SORT (Special Orders Routing Team) Quick Start Guide

ESDAL
### (ELECTRONIC SERVICE DELIVERY FOR ABNORMAL LOADS)

July 2024

ESDAL Quick Start Guide for SORT (Special Orders Routing Team) Users

Introduction

The purpose of this "quick start" guide is to provide SORT team members with an introduction to completing a Special Order Application from start to finish in ESDAL (Electronic Service Delivery for Abnormal Loads):

The guide navigates you from the ESDAL login screen shown below, through:

- Process A – Movement inbox and application processing to initial checking;
- Process B – Create movement version including creation of Special Order;
- Process C – QA and Final checking, distribute movement.
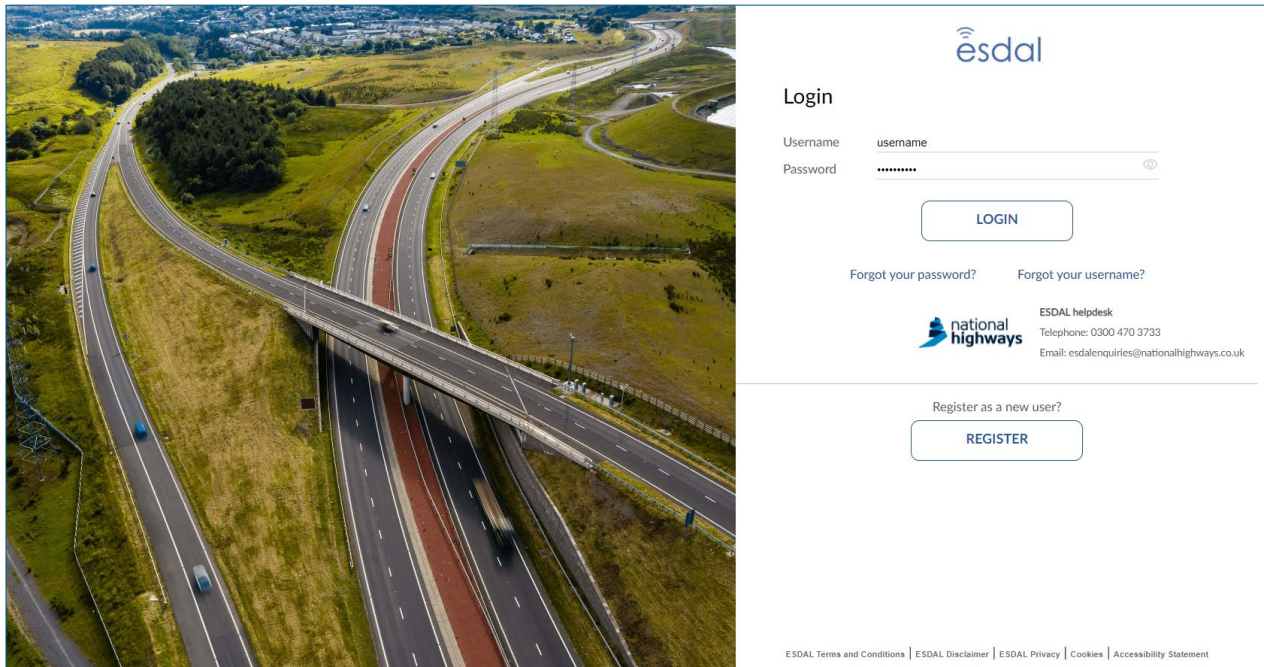
Images used in this quick start guide which have blue borders are from ESDAL and show what you will see as you use the system. Text in red and images with a red border are notes explaining each of the actions needed to progress through each of the three processes described within this guide.

Additional support material relating to the use of ESDAL is available as follows:

- The ESDAL pages on the National Highways website
  https://nationalhighways.co.uk/road-safety/abnormal-loads-and-the-esdal-system
- In-page help within the ESDAL website
- Answers to "Frequently Asked Questions" which are available here ESDAL FAQs
- the ESDAL Helpdesk, which can be contacted by telephone on 0300 470 3733 or email at esdalenquiries@nationalhighways.co.uk

Structure of this Quick Start Guide

Each of the stages involved in the three processes (A, B and C) along with the steps comprising each stage are described in the following pages.

Explanatory steps in this Quick Start Guide and user

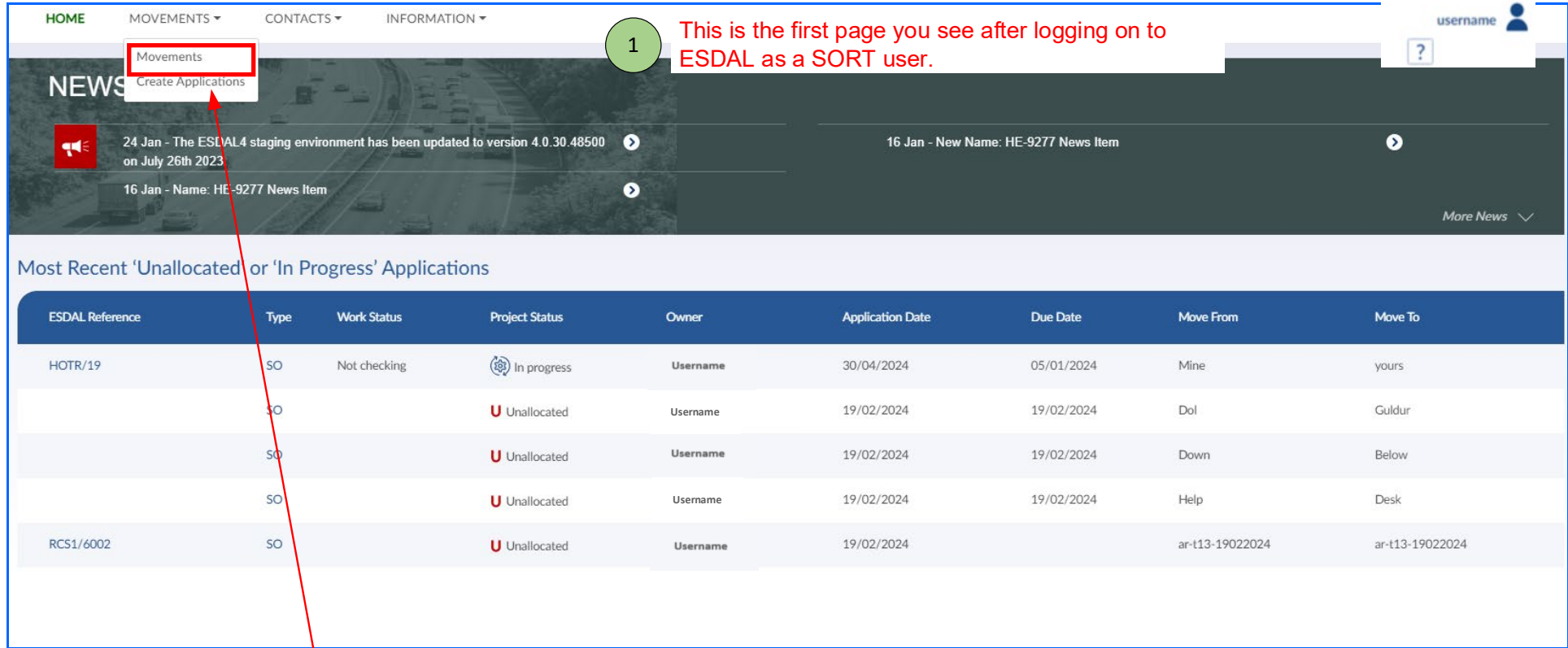| Processes	Stages in each process	SORT user	Checker / QA checker
Process A - Movement inbox and application processing to initial checking	A1 (SORT user) - Movement Inbox	1 2 3	
	A2 (SORT user) – Haulier application version, check details, view route/ vehicle / supplementary information	4 5 6 7 8 / 9 10 11 12 13	
	A3 (SORT user) – Allocate SORT user, create and save candidate route	14 15 16 17 / 18 19 20	
	A4 (SORT user) – Affected parties, view route, add annotations	21 22 23 24 25 / 26 27 28 28 30 / 31	
	A5 (SORT USER) - checking	32 33	
	A5 (Checker) – Check application		34 35 36 37 38 / 39 40
	A6 (SORT user) – Show my projects, application filtering	41 42 43 44 45 / 45	

Processes	Stages in each process	Explanatory steps in this Quick Start Guide and user	
		SORT user	**Checker / QA checker**
Process B – Create movement version including creation of special order	B1 (SORT user) – Create movement version, distribute movement version	47 48 49 50 51 52	
	B2 (SORT user) – Collaboration notes	53 54 55 56 57 58 59 60 61 62	
	B3 (SORT user) – Agree movement version add notes to haulier	63 64 65 66 67	
	B4 (SORT user) – Affected parties and adding contacts	68 69 70 71 72 73	
	B5 (SORT user) – Annotations	74 75 76 77 78 79 80	
	B6 (SORT user) – Create special order, generate documentation	81 82 83 84 85 86 87 88 89 90	
Process C – QA and Final checking, distribute movement	C1 (SORT user) – Send for QA checking	91 92	
	C2 (QA checker) – QA checking by QA checker		93 94 95 96 97 98
	C3 (SORT user) – Send for final checking	99 100 101	
	C4 (Final checker) – Final checking by final checker		102 103 104
	C5 (SORT user) – Distribute movement	105 106 107	

Process:	A. Movement Inbox and Application Processing to Initial Checking
Stage in the process:	A1. (SORT user) Movement Inbox 1/2

1 This is the first page you see after logging on to ESDAL as a SORT user.

2 Click on the "movements" drop down arow, then on "movements" to open your movement inbox.
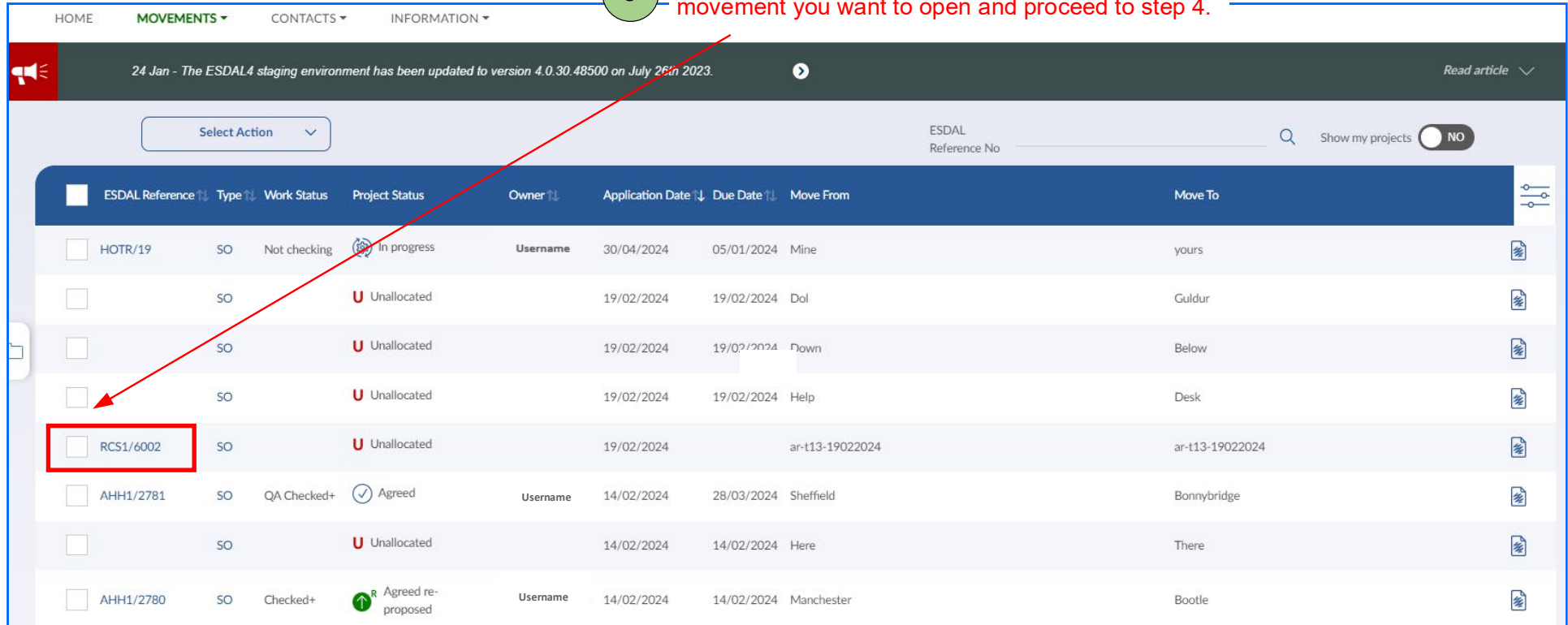
Proceed to step 3.

3 Click on the ESDAL reference number of the movement you want to open and proceed to step 4.

	ESDAL Reference	Type	Work Status	Project Status	Owner	Application Date	Due Date	Move From	Move To	
	HOTR/19	SO	Not checking	In progress	Username	30/04/2024	05/01/2024	Mine	yours	
		SO		U Unallocated		19/02/2024	19/02/2024	Dol	Guldur	
		SO		U Unallocated		19/02/2024	19/02/2024	Down	Below	
		SO		U Unallocated		19/02/2024	19/02/2024	Help	Desk	
	RCS1/6002	SO		U Unallocated		19/02/2024		ar-t13-19022024	ar-t13-19022024	
	AHH1/2781	SO	QA Checked+	Agreed	Username	14/02/2024	28/03/2024	Sheffield	Bonnybridge	
		SO		U Unallocated		14/02/2024	14/02/2024	Here	There	
	AHH1/2780	SO	Checked+	R Agreed re-proposed	Username	14/02/2024	14/02/2024	Manchester	Bootle	

Process:	A. Movement Inbox and Application Processing to Initial Checking
Stage in the process:	A2. (SORT user) – Haulier Application Version, Check Details, View Route/ Vehicle / Supplementary Information 1/6

Project Overview | History

RCS1/6002 - SO - Unallocated

Application details

ESDAL Reference	RCS1/6002	Movement Name	
Haulier Reference	ar-t13-19022024	NH Job Reference Number	
Project Status	Unallocated	Full Start Address	ar-t13-19022024
Checking Status	Not Checking	Full End Address	ar-t13-19022024
Owner			
Application Date	**(4)**		
Application Due Date			**EDIT**
Haulier Name	Heavy Haulage		
Checker Name			

In project overview, select the latest haulier application version, this will take you to step 5.

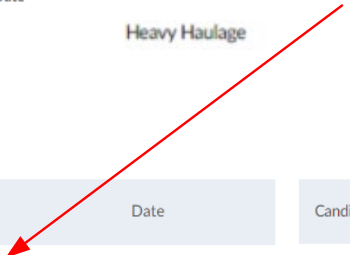| Haulier application versions	Date	Candidate routes	Date	Movement versions	Date	Special orders	Expiry Date
RCS1/6002-1	19-02-2024	No candidate routes for this application.		No movement versions for this application.		No special orders for this application.	

