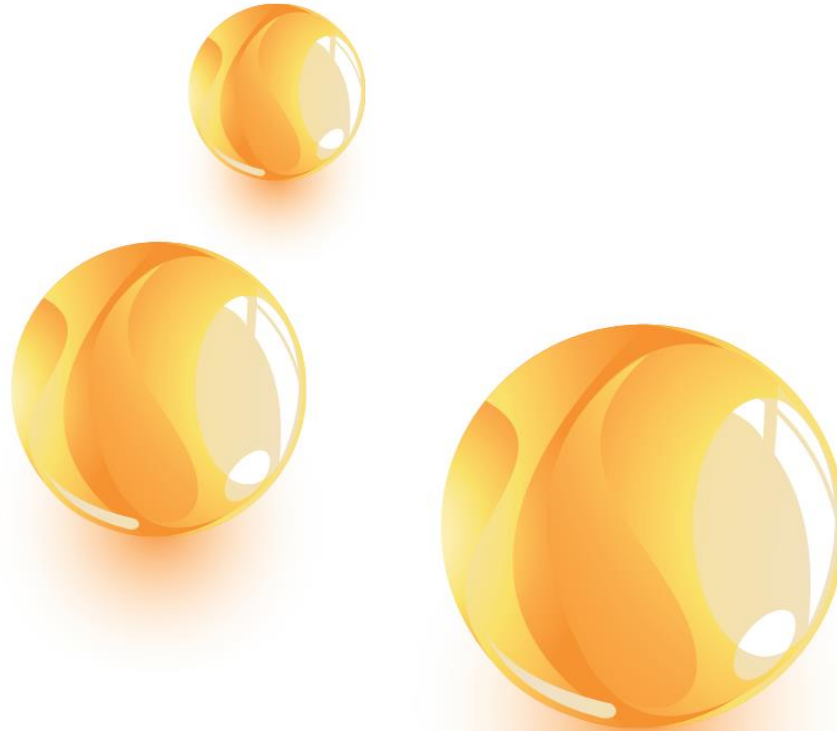


Permit to Work Module – Client Prospective



PROCEDURE PURPOSE

This procedure will guide you through the Permit Module on SOTERweb, this includes Client representative raising a Permit, a Contractor requesting a Permit for planned work and Operatives requesting a permit via the Access IT module.

PREREQUISITES

1. Client representatives should have a profile of either an Administrator or Power User.
2. Contractors should have a profile of Admin (External Contractor) or Admin (External Consultant) to provide management acceptance of the Client key expectations and provide the necessary RAMS or to request a permit on behalf of the organisation.
3. Operatives need to be designated as a User (External) and have the particular permit assigned to them to them, their organisation or profile in order to activate an approved Permit on-site and to request a reactive permit whilst on site.

HELP SUPPORT

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

Contents

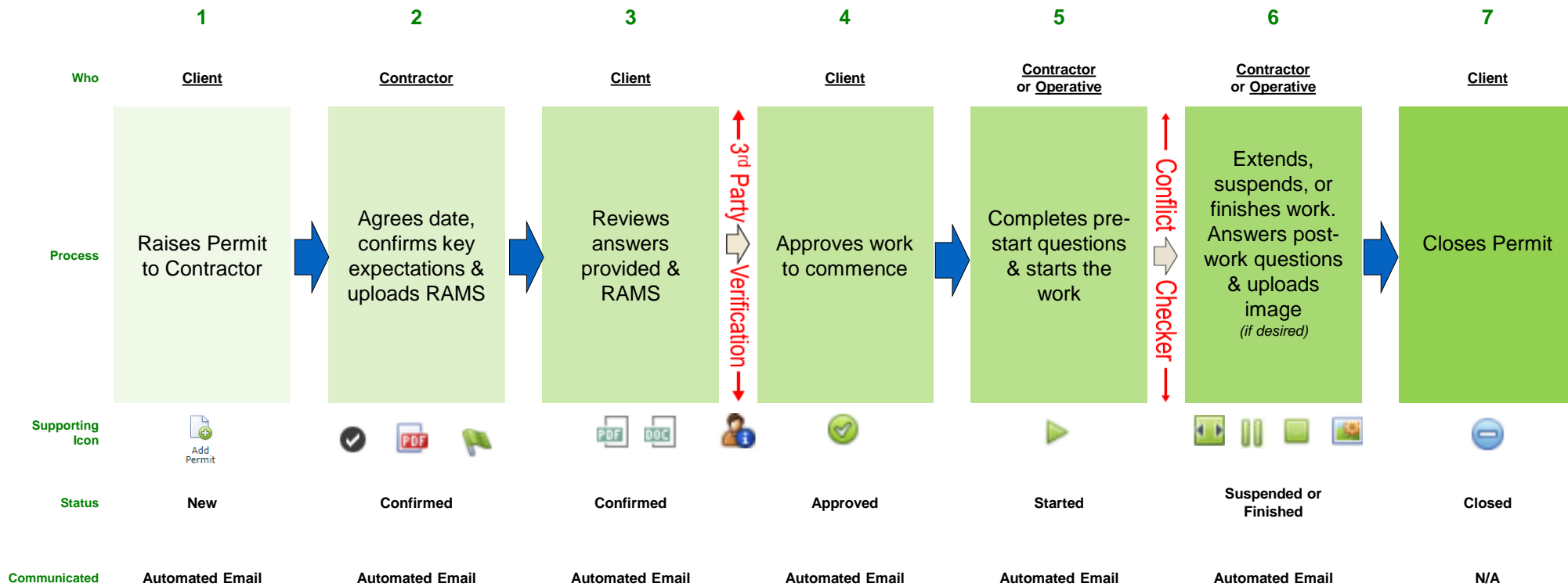
| Task | Slide |
|--|--------------|
| Module Overview | 5 |
| Quick Steps | 6 - 11 |
| Client initiated Permits for Planned Work | |
| Client initiated Permits for Reactive Work | |
| Contractor initiated Permits for Planned Work | |
| Contractor initiated Permits for Reactive Work | |
| Operative initiated reactive Permits via the Access IT module | |
| How system identifies the appropriate Client Contact for Permit Requests | |
| Standard Permissions | 13 |
| Locating the Permit Module | 14 - 18 |
| Explanation of the primary icons used in the Permit Module..... | 20 - 22 |
| Adding a new Permit | 24 - 40 |
| Activating a Permit via Access IT | 42 - 47 |
| Closing a Permit via Access IT | 49 - 51 |
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Module Overview

Module Overview

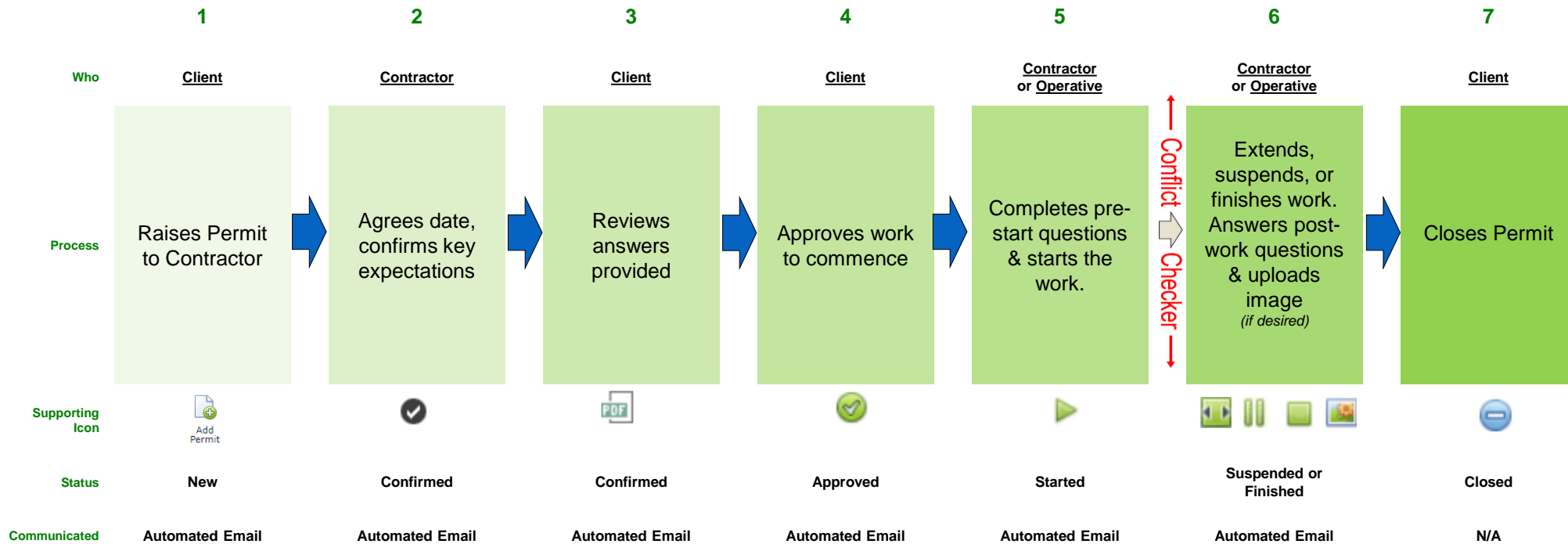
- ✓ Built in Permits with configurable question banks & guidance.
- ✓ E-permits, hardcopy or a mix.
- ✓ User definable permissions.
- ✓ Raise, request, accept, reject, extend & suspend permits with ease.
- ✓ Upload RAMS, training records & certificates.
- ✓ Provides live RAG permit status.
- ✓ Uses email automation with inbuilt active links.
- ✓ Incorporates a 3rd party verification process.
- ✓ Automated clash / conflict checker.
- ✓ Mobile friendly, fully auditable.
- ✓ Real time dashboard exception reporting.

