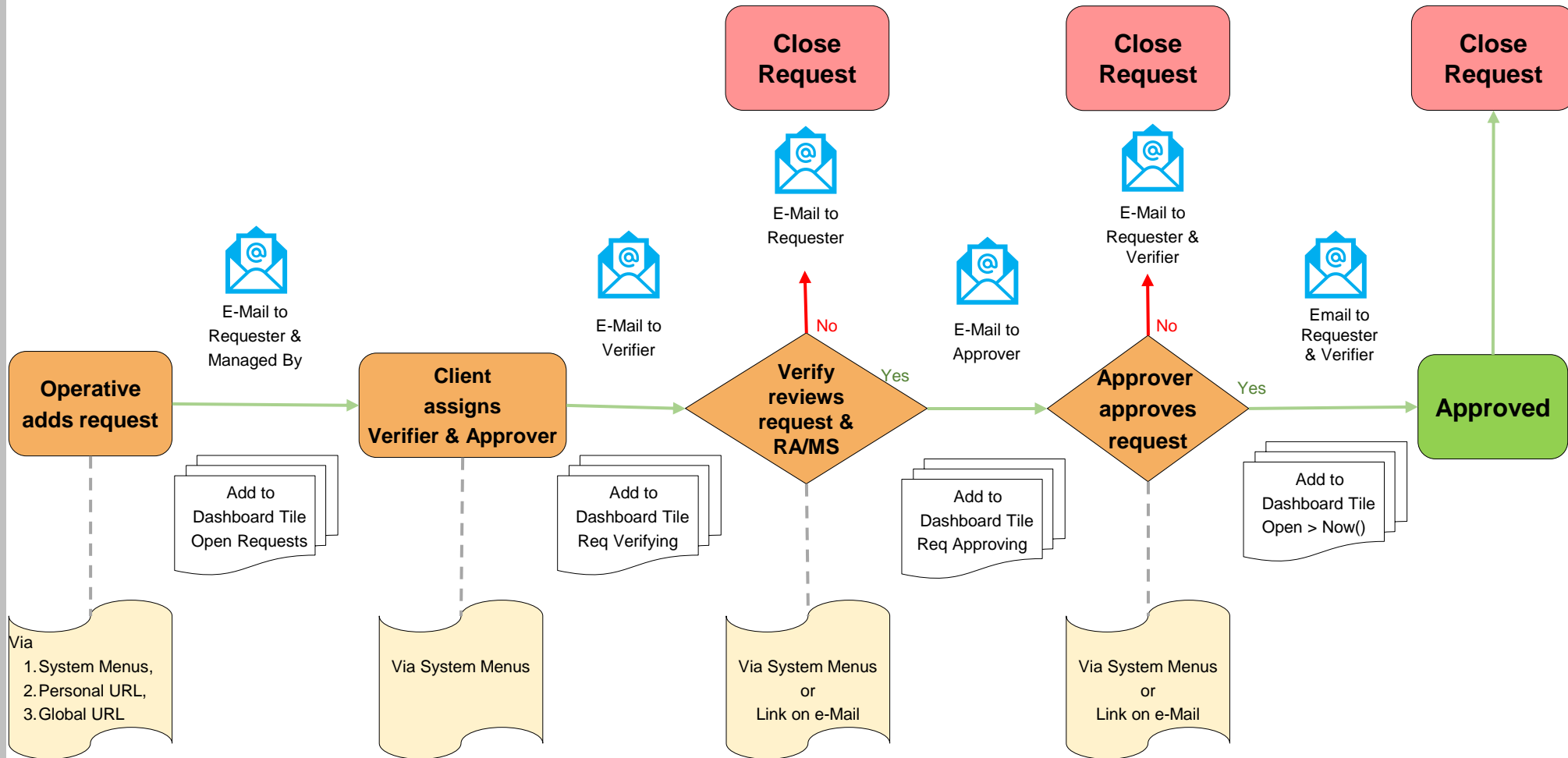
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Site Access Request – Process Overview



* A request can be raised in one of three ways, via the SOTERweb system, via the Client website or following link provided within an email initiated by the Client representative.