ALLOCATE | DECLINE | WITHDRAW

Process:	**A. Movement Inbox and Application Processing to Initial Checking**
Stage in the process:	**A2. (SORT user) – Haulier Application Version, Check Details, View Route/ Vehicle / Supplementary Information 2/6**

HOME   MOVEMENTS ▾   CONTACTS ▾   INFORMATION ▾

Project Overview   Application Details

RCS1/6002 - SO
Application version - 1

Application general details

ESDAL reference	RCS1/6002-1
My reference	SO APP 1
Client name	
From summary	Depot
To summary	Customer
Description	
Load	Leicester heavy load 1
Application Date	24-01-2024
Movement date from	24-01-2024
Movement date to	08-05-2024
Number of movements	1
Maximum pieces per load	1
Agent name	

Applicant contact details
Applicant contact name	Username
Applicant organisation name	Heavy Haulage
Applicant address	Beveridge Lane

5 Check the application details.

6 Click this arrow to expand and view route and vehicle details, see steps 9 and 10.

Route and Vehicle

7 Click this arrow to expand and view supplementary information, see step 11.

Supplementary Information

8 Click on this arrow to return to the top of the page.

REVISE

ESDAL Terms and Conditions | ESDAL Feedback Form | ESDAL Disclaimer | ESDAL Privacy | Cookies | Accessibility Statement | ESDAL Help Desk - 0300 470 3733 - 8am-6pm Mon-Fri excluding bank holidays
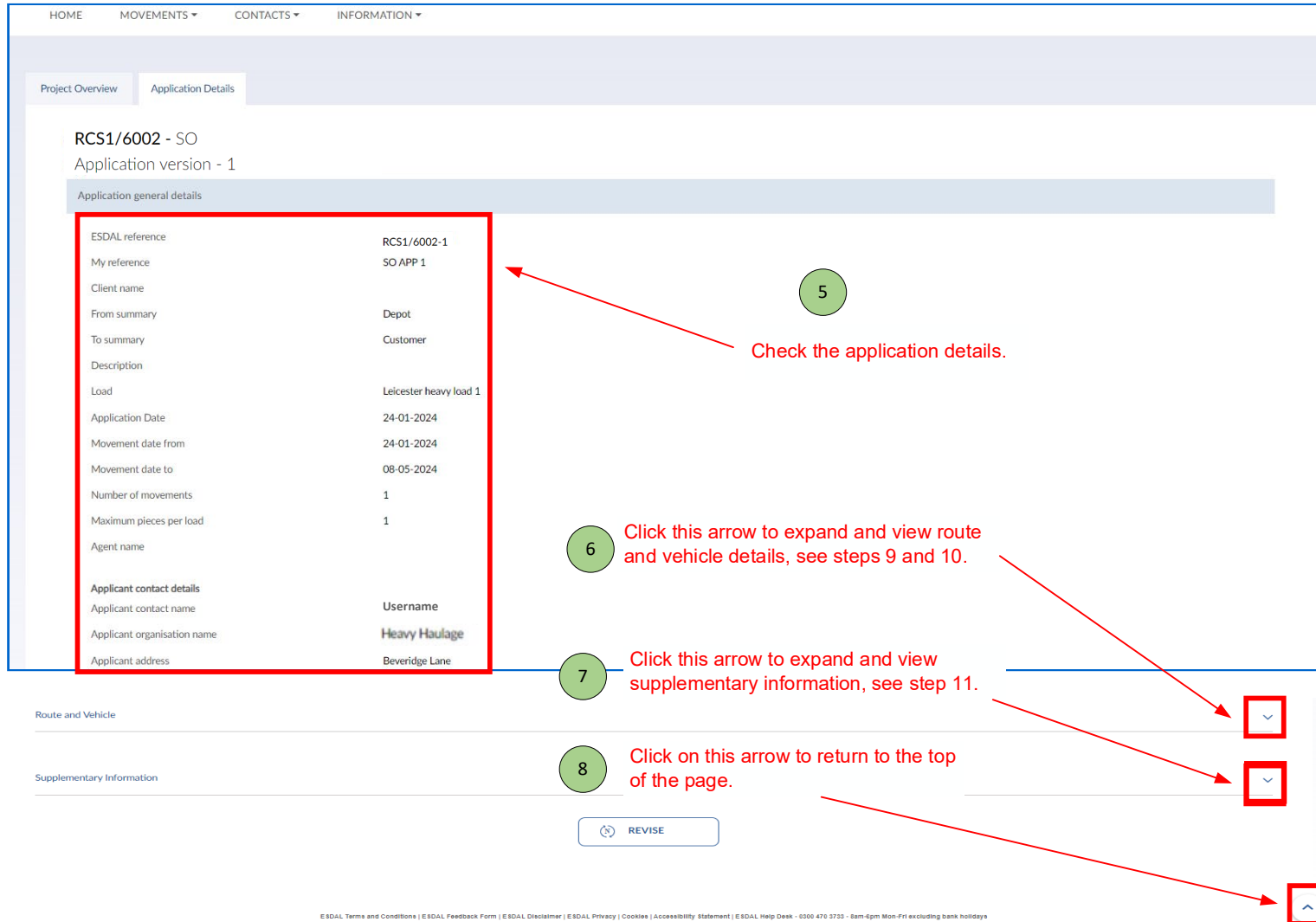
Process:	A. Movement Inbox and Application Processing to Initial Checking
Stage in the process:	A2. (SORT user) – Haulier Application Version, Check Details, View Route/ Vehicle / Supplementary Information 3/6

Route and Vehicle

Route Parts	Route Part Name	Route Type	
Route part 1 (282)	282	planned	◉

Route

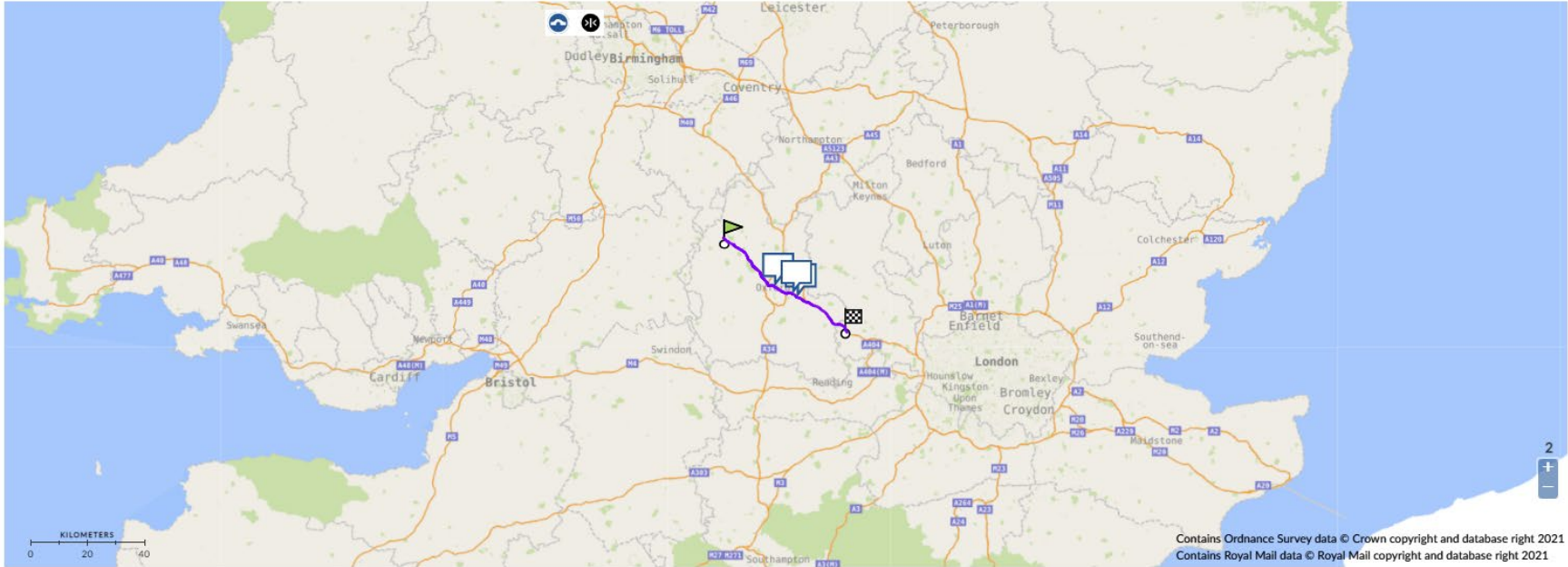|	
Starting	Oakdale Place, A47, Elm, WISBECH, Cambridgeshire, PE14 0EN
Via Waypoint	
Ending	M40, HP14 3EN

(9) Clicking on the arrow allows you to view route details, clicking on the arrow in the bottom right hides these details again.
Proceed to step 10 to see vehicle details.

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Contains Royal Mail data © Royal Mail copyright and database right 2021

![national highways logo]

Process:	**A. Movement Inbox and Application Processing to Initial Checking**
Stage in the process:	**A2. (SORT user) – Haulier Application Version, Check Details, View Route/ Vehicle / Supplementary Information 4/6**

Vehicle configurations

Rigid

(10) Clicking on the arrow allows you to view vehicle details; clicking on the arrow in the bottom right hides these details again. Proceed to step 11 to view supplementary information.

Hide Details ⌃

			Overhang & Projection (Required if Overhang >0.305 or Projection > 3.05)		
Notes	-		Left Overhang	-	
Gross Weight	160000	kg	Right Overhang	-	
Overall Length	16	m	Front Projection	-	
Overall Width	4	m	Rear Projection	-	
Max Height	3	m	Ground Clearance	0.5	m
Number of Axles	16		Reduced Ground Clearance	-	
Reducible Height	-		Outside Track	4	m
Heaviest Axle Weight	10000	kg	Travelling speed	-	kph
			Wheelbase	15	m

Registration ID	Fleet ID
Reg	

Axle	No. of wheels	Axle weight (kg)	Distance to next axle (m)	Tyre sizes	Tyre centre spacing		
					1	2	3
1	4	10000	1	1	1	2	1
2	4	10000	1	1	1	2	1
3	4	10000	1	1	1	2	1
4	4	10000	1	1	1	2	1

Process: A. Movement Inbox and Application Processing to Initial Checking

Stage in the process: A2. (SORT user) – Haulier Application Version, Check Details, View Route/ Vehicle / Supplementary Information 5/6

Rigid

Show Details ⌄

(11) Clicking on the arrows allows you to view and hide supplementary information.
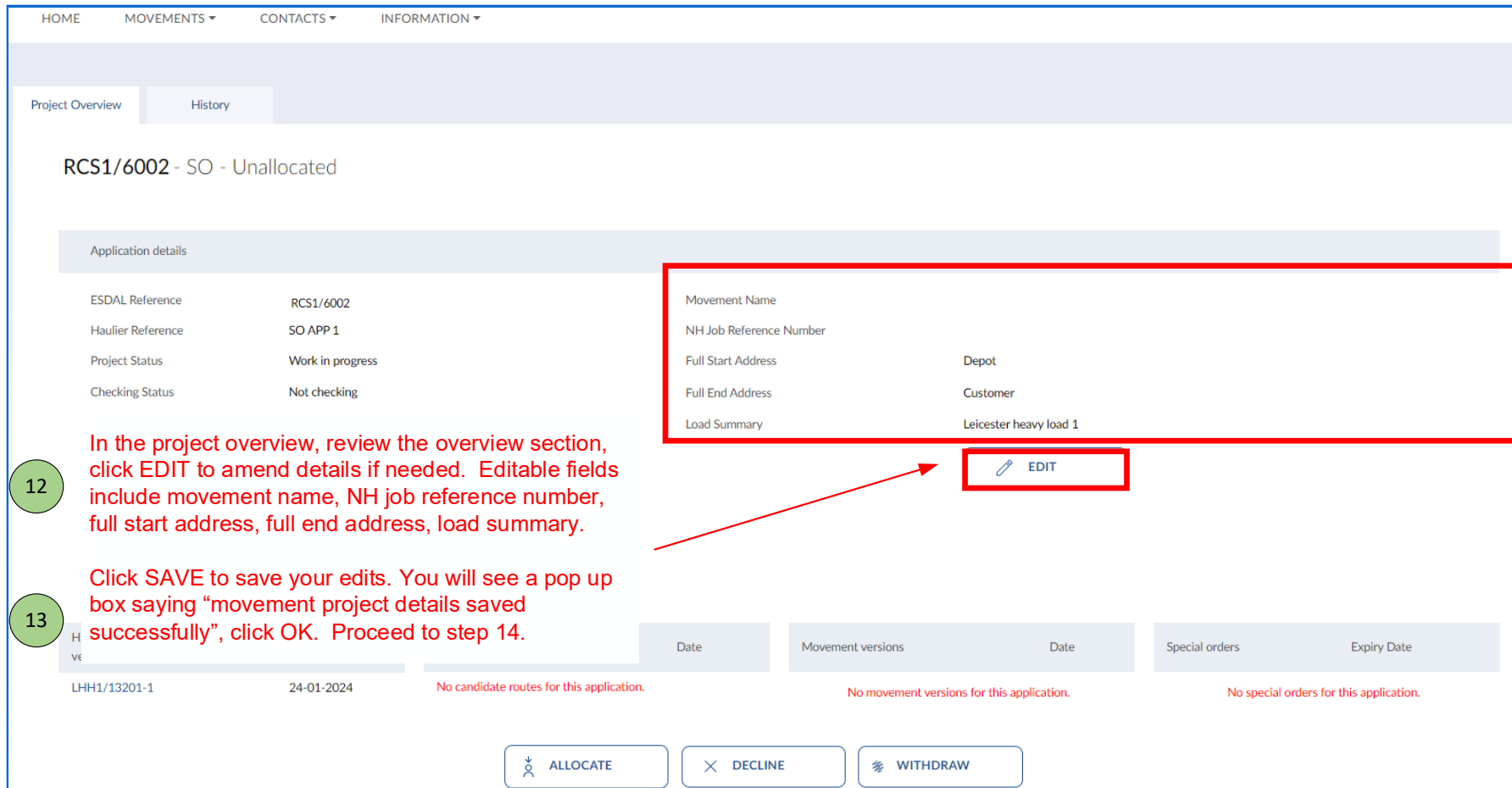Proceed to step 12.

Supplementary Information ⌃

Total distance by road	56
Value of load	90000
Date of authority and starting point of any similar movement previously authorised	
Is load divisible	No
Cost of division	
Risk of division	
Has sea been considered	No
Port name	
Sea quotation	
Is final address	No
Details of further proposed movements	
Cost of road movement	
Other considerations	

Process:	A. Movement Inbox and Application Processing to Initial Checking
Stage in the process:	A2. (SORT user) – Haulier Application Version, Check Details, View Route/ Vehicle / Supplementary Information 6/6

HOME   MOVEMENTS ▾   CONTACTS ▾   INFORMATION ▾

Project Overview   History

RCS1/6002 - SO - Unallocated

Application details

ESDAL Reference	RCS1/6002	Movement Name	
Haulier Reference	SO APP 1	NH Job Reference Number	
Project Status	Work in progress	Full Start Address	Depot
Checking Status	Not checking	Full End Address	Customer
		Load Summary	Leicester heavy load 1

✏ EDIT

12 In the project overview, review the overview section, click EDIT to amend details if needed. Editable fields include movement name, NH job reference number, full start address, full end address, load summary.

13 Click SAVE to save your edits. You will see a pop up box saying "movement project details saved successfully", click OK. Proceed to step 14.