Client initiated Permits for Planned Work*



* System Default

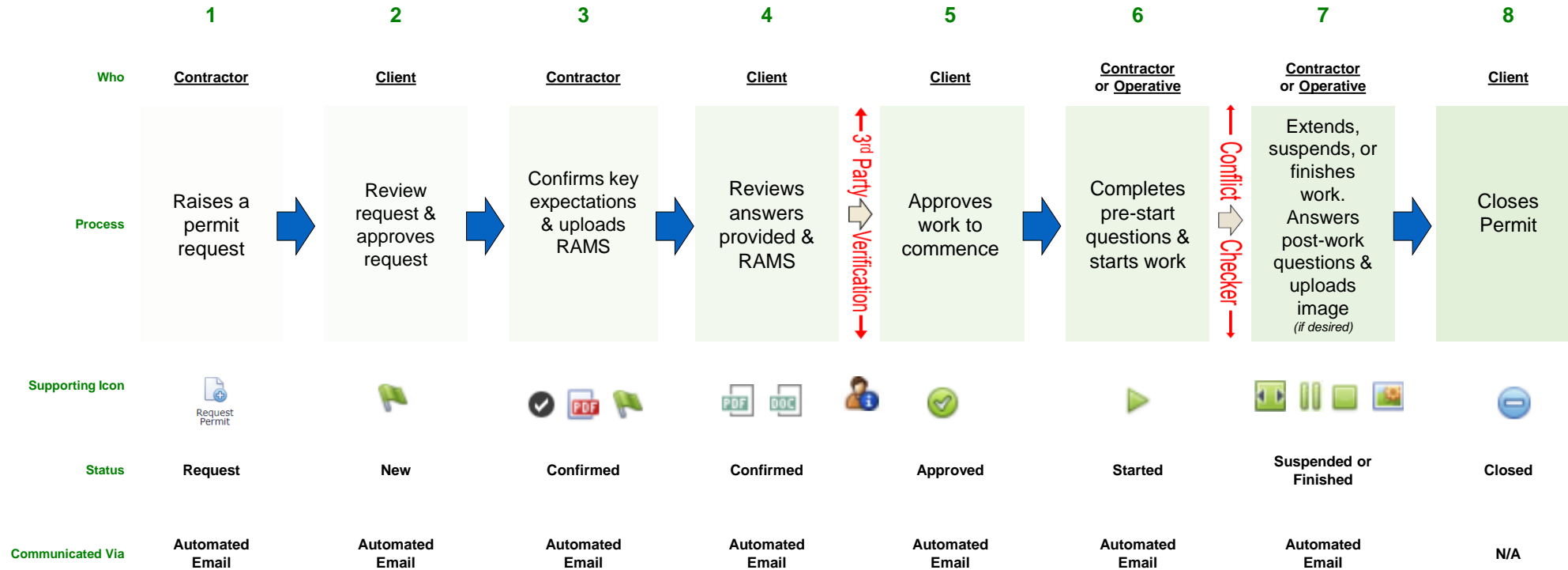
Client initiated Permits for Reactive Work



Notes:

- The number of inbuilt questions are fewer to support the use of mobile devices.
- There is no requirement to upload RAMS.

Contractor initiated Permits for Planned Work*



* System Default

Contractor initiated Permits for Reactive Work



Notes:

- The number of inbuilt questions are fewer to support the use of mobile devices.
- There is no requirement to upload RAMS.

Operative initiated reactive Permits via Access IT



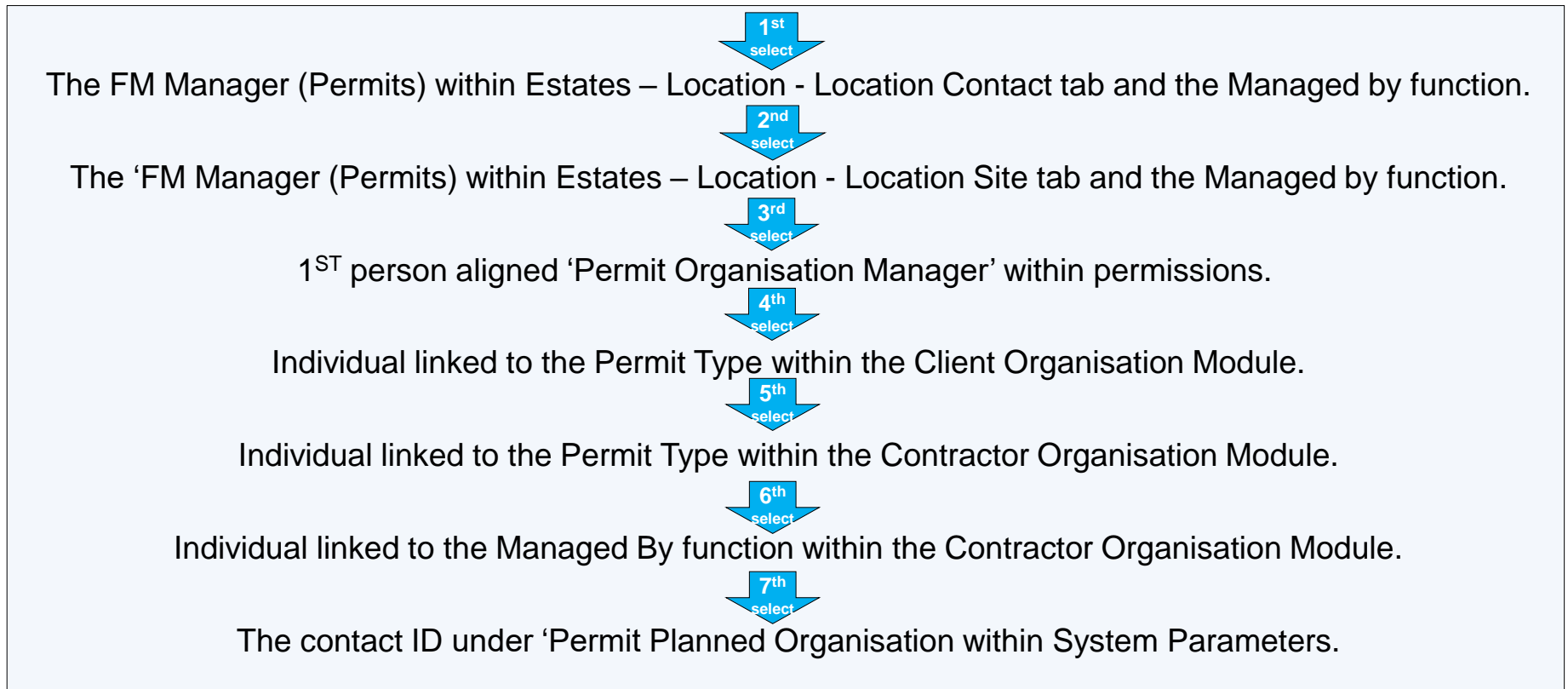
Note:

On-site reactive permits are designed to deal an operative already on site realises a permit is needed. They do not incorporate the facility to upload RAMS and the number of inbuilt questions is limited to facilitate the use of mobile devices. The Client should use their judgement whether to approve the permit request or not.

How system identifies the appropriate Client Contact for Permit Requests

Note

Data protection prevents the contractor being able to select a named Client representative. Therefore the system selects the appropriate Client contact using the following workflow.



Standard Permissions

Standard Permissions

Clients

- Can raise, approve, suspend, extend and close permits and ask for 3rd party verification of a set of RAMS associated with a particular permit.

Contractors *(with an admin profile)*

- Can request a permit, complete and submit acknowledgement of key expectations. Upload RAMS and other supporting documents. They can also activate, request an extension or complete and suspend a Permit.

Operatives

- Can activate an approved permit. Request a reactive permit, extend, suspend and complete an existing Permit via the Access IT module.

Locating the Permit Module

From your Home Screen

 soterweb[®] Estate Facilities Management System

Organisation Companies **Estate** Projects Access-IT Quality Accounts

        [Logout](#)

SOTERweb : Estate Facilities Management System

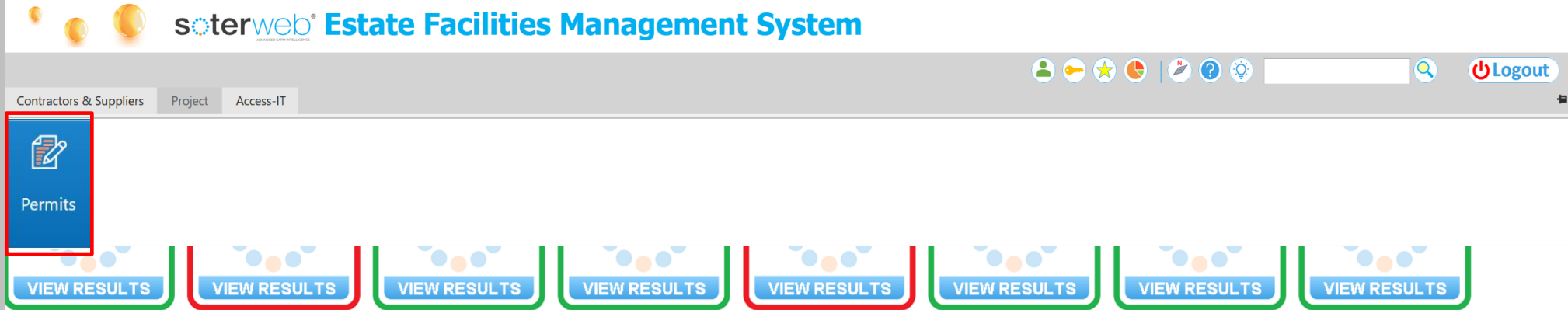
WEB PORTAL

soterweb[®]
ADVANCED CAFM INTELLIGENCE



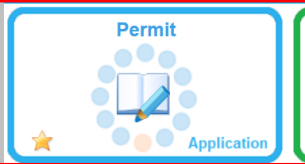
1 Click the **PROJECTS** tab

To find Permit Module



2 Click **Permits**

To find Permit Module



3 Select the **Permit**

Permit Home Screen



Permits



Enter text to search...