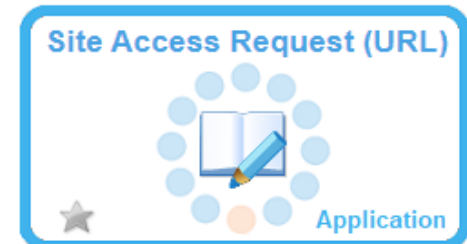
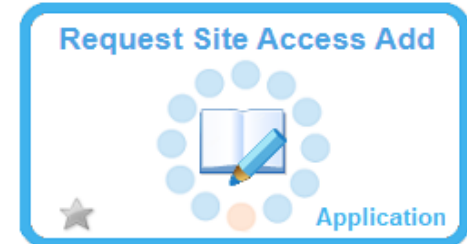
Site Access Request - Flow Diagram



REQUEST A ACCESS TO SITE

Request Access to Site – 3 Options

1. Launch via the 'Request Site Access' Tab
2. Launch by a Client team member issuing a URL link to an individual via email automation.
3. Launch via a global URL link placed on the Clients main website.



Complete form, attach RAMS, press 'Request Access' icon



Contractor Site Access Request

To be completed by the Contractor and submitted at least 24 hours (unless an emergency) in advance of need. Please note parking will need to be booked in via your Client representative.




Company	Montgomery and Coupers Ltd
Name	Test Profile 1
e-Mail	rik@montgomeryandcoupers.co.uk
Mobile Number	07744 695 8499
My Supervisor (OOH) & Mobile No	Mr Fred Bloggs - 0790 456 8738
Site	Greenwich Campus
Location	
Area/Room	ground floor
Description of Works	painting main walls
Upload RAMS	Browse... No file selected.
Date Access Req'd	15/06/2022 20:51
Date Access To	16/06/2022 00:51
Client Contact (if Known)	Paul Lambert
Impact to Immediate (area if any)	Some low level noise, minor dust and sections of the circulation areas will be barred off.
Does Work Involve	<input type="checkbox"/> Hot Works <input type="checkbox"/> Service Isolation <input type="checkbox"/> Use of Lifting Equipment <input type="checkbox"/> Working@Height <input type="checkbox"/> Service Interruption <input type="checkbox"/> Disturb Asbestos <input type="checkbox"/> Access to Restricted Area <input type="checkbox"/> Excavations <input type="checkbox"/> Use of Herbicide
Confirm	<input checked="" type="checkbox"/> Valid Induction <input checked="" type="checkbox"/> RAMS Submitted <input checked="" type="checkbox"/> RAMS Agreed

REVIEWING ACCESS REQUESTS

Access Site Request via SOTERweb

soterweb® Estate Facilities Management System

Contractors & Suppliers | **Project** | Access-IT

    |    |  [Logout](#)

Login Accepted

Step 1 – Click the **PROJECTS** tab

Access Site Requests

soterweb® Estate Facilities Management System

The screenshot shows the user interface of the soterweb Estate Facilities Management System. At the top, there is a navigation bar with the system name and a 'Logout' button. Below this, there are tabs for 'Contractors & Suppliers', 'Project', and 'Access-IT'. A row of menu items is displayed, each with a document icon and a pencil: 'Projects', 'Permits', 'Access Site Requests', 'Access-IT (Admin)', and 'Financial'. The 'Access Site Requests' item is highlighted with a red rectangular box. In the center of the page, the text 'Login Accepted' is displayed.

Step 2 – Click the **Access Site Requests**

Access Site Requests



Site Access Request Listing



Application

Request Site Access



Application

Site Access Request (URL)



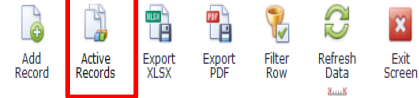
Application

Step 3 – Click the **Site Access Request Listing** tab

Access Site Requests – Main Screen



Site Access Requests



Enter text to search...

Company	Name	e-Mail	Mobile	Supervisor	Site	Location	Area/Room	From	To	Client C...	Impact	RAMS S...	RAMS A...	Manage...	V...	Verified	A...	Approved	
SOTERweb Contracto...	SOTER Administrator	jhill@qtg.co.uk	07744 695 8499	Supervisor	Avery Hill Campus	Bingley Distribution D...	Area	14-06-2022 17:06	14-06-2022 21:06	Contact	No	No	No	SOTER Adm...	SOTE...	Yes	SOTE...		
SOTERweb Contracto...	SOTER Administrator	jhill@qtg.co.uk	07744 695 8499	Supervisor	Avery Hill Campus	Bingley Distribution D...	PlantRoom	15-06-2022 13:11	15-06-2022 17:11	University ...	Yes	Yes	Yes						








A list of all current **live** requests will be shown.

