Site Works Tracker App – user guide

1: Introduction

The Site Works Tracker application is intended as tool to both effectively plan site work, and to allow a live sign-in/out functionality to monitor in real time who is on site, and where.

The primary users are intended to be Project Manager's and their authorised delegates. During the planning of site works, the app is optimised around a laptop/desktop PC, though can work on mobile devices as well. During site works when staff are signing in and out, it is optimised for mobile devices (e.g. phones, tablets).

Senior Management and Safety Representatives will have Superuser access, allowing full visibility of all entered data and live tracking of who is signed into active sites.

2: Intended Users

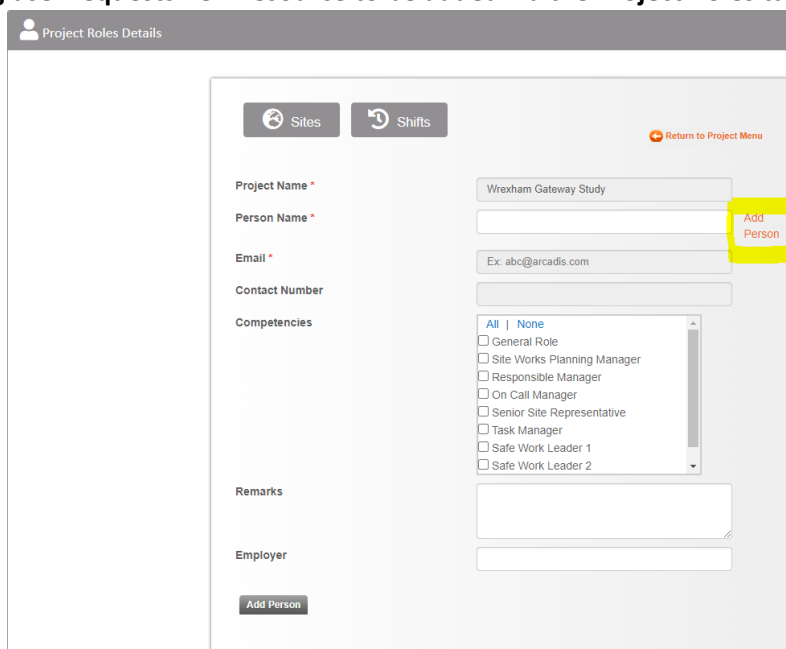The application will be used by the following roles:

- **Project Manager and authorised delegate** – For the planning of all sites works
- **Senior Site Representative / Shift Supervisor** – Responsible for management of the application when on site through ensuring all staff sign in and sign out
- **All site personnel** – All personnel accessing an Arcadis site (including non-Arcadis staff) are to sign and out of the application through use of the mobile device held by the Senior Site Representative. Access to the application is not required for all staff. A single device manages the sign in/out of all people for any given shift
- **Super Users** – Senior Management and BU safety Representatives will be able to access the application data for management and monitoring purposes.

3: Sign Up & Log In Process

To add a new user or to access to the application please follow the process detailed here:

New User Access:

- **Existing user requests new resource to be added via the Project Roles tab.**

- **The existing user completes the form and assigns it to a superuser. –** This will send an email with the details to the assigned superuser.
- **The superuser will add the requested resource to the Site Tracker and send confirmation .to the requester and new resource confirming this has been completed.**
- **The new resource can now follow the sign-up process on the log in screen of the app.**
- **Once completed the user will be able to log in.**

Existing Users Access:

- **To log in, existing users should enter their email and password.**
- **A One Time Password will be sent to their email, please copy this into the application and access will be granted.**

3: Application Home Page

When opening the application, the user is taken to the home page. The application menu is spit into 3 core functions