| ID | Permit | Managed... | Receiver | Mobile No | Organisation | Project | Location | Start | Expiry | E... | T... | Rej... | Stat... | |
|----|---------------|----------------|--------------|-------------|--------------------|---------|--------------------|------------------|------------------|------|---------|--------|------------|--|
| 56 | PTW - Pres... | Test Profile 1 | Fred Bloggs1 | 07903039694 | Montgomery and ... | TEST 4 | Castleford Dis... | 15/09/2022 11:43 | 15/09/2022 15:43 | No | Plan... | | Confirm... | |
| 55 | PTW - Pres... | Test Profile 1 | Fred Bloggs1 | 07903039694 | Montgomery and ... | TEST | Bradford Halls... | 15/09/2022 19:20 | 15/09/2022 23:20 | No | Plan... | | Finished | |
| 54 | PTW - Pres... | Test Profile 1 | Fred Bloggs1 | 07903039694 | Montgomery and ... | TEST | Bradford Halls... | 15/09/2022 18:56 | 15/09/2022 22:56 | No | Plan... | | Confirm... | |
| 53 | PTW - Pres... | Test Profile 1 | Fred Bloggs1 | 07903039694 | Montgomery and ... | TEST | Bradford Halls... | 15/09/2022 09:30 | 15/09/2022 13:30 | No | Plan... | | Confirm... | |
| 52 | Access Aut... | Test Profile 1 | Fred Bloggs1 | 07903039694 | Montgomery and ... | TEST | Bingley Distrib... | 15/09/2022 18:20 | 15/09/2022 22:20 | No | Plan... | | Started | |

This is the Permit home screen. It presents an overview of all active permits. If you are a contractor this will be restricted to those aligned to your organisation.

Explanation of the primary icons used in the Permit Module

Arrive at the main Permit screen

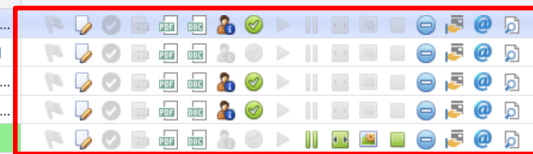


Permits



Enter text to search...

| ID | Permit | Managed... | Receiver | Mobile No | Organisation | Project | Location | Start | Expiry | E... | T... | Rej... | Stat... |
|----|---------------|----------------|--------------|-------------|--------------------|---------|--------------------|------------------|------------------|------|---------|--------|------------|
| 56 | PTW - Pres... | Test Profile 1 | Fred Bloggs1 | 07903039694 | Montgomery and ... | TEST 4 | Castleford Dis... | 15/09/2022 11:43 | 15/09/2022 15:43 | No | Plan... | | Confirm... |
| 55 | PTW - Pres... | Test Profile 1 | Fred Bloggs1 | 07903039694 | Montgomery and ... | TEST | Bradford Halls... | 15/09/2022 19:20 | 15/09/2022 23:20 | No | Plan... | | Finished |
| 54 | PTW - Pres... | Test Profile 1 | Fred Bloggs1 | 07903039694 | Montgomery and ... | TEST | Bradford Halls... | 15/09/2022 18:56 | 15/09/2022 22:56 | No | Plan... | | Confirm... |
| 53 | PTW - Pres... | Test Profile 1 | Fred Bloggs1 | 07903039694 | Montgomery and ... | TEST | Bradford Halls... | 15/09/2022 09:30 | 15/09/2022 13:30 | No | Plan... | | Confirm... |
| 52 | Access Aut... | Test Profile 1 | Fred Bloggs1 | 07903039694 | Montgomery and ... | TEST | Bingley Distrib... | 15/09/2022 18:20 | 15/09/2022 22:20 | No | Plan... | | Started |











...lets look at these icons and explain what they do...












Permit Home Screen – Icons



| Icons | | What They Do |
|---|--|---|
|  | Approve Request | Aimed at the Client contact this is where you Approve a Contractor initiated Permit Request to start the standard Permit workflow. |
|  | View/Edit | Dependant upon Permissions you can View and Edit Permit details via this icon |
|  | Confirm Expectations | Aimed exclusively at the contractor this is where they acknowledge the 'Key Permit Expectations. |
|  | Upload Supporting Documents | Aimed exclusively at the contractor this is where they upload their RAMS and other supporting documentation. |
|  | Verify Expectations | Aimed exclusively at the Client contact this is where you can review, reject & reject but ask the contractor to resubmit the answers provided to the Key Permit Expectations. |
|  | Verify RAMS | Similar to the above, aimed at the Client contact allowing you to review, reject & reject but ask the contractor to resubmit RAMS. |
|  | 3rd Party Verification | This allows Client contacts to ask a 3 rd Party to review, reject & reject but ask the contractor to resubmit a set of RAMS. |
|  | Approve | When contractor has uploaded their RAMS & other documentation this will become visible. You can then review documents provided. |

Permit Home Screen – Icons



| Icons | | What They Do |
|---|--------------------------------------|--|
|  | Start Work | Click to let the system know the work has started. This will initiate the prestart questions and conflict checker. This function can also be initiated via the Access IT module. |
|  | Suspend Work | Temporarily suspend work if needed. This function can be initiated by the Client, Contractor or the Operative on site. |
|  | Request to Extend | Need an extension to a Permit then request an extension through this icon. Requests are sent to the Permit Manager and whether it is approved or reject communicated via email automation. |
|  | Upload Picture | Provides the facility for the Contractor or Operative on site to upload a picture if desired. |
|  | Finish Work | Click to let the system know the work has finished. This will initiate some closing questions. This function can also be initiated via the Access IT module. |
|  | Close Permit | Allows the Client contact to close the permit once all keys and equipment have been returned. |
|  | Keys & Equipment Register | Allows the Client contact to log keys or other equipment issued to the contractor against the permit. |
|  | Send Email | This allows either the Client or the Contractor to send the an email to a 3 rd Party incorporating a link to the permit. |
|  | Preview Permit | Print, download the Permit via this icon. |

Adding a new a Permit

To raise a New Permit

Permits

Add Permit Active Records Export XLSX Export PDF Filter Row Refresh Data Exit Screen

Enter text to search...

| ID | Permit | Managed... | Receiver | Mobile No | Organisation | Project | Location | Start | Expiry | E... | T... | Rej... | Sta... | |
|----|---------------|----------------|--------------|-------------|-------------------|---------|-------------------|------------------|------------------|------|---------|--------|------------|--|
| 59 | PTW - Pres... | Test Profile 1 | Fred Bloggs1 | 07903039694 | Montgomery and... | TEST | Cleckheaton ... | 17/09/2022 14:23 | 17/09/2022 18:23 | No | Plan... | | New | |
| 58 | Access Aut... | Ann Yellow | Fred Bloggs1 | 07903039694 | Montgomery and... | TEST | Cleckheaton ... | 17/09/2022 08:05 | 17/09/2022 12:05 | No | Plan... | | Request | |
| 57 | PTW - Pres... | Test Profile 1 | Fred Bloggs1 | 07903039694 | Montgomery and... | TEST | Cleckheaton ... | 17/09/2022 07:55 | 17/09/2022 11:55 | No | Plan... | | Confirm... | |
| 56 | PTW - Pres... | Test Profile 1 | Fred Bloggs1 | 07903039694 | Montgomery and... | TEST 4 | Castleford Dis... | 17/09/2022 11:43 | 17/09/2022 15:43 | No | Plan... | | Started | |
| 55 | PTW - Pres... | Test Profile 1 | Fred Bloggs1 | 07903039694 | Montgomery and... | TEST | Bradford Halls... | 17/09/2022 19:20 | 17/09/2022 23:20 | No | Plan... | | Finished | |
| 54 | PTW - Pres... | Test Profile 1 | Fred Bloggs1 | 07903039694 | Montgomery and... | TEST | Bradford Halls... | 17/09/2022 18:56 | 17/09/2022 22:56 | No | Plan... | | Confirm... | |
| 53 | PTW - Pres... | Test Profile 1 | Fred Bloggs1 | 07903039694 | Montgomery and... | TEST | Bradford Halls... | 17/09/2022 09:30 | 17/09/2022 13:30 | No | Plan... | | Confirm... | |
| 52 | Access Aut... | Test Profile 1 | Fred Bloggs1 | 07903039694 | Montgomery and... | TEST | Bingley Distri... | 17/09/2022 18:20 | 17/09/2022 22:20 | No | Plan... | | Finished | |

1 From the permit home screen press the **Add Permit** icon

Main Permit input Screen

Permit : Details Save Record Exit Screen


| | | | | | |
|------------------------|--------------------------|------------------------------------|------------------------------|--------|-----|
| Permit Type | PTW 02 - Work at Height | Type | Planned | Status | New |
| Work to be carried out | Investigate roof leak | Managed by Contact | Rik Hutchins (Test Profile1) | | |
| Receiving Company | Montgomery & Coupers Ltd | Receiving Contact | Fred Bloggs 1 | | |
| Project | Maintenance | Location/Room | RF01 RO2 | | |
| Building/Area | Adelaide | High Risk Location (If Applicable) | | | |
| Anticipated Start Date | 24/07/2022 09:01 | Anticipated Finish Date | 24/07/2022 13:01 | | |
| Specific Information | | | | | |

2 Complete the new permit screen


Note:

- 1 Select permit type from drop down list.
- 2 Assign the Permit to a receiving organisation and an individual (the individual **must** have a admin profile).
- 3 Complete the desired start and finish date and time.
- 4 Press **Save**. The system will save the Permit details and add it to the Permit Home screen.


