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Facilitator Guide



Sector
Logistics

Sub-Sector
Land Transportation

Occupation
Documentation and Reporting

Reference ID: : LSC/Q1122, Version 2.0
NSQF Level: 4

Documentation Executive



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Logistics Sector Skill Council

Logistics Sector Skill Council Contact Details:

Address: No. 480 A, 7th floor Khivraj Complex 2,

Anna Salai, Nandanam, Chennai – 600 035

Email: reena@lsc-india.com

Phone: 044 4851 4605

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Shri Narendra Modi
Prime Minister of India

“ Skilling is building a better India.
If we have to move India towards
development then Skill Development
should be our mission. ”

Acknowledgements

We thank the following organizations for endorsing the contents of this Facilitation Guide, thus contributing towards skilling based on the Qualification Pack (QP) and National Occupational Standards (NOSs).



About this Guide

This Facilitator Guide is designed to enable training for the Documentation Executive Qualification Pack (QP). It provides facilitators with the necessary knowledge relating to major topics in courier sales.

The book elaborates how facilitators interact with the participants and train them by understanding their needs and explaining all the key concepts pertaining to the job roles. Also it helps the facilitator to complete all the topics to the participants in timely fashion.

This guide also provides the latest information on current advancements in technology and its impact on the industry. Many modules have been revised to capture the diversity, varied perspectives, and current spirit of courier service.

Key Learning Objectives for the specific NOS mark the beginning of the Unit/s for that NOS. The symbols used in this book are described below.

Symbols Used



Steps



Time



Tips



Notes



Objectives



Do



Ask



Explain



Elaborate



Field Visit



Practical



Lab



Demonstrate



Exercise



Team Activity



Facilitation Notes



Learning Outcomes



Say



Resources



Activity



Summary



Role Play



Example

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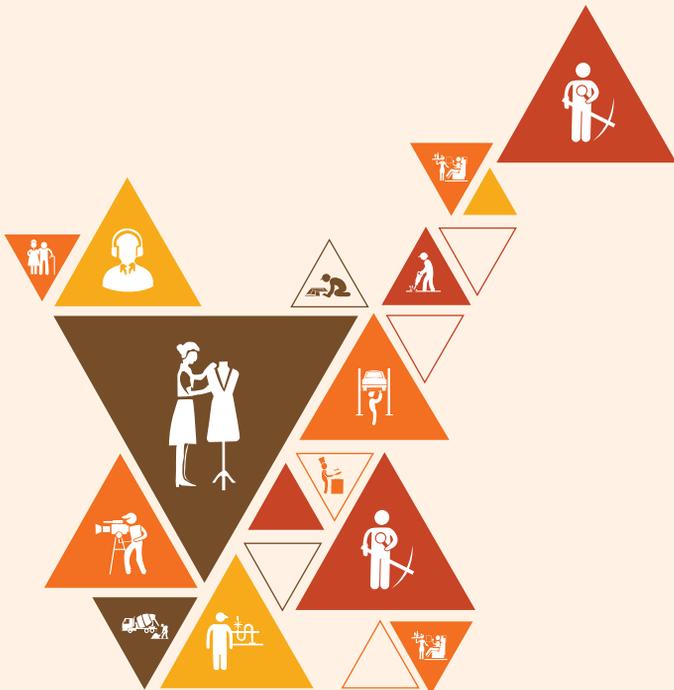
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1. Introduction

Unit 1.1 - Supply Chain Management

Unit 1.2 - About the Course

Unit 1.3 - Importance of Warehouse in
Supply Chain



Key Learning Outcomes

At the end of this module, participant will be able to:

1. Discuss Supply Chain and Logistic Management
2. Define your job roles and responsibilities
3. Explain the activities in warehouse services
4. Explain the importance of warehouse service
5. Describe the organizational structure in transportation industry
6. Describe about the employment opportunities for in the industry
7. Explain warehouse management system
8. Roles of Documentation Executive
9. Describe the functions involved for Documentation Executive
10. Narrate the layout of warehouse & operations involved
11. Know the prerequisites of joining the industry