1. **Planning** – allows for users to plan all aspects of their site works, including project details, site details, allocate resources, and plan shifts,
2. **Delivering** – When planning is complete and site works commence, the Delivering menu takes the user to the live Sign in / Sign Out functionality
3. **Monitoring** – Shows live data on who is signed in and out of live sites
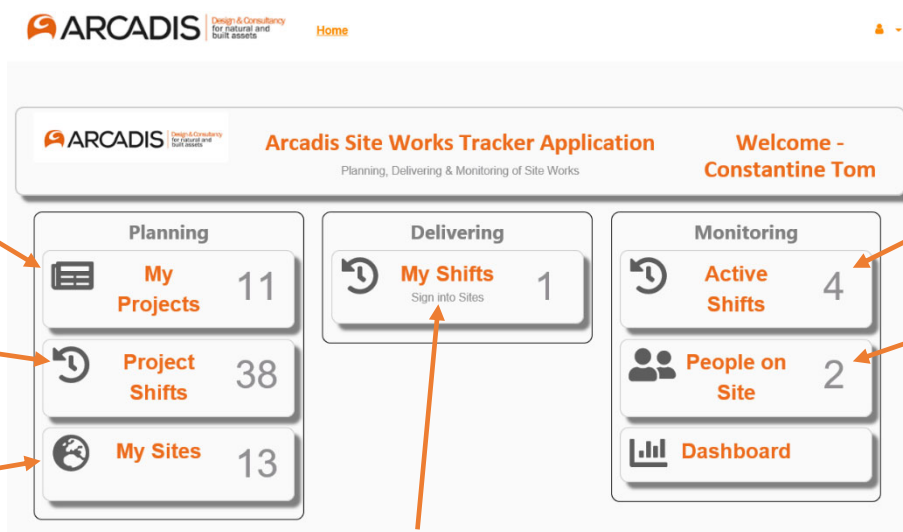
Link to list of projects assigned to them

Link to summary of all shifts associated with user across all their projects

Link to summary of all sites on user's live projects

Link to shifts currently active and on-site

List of all people signed in to Shifts assigned to the user

Link to the sign-in page for projects due in the preceding and following 24hr period

4: Adding a new and ~~~~ ~roject:

The user selects 'My Projects' from the app project home screen, and then 'Add New Project', to bring up a form to enter setup data for their project. This includes:

- Project Name
- Project Number
- Business Unit
- Project Manager's email address
- Authorised Delegate's email address
- Any comments/remarks
- Active/inactive check box

Once submitted, the Project Manager and Delegate will receive email notification that they have access to this project, and it will appear in their table of projects from the home screen.

To edit a project, the user selects the edit icon from the 'My Projects' page, and makes any necessary changes.
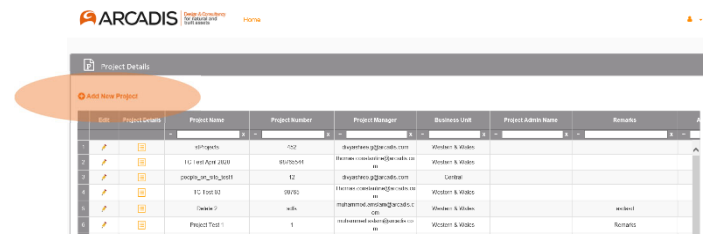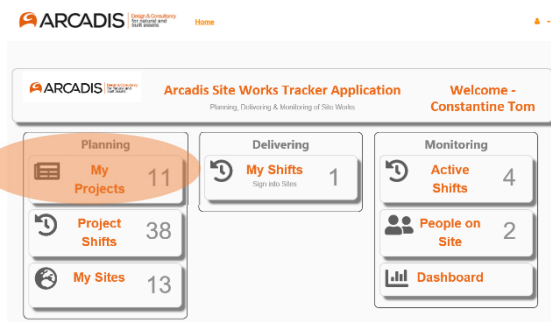

5: Adding a new and editing Sites on a Project

Once a project is set up, Sites need to be added for where work will be planned to take place. Multiple site details can be added as necessary. To add Sites to a Project, the user selects the project from the icon in their list on the project home screen. This takes the user to the Project Page, where they then select 'Sites', and 'Add New'.

 Site data to be entered includes:

- Site Name – this can be whatever the user deems appropriate, but should reflect sites referred to in the Contract
- Site Post Code – This field acts as a search function. Enter the postcode (or location name, such as 'Birmingham New Street', and click the search icon. The map image of the site will appear. The pin can be dragged to the precise location (e.g. an access point).
- Site Address – this is automatically populated by moving the pin to the desired location
- Site ELR
- Site Mileage
- Any comments/remarks
- Active/inactive check box