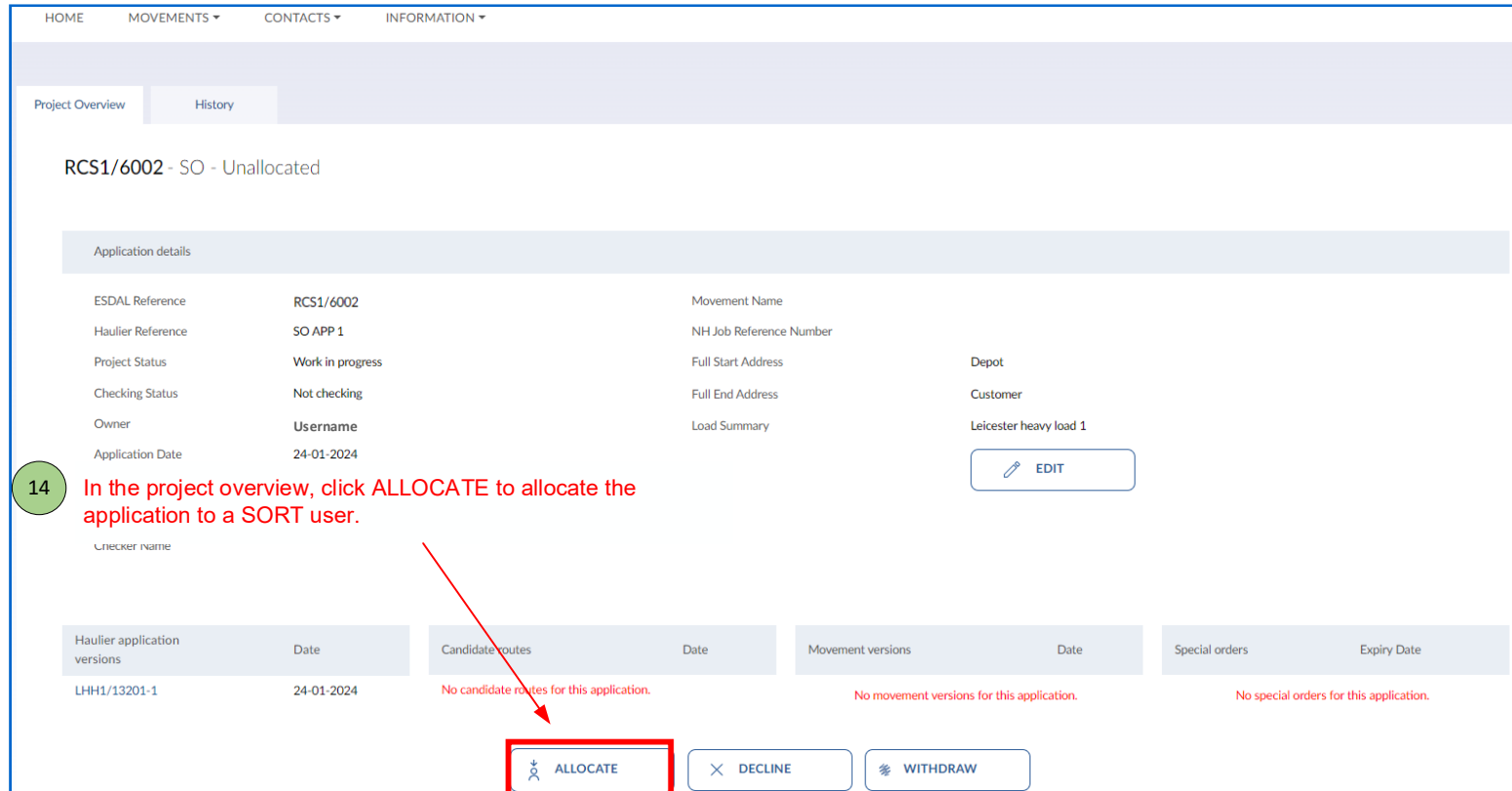|	Date	Movement versions	Date	Special orders	Expiry Date
LHH1/13201-1	24-01-2024	No candidate routes for this application.		No movement versions for this application.	No special orders for this application.

👤 ALLOCATE   ✕ DECLINE   ⚡ WITHDRAW

![national highways]

| Process: | A. Movement Inbox and Application Processing to Initial Checking |
| Stage in the process: | A3 (SORT user) – Allocate Sort User, Create And Save Candidate Route 1/4 |

HOME   MOVEMENTS ▾   CONTACTS ▾   INFORMATION ▾

Project Overview   History

RCS1/6002 - SO - Unallocated

Application details

ESDAL Reference	RCS1/6002	Movement Name	
Haulier Reference	SO APP 1	NH Job Reference Number	
Project Status	Work in progress	Full Start Address	Depot
Checking Status	Not checking	Full End Address	Customer
Owner	**Username**	Load Summary	Leicester heavy load 1
Application Date	24-01-2024		

EDIT

14 In the project overview, click ALLOCATE to allocate the application to a SORT user.

Checker Name

Haulier application versions	Date	Candidate routes	Date	Movement versions	Date	Special orders	Expiry Date
LHH1/13201-1	24-01-2024	No candidate routes for this application.		No movement versions for this application.		No special orders for this application.	

ALLOCATE   ✕ DECLINE   WITHDRAW

SORT user   --Select user--   ▾

Work due date   *30/01/2024*

OK   CANCEL

15 Select a user from the drop down menu, set the work due date as 8 weeks from the application date and click OK. A pop up box will state "SORT user [Username]" is allocated to this application.
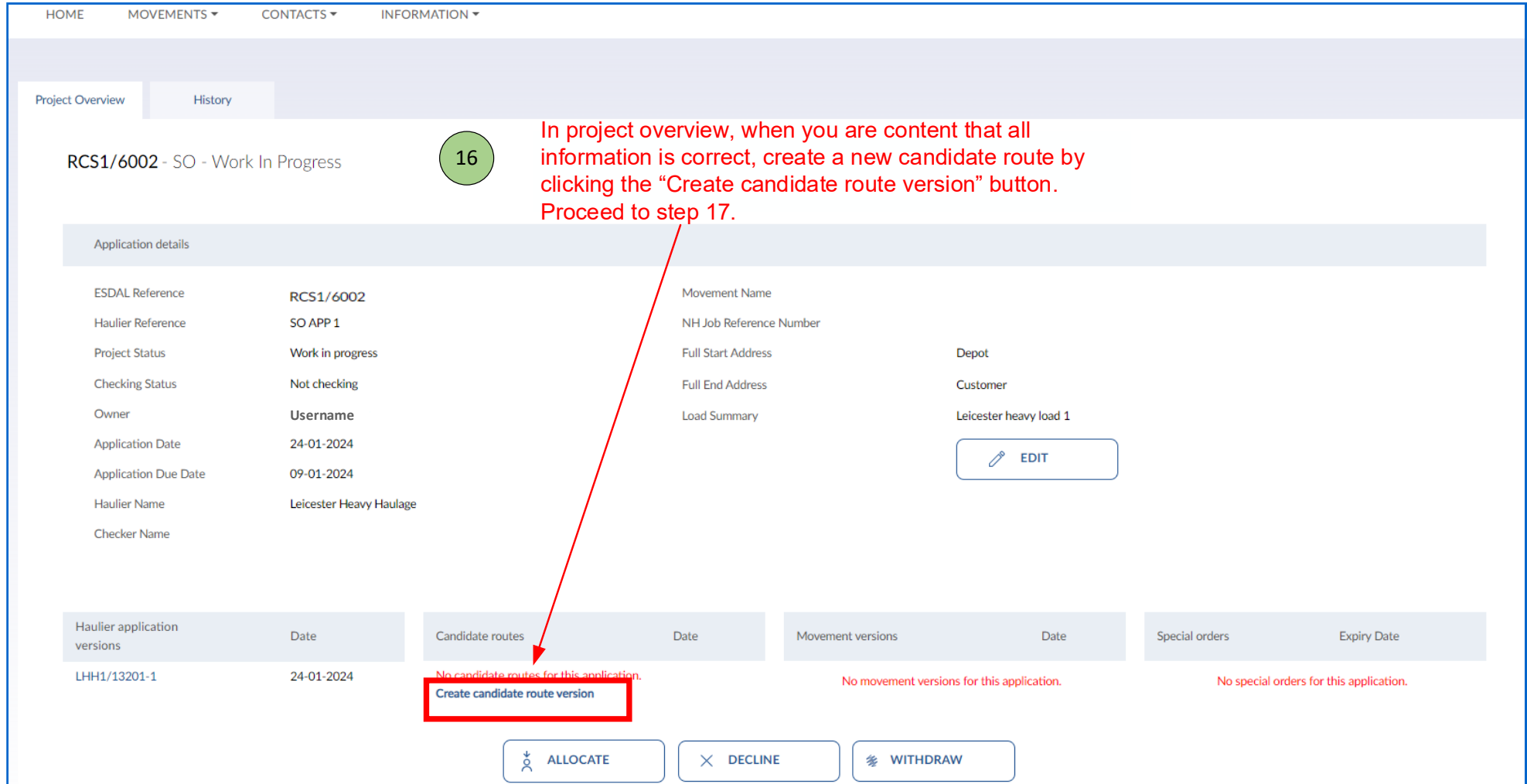
Click OK, proceed to step 16.

HOME   MOVEMENTS ▾   CONTACTS ▾   INFORMATION ▾

Project Overview   History

RCS1/6002 - SO - Work In Progress   **(16)**

In project overview, when you are content that all information is correct, create a new candidate route by clicking the "Create candidate route version" button. Proceed to step 17.

Application details

ESDAL Reference	RCS1/6002	Movement Name	
Haulier Reference	SO APP 1	NH Job Reference Number	
Project Status	Work in progress	Full Start Address	Depot
Checking Status	Not checking	Full End Address	Customer
Owner	Username	Load Summary	Leicester heavy load 1
Application Date	24-01-2024		
Application Due Date	09-01-2024		
Haulier Name	Leicester Heavy Haulage		
Checker Name			

✎ EDIT

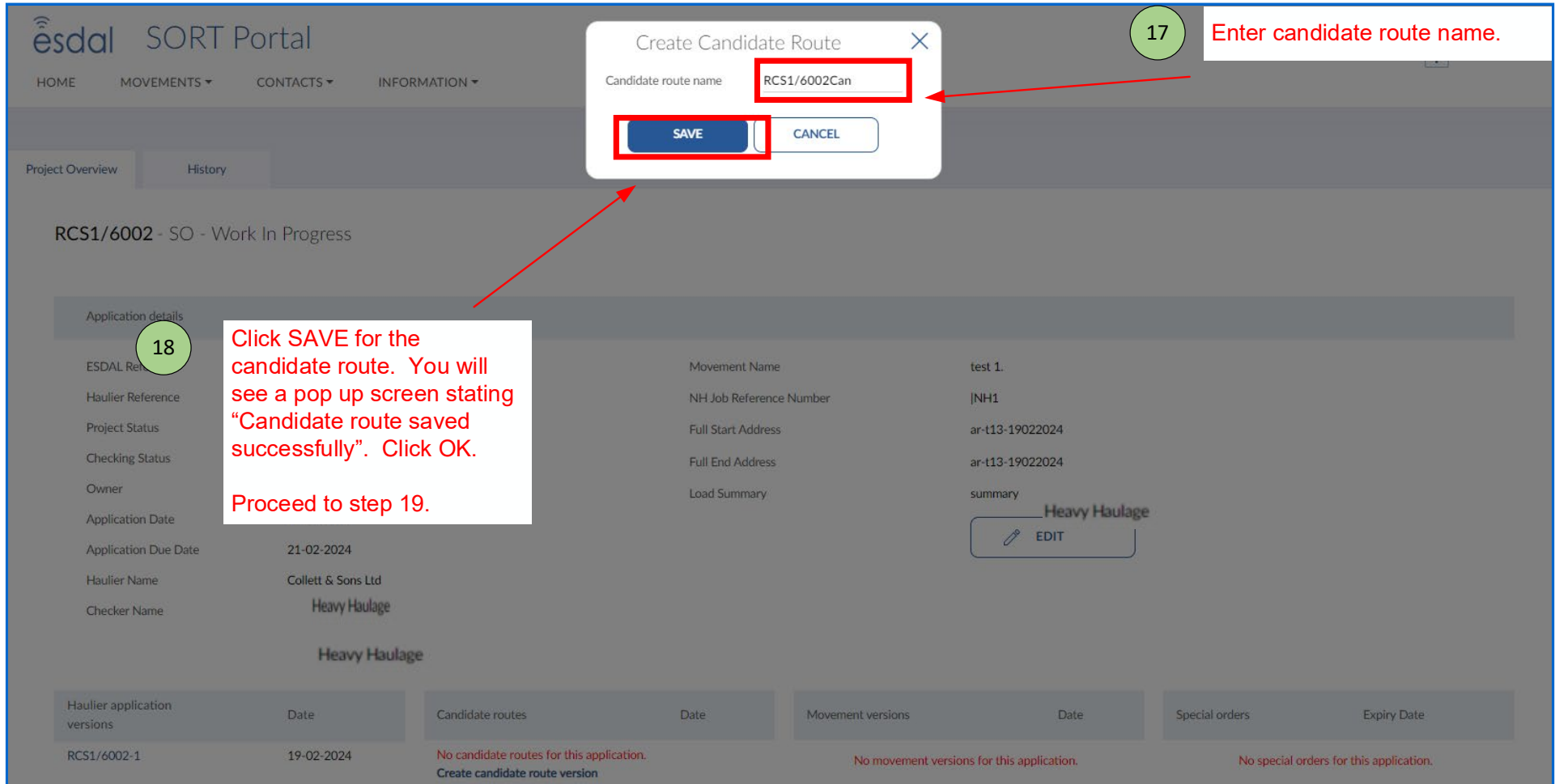| Haulier application versions	Date	Candidate routes	Date	Movement versions	Date	Special orders	Expiry Date
LHH1/13201-1	24-01-2024	No candidate routes for this application.		No movement versions for this application.		No special orders for this application.	
		Create candidate route version					

⊻ ALLOCATE   ✕ DECLINE   ⧉ WITHDRAW

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Process:	A. Movement Inbox and Application Processing to Initial Checking
Stage in the process:	A3 (SORT user) – Allocate Sort User, Create And Save Candidate Route 3/4

esdal   SORT Portal

HOME   MOVEMENTS ▾   CONTACTS ▾   INFORMATION ▾

Create Candidate Route ✕

Candidate route name   RCS1/6002Can

SAVE   CANCEL

17 Enter candidate route name.

Project Overview   History

RCS1/6002 - SO - Work In Progress

Application details

18 Click SAVE for the candidate route. You will see a pop up screen stating "Candidate route saved successfully". Click OK.

Proceed to step 19.

ESDAL Ref   Movement Name   test 1.
Haulier Reference   NH Job Reference Number |NH1
Project Status   Full Start Address   ar-t13-19022024
Checking Status   Full End Address   ar-t13-19022024
Owner   Load Summary   summary
Application Date
Application Due Date   21-02-2024   Heavy Haulage
Haulier Name   Collett & Sons Ltd   ✎ EDIT
Checker Name   Heavy Haulage

Heavy Haulage

Haulier application versions	Date	Candidate routes	Date	Movement versions	Date	Special orders	Expiry Date
RCS1/6002-1	19-02-2024	No candidate routes for this application. Create candidate route version		No movement versions for this application.		No special orders for this application.	

Process:	A. Movement Inbox and Application Processing to Initial Checking 4/4
Stage in the process:	A3 (SORT user) – allocate sort user, create and save candidate route

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Project Overview | History

RCS1/6002 - SO - Work In Progress

Application details

ESDAL Reference	RCS1/6002	Movement Name	test 1.
Haulier Reference		NH Job Reference Number	|NH1
Project Status		Full Start Address	ar-t13-19022024
Checking Status		Full End Address	ar-t13-19022024
Owner		Load Summary	s heavy load 1
Application Date			
Application Due Date			EDIT
Haulier Name	'Heavy Haulage		
Checker Name			

(19) In the project overview, open the candidate route that you have just created, in this case by clicking first on the name "LHH1_13201Can" and then on the Version 1 (in this case) link. Proceed to step 20.