UNIT 1.1 - Supply Chain Management

Unit Objectives

At the end of this unit, participant will be able to:

1. Define Supply Chain Management
2. Define Logistics Management
3. Explain the important flows in Supply Chain Management

Resources to be Used

- Available objects such as a duster, pen, notebook etc.
- Teaching board
- Ball or any weightless object to pass

Do

- Make the students stand in a circle, close enough to the person each side of them that they can pass the parcel quickly.
- Say 'Stop' when the when students least expect it. The person who has the parcel at that time should get out.
- Those who get out should introduce themselves by providing their names and a little additional information such as favorite hobbies, likes, dislikes etc.
- The winner of the game should stand and introduce himself/herself at the end of the game.
- Continue with rest of the participants till become last one
- Finish the task by clapping and ask them to sit next to one whom they do not know before

Say

- Thank the students for their participation.

Notes for Facilitation

- You could ask the students who get out during the game to be the music keepers. They can start and stop the music as the game progresses.
- Encourage shy students to provide information about themselves by prompting them with questions such as 'what do you enjoy doing the most', 'what is your favorite movie or book' etc.
- Motivate students by stating that they are going to achieve something big in their life
- Promote all the students in a much positive note and do not allow anybody to share any negative stories.

Unit 1.2 - About the Course

Unit Objectives

At the end of this unit, participant will be able

1. Explain organizational structure in Land transportation industry
2. Explain who is a Documentation Executive
3. Identify the activities of the Documentation Executive
4. Narrate the roles and responsibilities of the Documentation Executive

Notes for Facilitation

- You could ask the students about the expectations from the course.
- Invite students to participate. List the expectations on the whiteboard.
- Give the students a brief overview of what all will be covered in the program.
- Provide information on what are they going to learn in the next 30 days
- Supply the time schedule about the learning they are going to cater periodically
- Inform about the discipline to be followed in the class, timings they have to maintain
- Share important dates, plan of visits, assessments, labs, practical classes and explain the calendar in detail as when and what is planned.

UNIT 1.3 - Importance of Warehouse in Supply Chain

Unit Objectives

At the end of this unit, participant will be able to:

1. Explain the importance of a Warehouse in supply chain
2. Describe the various activities carried inside a warehouse
3. Narrate the significance of policies and procedures

Say

- The definition of Supply Chain and Logistics Management
- The definition of Supply Chain and Logistics Management The movement of goods from supplier to the manufacturer to the customer is called as the supply chain flow (use the diagram for reference Fig 1.2)
- 3 basic flows of Supply Chain management- Product flow / Service Flow, Information Flow, Finance/Money Flow
- An example of a very simple supply chain for a single product, where raw material is procured from suppliers, transformed into finished goods in a single step, and then transported to distribution centers, and ultimately, customers. Example –Pen, where suppliers are plastic molding supplier (shell, cap, top and bottom lid), ink supplier, steel supplier (nib and ball). Manufacturer assembles the pen in right condition and quality. Customer is you and me.

Elaborate

- The hierarchy and reporting structure of the job role, as whom will be the student on job will be reporting to.(Refer the Chart 1- Organizational structure)
- The land transportation activities as stepwise and the operations that will be carried in an office and warehouse

Notes for Facilitation

- You could ask the students Ask the students the three important flows in Supply Chain Management.
- Ask students about, the activities carried inside the warehouse
- Give students some time to think about how the transportation industry has changed in the last five years.
- Set the context and ask them to describe the industry trends in transportation.
- Identify the knowledge of students on the various types of transportation companies.