Saved Sites appear in the table when the 'Sites' icon is clicked from the Project Home Page. Entered sites can then be viewed or edited by selecting the appropriate icon and making any necessary changes.
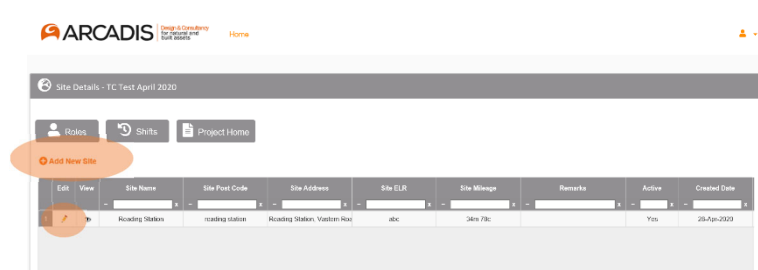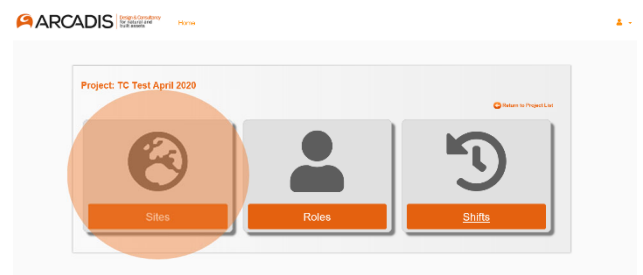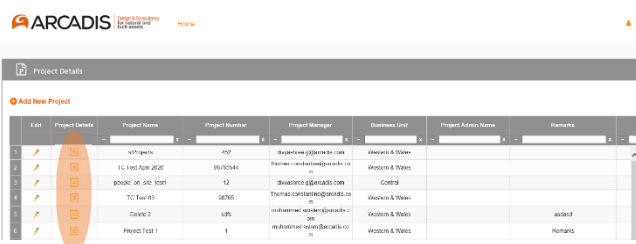
6: Adding new and editing Roles to a Project

Any person who will be required to attend site and sign-in/out using the app must be added as a Role to the project. To add Roles to a project, the user selects the project from the icon in their list on the project home screen. This takes the user to the Project Page, where they then select 'Roles'.

This brings up a page showing both a form entry for adding roles, and the table of existing roles already assigned.

Every person attending site must be assigned a Role on the project. The available roles are as follows:

- Site Works Planning Manager – The person who will be responsible for planning a specific shift. A project may have multiple people who are authorised to undertake this role (i.e. Survey Manager, Project Manager, Design Manager, etc)
- Responsible Manager – as per the NR Standard NR/OHS/L2/019
- On-Call Manager – Authorised person to act as the emergency contact for the shift
- Senior Site Representative – The Senior Arcadis person on site
- Shift Supervisor – Responsible person for the shift when SSR is not internal.
- Task Manager – Person responsible for the delivery of a package of site works (not necessarily the Task PIC as defined in NR/OHS/L3/019)
- Safe Work Leader 1 – as per the NR Standard NR/OHS/L3/019
- Safe Work Leader 2 – as per the NR Standard NR/OHS/L3/019
- General Role – someone who will attend site, but not undertake any of the duties above

Each person assigned a Role will have their name, email address, and contact number added.

A person may hold multiple roles for a project. The 'Roles' function in the app is intended to act as the shopping list of staff that may be allocated to a specific Shift. Not all projects or shifts will require all potential roles to be populated; just add those that are relevant to the project/shift.

The Project Manager is responsible for ensuring that Roles are correctly allocated to people, and that they are competent and certified to undertake the duties being assigned to them.

