MSite User Guide

Document: MSite Delivery Management User Guide

FAO: Contractor Users

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1 MSite Delivery Management

To access the Delivery Management functionality within in MSite the user must first have Delivery Management permissions, this will enable the ‘Delivery Management’ option on the toolbar. Clicking this option will move the user to the Delivery Management section of MSite.
2 Using MSite Delivery Management

When accessing msite with a contractor that has Delivery Management the ‘Delivery Management’ option will be available on the MSite Toolbar.

By clicking this option you will move to the ‘Delivery Management’ functionality within MSite.

2.1 Adding a New Booking

To add a booking to Delivery Management navigate to the ‘Delivery Management’ tab on the MSite Toolbar and then click ‘New Booking’.

This will load the ‘Create a New Booking’ Page, this page should look like the one overleaf.
2.1.1 The Booking Details Panel

- What do you want to book – Select the type of booking you wish to create (small descriptions are displayed for each type).
- Contact details of the person making the booking (you) - enter your contact details.
- Person making the delivery/collection – Enter the contact details for the person in charge of the delivery.

If the ‘Type’ of booking is changed you will see the panels below it change this is due to a change in the details that are required for your booking. The reference number will be automatically generated when your booking is submitted.

2.1.2 The ‘Where & When?’ Panel

- Site – The Site where the booking will take place.
- Gate – The gate which will be used for the delivery to access the site. (Disabled when set to crane only booking.)
- Crane – The crane which will be used to move the items. (Can be set ‘not required’).
• Delivery Collection Method – The method to which the item(s) are going to be exchanged (Vehicle/Hand/NA)(Disabled when set to crane only booking)
• Arrival Date/Time – the expected time of arrival for the booking.
• Check Schedule Availability – See Schedule.
• Delivery Collection Method – The method to which the item(s) are going to be exchanged (Vehicle/Hand/NA)(Disabled when set to crane only booking)

The inputs which are available to edit in this panel will change dependent on the type the booking has been set to, this is due to a change in the details required for the booking. When clicking the ‘Check Schedule Availability’ the Daily Schedule calendar will appear atop of the form with the ‘Arrival Date’ already selected.

! The following panels will not be displayed for Crane Only Bookings
The Vehicle Details panel will be hidden if delivery method is set to hand.

2.1.3 The Vehicle Details Panel

- Vehicle Type – The Type of vehicle which will be used for the booking (See ‘Vehicles’)
- Vehicle Registration Number – The Registration Number of the vehicle in question
- CO2 Class – The approximate emissions class for the vehicle.
- Haulage Company Name – The name of the third party haulage company if one is being used.
- FORS Member – If the haulier is a member of the Fleet Operator Recognition Scheme.
- FORS Membership Number – If the haulier is a member of FORS the membership number is required.
- Distance from previous stop/Distance to next stop – The distance between the vehicles last and next stops.
Lorry Driver Trained – Does the driver possess the correct licenses/qualifications to use the required vehicles.

Certain details are required as they will be needed by the site to allow for the details of the delivery to be used elsewhere – such as reporting.

2.1.4 The Material Details Panel

- Materials Category – A list of common categories of materials to be delivered (if corresponding category doesn’t exist use other).
- Combustible/Hazardous Materials – If any hazardous materials are being transported select them here.
- Materials Description/COSHH Requirements – The materials which are going to be moved during the delivery and any COSHH requirements which must be met during the booking.

The material details panel will be used by the site to a plan of action, which will be used to move the items once they arrive on site.

2.1.5 The Loading/Unloading Details Panel
• Unload Method – The type of vehicle which will be required to load or unload the materials on site.
• Edge Protection – The types of edge protection which will available on site.
• Lifting Plan – If a lifting plan is required (if set to ‘Attached’ a lifting plan must be uploaded using the ‘New Lifting Plan’ button.

Providing these details allows for the site to have an understanding of the bookings need and the availability of the required resources.

Once all of the required fields, shown with a *, are filled in correctly you can now submit the booking. If any of the required fields have been missed they will be shown like the following:

**Booking Contact Tel.** *

The Booking Contact Tel. field is required.

If the booking has submit successfully a message will appear reading ‘Your booking was successfully submitted’.

2.2 Browse Bookings

The ‘Browse Bookings’ page allows you to find all bookings that fit within a selected criteria, displaying all bookings which are available for the current user to edit.

2.2.1 The Search Bookings Panel

• Status – Allows for filtering of bookings based on their current status.
- Reference Number – Searches all bookings for the entered value within their reference number.
- Arrival Date From/To – Allows for filtering of bookings based on their expected arrival date/time.
- Site(s) – Filters bookings based on the relative site.
- Records per Page – Changes the maximum amount of records displayed per page.

None of the fields for filtering are required, as default all records are returned. Once the panels has been submitted the appropriate bookings are returned below.

2.2.2 The Bookings List

Once the ‘Search Bookings’ panel has been submitted, the bookings will be returned as seen above. The search will return Reference Number, Status, Type, Arrival Date and Time, Contractor, Site and Gate – This will change based on screen size with only Status, Type, Arrival Date and Time, Contractor and Site being displayed at the smallest supported resolution.
2.3 Site Information

The site information page allows the user to view the Site Name, Address, Post Code, Phone Number, Opening Times, Working Days, Notice Period and Instructions for the site.
3 GLOSSARY

3.1 Statuses

<table>
<thead>
<tr>
<th>State/Colour Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>Temp state between when a new booking is initialised and before it is submitted. Never appears in lists as bookings cannot be saved, they go straight to a Booking Pending state when submitted or cease to exist if not submitted.</td>
</tr>
<tr>
<td>Booking Pending</td>
<td>A booking cannot be saved so it will automatically move to ‘Booking Pending’ on submission.</td>
</tr>
<tr>
<td>Approved/ Scheduled</td>
<td>Can also move to this state automatically if Auto-accept rules are met.</td>
</tr>
<tr>
<td>Arrived On Site</td>
<td>Marked as Arrived On Site by the Delivery Operator once delivery/collection has arrived on site. This is not the final state. Needs to be recorded to allow the site to report the amount of time spent on site by delivery/collection personnel.</td>
</tr>
<tr>
<td>Completed</td>
<td>Marked as Completed by the Delivery Operator once delivery/collection has taken place and the delivery/collection personnel have left site. Needs to be recorded to allow the site to report the amount of time spent on site by delivery/collection personnel.</td>
</tr>
<tr>
<td>Completed (Unplanned)</td>
<td>Same as above but denotes that there was not a booking prior to delivery/collection.</td>
</tr>
<tr>
<td>Booking Rejected</td>
<td>Marked as Rejected by Delivery Operator if the delivery cannot be accommodated.</td>
</tr>
<tr>
<td>No Show</td>
<td>Marked as Missed by Delivery Operator if the delivery did not arrive.</td>
</tr>
<tr>
<td>Turned Away</td>
<td>Marked as Missed by Delivery Operator if the delivery arrived on site but was not accepted.</td>
</tr>
<tr>
<td>Withdrawn</td>
<td>Marked as Withdrawn by the Delivery Contractor or Delivery Operator.</td>
</tr>
</tbody>
</table>

3.2 Icons

- Delivery – Used to show delivery bookings.
- Collection – Used to show collection bookings.
- Crane – Used to show crane only bookings.
- Gate – Used to show gates within ‘Site Configuration’.
- Delivery Management – Used on Contractors to show that delivery management enabled.