Email Automation



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Permits



| ID | Permit | ManagedBy | Receiver | Mobile No | Organisation | Project | Location | Start | Expiry | Equip I... | Status | |
|----|--------------|-------------------|------------------|-------------|--------------------|---------|----------------------|------------------|------------------|------------|---------|--|
| 20 | Access Au... | Rik Hutchins | Richard Hutchins | 07903039694 | Montgomery and ... | | Todmorden Fire St... | 28/10/2019 11:47 | 28/10/2019 15:47 | No | Started | |
| 21 | Access Au... | Tracey Dransfield | Richard Hutchins | 07903039694 | Montgomery and ... | | Birkenshaw HQ - ... | 28/10/2019 08:00 | 31/10/2019 17:00 | No | New | |

Montgomery and Coupers Ltd - Access Authorisation - Service Duct - Permit Raised



SOTER <do not reply> <information@soterweb.org.uk>
 To: rik@montgomeryandcoupers.co.uk
 Cc: rik@montgomeryandcoupers.co.uk

Mon 28/10/2019 11:48

Reply Reply All Forward

Dear Richard Hutchins

This is a automated system generated notification from SOTER informing you that a Permit has been raised to by West Yorkshire Fire & Rescue Service (WYFRS) to Montgomery and Coupers Ltd.

- Permit Number - 20
- Permit Type - Access Authorisation - Service Duct
- Permit Description - test
- Anticipated Date Range - 28/10/2019 - 28/10/2019

Please log onto SOTERweb <https://wfrs.soterweb.org.uk>. Confirm WYFRS expectations will be met and upload your RA/MS.

This information will then need to be reviewed by your WYFRS Representative before final approval is given to allow the work activity to commence.

Specific Information (if any)

Regards

Rik Hutchins

SOTERweb Contractor Management System

The information in this email is confidential and may also be privileged. If you are not the intended recipient, please notify us immediately. You should not copy this e-mail or its contents or use it for any purpose nor disclose its contents to any other person unless authorised to do so. Although this email and any attachments are believed to be free of any virus, or any other defect which might affect any computer or IT system into which they are received and opened, it is the responsibility of the recipient to ensure that they are virus free and no responsibility is accepted by us for any loss or damage arising in any way from receipt or use thereof.

Page 1 of 1 (2 items)

An email automation will be sent to the Contractor informing them of the Permit and action to take.

Note:

The status will change to **New** and the **Confirm Expectations** and **Upload Supporting Documents** icons become live.

Expectations & RAMS

Estate Facilities Management System

Permits

| ID | Permit | ManagedBy | Receiver | Mobile No | Organisation | Project | Location | Start | Expiry | Equip I... | Status | |
|----|--------------|-------------------|------------------|-------------|--------------------|---------|----------------------|------------------|------------------|------------|---------|--|
| 20 | Access Au... | Rik Hutchins | Richard Hutchins | 07903039694 | Montgomery and ... | | Todmorden Fire St... | 28/10/2019 11:47 | 28/10/2019 15:47 | No | Started | |
| 21 | Access Au... | Tracey Dransfield | Richard Hutchins | 07903039694 | Montgomery and ... | | Birkenshaw HQ - ... | 28/10/2019 08:00 | 31/10/2019 17:00 | No | New | |

| Question | Category | Yes - No - N/A |
|--|-----------|---|
| As a Primary Contact for your organisation you agree the work will be completed in accordance with the limitations and expectations detailed within this Access Authorisation? | Mandatory | <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| Can you undertake this work within the specified date range provided? (Anticipated Date Range is detailed within the automated email associated with this Access Authorisation) | Advisory | <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| <p>Your PMU Representative has deemed this work not to be a Confined Space. Whilst they acknowledge the space is restricted in nature, the space nor the work activity presents a reasonable foreseeability of your operatives suffering a serious risk on injury from a Specified Risk namely;</p> <ol style="list-style-type: none"> 1. A fire or explosion. 2. A loss of consciousness of any person at work arising from an increase in body temperature. 3. A loss of consciousness or asphyxiation arising from gas, fume, vapour or lack of oxygen. 4. The drowning of any person arising from an increase in the level of liquid. 5. Asphyxiation arising from a free flowing solid e.g. sand or other similar material. <p>Therefore, this work falls outside the definition of a Confined Space as detailed in the Confined Space Regulations 1997. Do you agree?</p> | | |
| Your Operatives will report to WYFRS Operational Staff (where available) to let them know they are on site, provide a brief description of work and resulting impact upon them (if any). In addition, they will let them know when they are leaving site? | Mandatory | <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| The operative/s assigned to undertake this work will have the necessary skills, experience and knowledge for the task in hand? Given this is a below ground service duct operatives should also have benefited from Confined Space Awareness training within .. | Mandatory | <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |

Page 1 of 1 (2 items)
1

3


The contractor needs to acknowledge the minimum health & safety expectations via the **Confirm Expectations** icon and upload their RAMS via the **Supporting Documentation** icon.

Uploading RAMS

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Upload Permit Documents

Confirm/ Proceed Add Document Export XLSX Export PDF Filter Row Refresh Data Exit Screen

| Document Required | Updated Date | Rejected | Verified Date | |
|-------------------|--------------|----------|---------------|---|
| RAMS | | | |  Upload Document |

4 To upload RAMS click the **Upload Document** icon

Page 1 of 1 (2 items) 1

Contractor uploads RAMS

Upload Permit Documents



Warning by Clicking Save You are acknowledging the documents, and information are an accurate reflection.

Document Type: RA/MS
 Upload Document (pdf): No file selected.
(Max 5mb File Size)

This work is subject to final approval by your Client Representative, approval cannot be given until suitable and sufficient RAMS have been uploaded and reviewed. When approved you will be notified by email.

Document Expectations / Requirements

| Question | Guidance |
|--|--|
| RA/MS should be site and task specific? | The document should accurately state the location where the work is taking place together with the task undertaken. For low-risk repeated tasks generic risk assessments should be acceptable. |
| The document should identify primary hazards? | It should include what might cause harm (Hazard) and the likelihood that a person may be harmed or suffers adverse health effects and how serious the harm could be (Risk). This includes their own operatives, staff, and students. |
| The document should be concise and not include hazards or risks that are clearly irrelevant? | These include work from ladders, scaffolds, and platforms, working on roofs both in good weather and in poor weather. In addition, you should also consider associated hazards such as gaining safe access, difficulty of access, rooflights and fragile roof coverings, the potential for materials to fall and injury others, and the potential for people to fall. |
| Hazards should be evaluated and presented as risks? | Once hazards have been identified there must be some form of evaluating risk. This can be done a multitude of ways, typically risk will be based upon severity of injury and likelihood of occurrence. Numbers are fine but the better risk assessments will deploy a simplistic RAG rating or determine each as high medium or low risks. We need to ensure that the medium and high risks are clearly identified and controlled. |
| It should state who is at risk? | m. Children and young people may also try and access the roof if doors and gates are not locked. Consider the location, could they potentially be at risk? |

SOTERweb Notification

Any approval or comments made in respect of risk assessment or method statement are provided in good faith. However, responsibility for approval and ensuring that the assessment is adequate remains with the employer / author. No liability will be accepted for any consequences or loss directly or indirectly attributed to comments suggestions or omissions provided by the Client or its representatives.

5 Read and **Accept** the declaration

- Controls stated are specific to the hazard, they seem realistic and would be considered a reasonable attempt at controlling risks.
- Ladders to be removed, scaffolds protected and access doors locked to prevent unauthorised access.
 - Consider weather conditions e.g. fog, driving rain, ice and snow and wind.
 - All roof lights will be considered to be fragile. **Note:** Operatives should not come within 4m of any fragile material including rooflights unless protected.
 - Be mindful of people on the ground. **Note:** If materials are likely to fall or roll off the roof fit toe-boards or tie materials / tools off.
 - Consider the potential for coming in close proximity to base stations/antennas. **Note:** At no stage should operatives be directly in front of an antenna.
 - Work in daylight hours / provide task lighting.

Contractor uploads RAMS

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Upload Permit Documents

Warning by Clicking Save You are acknowledging the documents, and information are an accurate reflection.

Document Type: RAMS

Upload Document (pdf): **Browse...** No file selected.

This work is subject to final approval by your Client Representative, approval cannot be given until suitable and sufficient RAMS have been uploaded and reviewed. When approved you will be notified by email.

Document Expectations / Requirements

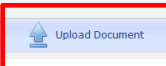
6 Add a document by clicking **Browse**. Then locate the document and double click to add the document to the system. Then press **save**.

Page 1 of 1 (2 items)

Contractor uploads RAMS

soterweb® Estate Facilities Management System

Upload Permit Documents

| Document Required | Updated Date | Rejected | Verified Date | |
|-------------------|--------------|----------|---------------|---|
| RA/MS | 24/07/2022 | | |  |

Confirm/Proceed Add Document Export XLSX Export PDF Filter Row Refresh Data Exit Screen

- 1 To change the document you've selected click **Upload Document** again. You will be able to view the original document but the system will require another document or the same document to be uploaded.
- 2 To add multiple documents click the **Add Document** icon, and add additional document/s. (see next slide)
- 3 When ready, proceed by clicking the **Confirm / Proceed** icon.

Adding multiple document



Warning by Clicking Save You are acknowledging the documents, and information are an accurate reflection.

Document Type

Certificate

Upload Document (pdf) View latest document

Browse... No file selected.
(Max 5mb File Size)

Note:

You will not be able to save an additional document unless a brief description in the Document Type field is provided before it is uploaded. Failure to do this will mean you will need to re-upload the document before pressing **save**.

Automated Email

soterweb Estate Facilities Management System
🏠

Permits

| 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 |

Montgomery and Coupers Ltd - Access Authorisation - Service Duct - Permit No 23 - Permit Questions Confirmed and Documents Upload...

↩ Reply
↩ Reply All
→ Forward
⋮

S SOTER <do not reply> <information@soterweb.org.uk>
 To: tracey.dransfield@westyorksfire.gov.uk
 Cc: rik@montgomeryandcoupers.co.uk

Wed 30/10/2019 12:19

Dear Tracey Dransfield

This notification confirms Montgomery and Coupers Ltd has provided answers for the permit and have uploaded their RA/MS;

- Permit Number - 23
- Permit Type - Access Authorisation - Service Duct
- Permit Description - Fix Leaking DHWS
- Anticipated Date Range - 30/10/2019 - 31/10/2019

Of Note: One or more the answers provided appears not to meet normal WYFRS expectations. Please log onto SOTERweb (<https://wyfrs.soterweb.org.uk>) to review the information provided and tick the GREEN FLAG to indicate you are comfortable to allow the work to commence on the date agreed.