Saved Roles appear in the table when the 'Roles' icon is clicked from the Project Home Page. Entered Roles can then be edited by selecting the edit icon and making any necessary changes.
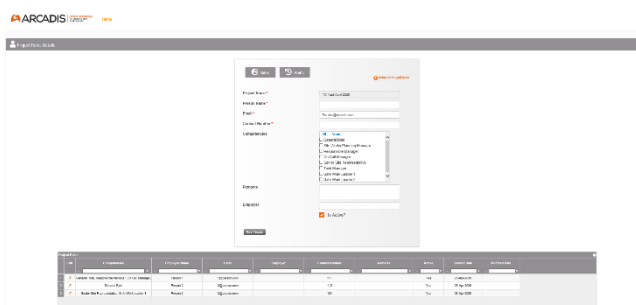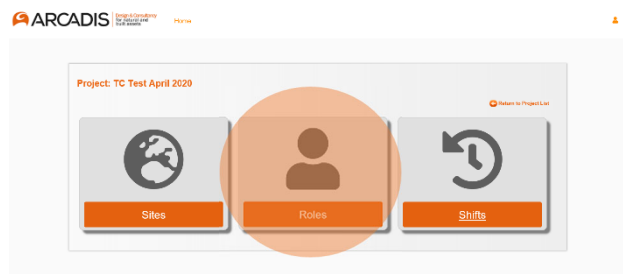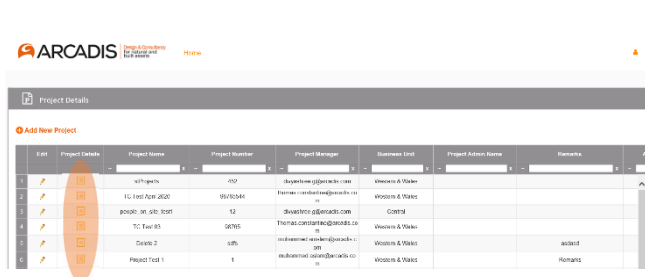
7: Adding new and editing Shift on a Project

Once a Project is added to the app, Site details entered and authorised Roles set up, then Shift Planning can commence.

Every shift undertaken on an Arcadis project must have a specific entry in the app.

To add a new shift, select 'Shifts' from the Project Home page, and Add New. The following details must be added for all Shifts:

- Shift Name – Local name of shift, to be set by user. Can be a terminology that is meaningful for the specific project
- Site – Select from drop-down list of Sites assigned to the Project
- Shift start/end date/time
- CPP – Add link to the approved CPP on the project sharepoint page (clicking the link will open the document in a new browser window)
- WPP – Add link to the approved WPP on the project sharepoint page (clicking the link will open the document in a new browser window)
- TBS – Add link to the approved TBS on the project sharepoint page (clicking the link will open the document in a new browser window)
- SWP – Add link to the approved SWP on the project sharepoint page (clicking the link will open the document in a new browser window)
- HASP – Add link to the approved HASP on the project sharepoint page (clicking the link will open the document in a new browser window)
- Shift Ref ID – autogenerated individual naming convention
- Method of Protection – Select from Possession, Line Block, Not Working On or Near the Line
- Any comments/remarks
- Shift Status – when adding a new Shift, select 'Planning in Progress', and then Save
  - When Planning in Progress is selected, mandatory fields for the safety documentation can be left blank

Not all safety documentation HASP/CPP/WPP/TBS/SWP will be applicable for every shift. If not applicable, user may enter N/A, briefly stating the reason why it doesn't apply

Once a shift has been saved as Planning in Progress, Roles/People can be assigned to the Shift. The user must add all roles necessary to safely deliver the site works, including all staff who will attend site as a 'General Role' who won't hold a specific safety duty. The user does this by selecting the required Role/Competence from the drop-down list, and only those Persons who are authorised to hold that role for the Project are available to select.

The App will not check that the assigned resources are competent for the role(s) assigned to them or that their certification/training is up to date. It is the responsibility of the user to ensure that all planned resources are correctly assigned (i.e. whether an SWL1 or SWL2 is required) and competent to undertake the allocated duties.

The app will prevent staff being planned for shifts which overlap – i.e. if a person is allocated to another shift which clashes, they will not be available from the drop-down list of Persons. The exceptions to this are the Responsible Manager, On-Call Manager and Site Works Planning Manager who all may hold these roles on multiple overlapping shifts.

Editing Resources on a Shift

Resourced people for a shift are visible in the table at the bottom of the Shift page, including the competencies they will hold for that shift. They can be edited/deleted from the list using the appropriate icons.
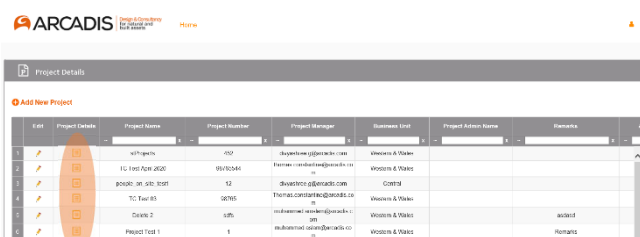
Approving a Planned Shift

Once a Shift has been planned in full, all safety documentation links added, and resources are correct, the user updates the Shift Status to Planning Complete. They are invited to submit the shift at this point (assuming all starred fields have entries). Once submitted, the Shift Status updates to 'Pending Approval'