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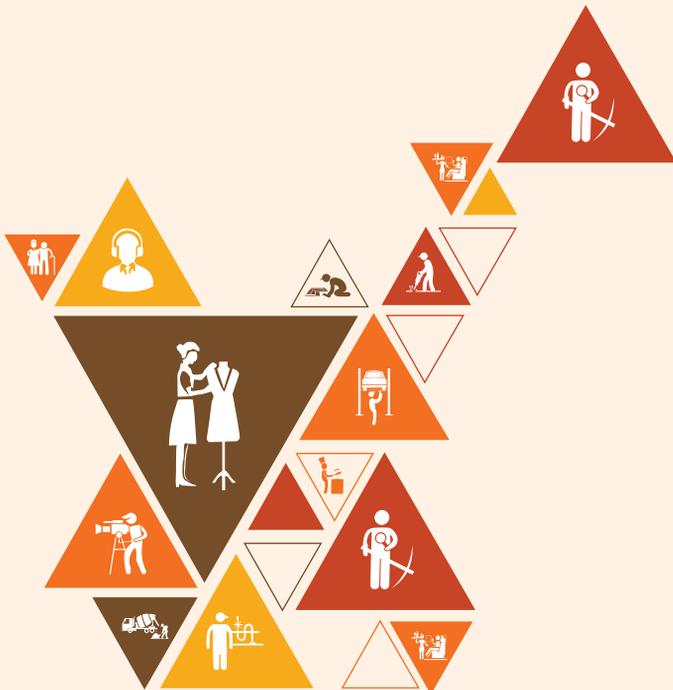
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2. Documents and its Requirements

Unit 2.1 - Different types of Documents Required during Transportation

Unit 2.2 - Types of Documents Used During Exports

Unit 2.3 - Documents Required During Interstate Transfer and General Parameters on Tax



LSC/N1120

Key Learning Outcomes

At the end of this module, participant will be able to:

1. Explain the various types of documents
2. Describe each document and its requirements
3. Distinguish documents required for exports with other documents
4. Key out documents used for interstate movement of goods
5. Explain the importance of documents
6. Identify as which document to be used at what needs
7. Educate the Documents requirement at check posts and during inspection
8. Distinguish the different documents used during exports
9. Narrate the tax parameters

UNIT 2.1: Different types of Documents Required during Transportation

Unit Objectives

At the end of this unit, participant will be able to:

1. Learn about the various documents
2. Explain as at what circumstances which documents to be used
3. Identify which document to be produced during each stages

Resources

- A copy of blank Commercial Invoice
- Copy of Performa Invoice
- Copy of CST Forms
- Copy of Permit and Way bill
- Copy of Entry Forms, Octroi Forms, Transit Pass
- Copy of Packing List, Insurance, Fitness certificate
- Computer, projector, with internet connection

Notes for Facilitation

- You shall verify with students to understand what is their knowledge, on documents, types of documents, etc.
- You shall check with them as whether have they did any documents in their past or have handled any documents.

Explain

- Each of the documents, with each and every detail of the document
- What is Commercial Invoice, Performa Invoice, CST forms, Permit and way bills
- What is an Entry form, Octroi Form and Transit pass, and when should it be produced
- What is packing list, Insurance, fitness certificate and why it should be collected?
- What are the details mentioned in each of the document, its meaning and the requirements?

Exercise



- Provide students blank copies of different documents
- Ask the students to fill the different documents by self and identify their doubts

Elaborate



- The students as how to fill the details in the various documents
- The dos and don'ts while filling Other types of documents

Notes for Facilitation



- You could ask the students as what should be filled in each column
- Invite students to answer each column
- Increase the awareness of the students in understanding by explaining the purpose of each column
- Give brief overview as what are the essential details, to be filled mandatory

Unit 2.2 : Types of Documents Used During Exports

Unit Objectives

At the end of this unit, participant will be able to:

1. Learn about the various documents used during exports
2. Narrate as at what circumstances which documents to be used
3. Identify which document to be produced during each stages

Explain

- What is an export?
- Why export is very critical?
- What are the common documents required for exports?