Click  icon to view closed requests

ICONS EXPLAINED







Access Request – Icons – What they do



Icons		What They Do
	Add Record	Add a new Access Request
	Active / Inactive	Toggle between Active and Closed Requests
	Excel	Download data to Excel
	PDF	Download data to PDF
	Search	Open up a search / filter facility
	Refresh	Refresh page
	Close	Close the current page & go back to previous page

Access Request – Icons – What they do

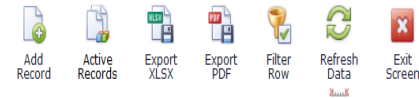


Icons		What They Do
	Edit	Edit the Request
	Assign Access Request	Assign the Verifier & the Approver
	Verify or Deny Access Request	When contractor has uploaded their RAMS & other documentation this will become visible. You can then review documents provided.
	Approve	Once you have reviewed the request you can approve it here. This will notify the contractor that the request has been approved and the works can proceed as planned.
	Close Request	You can close the request here. This will make it inactive.
	View Request	View the Request

APPROVING or REJECTING A REQUEST

Access Site Requests – Main Screen

Site Access Requests



Enter text to search...

Company	Name	e-Mail	Mobile	Supervisor	Site	Location	Area/Room	From	To	Client C...	Impact	RAMS S...	RAMS A...	Manage...	V...	Verified	A...	Approved	
SOTERweb Contracto...	SOTER Administrator	jhill@qtg.co.uk	07744 695 8499	Supervisor	Avery Hill Campus	Bingley Distribution D...	Area	14-06-2022 17:06	14-06-2022 21:06	Contact	No	No	No	SOTER Adm...	SOTE...	Yes	SOTE...		
SOTERweb Contracto...	SOTER Administrator	jhill@qtg.co.uk	07744 695 8499	Supervisor	Avery Hill Campus	Bingley Distribution D...	PlantRoom	15-06-2022 13:11	15-06-2022 17:11	University ...	Yes	Yes	Yes						

Step 1 – From the main access site request screen click on the icon and assign a **Verifier & Approver**

Note: The module is designed based upon a simple 2 stage verification. The verifier is envisaged to possess either technical knowledge, the approver knowledge of the location.

Step 2 - Assign Verifier & Approver via dropdown list & press **Save**

Contractor Site Access Request

To be completed by the Contractor and submitted at least 24 hours (unless an emergency) in advance of need.
Please note parking will need to be booked in via your Client representative.



Company	Montgomery & Coupers Ltd		
Name	Fred Bloggs 1		
e-Mail	rik@montgomeryandcoupers.co.uk		
Mobile Number	07903039694		
My Supervisor & Mobile No	Bill White		
Site	Avery Hill Campus		
Location	Critical Care Unit		
Area/Room	Ground Floor Plant Room		
Description of Works	Visual inspection of boiler rooms		
Upload RAMS			
Date Access Req'd	25/10/2022 12:57		
Date Access To	25/10/2022 16:57		
Client Contact	Alice Yellow		
Impact to Immediate (area if any)	Temporary loss of heating and hot water for approx one hour		
Does Work Involve	<input checked="" type="checkbox"/> Hot Works <input type="checkbox"/> Service Isolation <input type="checkbox"/> Use of Lifting Equipment	<input type="checkbox"/> Working@Height <input type="checkbox"/> Service Interruption <input type="checkbox"/> Disturb Asbestos	<input type="checkbox"/> Access to Restricted Area <input type="checkbox"/> Excavations <input type="checkbox"/> Use of Herbicide
Confirm	<input checked="" type="radio"/> Valid Induction	<input checked="" type="radio"/> RAMS Submitted	<input type="checkbox"/> RAMS AGREED
Verifier	Hannah Cook		
Approver	Rik Hutchins (Test Profile 2)		

Email Automation – with link

Site Access Request - ID: 164 - Critical Care Unit - Ground Floor Plant Room for Montgomery & Coupers Ltd - Please Verify

University of Greenwich <uog@soterweb.org.uk>
To: Richardphutchins@gmail.com

20221025130019414308--SITEREQUEST-x4QjVpLNW6o8vAFG0w2.pdf
2 MB

Dear Rik Hutchins (Test Profile1)

Please verify the following Site Access Request and submitted RAMS by [Clicking Here.](#)

- **Request:** 164 - Montgomery & Coupers Ltd - Fred Bloggs 1 - 07903039694
- **Location:** Avery Hill Campus - Critical Care Unit - Ground Floor Plant Room
- **Work Description:** Visual inspection of boiler rooms
- **When:** 25/10/2022 12:57 - **Until:** 25/10/2022 16:57
- **Impact:** *(suggested by Fred Bloggs 1)* Temporary loss of heating and hot water for approx one hour
- **RAMS:** RAMS Uploaded

Regards
University of Greenwich

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

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Reference: University of Greenwich SR00140

System will send an Email Automation to the nominated **Verifier**.
Step 3 - The verifier can review the RAMS (attached) and **approve** or **reject** the request by clicking the link embedded within the email.