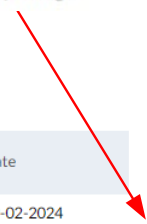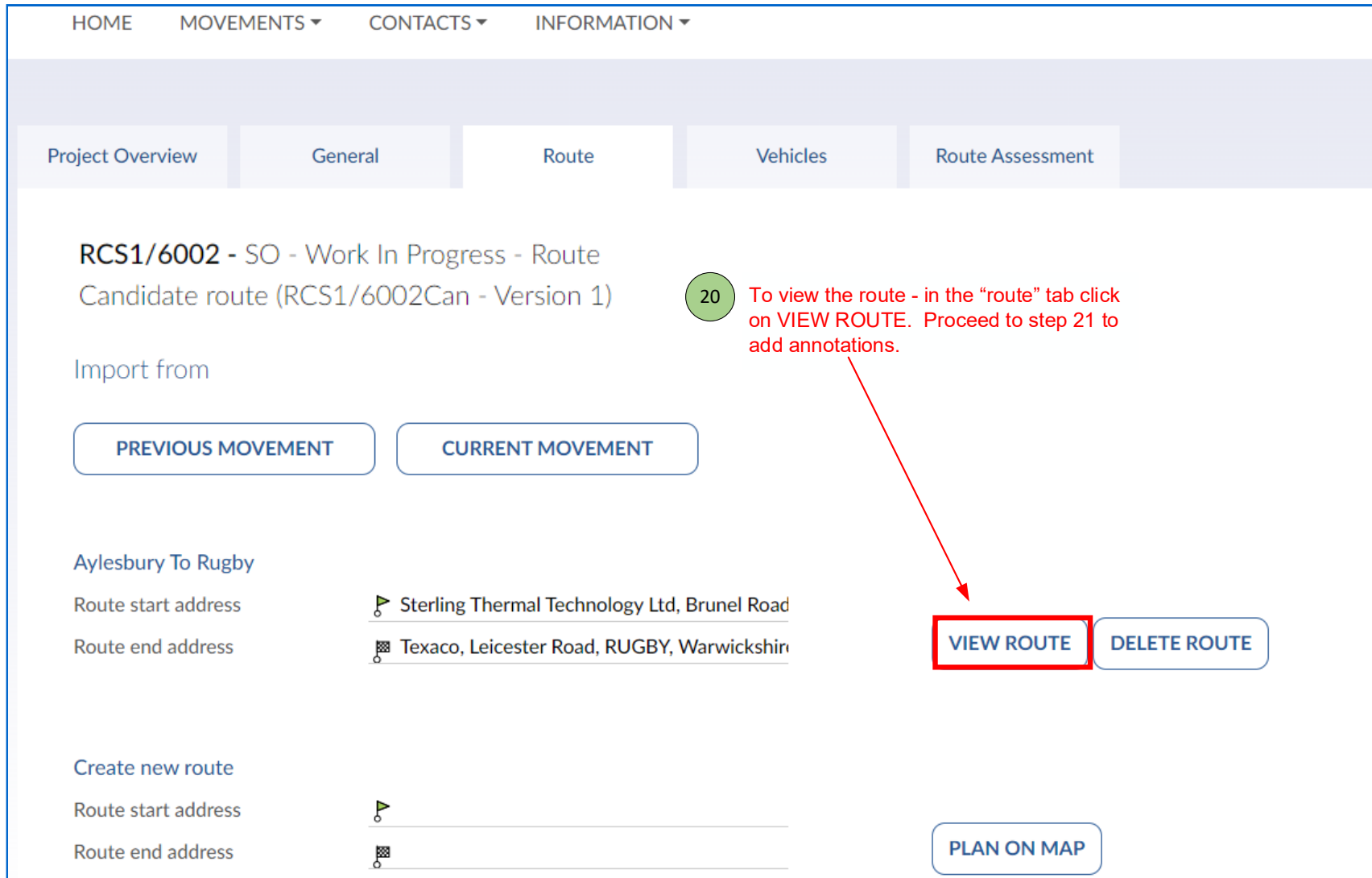| Haulier application versions	Date	Candidate routes	Date	Movement versions	Date	Special orders	Expiry Date
RCS1/6002-1	19-02-2024	RCS1/6002Can Version 1	21-02-2024	No movement versions for this application.		No special orders for this application.	

ALLOCATE | DECLINE | WITHDRAW | SEND FOR CHECKING | CREATE NEW CANDIDATE VERSION

Process:	A. Movement Inbox and Application Processing to Initial Checking
Stage in the process:	**A4 (SORT user) – Affected Parties, View Route, Add Annotations 1/4**

HOME   MOVEMENTS ▾   CONTACTS ▾   INFORMATION ▾

| Project Overview | General | Route | Vehicles | Route Assessment |

RCS1/6002 - SO - Work In Progress - Route
Candidate route (RCS1/6002Can - Version 1)

Import from

20 To view the route - in the "route" tab click on VIEW ROUTE. Proceed to step 21 to add annotations.

PREVIOUS MOVEMENT   **CURRENT MOVEMENT**

Aylesbury To Rugby

Route start address   ⚑ Sterling Thermal Technology Ltd, Brunel Road

Route end address   🏁 Texaco, Leicester Road, RUGBY, Warwickshir

VIEW ROUTE   **DELETE ROUTE**

Create new route

Route start address   ⚑

Route end address   🏁

PLAN ON MAP

Process:	A. Movement Inbox and Application Processing to Initial Checking
Stage in the process:	A4 (SORT user) – Affected Parties, View Route, Add Annotations 2/4

If you need to add one or more annotations, right click on the map and click "add annotation".

21

RCS1/6002 - SO - Work In Progress - Route
Candidate route (RCS1/6002Can - Version 1)

BACK

5 Oakdale Place, A47, Elm, WISBECH, Cambi
M40, HP14 3

Add waypoint   Add stopping point

CLEAR

Type Start postcode or partial address (comma separated) into the first box, hit Enter to display matches and select address. Repeat with End box.

The ESDAL route planner does not automatically avoid restrictions. This is your responsibility. Please ensure you check and edit the route before submitting if necessary.

Add waypoint
Add stopping point
Add annotation
Show Road contacts
Zoom in
Zoom out
Centre here

22 Add the annotation text.

Insert Annotation   ✕

The annotation is shared with all parties involved (not private)

Import From Library   ☐ Add Notes to Library

Annotation text

Annotation type   Special Manoeuvre

Associated contacts

Organisation Name	Contact Number

+ ADD CONTACT

23 Change the annotation type to "generic" or "special manoeuvre" if needed.
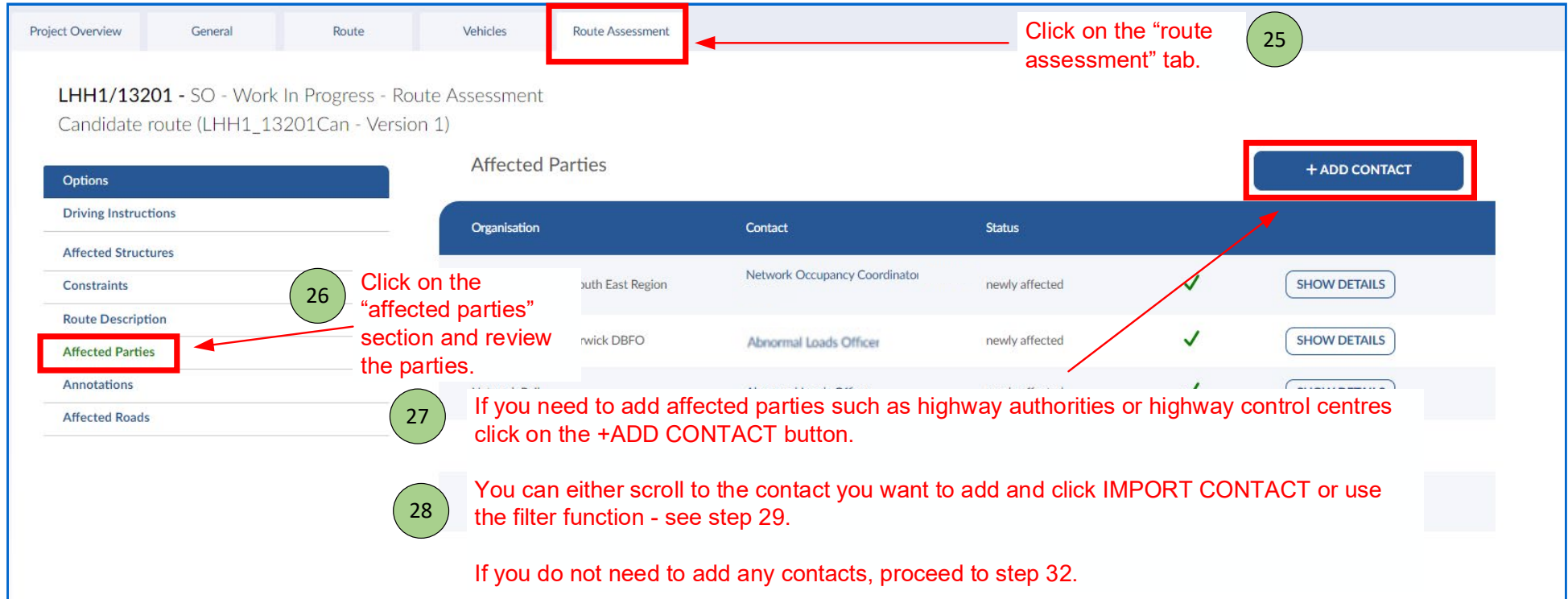
24 Click OK, proceed to step 25.

OK

![national highways logo]

Process:	A. Movement Inbox and Application Processing to Initial Checking
Stage in the process:	A4 (SORT user) – Affected Parties, View Route, Add Annotations 3/4

Project Overview	General	Route	Vehicles	Route Assessment

Click on the "route assessment" tab.

25

LHH1/13201 - SO - Work In Progress - Route Assessment
Candidate route (LHH1_13201Can - Version 1)

Options

Driving Instructions

Affected Structures

Constraints

Route Description

Affected Parties

Annotations

Affected Roads

26 Click on the "affected parties" section and review the parties.

Affected Parties

+ ADD CONTACT

Organisation	Contact	Status	
...uth East Region	Network Occupancy Coordinato⁣r	newly affected	✓ SHOW DETAILS
...rwick DBFO	Abnormal Loads Officer	newly affected	✓ SHOW DETAILS

27 If you need to add affected parties such as highway authorities or highway control centres click on the +ADD CONTACT button.

28 You can either scroll to the contact you want to add and click IMPORT CONTACT or use the filter function - see step 29.
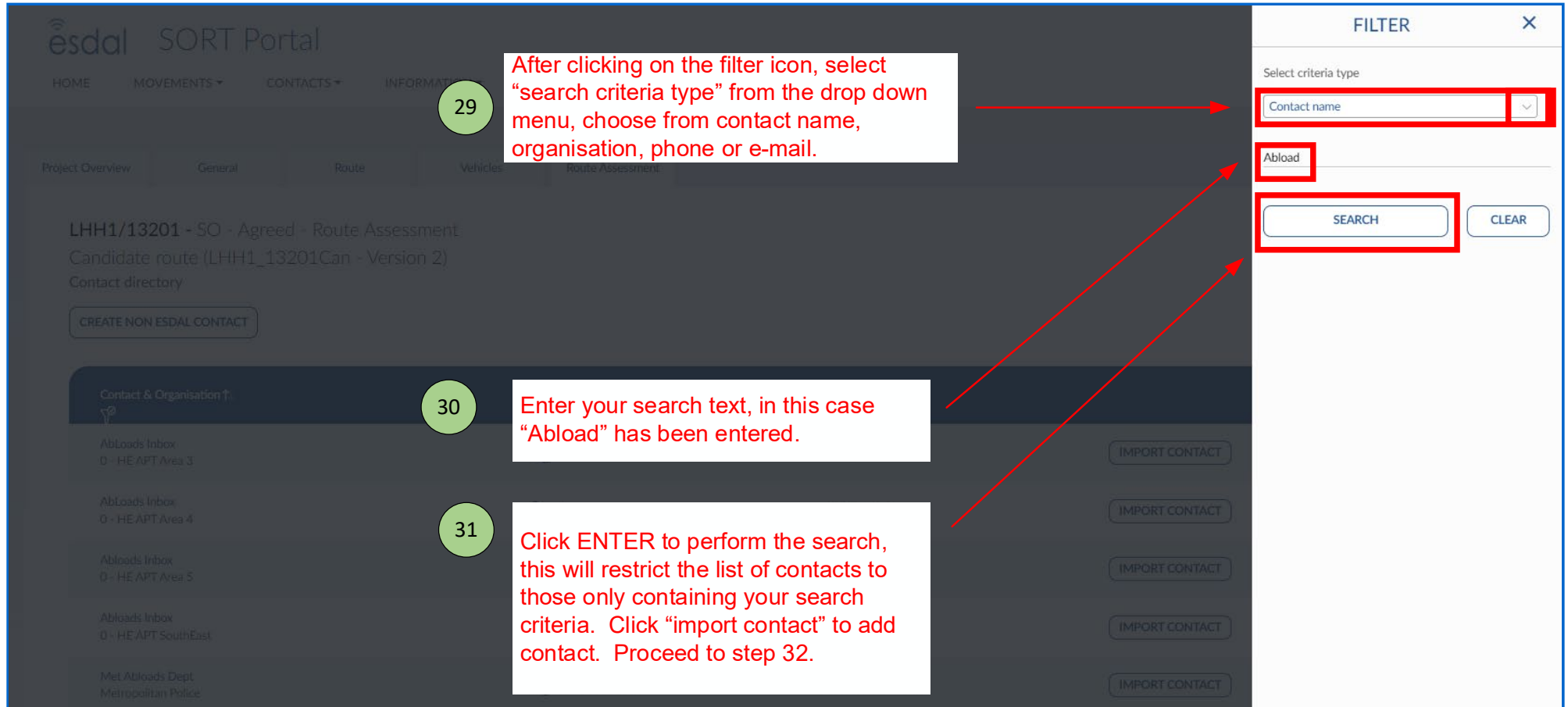
If you do not need to add any contacts, proceed to step 32.

national highways

FILTER ✕

Select criteria type

| Contact name | ∨ |

29 After clicking on the filter icon, select "search criteria type" from the drop down menu, choose from contact name, organisation, phone or e-mail.

Abload

SEARCH   CLEAR

esdal SORT Portal

HOME   MOVEMENTS ▾   CONTACTS ▾   INFORMAT...

Project Overview   General   Route   Vehicles   Route Assessment

LHH1/13201 - SO - Agreed - Route Assessment
Candidate route (LHH1_13201Can - Version 2)
Contact directory

CREATE NON ESDAL CONTACT

Contact & Organisation ↑

30 Enter your search text, in this case "Abload" has been entered.

AbLoads Inbox
0 - HE APT Area 3   IMPORT CONTACT

AbLoads Inbox
0 - HE APT Area 4   IMPORT CONTACT

31 Click ENTER to perform the search, this will restrict the list of contacts to those only containing your search criteria. Click "import contact" to add contact. Proceed to step 32.

Abloads Inbox
0 - HE APT Area 5   IMPORT CONTACT

Abloads Inbox
0 - HE APT SouthEast   IMPORT CONTACT

Met Abloads Dept
Metropolitan Police   IMPORT CONTACT

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Process:	A. Movement Inbox and Application Processing to Initial Checking
Stage in the process:	A5 (SORT USER) – Checking 1/3

Project Overview   History

RCS1/6002 - SO - Work In Progress

Send for checking ✕

Sending to   --Select user-- ⌄

SEND   **CANCEL**

Application details

| ESDAL Reference | RCS1/6002 |
| Haulier Reference | SO APP 1 |

NH Job Reference Number

Full Start Address   Depot

Full End Address   Customer

Load Summary

heavy load 1

✎ EDIT

32 From the project overview, click SEND FOR CHECKING.

33 Select a user to send the application to for checking from the drop down menu, then click SEND. You will see a pop up box saying that "checker allocation" is successfully completed.

Click OK.

Checker proceeds to step 34.

Haulier application versions	Date	Candidate routes	Date	Movement versions	Date	Special orders	Expiry Date
LHH1/13201-1	24-01-2024	LHH1_13201... ✎	09-01-2024	No movement versions for this application.		No special orders for this application.	

👤 ALLOCATE   ✕ DECLINE   ⚏ WITHDRAW   ↑ SEND FOR CHECKING   ⧉ CREATE NEW CANDIDATE VERSION

Process:	A. Movement Inbox and Application Processing to Initial Checking
Stage in the process:	**A5 (SORT USER) – Checking 2/3**

Checker opens home page to view the most recent "Unallocated" or "'In Progress' Applications".

Checker clicks on the link to the application marked as "checking". Proceed to step 36.