Elaborate

- The students as what documents required under the various category
- Bank Documents
- Customs documents
- Shipping documents and
- Customer documents

Ask

- The students on their knowledge and experience about exports
- What goods in India shall be exported, according to them?
- What goods could not be exported, according to them?
- Their Idea about Make In India Program
- To which country do India exports textiles?
- From which country do we import Oil?

Exercise

- Tell the students to open and keep the book on Unit 2.3 - Documents Required During Interstate Transfer and General Parameters on Tax

Activity

- Ask the students, whether Bihar state requires entry tax?
- Whether Pondicherry has Octroi?
- Whether transit pass is required for Maharashtra?
- How many invoice copies required for Gujarat?
- What are the other information to be taken care at Orissa?
- What is the Permit type requirement for sealable goods in Manipur?

Explain

- What is VAT?
- What is CST, ST, and GST?
- What is C form?

Elaborate

- What is GST?
- What are the impact of GST and how things will change?
- What does it mean one India one Tax?

Explain

- The students as how to fill the airway bill / courier slip

Ask

- Where is the airway bill number?
- Where should we enter the customer address?
- Where should we enter the senders address?
- Where should the customer sign?
- Where should the weight of package to be mentioned?

Unit 2.3 - Documents Required During Interstate Transfer and General Parameters on Tax

Unit Objectives

At the end of this module , participant will be able to:

1. Learn about the various documents required during interstate transfer
2. Narrate as at what circumstances which documents to be used
3. Identify how many copies of each document to be produced
4. Gather information on tax parameters

Resources

- Computer
- Projector
- Internet connection
- Live Airway bill number

Say

- It important to understand the courier tracking and understand as how it works
- Customers, nowadays can track their parcel live, including location.

Practical

- Login to the courier website, enter the airway bill details and track
- Convey the students as how to track the courier
- Ask the students to do the same



Explain

- Each step shown in the detailed tracking summary
- The length of journey, time taken for the courier to pick up and reach the customer

Say

- Packaging plays an important role in transportation industry indirectly
- Without noticing the label, moving a parcel may lead to big errors
- There are universal signs on labels
- Packaging is an art by which we handle the items inside the parcel, undamaged and in safe condition till it reaches the customer
- Multiple handling is done in between and hence proper packaging and labelling plays a very important to handle safe.

Ask

- The students to think about a situation, when they are carrying a package which got loose ends and all the parcel inside falls down and broken.
- Who is responsible for the broken items?
- Consider if the label is marked upside down and handling the parcel opposite, causes damages to the items inside. Now in this situation, whose fault is it?

Activity

- Arrange a list of labels across the table and ask the students to match the following
- Arrange the list of packing accessories and ask students to identify which type of packing material goes with what kind of materials.

Demonstrate

- Packing a box
- At which part of the box the labels are to be attached

Explain

- Different labels
- What is prohibited goods, its labels and its meaning
- The checks to be made after packing, to confirm the packing is good.

Explain

- Why we need handling equipment's?
- The reason as why should we carry the package in an orderly fashion

Say

- Handling equipment's are those, which help us to lift or move the packages easily
- Manual, semi-automated and fully automated equipment's are used in the warehouses to handle goods handling
- Handling packages should be in right movement, else in few months, back pain and other health related issues may arise.

Demonstrate

- The steps in manual handling, step wise, as explained in the participant handbook and as reference image below
- Place a package in front and explain as how to lift, without affecting the backbone.
- Demonstrate to make understand that the students make sure that the load is handled on the arms and legs and pressure not on the bones

Because of the orthopedic pains and to avoid the pressure on bones, there has been a systematic way to handle goods. Handling of materials should be taken care. Lift heavy objects safely.