Regards

Richard Hutchins

SOTERweb Contractor Management System

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Page 1 of 1 (1 Items)
🔍

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

The Client contact will be notified when the contractor has acknowledged the expectations and uploaded their RAMS.

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

Client - Review Responses

The screenshot shows the Soterweb Estate Facilities Management System interface. At the top, the title bar reads "soterweb Estate Facilities Management System". Below this is a "Permits" section with a table of data. The table has columns for ID, Permit, ManagedBy, Receiver, Mobile No, Organisation, Project, Location, Start, Expiry, Equip Iss..., and Status. A single row is visible with ID 23, Permit "Access Aut...", ManagedBy "Tracey Dransfield", Receiver "Richard Hutchins", Mobile No "07903039694", Organisation "Montgomery and Co...", Project, Location "Birkenshaw HQ - Oa...", Start "30/10/2019 08:01", Expiry "31/10/2019 17:01", Equip Iss... "No", and Status "Confirmed". To the right of the table is a toolbar with various icons, including a red box highlighting a PDF icon and a DOC icon. Below the table is another toolbar with icons for a green flag, a pencil, a checkmark, a PDF icon, a DOC icon, a person, a green checkmark, a play button, a pause button, a double arrow, a photo, a green square, a blue minus sign, a hand, an @ symbol, and a magnifying glass. A large text overlay in the center of the screenshot reads: "7 From the Permits Home screen the **Verify Expectations & Verify RAMS** icons become active." At the bottom left, there is a "Note:" section stating "The permit status will change to Confirmed." At the bottom of the screenshot, there is a footer with page information: "Page 1 of 1 (1 Items)", user information: "Richard Hutchins (Gmail) Login Details Type:[Organisation] Profile:[Power User (Internal)] Department:[All] / (Browser:Chrome70)", and copyright information: "2019 © Copyright by SOTER Management Systems Ltd Login Organisation ID:[1] Organisation Contact ID:[15]".

7 From the Permits Home screen the **Verify Expectations & Verify RAMS** icons become active.

Note:
The permit status will change to Confirmed.

Client – reviews responses



View / Verify Question



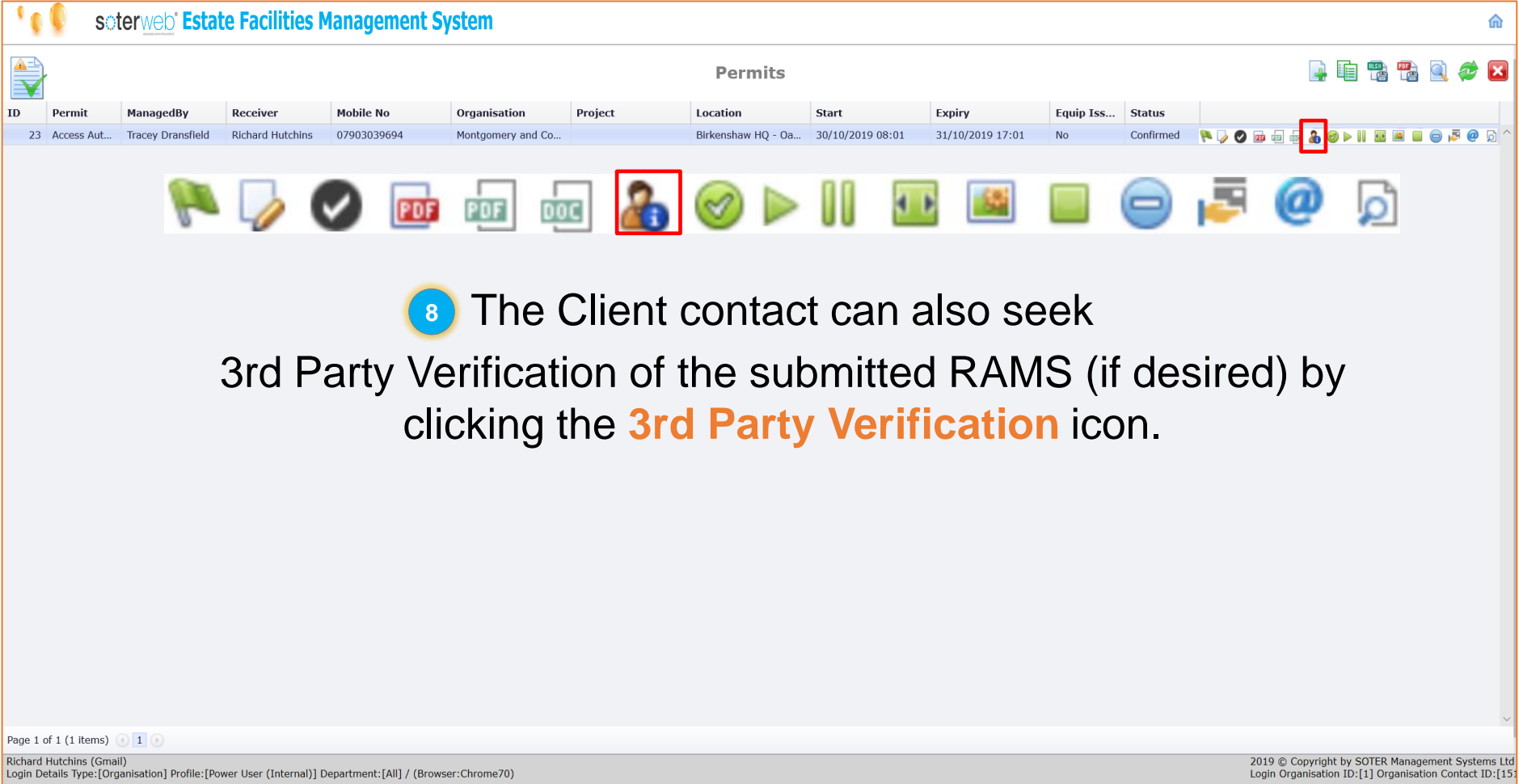
Exit Screen

| Question | Comments | Category | Yes - No - N/A |
|--|----------|-----------|---|
| As a Primary Contact for your organisation, you agree the work will be completed in accordance with the limitations and expectations detailed within this Permit? | | Mandatory | <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| Confirm your organisation has the resources to complete the activity within the specified date range provided? Note: the date range is stated within the automated email associated with this Permit. | | Advisory | <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| Provide the names of the operatives likely to be undertaking this task including one assigned as a supervisor? Note: If you are intending to use a subcontractor provide details. | TEST | Advisory | <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| As this work involves a high-risk location, the presumption is it is unlikely to be suited to lone working. Do you agree? If not, provide justification. | | Advisory | <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| Operatives should report to Operational Staff (<i>where available</i>) to let them know they are on site, provide a brief description of work and resulting impact (<i>if any</i>)? | | Mandatory | <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| Provide details of the fall protection measures you intend to use e.g Edge Protection, Fall Restraint, Fall Arrest, Safety Net, Air Bags etc.? | TEST | Advisory | <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| Where used, access equipment will be inspected in line with legal requirements? Note: Where applicable evidence should be available upon request. | | Advisory | <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| Is a rescue plan needed? (<i>If so details should be provided in your accompanying risk assessment</i>) | | Advisory | <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| Where relevant (<i>in any building that is built before the year 2000</i>) you acknowledge you have accessed Asbestos information to confirm works will not inadvertently disturb asbestos? If this is not the case seek further clarification from your EFD Representative. | | Mandatory | <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| All scaffolders working at the University must hold appropriate CISRS (Construction Industry Scaffolders Record Scheme) cards (including labourers). Contractors are required to only use scaffolding subcontractors who are registered with either the Scaffolding Association or the National Access and Scaffolding Confederation (NASC). Please acknowledge. | | Mandatory | <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |

Client contact reviews responses and can

- 1 **Return Permit** - for further consideration.
- 3 **Reject Permit** - which will close the Permit.
- 2 **Approve Permit**

3rd Part 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 icons. A red box highlights the '3rd Party Verification' icon, which is a person with a blue 'i' symbol.

| 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)

2019 © Copyright by SOTER Management Systems Ltd
Login Organisation ID:[1] Organisation Contact ID:[153

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

3rd Part Verification



Permit Third Party Approval

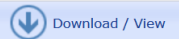


Approval By - eMail

rik@montgomeryandcouper.co.uk

Document

RA/MS



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

SD 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](#)

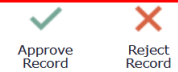
Do not reply to this email. If you require further information please contact your SOTERweb Demo SOTERweb system administrator.

Then add an **email address** and click **save** and the system will send an email automation with an embedded link to allowing the RAMS to be reviewed by a 3rd Party.