Process:	A. Movement Inbox and Application Processing to Initial Checking
Stage in the process:	A5 (CHECKER) – Checking 3/3

Project Overview | History

36 Checker checks route, vehicle and affected parties.

Complete checking ✕

Returned to: **Username** ▼

Checking Outcome: ● Positive ○ Negative

SEND **CANCEL**

37 Once checker is happy with the route and vehicle, click COMPLETE CHECKING.

Application details

ESDAL Reference
Haulier Reference
Project Status — Work in progress
Checking Status — Checking
Owner — **Username**
Application Date — 24-01-2024
Application Due Date — 09-01-2024
Haulier Name — Heavy Haulage
Checker Name — **Username**

Movement Name — QSG1
NH Job Reference Number — QSG1_SB
Full Start Address — Depot
Full End Address — Customer
Load Summary — Heavy Haulage 1

✏ EDIT

38 Return to user positive or negative. Use the drop down "Returned to" menu if a different owner needs to be selected.

39 Click the checking outcome "positive" or "negative" radio button.

40 Click SEND. You will see a pop-up box stating "Successfully updated checking status as "checked+"" (assuming successful check), click OK.

Proceed to step 41.

Haulier application versions	Date	Candidate routes	Date	Movement versions	Date
RCS1/6002-1	19-02-2024	RCS1/6002Can ✏	21-02-2024	No movement versions for this application.	

⤓ ALLOCATE | ✕ DECLINE | ⚡ WITHDRAW | ✓ COMPLETE CHECKING

41 — Left click on the "show my projects" slider to show your projects.

42 — Left click on the filters icon to open the filter options. You can search by movement status, ESDAL reference number, haulier name, allocated user, checking user, data criteria, perform a map search and perform an advanced search.

Proceed to step 43.

Process:	A. Movement Inbox and Application Processing to Initial Checking
Stage in the process:	A6 (SORT user) – Show My Projects, Application Filtering 2/3

43 To filter on new applications in progress, select the "in progress" tick box.

44 Click SEARCH, this will display the list of applications matching the filter options as shown at step 45.

Process:	A. Movement Inbox and Application Processing to Initial Checking
Stage in the process:	A6 (SORT user) – Show My Projects, Application Filtering 3/3

45 This illustrates the movement inbox displaying new applications in progress, using the "in progress" filter.

46 In the movements inbox, click on the application you want to open, this will take you to step 47, the project overview.

47 SORT user opens home page to view the most recent "Unallocated" or "In Progress Applications".

48 Sort user clicks on the link to the application marked as Checked+, proceed to step 49.

Project Overview	History

LHH1/13201 - SO - Work In Progress

(49)

In project overview, click the CREATE MOVEMENT VERSION button (this movement will be sent to all affected parties). You will see a pop-up box saying "Do you want to create new movement version?", click YES. Proceed to step 50.

Application details

ESDAL Reference	LHH1/13201	Movement Name	QSG1
Haulier Reference	SO APP 1	NH Job Reference Number	QSG1_SB
Project Status	Work in progress	Full Start Address	Depot
Checking Status	Checked positively	Full End Address	Customer
Owner	**Username**	Load Summary	Leicester heavy load 1
Application Date	24-01-2024		
Application Due Date	09-01-2024		✏️ EDIT
Haulier Name	Heavy Haulage		
Checker Name			

Haulier application versions	Date	Candidate routes	Date	Movement versions	Date	Special orders	Expiry Date
LHH1/13201-1	24-01-2024	LHH1_13201... ✏️	09-01-2024	No movement versions for this application.		No special orders for this application.	

👤 ALLOCATE	✕ DECLINE	⚡ WITHDRAW	↑ SEND FOR CHECKING	▣ **CREATE MOVEMENT VERSION**	▣ CREATE NEW CANDIDATE VERSION
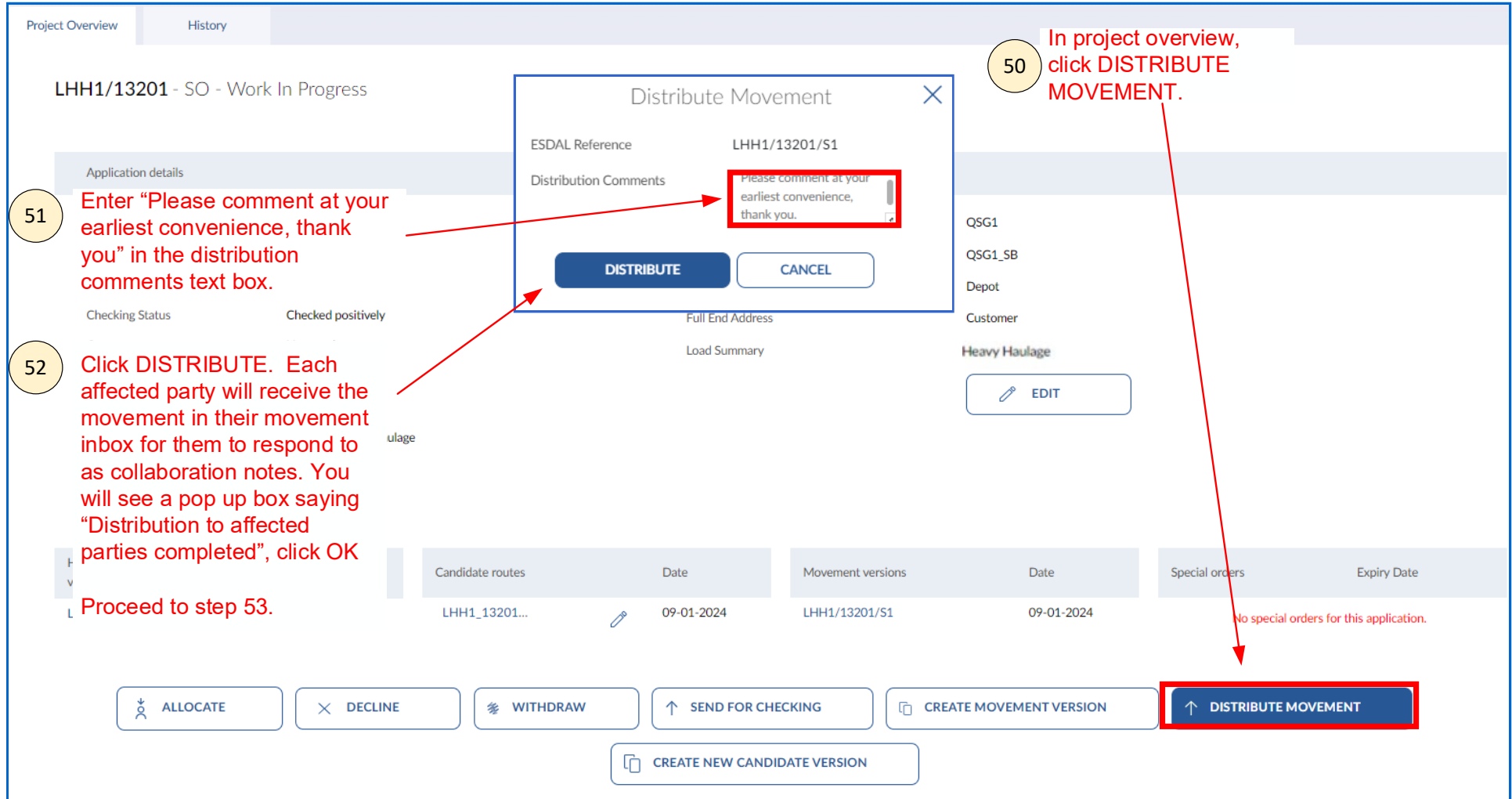
Process: B. Create Movement Version including Creation of Special Order

Stage in the process: B1. (SORT user) – Create Movement Version, Distribute Movement Version 1/3

Project Overview   History

LHH1/13201 - SO - Work In Progress

Application details

50 In project overview, click DISTRIBUTE MOVEMENT.

Distribute Movement ✕

ESDAL Reference   LHH1/13201/S1

Distribution Comments   Please comment at your earliest convenience, thank you.

51 Enter "Please comment at your earliest convenience, thank you" in the distribution comments text box.

DISTRIBUTE   **CANCEL**

Checking Status   Checked positively

QSG1
QSG1_SB
Depot
Customer

Full End Address

Load Summary   Heavy Haulage

52 Click DISTRIBUTE. Each affected party will receive the movement in their movement inbox for them to respond to as collaboration notes. You will see a pop up box saying "Distribution to affected parties completed", click OK

Proceed to step 53.

ulage

✏ EDIT

Candidate routes		Date	Movement versions	Date	Special orders	Expiry Date
LHH1_13201...	✏	09-01-2024	LHH1/13201/S1	09-01-2024	No special orders for this application.	
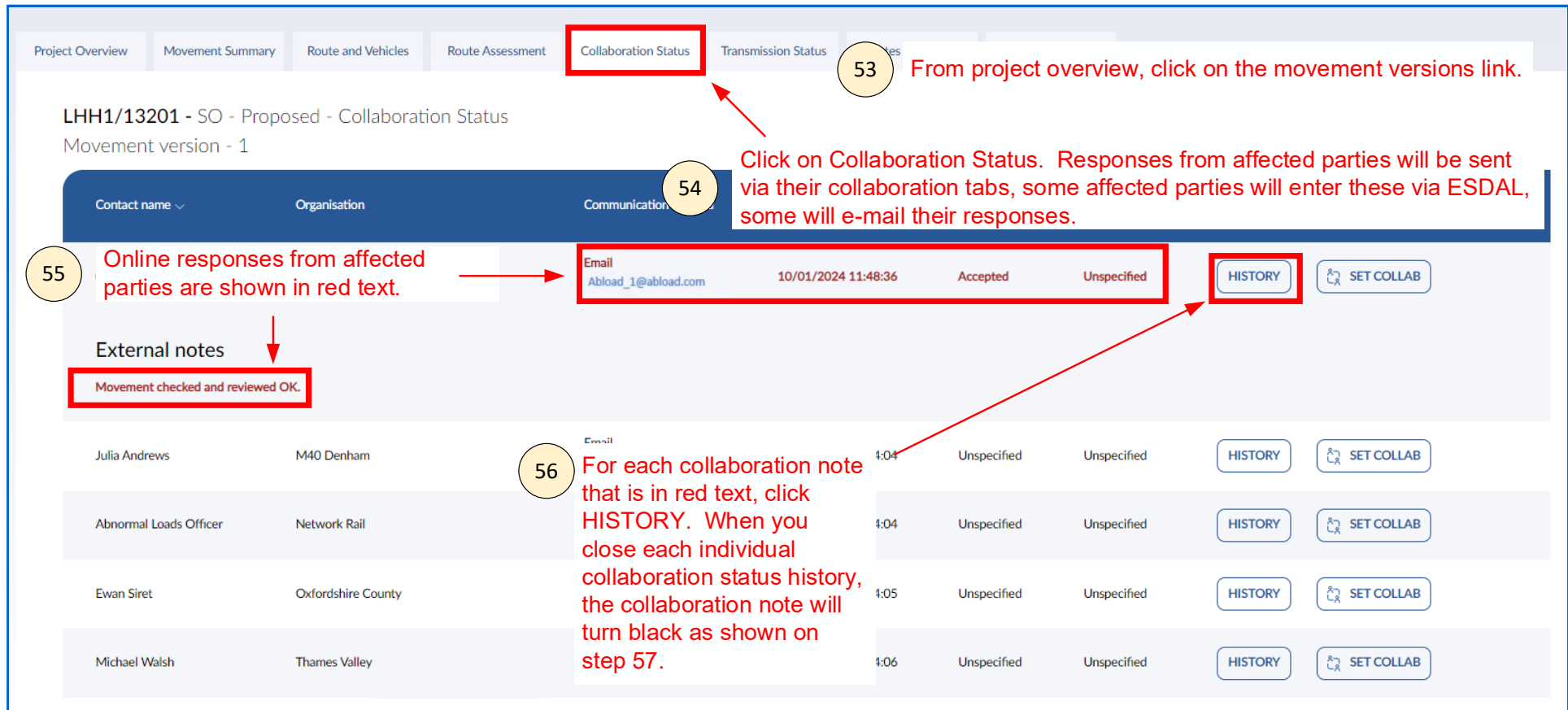
👤 ALLOCATE   ✕ DECLINE   ⬗ WITHDRAW   ↑ SEND FOR CHECKING   ⧉ CREATE MOVEMENT VERSION   ↑ DISTRIBUTE MOVEMENT

⧉ CREATE NEW CANDIDATE VERSION

Process: B. Create Movement Version including Creation of Special Order

Stage in the process: B2. (SORT user) – Collaboration Notes 1/3

53 From project overview, click on the movement versions link.

54 Click on Collaboration Status. Responses from affected parties will be sent via their collaboration tabs, some affected parties will enter these via ESDAL, some will e-mail their responses.

55 Online responses from affected parties are shown in red text.

56 For each collaboration note that is in red text, click HISTORY. When you close each individual collaboration status history, the collaboration note will turn black as shown on step 57.

LHH1/13201 - SO - Proposed - Collaboration Status
Movement version - 1

Contact name	Organisation	Communication

Email
Abload_1@abload.com   10/01/2024 11:48:36   Accepted   Unspecified   HISTORY   SET COLLAB

External notes
Movement checked and reviewed OK.

Julia Andrews	M40 Denham	Email	4:04	Unspecified	Unspecified	HISTORY	SET COLLAB
Abnormal Loads Officer	Network Rail		4:04	Unspecified	Unspecified	HISTORY	SET COLLAB
Ewan Siret	Oxfordshire County		4:05	Unspecified	Unspecified	HISTORY	SET COLLAB
Michael Walsh	Thames Valley		4:06	Unspecified	Unspecified	HISTORY	SET COLLAB

| Project Overview | Movement Summary | Route and Vehicles | Route Assessment | Collaboration Status | Transmission Status | Notes to Haulier | History |

LHH1/13201 - SO - Proposed - Collaboration Status
Movement version - 1

Contact name ∨	Organisation	Communication method	Sent on	External collab status	Internal collab status		
		...com	10/01/2024 11:48:36	Accepted	Unspecified	HISTORY	SET COLLAB
Julia Andrews	M40 Denham to Warwick DBFO	Email username@email.com	10/01/2024 11:44:04	Unspecified	Unspecified	HISTORY	SET COLLAB
Abnormal Loads Officer	Network Rail	Email username@email.com	10/01/2024 11:44:04	Unspecified	Unspecified	HISTORY	SET COLLAB
Ewan Siret	Oxfordshire County Council	Email username@email.com	10/01/2024 11:44:05	Unspecified	Unspecified	HISTORY	SET COLLAB
Michael Walsh	Thames Valley Police	Email username@email.com	10/01/2024 11:44:06	Unspecified	Unspecified	HISTORY	SET COLLAB