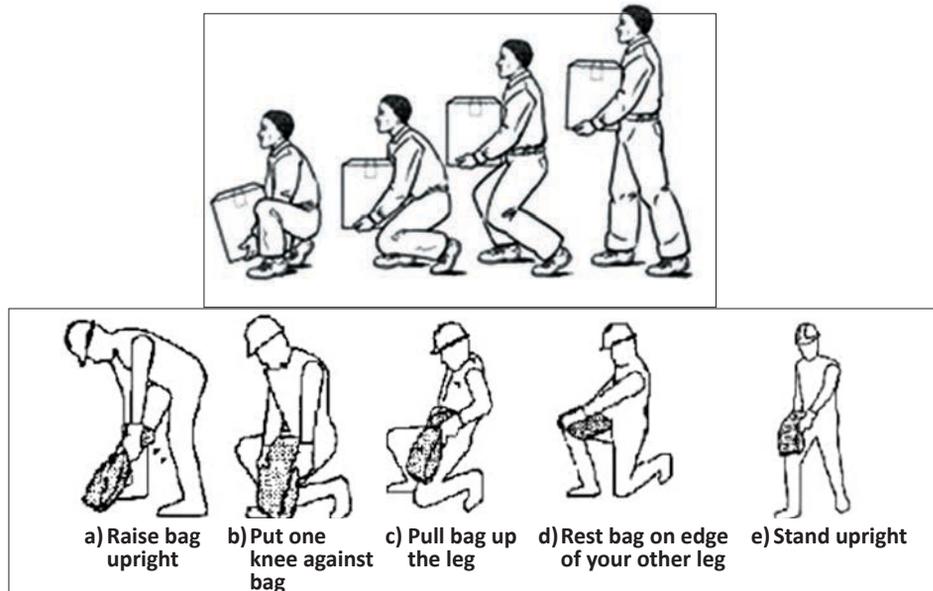


fig 2.3.1 : handling of packages

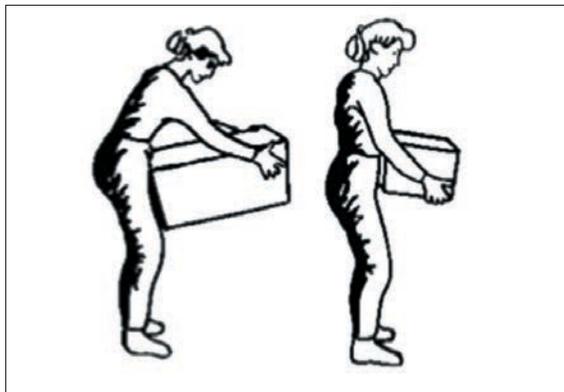


fig 2.3.2 :Reduce Package weight and Size

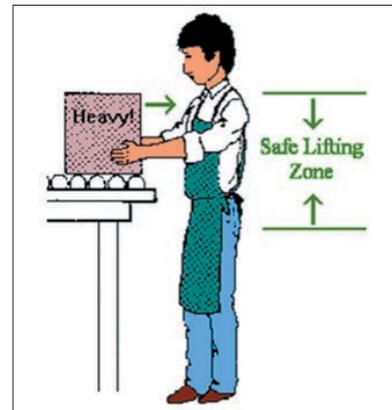


fig 2.3.3:safe lifting zone

Activity



- Ask few students to perform lifting of a box from ground and place back to another location on the ground
- Monitor the body movement as how they lift and handle.

Summarize



- Summarize as how to fill airway bill details
- Summarize what is packaging, its accessories and different labels
- Sum up the process of handling and lifting a box
- Sum up the different types of handling equipment's

Answers to the Exercise in PHB



1. Refer 2.1.2 in Participant handbook
2. Gujarat, Maharashtra, Punjab
3. Refer 2.3 in Participant handbook
4. Permit
5. Refer 2.1.11 in participant handbook
6. Refer 2.3.4 in Participant handbook
7. Refer 2.3.5 in Participant handbook
8. Refer 2.3.5 in Participant handbook
9. Refer 2.3.7 in participant handbook
10. Refer 2.3.8 in Participant handbook
11. Activity