Verify Request

Contractor Site Access Request



To be completed by the Contractor and submitted at least 24 hours (unless an emergency) in advance of need.
Please note parking will need to be booked in via your Client representative.

Verification Notes:

Happy to approve this request and the provided RAMS.

Company	Montgomery & Coupers Ltd
Name	Fred Bloggs 1
e-Mail	rik@montgomeryandcoupers.co.uk
Mobile Number	07903039694
My Supervisor & Mobile No	Bill White
Site	Avery Hill Campus
Location	Critical Care Unit
Area/Room	Ground Floor Plant Room
Description of Works	Visual inspection of boiler rooms

RAMS


VIEW DOCUMENT



Step 4 – Add comments (if desired) and press either the **Approve** or **Reject** icons.

Email Automation – with link

Site Access Request - ID: 164 - Critical Care Unit - Ground Floor Plant Room for Montgomery & Coupers Ltd - Site Access Request Requires Approving

University of Greenwich <uog@soterweb.org.uk>
To: Richard Hutchins

 20221025130019414308--SITEREQUEST-x4QjVpLNW6o8vAFG0w2.pdf
2 MB

Reply Reply All Forward  

Tue 25/10/2022 13:50

Dear Rik Hutchins (Test Profile 2)

The following Site Access Request and RAMS has been verified by Rik Hutchins (Test Profile1) and needs final approval.

- **Request:** 164 - Montgomery & Coupers Ltd - Fred Bloggs 1 - 07903039694
- **Location:** Avery Hill Campus - Critical Care Unit - Ground Floor Plant Room
- **Work Description:** Visual inspection of boiler rooms
- **When:** 25/10/2022 12:57 - **Until:** 25/10/2022 16:57
- **Impact:** (suggested by Fred Bloggs 1) Temporary loss of heating and hot water for approx one hour
- **RAMS:** RAMS Uploaded

Please [Clicking here](#) to indicate whether you are comfortable for the work to commence.

Regards

University of Greenwich

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Reference: University of Greenwich SR00150

System will then send an Email Automation to the nominated **Approver**.
Step 5 - The Approver can review the RAMS (attached) and **approve** or **reject** the request by clicking the link embedded within the email.

Approve Request

Contractor Site Access Request



To be completed by the Contractor and submitted at least 24 hours (unless an emergency) in advance of need.
Please note parking will need to be booked in via your Client representative.

Approval Notes:

Happy to approve this request and the provided RAMS.

Company	Montgomery & Coupers Ltd
Name	Fred Bloggs 1
e-Mail	rik@montgomeryandcoupers.co.uk
Mobile Number	07903039694
My Supervisor & Mobile No	Bill White

Site	Avery Hill Campus
Location	Critical Care Unit
Area/Room	Ground Floor Plant Room

Description of Works

Visual inspection of boiler rooms




RAMS




Step 6 – Add comments (if desired) and press either the **Approve** or **Reject** icons.

Email Automation – with link

Site Access Request Approved ID: 164 - Critical Care Unit - Ground Floor Plant Room for Montgomery & Coupers Ltd

 University of Greenwich <uog@soterweb.org.uk>
To  Richard Hutchins
Cc  p.d.lambert@greenwich.ac.uk

 Reply  Reply All  Forward  
Tue 25/10/2022 14:00

 20221025130019414308--SITEREQUEST-x4QjVpLNIW6o8vAFG0w2.pdf
2 MB

Dear Fred Bloggs 1

The following Site Access Request has been **Approved**.

- **Location:** Avery Hill Campus - Critical Care Unit - Ground Floor Plant Room
- **Work Description:** Visual inspection of boiler rooms
- **When:** 25/10/2022 12:57 - **Until:** 25/10/2022 16:57
- **RAMS:** RAMS Uploaded
- **Verifier Notes:** *(if any)* Happy to approve this request and the provided RAMS.
- **Approver Notes:** *(if any)* Happy to approve this request and the provided RAMS

Let us know you are on site via the following link [Login Site](#)

Regards

University of Greenwich

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Reference: University of Greenwich SR00160

System will send an Email Automation to the **Requester**. Informing them the Request has been approved or rejected. Comment from the verifier and approver are also provided.

LOG ON – SITE ACCESS REQUESTS

Log On Site Access Requests via Embedded Link

Site Access Request Approved ID: 164 - Critical Care Unit - Ground Floor Plant Room for Montgomery & Coupers Ltd

University of Greenwich <uog@soterweb.org.uk>
To: Richard Hutchins
Cc: n.d.lambert@greenwich.ac.uk

20221025130019414308--SITEREQUEST-x4QjVpLNIW6o8vAfG0w2.pdf
2 MB

Reply Reply All Forward Tue 25/10/2022 14:00

Dear Fred Bloggs 1

The following Site Access Request has been **Approved**.