57 The response will now appear in black, showing that the collaboration has been actioned.
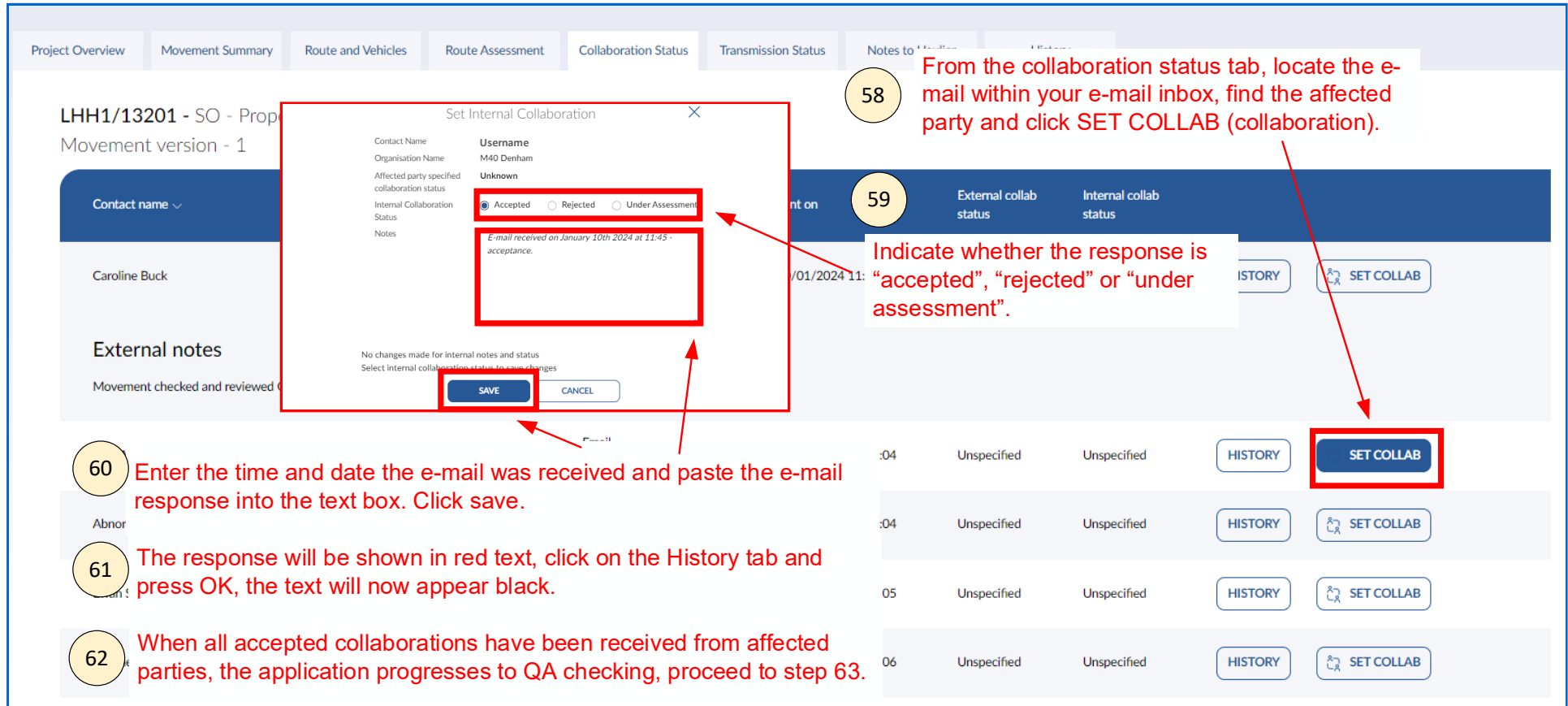
E-mailed responses are processed differently, proceed to the explanation in step 58.

![National Highways logo]

Process:	B. Create Movement Version including Creation of Special Order
Stage in the process:	B2. (SORT user) – Collaboration Notes 3/3

Project Overview | Movement Summary | Route and Vehicles | Route Assessment | **Collaboration Status** | Transmission Status | Notes to ~~Haulier~~ | ~~History~~

LHH1/13201 - SO - Prop
Movement version - 1

Set Internal Collaboration ✕

Contact Name **Username**
Organisation Name **M40 Denham**
Affected party specified **Unknown**
collaboration status
Internal Collaboration ◉ Accepted ○ Rejected ○ Under Assessment
Status
Notes

E-mail received on January 10th 2024 at 11:45 - acceptance.

No changes made for internal notes and status
Select internal collaboration status to save changes

SAVE **CANCEL**

Contact name ⌄

External collab status | Internal collab status

Caroline Buck

External notes

Movement checked and reviewed

58 From the collaboration status tab, locate the e-mail within your e-mail inbox, find the affected party and click SET COLLAB (collaboration).

59 Indicate whether the response is "accepted", "rejected" or "under assessment".

60 Enter the time and date the e-mail was received and paste the e-mail response into the text box. Click save.

61 The response will be shown in red text, click on the History tab and press OK, the text will now appear black.

62 When all accepted collaborations have been received from affected parties, the application progresses to QA checking, proceed to step 63.

		External collab status	Internal collab status		
	/01/2024 11:			ISTORY	SET COLLAB
	:04	Unspecified	Unspecified	HISTORY	**SET COLLAB**
Abnor	:04	Unspecified	Unspecified	HISTORY	SET COLLAB
	05	Unspecified	Unspecified	HISTORY	SET COLLAB
	06	Unspecified	Unspecified	HISTORY	SET COLLAB

Process: **B. Create Movement Version including Creation of Special Order**

Stage in the process: **B3. (SORT user) – Agree Movement Version Add Notes To Haulier 1/3**

Project Overview | History

LHH1/13201 - SO - Proposed

(63)

Application details

ESDAL Reference
Haulier Reference
Project Status
Checking Status
Owner
Application Date
Application Due Date
Haulier Name
Checker Name

From the project overview, click AGREE application, you will see a pop up box saying "Do you want to agree this movement version … ". Click YES, a second pop up box will say "… version is agreed", click OK.

Proceed to step 64.

Movement Name | QSG1
NH Job Reference Number | QSG1_SB
Full Start Address | Depot
Full End Address | Customer
Load Summary | Leicester heavy load 1

✏ EDIT

Haulier application versions	Date	Candidate routes	Date	Movement versions	Date	Special orders	Expiry Date
LHH1/13201-1	24-01-2024	LHH1_13201... ✏	09-01-2024	LHH1/13201/S1	10-01-2024	No special orders for this application.	

👤 ALLOCATE | ✕ DECLINE | ≋ WITHDRAW | ✓ AGREE | ⧉ CREATE NEW CANDIDATE VERSION

Process:	B. Create Movement Version including Creation of Special Order
Stage in the process:	B3. (SORT user) – Agree Movement Version Add Notes To Haulier 2/3

Project Overview   History

LHH1/13201 - SO - Agreed

Application details

ESDAL Reference	LHH1/13201	Movement Name	QSG1
Haulier Reference	SO APP 1	NH Job Reference Number	QSG1_SB
Project Status	Agreed	Full Start Address	Depot
Checking Status	Checked positively	Full End Address	Customer
Owner		Load Summary	Leicester heavy load 1
Application Date			
Application Due Date			
Haulier Name			
Checker Name			

64

Click the link to the movement you have just agreed, proceed to step 65 to add haulier notes.
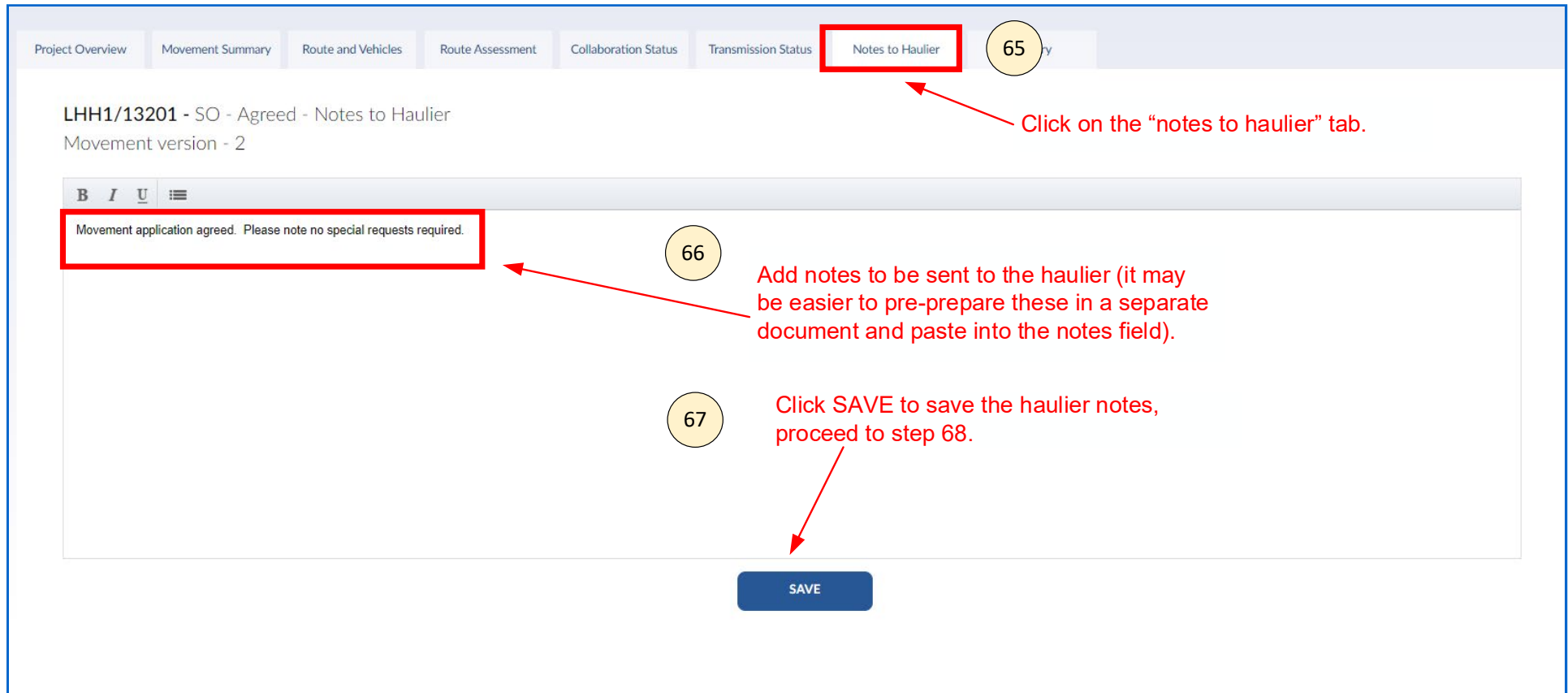
✎ EDIT

Haulier application versions	Date	Candidate routes	Date	Movement versions	Date	Special orders	Expiry Date
LHH1/13201-1	24-01-2024	LHH1_13201... ✎	09-01-2024	LHH1/13201/S1	10-01-2024	No special orders for this application.	
				LHH1/13201/S2	09-01-2024		

👤 ALLOCATE   ✕ DECLINE   ⇶ WITHDRAW   ✕ UNAGREE   ↑ SEND FOR QA CHECKING

Project Overview | Movement Summary | Route and Vehicles | Route Assessment | Collaboration Status | Transmission Status | Notes to Haulier | 65

Click on the "notes to haulier" tab.

LHH1/13201 - SO - Agreed - Notes to Haulier
Movement version - 2

B *I* U ≔

Movement application agreed. Please note no special requests required.

66

Add notes to be sent to the haulier (it may be easier to pre-prepare these in a separate document and paste into the notes field).

67

Click SAVE to save the haulier notes, proceed to step 68.
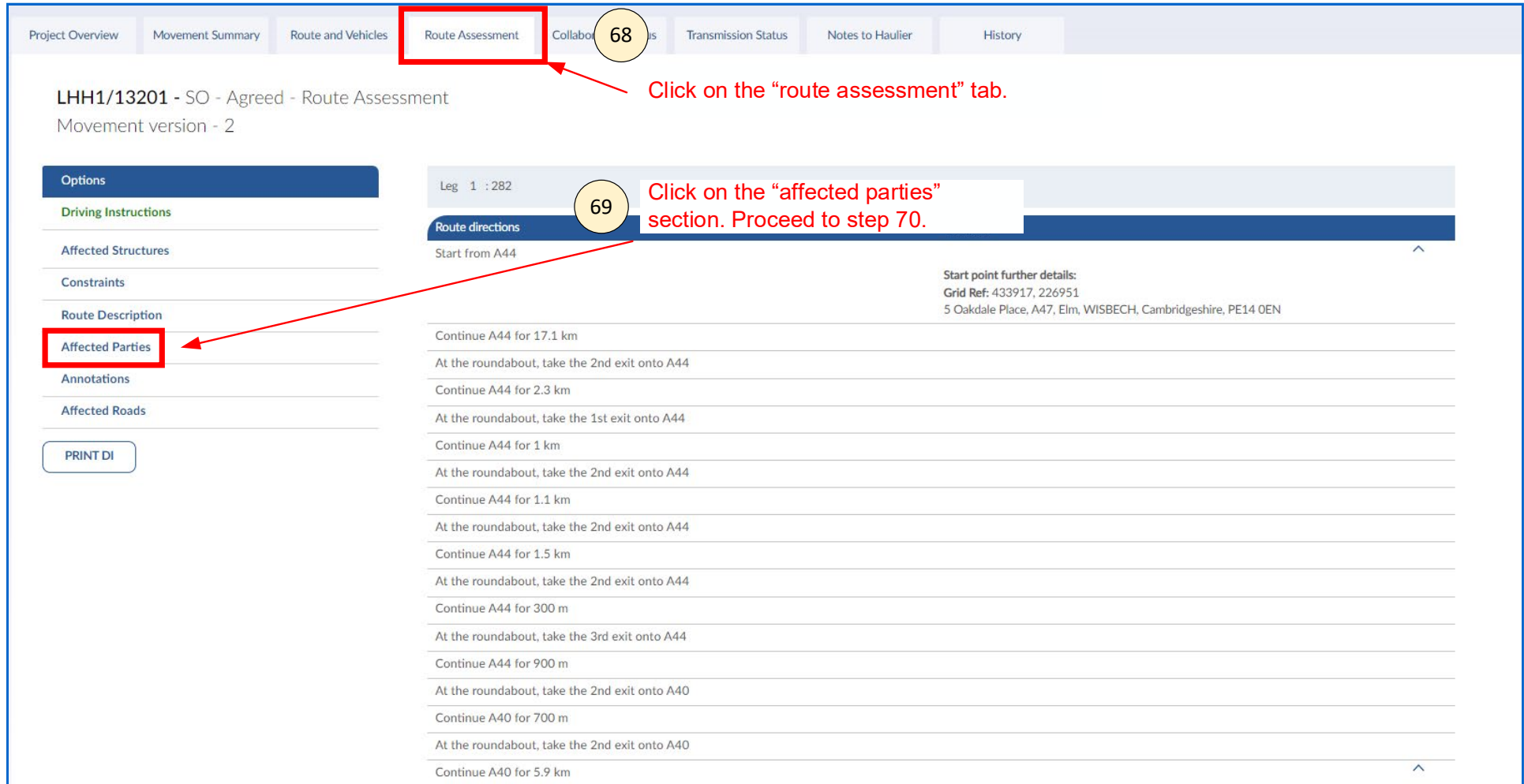
SAVE

![national highways logo]

Process:	**B. Create Movement Version including Creation of Special Order**
Stage in the process:	**B4. (SORT user) – Affected Parties And Adding Contacts 1/2**

Project Overview	Movement Summary	Route and Vehicles	**Route Assessment** (68)	Collabor...us	Transmission Status	Notes to Haulier	History

Click on the "route assessment" tab.

LHH1/13201 - SO - Agreed - Route Assessment
Movement version - 2

Options

Driving Instructions

Affected Structures

Constraints

Route Description

Affected Parties

Annotations

Affected Roads

PRINT DI

Leg 1 : 282

(69) **Click on the "affected parties" section. Proceed to step 70.**

Route directions

Start from A44

Start point further details:
Grid Ref: 433917, 226951
5 Oakdale Place, A47, Elm, WISBECH, Cambridgeshire, PE14 0EN

Continue A44 for 17.1 km

At the roundabout, take the 2nd exit onto A44

Continue A44 for 2.3 km

At the roundabout, take the 1st exit onto A44

Continue A44 for 1 km

At the roundabout, take the 2nd exit onto A44

Continue A44 for 1.1 km

At the roundabout, take the 2nd exit onto A44

Continue A44 for 1.5 km

At the roundabout, take the 2nd exit onto A44

Continue A44 for 300 m

At the roundabout, take the 3rd exit onto A44

Continue A44 for 900 m

At the roundabout, take the 2nd exit onto A40

Continue A40 for 700 m

At the roundabout, take the 2nd exit onto A40

Continue A40 for 5.9 km

Project Overview | **Movement Summary** | **Route and Vehicles** | **Route As**

LHH1/13201 - SO - Agreed - Route Assess
Movement version - 2

70 If you need to add a contact, click on + ADD CONTACT to add a contact to the movement. This will provide you with a list of users to import.