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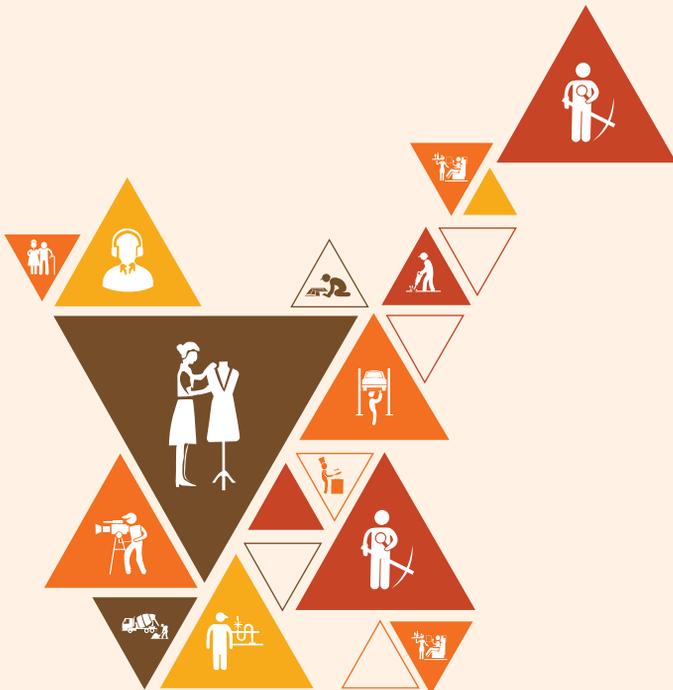
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3. Procedure in Handling Documents

Unit 3.1 - Steps involved in Processing Documents

Unit 3.2 - Inbound Consignment Process

Unit 3.3 - Outbound Consignment Process



LSC/N1121

Key Learning Outcomes

At the end of this module participant will be able to:

1. Narrate the steps that are involved in preparing documents
2. Identify the Do's and Don't s while preparing documents
3. Process the inbound and outbound consignment process
4. Plan parameters and considerations before scheduling activities
5. Source out information's required for planning the day
6. Prioritize the activities for the day
7. Educate in identifying the right type of documents required
8. Explain the steps in inbound and outbound transportation movement
9. Inspect the documents and documents to be produced as acknowledgment

UNIT 3.1: Steps Involved in Processing Documents

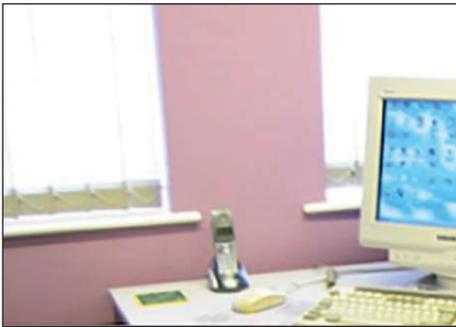
Unit Objectives

At the end of this module participant will be able to:

1. Agree upon understandings required while preparing documents
2. Learn about process involved
3. Inspect on the various checklist required and reporting

Steps

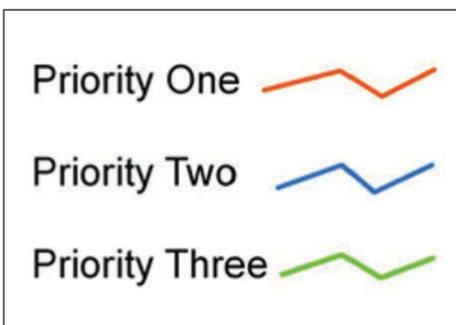
Steps: How to Process Documents



STEP 1: Check your table Everything is ok



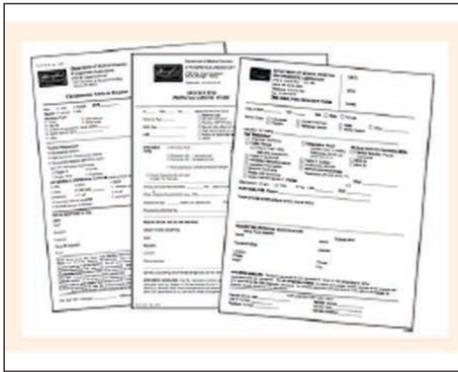
STEP 2: Get tasks from Transportation Manager