The 3rd Part Verification Screen



Permit Third Party Approval



Approval By - eMail

rik@montgomeryandcoupers.co.uk

Approval Comments

Additional Comments Go in Here

Document

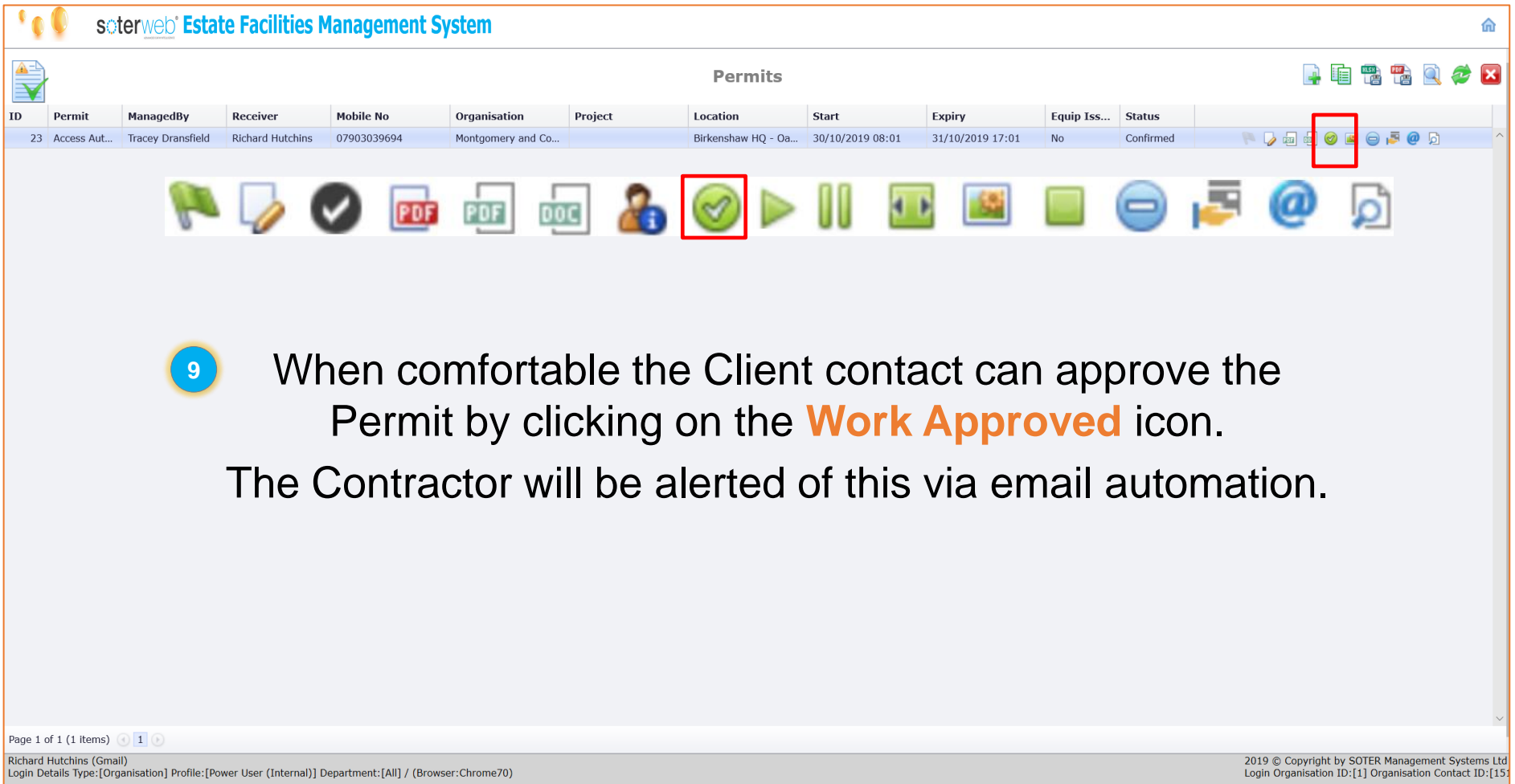
RA/MS

Download / View

The 3rd Party can

- 1 **Download / View** the RAMS
- 2 Provide comments
- 3 **Approve** or **Reject** the RAMS.

Approve work



The screenshot displays the Soterweb Estate Facilities Management System interface. At the top, the title bar reads "soterweb Estate Facilities Management System". Below this is a "Permits" section with a table of data. The table has columns for ID, Permit, ManagedBy, Receiver, Mobile No, Organisation, Project, Location, Start, Expiry, Equip Iss..., and Status. A single row is visible with ID 23, Permit "Access Aut...", ManagedBy "Tracey Dransfield", Receiver "Richard Hutchins", Mobile No "07903039694", Organisation "Montgomery and Co...", Project, Location "Birkenshaw HQ - Oa...", Start "30/10/2019 08:01", Expiry "31/10/2019 17:01", Equip Iss... "No", and Status "Confirmed". Below the table is a toolbar with various icons. A green checkmark icon with a white checkmark inside a green circle is highlighted with a red box. At the bottom of the interface, there is a footer with page information and login details.

| 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)


2019 © Copyright by SOTER Management Systems Ltd
Login Organisation ID:[1] Organisation Contact ID:[153]

- 9 When comfortable the Client contact can approve the Permit by clicking on the **Work Approved** icon. The Contractor will be alerted of this via email automation.

Contractor receives a notification

soterweb[®] Estate Facilities Management System

Permits

| ID | Permit | ManagedBy | Receiver | Mobile No | Organisation | Project | Location | Start | Expiry | Equip Issued | Status | |
|----|-----------------------|-------------------|------------------|-------------|----------------------------|---------|------------------------------|------------------|------------------|--------------|----------|---|
| 23 | Access Authorisati... | Tracey Dransfield | Richard Hutchins | 07903039694 | Montgomery and Coupers Ltd | | Birkenshaw HQ - Oakroyd Hall | 30/10/2019 08:01 | 31/10/2019 17:01 | No | Approved |  |

Montgomery and Coupers Ltd - Access Authorisation - Service Duct - Permit Approved

SOTER <do not reply> <information@soterweb.org.uk>
 To: rik@montgomeryandcoupers.co.uk
 Cc: rik@montgomeryandcoupers.co.uk
 Wed 30/10/2019 12:46

Dear Richard Hutchins

This is an automated notification to indicate that your PMU representative has approved your RAMS relating to;

- Permit Number - 23
- Permit Type - Access Authorisation - Service Duct
- Permit Description - Fix Leaking DHWS
- Anticipated Date Range - 30/10/2019 - 31/10/2019

Permit (View/Print) - [PERMIT LINK](#)

Work can now progress in accordance with any agreed conditions and dates. Please remind your operative/s to log onto SOTERweb <https://wfrs.soterweb.org.uk> upon arrival to site to complete the pre-issuance and the end of work questions.

Regards
 Tracey Dransfield

SOTERweb Contractor Management System

Page 1 of 1 (1 items)

Richard Hutchins
 Login Details Type:[Consultant] Profile:[Admin (External Consultant)] Department:[All] / (Browser:Chrome77)

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 Login Organisation ID:[83] Organisation Contact ID:[1]

Note:

Status will change to **Approved** and the **Start Work** icon will become active.

Activating a Permit via Access IT

Operative activates a Permit.

soterweb Estate Facilities Management System Login

ACCESS-IT

Welcome to The SOTER Contractor Management

WEB PORTAL

1 Via main home screen click the **ACCESS IT** tab

2019 © Copyright by SOTER Management Systems Ltd
Login Organisation ID:[0] Organisation Contact ID:[0]

To activate a Permit

soterweb® Estate Facilities Management System

ACCESS-IT

Login Logout My Attendance History Visitor Login/Out

Contractors & Consultants Visitors

2 Click Login

System Licensed Until 30/09/2021

2021 © Copyright by SOTER Management Systems Ltd
Login Organisation ID:[] Organisation Contact ID:[]

Logs in the Access IT

soterweb[®] Estate Facilities Management System

Log In Site

LOG OUT

Username rhutchins1

Password ●●●●●●●●●●●●●●●●

- General Work
- Carry out Essential Emergency work
- Carry out work under and Existing Permit
- Request a New Permit

▶ PROCEED

- 1 Complete **Username** and **Password** fields.
- 2 Click **Carry out work under an Existing Permit**.
- 3 Click **Proceed**.

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Select the Approved Permit

soterweb® Estate Facilities Management System

Permits

Enter text to search...


| ID | Permit |
|-----|--|
| 280 | Access Authorisation - Flat Roof Bingley Fire Station Start Date 14/01/2021 End Date 14/01/2021 |

Page 1 of 1 (1 items)


Create Filter


Operative will arrive at the Permit screen which shows all approved Permits for the organisation.
To activate a Permit click **here.**

Complete pre-start questions





soterweb[®] Estate Facilities Management System





Acknowledgment of Minimum Expectations

Secondary Contact Name


Mobile

Start

Finish

| Question | Category | Yes - No - N/A |
|---|-----------|---|
| I can confirm I have presented myself to Operational staff (where applicable) to let them know I am on site and what work activities I am doing? | Mandatory | <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| Where intrusive works are planned I confirm I have been provided with asbestos information from my employer and/or accessed information directly via WYFRS Asbestos Portal 'TEAMS' via https://ems.inspectas.co.uk . I have read and understood the information provided in respect of these works? | Mandatory | <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| I agree I will work safely in accordance with my method statement and risk assessment and will seek support if required? | Mandatory | <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |

Note:

- 1 Answer the Pre-start Questions.
- 2 Dependant upon the Permit type, a Secondary contact may be required.
- 3 Press the **Confirm Question**  icon.

Client – Receives an Email

soterweb Estate Facilities Management System
Permits

| ID | Permit | ManagedBy | Receiver | Mobile No | Organisation | Project | Location | Start | Expiry | Equip Issued | Status |
|----|-----------------------|-------------------|------------------|-------------|----------------------------|---------|------------------------------|------------------|------------------|--------------|---------|
| 23 | Access Authorisati... | Tracey Dransfield | Richard Hutchins | 07903039694 | Montgomery and Coupers Ltd | | Birkenshaw HQ - Oakroyd Hall | 30/10/2019 08:01 | 31/10/2019 17:01 | No | Started |

Montgomery and Coupers Ltd - Access Authorisation - Service Duct - Permit No 23 - Permit Work Started

SOTER <do not reply> <information@soterweb.org.uk>
 To: tracey.dransfield@westyorkshire.gov.uk
 Cc: rik@montgomeryandcoupers.co.uk

Wed 30/10/2019 16:40

Dear Tracey Dransfield

This is a notification to inform you that an operative of Montgomery and Coupers Ltd has commenced work on;

- Permit Number - 23
- Permit Type - Access Authorisation - Service Duct
- Permit Description - Fix Leaking DHWS
- Agreed Date Range - 30/10/2019 - 31/10/2019

Regards

Richard Hutchins

SOTERweb Contractor Management System

The information in this email is confidential and may also be privileged. If you are not the intended recipient, please notify us immediately. You should not copy this e-mail or its contents or use it for any purpose nor disclose its contents to any other person unless authorised to do so. Although this email and any attachments are believed to be free of any virus, or any other defect which might affect any computer or IT system into which they are received and opened, it is the responsibility of the recipient to ensure that they are virus free and no responsibility is accepted by us for any loss or damage arising in any way from receipt or use thereof.