If no additional contacts are required progress to step 74.

+ ADD CONTACT

Options

Driving Instructions

Affected Structures

Constraints

Route Description

Affected Parties

Annotations

Affected Roads

71 Locate the contact you want to add and click IMPORT CONTACT.

Organis			Status	
Highwa		Buck	newly affected	✓ SHOW DETAILS

M40 Denham to Warwick DBFO

Network Rail

Oxfordshire County Council

Thames Valley Police

CREATE NON ESDAL CONTACT

Contact & Organisation ↑↓	Phone	Email	
Phil Leng 0 - A1 Dishforth to Darrington DBFO	📞 0300 4702494	Abload_1@abload.com	IMPORT CONTACT
Lorna Kelly 0 - A1(M) Alconbury to Peterborough DBFO	📞 0300 470 4838	Abload_1@abload.com	IMPORT CONTACT
Annette Hodgman 0 - A1(M) Alconbury to Peterborough DBFO	📞 0	Abload_1@abload.com	IMPORT CONTACT

72 You can use the filter function to filter users by contact name, organisation, phone number or e-mail address.

73 If you need to add a contact who is not an ESDAL user and has not already been created click CREATE NON ESDAL CONTACT. You will need to add the name of the contact, name of their organisation and their e-mail address. Proceed to step 74.

Project Overview | Movement Summary | Route and Vehicles | Route Assessment | Collaboration Status | Transmission Status | Notes to Haulier | History

LHH1/13201

Movement version - 2

74 To add annotations to the agreed version, click on the Route and Vehicles tab of the movement you are working on.

Route parts	Route Part Name	Route type
Route part 1 (2		Planned

75 Click the structures icon.

76 Zoom into the map using your mouse wheel or zoom buttons to find the location along the route where you want to add an annotation.

77 Position your cursor where you want to add the annotation and left click the mouse button. This will bring up the annotation, structure and route box.

Add annotation
View details
Show structure contacts
Show Road contacts
Zoom in
Zoom out
Centre here
Show related movements

78 Click "add annotation".

Insert Annotation ✕

The annotation is shared with all parties involved (not private)

Import From Library   ☐ Add Notes to Library

Annotation text   *Refer to road position for this structure.*

Annotation type   Caution

Associated contacts

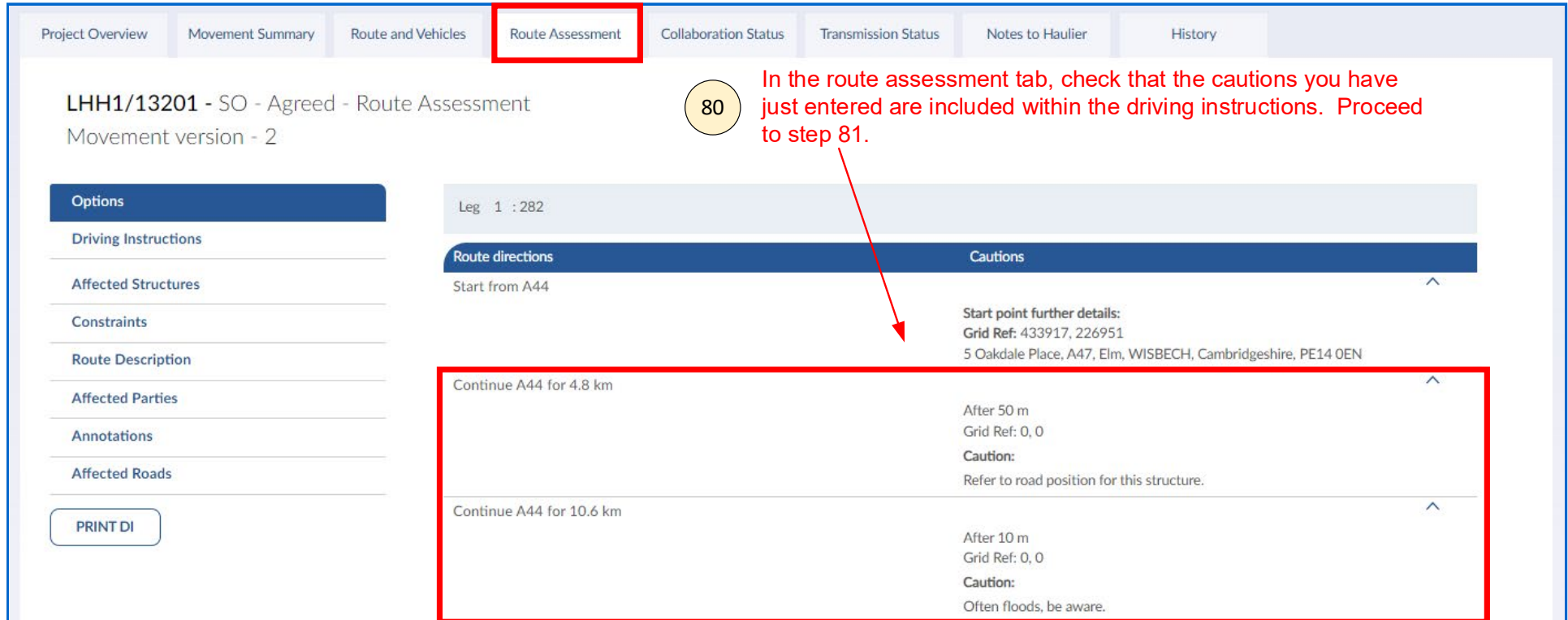| Organisation Name	Contact Number

+ ADD CONTACT

OK

79 Paste in your caution and change the annotation type to caution. Repeat until you have added all cautions.
Then click OK and proceed to step 80.

Project Overview	Movement Summary	Route and Vehicles	**Route Assessment**	Collaboration Status	Transmission Status	Notes to Haulier	History

LHH1/13201 - SO - Agreed - Route Assessment
Movement version - 2

80 — In the route assessment tab, check that the cautions you have just entered are included within the driving instructions. Proceed to step 81.

Options

Driving Instructions

Affected Structures

Constraints

Route Description

Affected Parties

Annotations

Affected Roads

PRINT DI
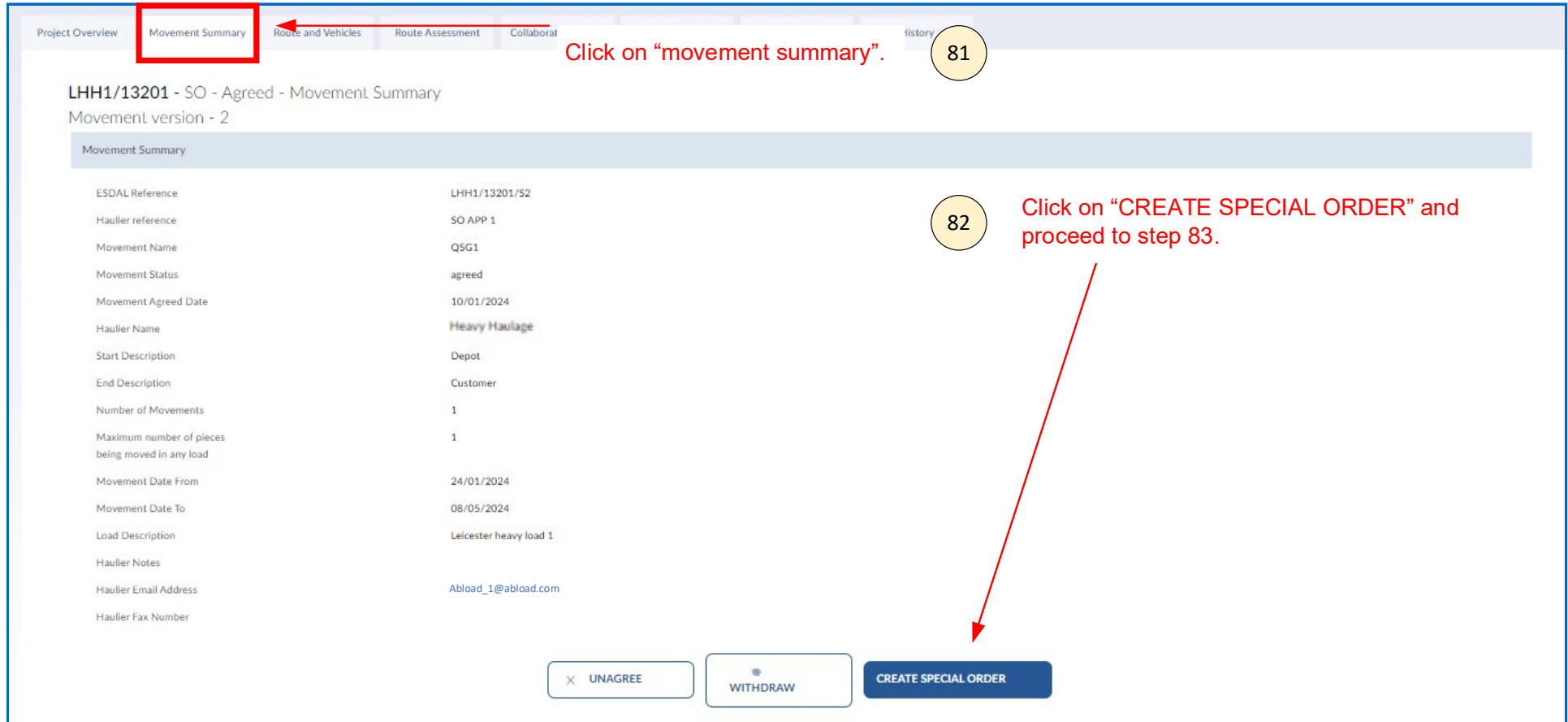
Leg 1 : 282

Route directions	Cautions
Start from A44	
	Start point further details: **Grid Ref:** 433917, 226951 5 Oakdale Place, A47, Elm, WISBECH, Cambridgeshire, PE14 0EN
Continue A44 for 4.8 km	After 50 m Grid Ref: 0, 0 **Caution:** Refer to road position for this structure.
Continue A44 for 10.6 km	After 10 m Grid Ref: 0, 0 **Caution:** Often floods, be aware.

Project Overview | Movement Summary | Route and Vehicles | Route Assessment | Collaborat | History
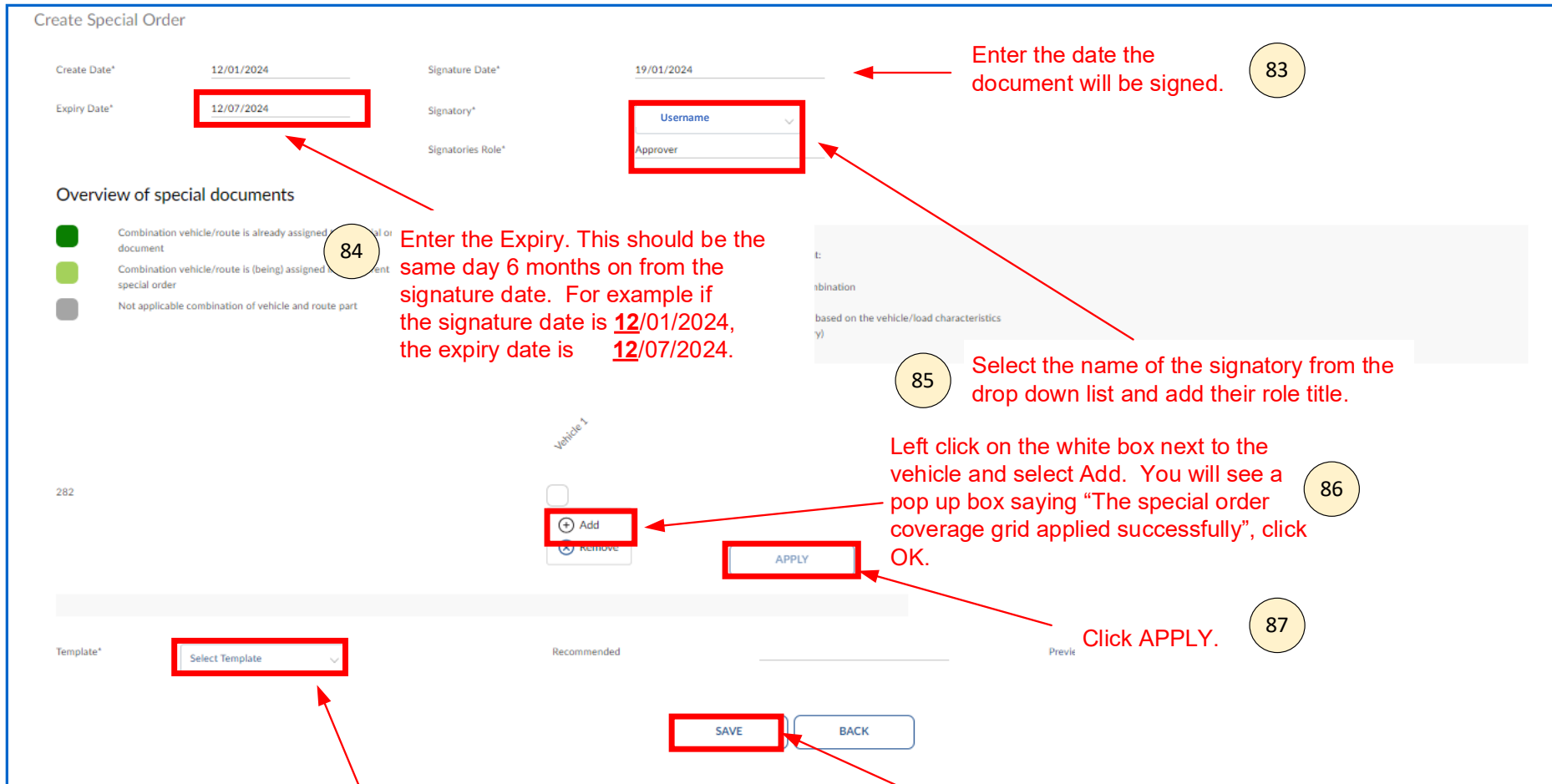
Click on "movement summary". (81)

LHH1/13201 - SO - Agreed - Movement Summary
Movement version - 2

Movement Summary

ESDAL Reference	LHH1/13201/S2
Haulier reference	SO APP 1
Movement Name	QSG1
Movement Status	agreed
Movement Agreed Date	10/01/2024
Haulier Name	Heavy Haulage
Start Description	Depot
End Description	Customer
Number of Movements	1
Maximum number of pieces being moved in any load	1
Movement Date From	24/01/2024
Movement Date To	08/05/2024
Load Description	Leicester heavy load 1
Haulier Notes	
Haulier Email Address	Abload_1@abload.com
Haulier Fax Number	

(82) Click on "CREATE SPECIAL ORDER" and proceed to step 83.

X UNAGREE | WITHDRAW | CREATE SPECIAL ORDER

Process:	B. Selecting A Route
Stage in the process:	B6. (SORT user) – Create Special Order, Generate Documentation 2/3

Create Special Order

Create Date*   12/01/2024   Signature Date*   19/01/2024   ← Enter the date the document will be signed. **83**

Expiry Date*   12/07/2024   Signatory*   Username ⌄

Signatories Role*   Approver

Overview of special documents

84 Enter the Expiry. This should be the same day 6 months on from the signature date. For example if the signature date is **12**/01/2024, the expiry date is   **12**/07/2024.