The Project Manager will then receive email notification to review and approve the submitted shift. The Project Manager must review all of the details for the shift, and check all of the linked documentation is present and correctly approved. Once reviewed, the Project Manager may approve of reject the Shift, and the Shift Status is updated accordingly. If rejecting, the Project Manager may add notes for the reasons why. The Shift Status then reverts to 'Planning in Progress' and the user notified via email of the change of status.
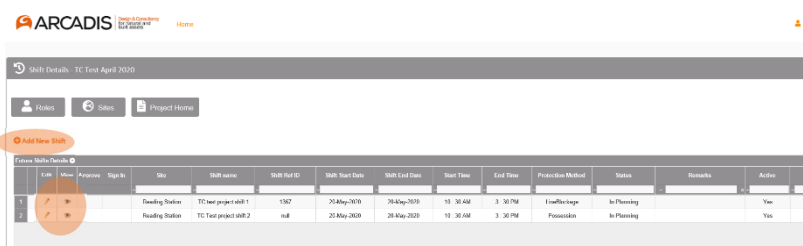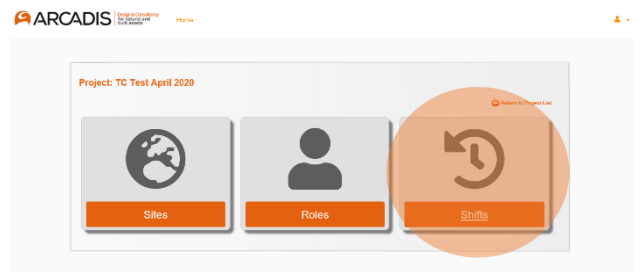
It is required that a planned shift is approved at least 48 hours before its start time. If this requirement is not met, a notification will be issued to the relevant Business Director to follow up.

In some instances, it may be that the Project Manager is the person who enters the Shift details, and hence then is prompted to approve their own submission. The intention of the Approval process in the App is to prompt the Project Manager to have a final check of the completed shift plan, assigned resources, and presence of correctly signed off safety documentation (HASP, CPP, WPP, TBS, SWP) prior to works being undertaken. It is not intended to act as a formal Check of the produced safety documents (which couldn't be undertaken by the same person and should follow the Arcadis PCRA process). It is preferable however that the Project Manager's Delegate completes the shift planning in order for the Project Manager's approval to be more independent.
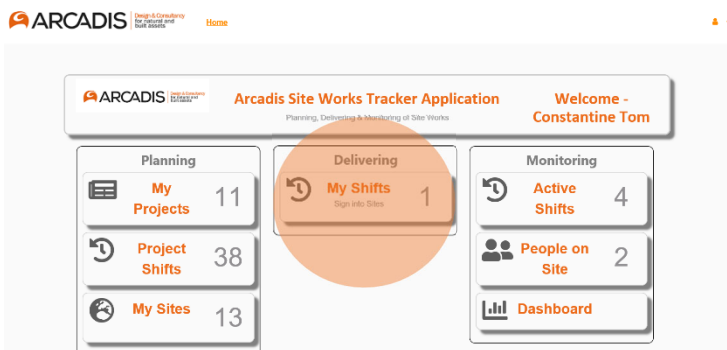
8: Signing In and Out of Site

The Signing In and Out process is to be managed by the Senior Site Representative/Shift Supervisor, using a single internet enabled mobile device. Site staff do not sign in on their own devices.

Upon arrival on site, the SSR/Shift Supervisor opens to App and navigates to the 'My Shifts' icon from the homepage. This will show all approved shifts assigned to that SSR over the prior and following 24hour period. A sign-in icon appears next to each available shift, which when selected takes the SSR to the main sign-in page.

Once the required safety briefings have all been undertaken in line with the requirements of Safe Work Planning, every worker on the Arcadis site is to sign-in to the app using the single device managed by the SSR/Shift Supervisor.

The person signing in selects their name from the available list of resources, adds their actual and anticipated travel in & out durations, reads and acknowledges the stated declaration, and signs the touchscreen to confirm they have been brief and are signed in.

At the end of the shift, each person is to sign out, with the process being managed by the SSR. The sign-out function does not require a signature, so the SSR may sign staff out if they are satisfied that they are clear of site.