The Client contact is notified the operative has started work via email automation.

Note: Status has changed to Started.

Page 1 of 1 (1 Items)

Richard Hutchins (Gmail) Login Details Type:[Organisation] Profile:[Power User (Internal)] Department:[] / (Browser:Chrome77)

2019 © Copyright by SOTER Management Systems Ltd
 Login Organisation ID:[1] Organisation Contact ID:[14]

Closing a Permit via Access IT

To Close a Permit via Access IT

soterweb® Estate Facilities Management System

Log Out of Site

Username rhutchins1

Password ●●●●●●●●●●●●●●●●

Log Out of Site

Log Out of Site and Keep Permit Open

Log Out of Site and Close Permit

PROCEED

LOG IN

Within the Access IT Log Out Screen

- 1 Complete the **Username and Password** fields.
- 2 Click **Log Out of Site and Close Permit**.
- 3 Click **Proceed**.

Select Permit to Close

soterweb[®] Estate Facilities Management System

Permits

Enter text to search...



| ID | Permit |
|-----|--|
| 280 | Access Authorisation - Flat Roof Bingley Fire Station Start Date 14/01/2021 End Date 14/01/2021 |


Page 1 of 1 (1 items)

Create Filter



Indicate which Permit you wish to close by clicking **here.**

Answer closing questions


soterweb Estate Facilities Management System




Acknowledgment of Minimum Expectations

| Question | Category | Yes - No - N/A |
|--|----------|--|
| I hereby declare that all work for which this Authorisation to Access was issued is now suspended/complete and that all persons in my charge have been withdrawn from the area, the roof is left in a clean and safe condition, tools and materials removed? | Advisory | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| I have locked off access to the roof and provided local WYFRS Operational Staff (where available) with a verbal update, returned key (where applicable) and notified them I am leaving and will log off SOTER? | Advisory | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |

- 1 Answers the Closing Questions.
- 2 Press the **Confirm** icon.

Note

A system generated email will notify the Client representative that work has finished.

Request a Permit via the main system

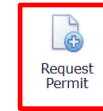
Requesting a Permit

Dependant upon permissions
Contractors can Request a Permit
through the system for both Planned
and Reactive Work.

Requesting a Permit



Permits



Enter text to search...

| ID | Permit | Managed... | Receiver | Mobile No | Organisation | Project | Location | Start | Expiry | E... | T... | Rej... | Stat... | |
|----|---------------|----------------|--------------|-------------|--------------------|---------|--------------------|------------------|------------------|------|---------|--------|------------|--|
| 59 | PTW - Pres... | Test Profile 1 | Fred Bloggs1 | 07903039694 | Montgomery and ... | TEST | Cleckheaton D... | 17/09/2022 14:23 | 17/09/2022 18:23 | No | Plan... | | New | |
| 58 | Access Aut... | Ann Yellow | Fred Bloggs1 | 07903039694 | Montgomery and ... | TEST | Cleckheaton D... | 17/09/2022 08:05 | 17/09/2022 12:05 | No | Plan... | | Request | |
| 57 | PTW - Pres... | Test Profile 1 | Fred Bloggs1 | 07903039694 | Montgomery and ... | TEST | Cleckheaton D... | 17/09/2022 07:55 | 17/09/2022 11:55 | No | Plan... | | Confirm... | |
| 56 | PTW - Pres... | Test Profile 1 | Fred Bloggs1 | 07903039694 | Montgomery and ... | TEST 4 | Castleford Dis... | 17/09/2022 11:43 | 17/09/2022 15:43 | No | Plan... | | Started | |
| 55 | PTW - Pres... | Test Profile 1 | Fred Bloggs1 | 07903039694 | Montgomery and ... | TEST | Bradford Halls... | 17/09/2022 19:20 | 17/09/2022 23:20 | No | Plan... | | Finished | |
| 54 | PTW - Pres... | Test Profile 1 | Fred Bloggs1 | 07903039694 | Montgomery and ... | TEST | Bradford Halls... | 17/09/2022 18:56 | 17/09/2022 22:56 | No | Plan... | | Confirm... | |
| 53 | PTW - Pres... | Test Profile 1 | Fred Bloggs1 | 07903039694 | Montgomery and ... | TEST | Bradford Halls... | 17/09/2022 09:30 | 17/09/2022 13:30 | No | Plan... | | Confirm... | |
| 52 | Access Aut... | Test Profile 1 | Fred Bloggs1 | 07903039694 | Montgomery and ... | TEST | Bingley Distrib... | 17/09/2022 18:20 | 17/09/2022 22:20 | No | Plan... | | Finished | |

From the Permit Home screen, the Contractor presses the **Request a Permit** icon

Contractor Completes Request Screen

soterweb[®] Estate Facilities Management System

Add New Permit

| | | | | | |
|------------------------|----------------------------------|-------------------------|--|--------|---------|
| Permit Type | Access Authorisation - Flat Roof | Type | Reactive | Status | Request |
| Description | Access main flat roof | Managed By Contact | West Yorkshire Fire and Rescue Service | | |
| Receiving Company | Montgomery and Coupers Ltd | Receiving Contact | Richard Hutchins | | |
| Project | Fixing roof leak | Area (with risk) | | | |
| Location | Birkenshaw HQ - Main Building | Area Other | N/A | | |
| Anticipated Start Date | 30/10/2019 21:21 | Anticipated Finish Date | 31/10/2019 01:21 | | |

Please tick if this location is in an enclosed or confined space

Specific Information

To fix the leak I need to gain access to the main flat roof. Please raised me the required Permit

Contractor completes the screen by filling in the fields.

Note:

1. Select permit type from drop down list.
2. Assign the Permit to a receiving organisation and an individual (the individual **must** have a admin profile).
3. Complete the desired start and finish date and time.
4. Press **Save**. The system will save the Permit details and add it to the Permit Home screen.

Client Contact is notified of the request

soterweb[®] Estate Facilities Management System

Permits

| ID | Permit | ManagedBy | Receiver | Mobile No | Organisation | Project | Location | Start | Expiry | Equip Issued | Status |
|----|---------------------------------|-------------------|------------------|-------------|----------------------------|---------|-------------------------------|------------------|------------------|--------------|----------|
| 23 | Access Authorisation - Serv... | Tracey Dransfield | Richard Hutchins | 07903039694 | Montgomery and Coupers Ltd | | Birkenshaw HQ - Oakroyd Hall | 30/10/2019 08:01 | 31/10/2019 17:01 | No | Finished |
| 24 | Access Authorisation - Flat ... | Tracey Dransfield | Richard Hutchins | 07903039694 | Montgomery and Coupers Ltd | | Birkenshaw HQ - Main Building | 30/10/2019 21:22 | 31/10/2019 01:22 | No | Request |
| 25 | Access Authorisation - Flat ... | Rik Hutchins | Richard Hutchins | 07903039694 | Montgomery and Coupers Ltd | | Birkenshaw HQ - Main Building | 31/10/2019 21:33 | 30/11/2019 01:33 | No | Request |

Montgomery and Coupers Ltd - Access Authorisation - Flat Roof - Permit No 25 - Has been requested

 SOTER <do not reply> <information@soterweb.org.uk>
 To: rik@montgomeryandcoupers.co.uk
 Cc: rik@montgomeryandcoupers.co.uk

[Reply](#) [Reply All](#) [Forward](#) [...](#)

Wed 30/10/2019 21:38

Dear Rik Hutchins

This notification advises that Montgomery and Coupers Ltd has requested a permit;

- Permit Number - 25
- Permit Type - Access Authorisation - Flat Roof
- Permit Description - Leaking Roof
- Anticipated Date Range - 31/10/2019 - 30/11/2019

Please log onto SOTERweb (<https://wfrs.soterweb.org.uk>) to confirm you are comfortable to allow the permit to be raised and for the company to upload their RA/MS.

Regards

Richard Hutchins

SOTERweb Contractor Management System

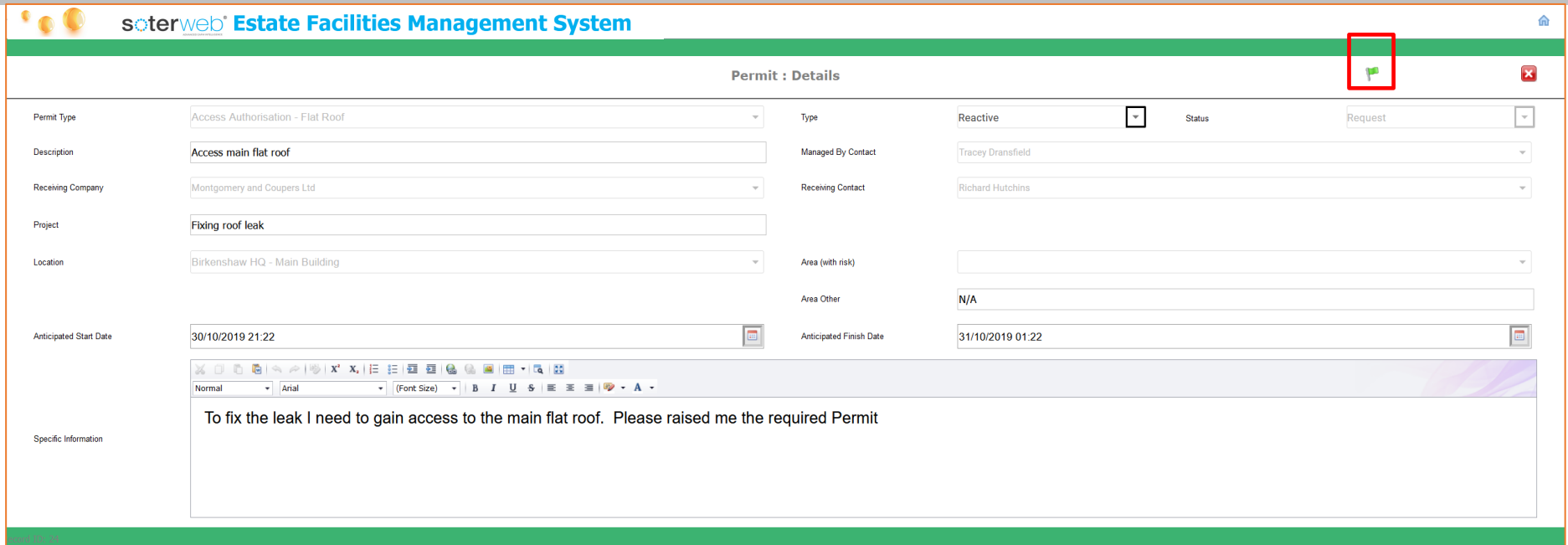
The information in this email is confidential and may also be privileged. If you are not the intended recipient, please notify us immediately. You should not copy this e-mail or its contents or use it for any purpose nor disclose its contents to any other person unless authorised to do so. Although this email and any attachments are believed to be free of any virus, or any other defect which might affect any computer or IT system into which they are received and opened, it is the responsibility of the recipient to ensure that they are virus free and no responsibility is accepted by us for any loss or damage arising in any way from receipt or use thereof.