■ Combination vehicle/route is already assigned ... al or document

■ Combination vehicle/route is (being) assigned ... ent special order

■ Not applicable combination of vehicle and route part

...t:

...mbination

...based on the vehicle/load characteristics
...y)

85 Select the name of the signatory from the drop down list and add their role title.

Vehicle 1

282

☐

⊕ Add

⊗ Remove

APPLY

Left click on the white box next to the vehicle and select Add. You will see a pop up box saying "The special order coverage grid applied successfully", click OK. **86**

Click APPLY. **87**

Template*   Select Template ⌄   Recommended   Previ

SAVE   BACK

88 Select the document to be applied to the movement from the drop down list.
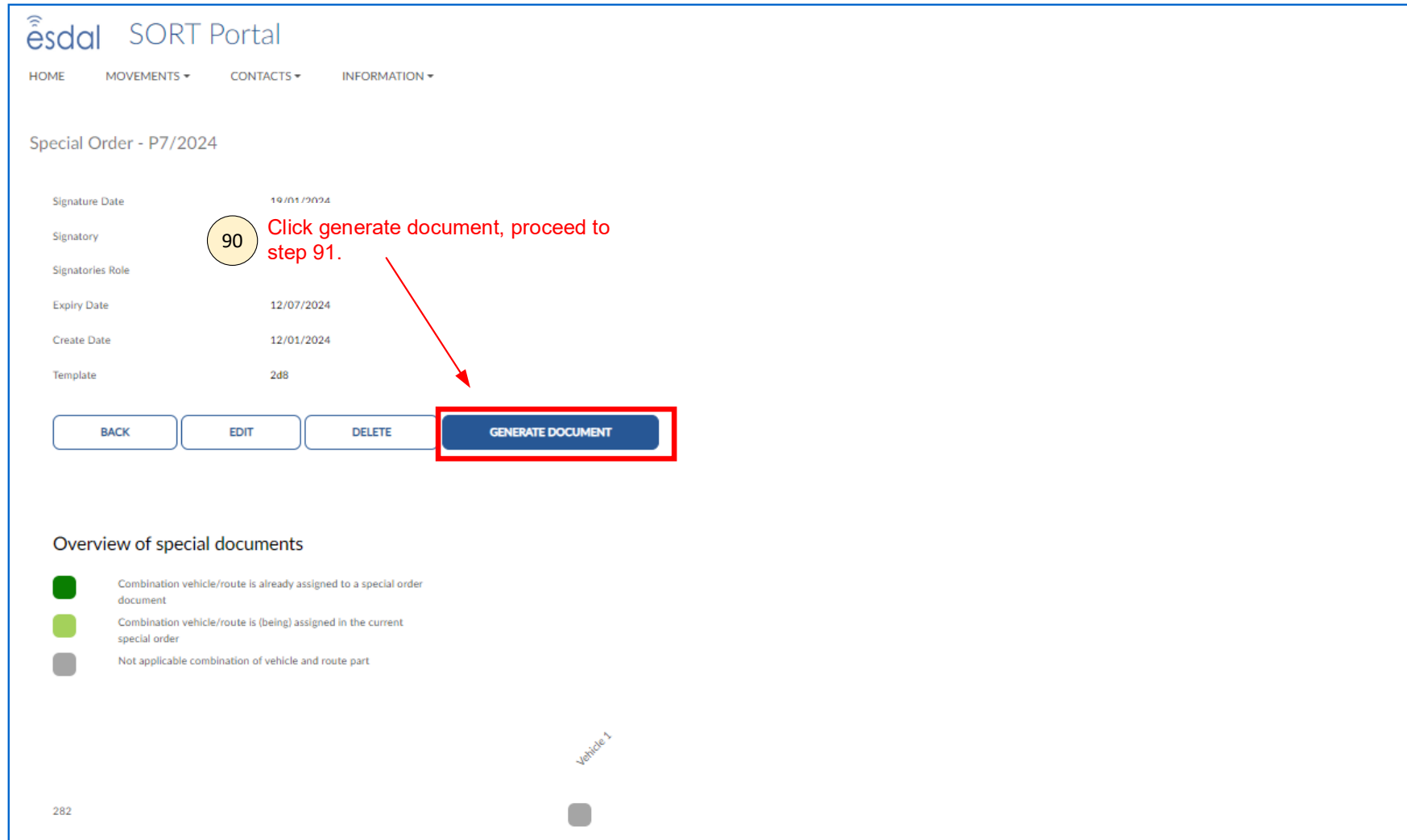
89 Click SAVE, proceed to step 90.

Process:	B. Selecting A Route
Stage in the process:	B6. (SORT user) – Create Special Order, Generate Documentation 3/3

esdal SORT Portal

HOME   MOVEMENTS ▾   CONTACTS ▾   INFORMATION ▾

Special Order - P7/2024

Signature Date	19/01/2024
Signatory	
Signatories Role	
Expiry Date	12/07/2024
Create Date	12/01/2024
Template	2d8

90 Click generate document, proceed to step 91.

BACK   EDIT   DELETE   **GENERATE DOCUMENT**

Overview of special documents

■ Combination vehicle/route is already assigned to a special order document

■ Combination vehicle/route is (being) assigned in the current special order

■ Not applicable combination of vehicle and route part

Vehicle 1

282

Process:	C. QA and Final checking, distribute movement
Stage in the process:	C1. (SORT user) – Send For QA Checking 1/2

Project Overview   History

LHH1/13201 - SO - Agreed

Application details

ESDAL Reference	LHH1/13201	Movement Name	QSG1
Haulier Reference	SO APP 1	NH Job Reference Number	QSG1_SB
Project Status	Agreed	Full Start Address	Depot
Checking Status		Full End Address	Customer
Owner		Load Summary	Leicester heavy load 1
Application Date	24-01-2024		
Application Due Date	09-01-2024		
Haulier Name	Leicester Heavy Haulage		
Checker Name			

(91) In project overview, click SEND FOR QA CHECKING, proceed to step 92.

✏ EDIT

Haulier application versions	Date	Candidate routes	Date	Movement versions	Date	Special orders	Expiry Date
LHH1/13201-1	24-01-2024	LHH1_13201... ✏	09-01-2024	LHH1/13201/S1	10-01-2024	P7/2024	12-07-2024
				LHH1/13201/S2	09-01-2024		

👤 ALLOCATE   ✕ DECLINE   ✳ WITHDRAW   ✕ UNAGREE   **↑ SEND FOR QA CHECKING**

Process:	C. QA and Final checking, distribute movement
Stage in the process:	C1. (SORT user) – Send For QA Checking 2/2

Select the user who will be completing QA checking, from the drop down list, then click SEND. You will see a pop up box stating "QA checker allocation is successfully completed".

Click OK and proceed to step 93.

| Project Overview | Movement Summary | Route and Vehicles | Route Assessment | Collaboration Status | Transmission Status | Notes to Haulier |

93 — QA checker opens the movement from their movement inbox.

LHH1/13201 - SO - Agreed - Movement Summary
Movement version - 2

Movement Summary

ESDAL Reference	LHH1/13201/S2
Haulier reference	SO APP 1
Movement Name	QSG1
Movement Status	agreed
Movement Agreed Date	10/01/2024
Haulier Name	Leicester Heavy Haulage
Start Description	Depot
End Description	Customer
Number of Movements	1
Maximum number of pieces being moved in any load	1
Movement Date From	24/01/2024
Movement Date To	08/05/2024
Load Description	Leicester heavy load 1
Haulier Notes	
Haulier Email Address	Abload_1@abload.com
Haulier Fax Number	

94 — QA checker reviews and checks vehicle, route, haulier notes, affected parties and generated document. Once the QA checker is content with the movement proceed to step 95.

Process:	C. QA and Final checking, distribute movement
Stage in the process:	**C2. (QA checker) – QA Checking by QA Checker 2/2**

Project Overview   History

95 Click on COMPLETE QA CHECKING.

LHH1/13201 - SO - Agreed

Complete checking ✕

Application details

Returned to   Rex Birch

96 Return to user positive or negative. Use the drop down "Returned to" menu if a different owner needs to be selected.

ESDAL Reference   LHH1/13201

Checking Outcome   ● Positive   ○ Negative

Haulier Reference
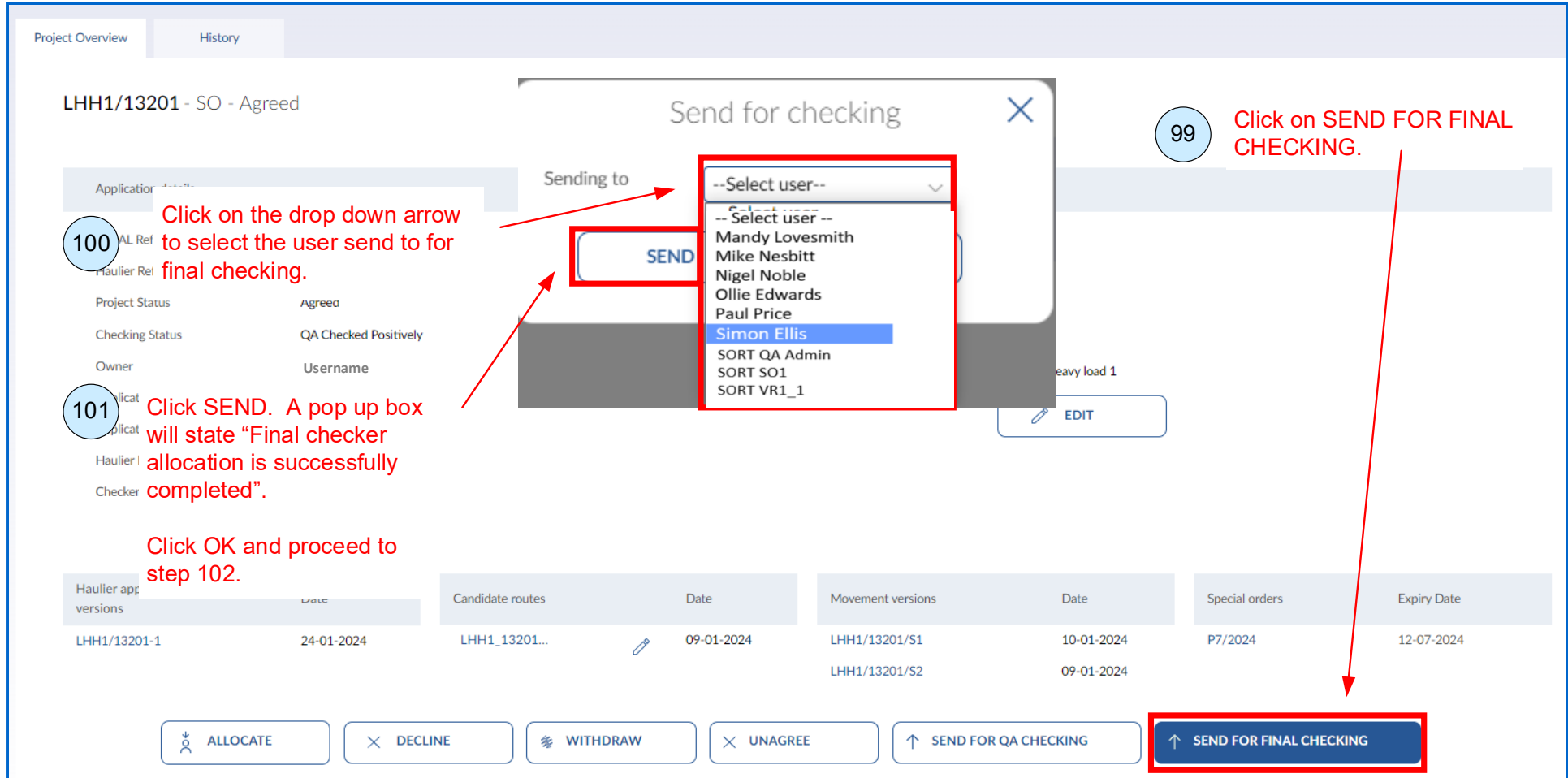
Project Status   97 If QA checking is all OK click the positive radio button.

SEND   CANCEL

Checking Status

Owner   Noreen doocey   Full End Address   Customer

Application Date   24-01-2024   Load Summary   Leicester heavy load 1

Application Due Date   09-01-2024

Haulier Name   ✎ EDIT

Checker Name

98 Click SEND. A pop-up box will state successfully updated the checking status as "QA checked +".

Click OK and proceed to step 99.

Haulier application versions	Date	Candidate routes	Date	Movement versions	Date	Special orders	Expiry Date
LHH1/13201-1	24-01-2024	LHH1_13201... ✎	09-01-2024	LHH1/13201/S1	10-01-2024	P7/2024	12-07-2024
				LHH1/13201/S2	09-01-2024		

⌗ ALLOCATE   ✕ DECLINE   ≋ WITHDRAW   ✓ COMPLETE QA CHECKING

Process:	C. QA and Final checking, distribute movement
Stage in the process:	C3. (SORT user) – Send for Final Checking

Project Overview   **History**

LHH1/13201 - SO - Agreed

Send for checking ✕

Application details

100 Click on the drop down arrow to select the user send to for final checking.

Sending to --Select user--

-- Select user --
Mandy Lovesmith
Mike Nesbitt
Nigel Noble
Ollie Edwards
Paul Price
Simon Ellis
SORT QA Admin
SORT SO1
SORT VR1_1

SEND

AL Ref
Haulier Ref

Project Status   Agreed

Checking Status   QA Checked Positively

Owner   Username

101 Click SEND. A pop up box will state "Final checker allocation is successfully completed".

Click OK and proceed to step 102.

eavy load 1

✏ EDIT

99 Click on SEND FOR FINAL CHECKING.

Haulier app versions	Date	Candidate routes	Date	Movement versions	Date	Special orders	Expiry Date
LHH1/13201-1	24-01-2024	LHH1_13201... ✏	09-01-2024	LHH1/13201/S1	10-01-2024	P7/2024	12-07-2024
				LHH1/13201/S2	09-01-2024		

👤 ALLOCATE   ✕ DECLINE   ≋ WITHDRAW   ✕ UNAGREE   ↑ SEND FOR QA CHECKING   ↑ **SEND FOR FINAL CHECKING**

Process: C. Using Folders To Manage Your Vehicle Movement Notifications

Stage in the process: C4. (Final Checker) – Final Checking by Final Checker

LHH1/13201 - SO - Agreed

Application details

Complete checking ✕

Checking Outcome ⦿ Agreed ⚪ Disagreed

ESDAL Reference   LHH1/13201

Project Status

Checking Status   Checking final

102 Click on COMPLETE FINAL CHECKING.

103 If final checking is agreed click the "agreed" radio button.

SEND   CANCEL

104 Click SEND. A pop up box will state "Successfully updated the checking status as "final checked +"".

Click OK and proceed to step 105.

Application Due

Haulier Name

Checker Name

Load Summary   Leicester heavy load 1

✎ EDIT

Haulier application versions	Date	Candidate routes	Date	Movement versions	Date	Special orders	Expiry Date
LHH1/13201-1	24-01-2024	LHH1_13201... ✎	09-01-2024	LHH1/13201/S1	10-01-2024	P7/2024	12-07-2024
				LHH1/13201/S2	09-01-2024		

⚲ ALLOCATE   ✕ DECLINE   ⚡ WITHDRAW   ↑ COMPLETE FINAL CHECKING

LHH1/13201 - SO - Agreed

Application details

ESDAL Reference   LHH1/13201

Haulier Reference   SO APP 1

Distribute Movement   ×

ESDAL Reference   LHH1/13201/S2

Distribution Comments   Please see agreed route, consultation now complete, thank you.

DISTRIBUTE   **CANCEL**

105 Click DISTRIBUTE AGREED ROUTE.

106 In the Distribute Movement Comments text box enter "Please see agreed route, consultation now complete, thank you."

107 Click DISTRIBUTE. A pop up box will say "Distribution to affected parties completed.

Haulier ap versions		Candidate routes	Date	Movement versions	Date	Special orders	Expiry Date
LHH1/13201-1	24-01-2024	LHH1_13201...	09-01-2024	LHH1/13201/S1	10-01-2024	P7/2024	12-07-2024
				LHH1/13201/S2	09-01-2024		

ALLOCATE   WITHDRAW   UNAGREE   **↑ DISTRIBUTE AGREED ROUTE**