- **Location:** Avery Hill Campus - Critical Care Unit - Ground Floor Plant Room
- **Work Description:** Visual inspection of boiler rooms
- **When:** 25/10/2022 12:57 - **Until:** 25/10/2022 16:57
- **RAMS:** RAMS Uploaded
- **Verifier Notes:** (if any) Happy to approve this request and the provided RAMS.
- **Approver Notes:** (if any) Happy to approve this request and the provided RAMS

Let us know you are on site via the following link: [Login Site](#)

Regards

University of Greenwich

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Reference: University of Greenwich SR00160

Where requests are approved the system will send an Email to the **Requester**. This will include the original set of RAMS and a **link** to allow the individual to log in.

Log on Site

Visiting Site



Exit

Name	<input type="text" value="Fred Bloggs 1"/>
Company	<input type="text" value="Montgomery & Coupers Ltd"/>
Mobile No	<input type="text" value="07903039694"/>
Email Address	<input type="text" value="rik@montgomeryandcoupers.co.uk"/>
Visiting	<input type="text" value="GroundFloorPlantRoom"/>
Reason For Visit	<input type="text" value="Visual inspection of boiler rooms"/>
Expected Logout Time	<input type="text" value="25/10/2022 16:57"/>





Step 1 – By clicking the link in the email you will arrive at the log in screen. This will be auto populated. Click **Proceed** to log in.

TO REVIEW WHO IS ON SITE

Access Site Requests via SOTERweb

soterweb[®] Estate Facilities Management System

Contractors & Suppliers | **Project** | Access-IT

    |    |  [Logout](#)

Login Accepted

Step 1 – Click the **PROJECTS** tab

Access Site Requests

soterweb[®] Estate Facilities Management System

Contractors & Suppliers | Project | Access-IT

Projects | Permits | Access Site Requests | **Access-IT (Admin)** | Financial

Login Accepted

Logout

Step 2 – Click the **Access-IT (Admin)**

Access Site Requests Main Screen



Projects : Access Site Requests

Navigation bar containing five application tabs:

- Access Site Reception Application
- People on Site Application
- Login Site Application
- Logout Site Application
- Visitors Application

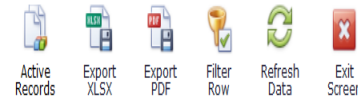
The "People on Site" tab is highlighted with a red border.

Step 3 – Click the **People on Site** tab

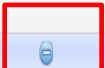
Access Site Requests Main Screen



Contacts on Site



Enter text to search...

Visit Type	Name	Company	Mobile	Building	Location/Visiting	Visit Description	Login	Expected Logout	Actual Logout	
SiteRequest 164	Fred Bloggs 1	Montgomery & Coupers Ltd	07903039694	Critical Care Unit	GroundFloorPlantRoom	Visual inspection of boiler rooms	25-10-2022 16:26	25-10-2022 16:57		

View people on site. To log an individual off, click  icon

Email Automation – with link

Visitor Details for Fred Bloggs 1 from Montgomery & Coupers Ltd at Critical Care Unit

University of Greenwich <uog@soterweb.org.uk>
To: Richard Hutchins

Reply Reply All Forward

Tue 25/10/2022 18:19

Welcome to
SOTERweb MANAGEMENT SYSTEMS Ltd
Please find attached your Electronic Visitors Pass

VISITOR PASS
Name:
Fred Bloggs 1
Company:
Montgomery & Coupers Ltd
Visiting:
Visual inspection of boiler rooms
Building:
Critical Care Unit
Location:
GroundFloorPlantRoom
Date:
25/10/2022 04:26

When you leave site please return any Equipment or Keys and contact reception.

When you leave site please use the following link to logout from the site.

[Click when Leaving Site](#)

Regards
University of Greenwich

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

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Reference: University of Greenwich 00004000

Alternatively, the system will have sent an email with an embedded link. This link if pressed will also allow the individual to log off the system.

Access Site Requests Main Screen

Visitor Leaving Site



[Show another code](#)

Capcha code is Case Sensitive

7756

Type the Code shown above:



LOG OFF SITE

LEAVING SITE NOTIFICATION

Please ensure any Keys and Equipment are Returned

Enter code and click **Log Off** Site to complete the process

ALTERNATIVELY

PERMISSIONS

END OF DOCUMENT