An email automation will be to the appropriate Client contact notifying them of the Permit request.

Note:

The status changes to Request.

Client Contact reviews the request



soterweb[®] Estate Facilities Management System

Permit : Details

| | | | | | |
|------------------------|----------------------------------|-------------------------|-------------------|--------|---------|
| Permit Type | Access Authorisation - Flat Roof | Type | Reactive | Status | Request |
| Description | Access main flat roof | Managed By Contact | Tracey Dransfield | | |
| Receiving Company | Montgomery and Coupers Ltd | Receiving Contact | Richard Hutchins | | |
| Project | Fixing roof leak | | | | |
| Location | Birkenshaw HQ - Main Building | Area (with risk) | | | |
| | | Area Other | N/A | | |
| Anticipated Start Date | 30/10/2019 21:22 | Anticipated Finish Date | 31/10/2019 01:22 | | |

Specific Information

To fix the leak I need to gain access to the main flat roof. Please raised me the required Permit

The Client Contact reviews the request and click the **Confirm Permit Request** icon if happy for the request to proceed.

Main Permit Screen is updated

soterweb® Estate Facilities Management System

Permits

| 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 | Finished |
| 24 | Access Aut... | Tracey Dransfield | Richard Hutchins | 07903039694 | Montgomery and Co... | | Birkenshaw HQ - Mai... | 30/10/2019 21:22 | 31/10/2019 01:22 | No | Request |
| 25 | Access Aut... | Rik Hutchins | Richard Hutchins | 07903039694 | Montgomery and Co... | | Birkenshaw HQ - Mai... | 31/10/2019 21:33 | 30/11/2019 01:33 | No | Request |


The Permit Request is also added to the main Permit screen

Page 1 of 1 (3 items)


Richard Hutchins (Gmail)
Login Details Type:[Organisation] Profile:[Power User (Internal)] Department:[/] (Browser:Chrome77)

2019 © Copyright by SOTER Management Systems Ltd
Login Organisation ID:[1] Organisation Contact ID:[151


Email Automation



soterweb[®] Estate Facilities Management System




Permits



| ID | Permit | ManagedBy | Receiver | Mobile No | Organisation | Project | Location | Start | Expiry | Equip I... | Status | |
|----|--------------|-------------------|------------------|-------------|--------------------|---------|----------------------|------------------|------------------|------------|---------|--|
| 20 | Access Au... | Rik Hutchins | Richard Hutchins | 07903039694 | Montgomery and ... | | Todmorden Fire St... | 28/10/2019 11:47 | 28/10/2019 15:47 | No | Started | |
| 21 | Access Au... | Tracey Dransfield | Richard Hutchins | 07903039694 | Montgomery and ... | | Birkenshaw HQ - ... | 28/10/2019 08:00 | 31/10/2019 17:00 | No | New | |

Montgomery and Coupers Ltd - Access Authorisation - Service Duct - Permit Raised



SOTER <do not reply> <information@soterweb.org.uk>
 To: rik@montgomeryandcoupers.co.uk
 Cc: rik@montgomeryandcoupers.co.uk

Mon 28/10/2019 11:48

Dear Richard Hutchins

This is a automated system generated notification from SOTER informing you that a Permit has been raised to by West Yorkshire Fire & Rescue Service (WYFRS) to Montgomery and Coupers Ltd.

- Permit Number - 20
- Permit Type - Access Authorisation - Service Duct
- Permit Description - test
- Anticipated Date Range - 28/10/2019 - 28/10/2019

Please log onto SOTERweb <https://wfrs.soterweb.org.uk>. Confirm WYFRS expectations will be met and upload your RA/MS.

This information will then need to be reviewed by your WYFRS Representative before final approval is given to allow the work activity to commence.

Specific Information (if any)

Regards

Rik Hutchins

SOTERweb Contractor Management System

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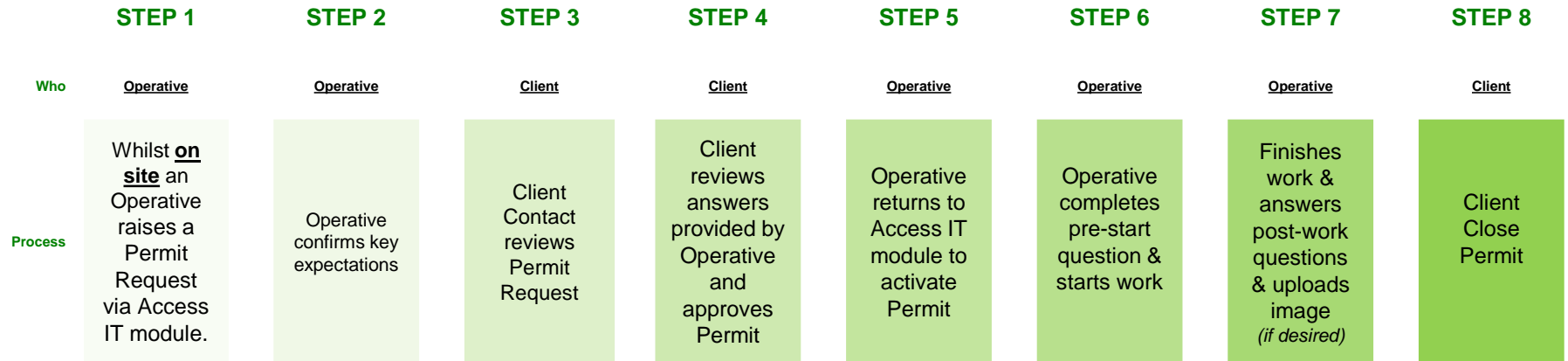
Once approved an email automation will notify the requester of the outcome.

Note:
 If approved the status will change to New
 The **Confirm Expectations** and **Upload Supporting Documents** icons become live.

Page 1 of 1 (2 items)

Request a Permit via Access IT.

Overview of the Process



Logs in the Access IT

soterweb[®] Estate Facilities Management System

Log In Site

LOG OUT

Username rhutchins1

Password ●●●●●●●●●●


- General Work
- Carry out Essential Emergency work
- Carry out work under and Existing Permit
- Request a New Permit

▶ PROCEED


- 1 Complete **Username** and **Password** fields.
- 2 Click **Carry out work under an Existing Permit**.
- 3 Click **Proceed**.

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Request a Permit Facility via Access IT

soterweb[®] Estate Facilities Management System 


Log In Site



Username

Password

- General Work
- Carry out Essential Emergency Work
- Carry out work under an Existing Permit
- Request a New Permit



- 1 Complete **Username** and **Password** fields.
- 2 Click **Request a New Permit**.
- 3 Click **Proceed**.

Complete the Request Screen

soterweb[®] Estate Facilities Management System

Request New Permit

| | | | | | |
|------------------------|--|------------------------------------|----------------------|--------|---------|
| Permit Type | <input type="text"/> | Type | Reactive | Status | Request |
| Work to be carried out | <input type="text"/> | Managed By Contact | <input type="text"/> | | |
| Receiving Company | <input type="text"/> | Receiving Contact | <input type="text"/> | | |
| Project | <input type="text"/> | | | | |
| Building/Area | <input type="text"/> | High Risk Location (If Applicable) | <input type="text"/> | | |
| | <input type="checkbox"/> Please tick if this location is in a enclosed or confined space | Location/Room | <input type="text"/> | | |
| Anticipated Start Date | 14/01/2021 14:29 | Anticipated Finish Date | 14/01/2021 18:29 | | |

Specific Information

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Administration

QUICK PERMITS (Configuration)

1. Create a New Permit Type

Control Panel > Edit List > Permit Types > Add

- a) Complete the Details and enter **QUICKPERMIT** in the Permit Parameters box.

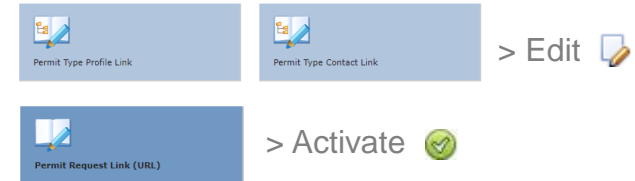
2. Create the Manager for the Permit

Organisation > Edit > My Organisation > Managed By  > Add

- a) Select the contact Name who manages the Permit
b) Select the contact Type (This is the Name of the Permit)

3. Add the Permit to the contacts who can Request the Permit

Project > Permits >



4. Send the contact a Email Link to add the Permit(s) when required. *Project > Permits >*

5. Associated Email Automation

- a) Permit Request (contact URL Authentication Link)
b) Permit Requested (QUICKPERMIT) Send to Client contact
c) Permit Approved
d) Work Started
e) Work In Progress (Standard System Emails)
f) Permit Work Finished
g) Permit Closed

6. Add Profile Permissions for the Permit - Request Edit Screen – Button – Save

END OF DOCUMENT