STEP 3: Prioritize based on time, availability of resources, customer and criticality



STEP 4: Understand legal requirements for each Consignment, each route, Product



STEP 5: Get ready with documents based on types of goods & its procedures



STEP 6: Fill Forms and inspection checklist



STEP 7: Use softwares & complete documentation procedure



STEP 8: Communicate with employees the instructions



STEP 9: Escalate to supervisor on issues



STEP 10: Complete the checklist and submit the documents



STEP 11: Prepare reports & submit to management



STEP 12: Help and support team members

Elaborate

- The reporting structure of a Documentation Executive
- The student to understand the hierarchy of reporting

Notes for Facilitation

- Every organization will have different reporting structure, so it is always better to understand whom to report and to coordinate
- As the work of the Documentation Executive would be at the transportation bay or at the warehouse, it is very essential to undergo safety and risk procedure during movement

Elaborate

- The understandings and requirements for the day
- Stationary Requirements
- Health, Risk & Safety Procedure
- Understanding on nature of Goods, truck type, load details, destination
- Standard Operating Procedure
- Government Documents & forms
- Software requirements (Login ID, password, reports generation)

Role Play

- The start of the day discussion with supervisor or Transportation Manager
- Reporting to supervisor on days activity and collecting sufficient information
- What all points will they discuss and how will the forecast plan look like for the day

Explain

- What are the information that is available in the Delivery planning sheet after entering the Load ID on the computer software?
- Inbound and Outbound Consignments
- How to identify the transportation mode
- What are the key areas of attention to be taken care?

Notes for Facilitation

- From the total list of the days consignments, classify the list of the inbound activities and outbound activities. Try and understand the types of materials that will be leaving / coming into the factory premises and what kind of documents will be required based on its usage and destination should be made ready. Understand the weight, length, width, route and type of truck that is going to be used. Based on each scenario the codes and checklist will differ. Try and align the documents as a perfect kit.
- Determine what mode of transportation is to be used and prepare the documents accordingly. Understand the legal requirements for each type of transportation.
- Classify the priorities for the day and start to work with. The priorities may be defined either by customer type, based on schedules planned, based on expedites or based on emergencies.
- Based on the mode of transportation and the type of goods, start to prepare the documents.
- Documentation Executive is not responsible for entering every detail of the document. Based on the information received from the finance and sales department, they cross-check the information against the purchase order, invoice, packing list, they start to prepare documents. The entry data will be limited to requirements needed in the document for transportation purpose only.
- Recording the physical /visual inspection of goods is one other key information to be captured. At some circumstances, electronic documentation has to be done. In such case, filing any form and submission would be done via the internet. Example – Transit Pass for certain states (Tamil Nadu) can be done online, and shall attach the receipt.
- With an understanding of the number of copies to be printed, take print out of the copies of packing list, Invoice, Quality reports, Interstate forms, Permit forms of Trucks, Transit pass and any other required forms based on the destination.
- Each transporter and freight forwarder may request a different format and copies of documents may vary. So, understanding of each of the transportation companies, the organization works with and their processes are important.

- Based on the standard operating procedures, start to prepare the documents. Prepare the kit for each consignment, stamp, seal the documents wherever necessary and get it approved at all stages.
- Prepare the number of sets as different kits as per the requirement at customs / RTO check post / tax audit/ for inspection
- Check the documents against the shipping checklist. Validate and keep it for future reference. The detail of destination is one more critical area where attention should be given. Because missing of it would delay the shipment process when it crosses the borders between the states. The documentation Executive should be very much aware of what kind of documents will be required at which check posts based on goods.
- Pass on the documents to the required person in hand as sealed package.
- If faced with any failures or on any issues, kindly report to the manager in charge immediately. The more delay you make may end up severe consequences, hence trying to notify your manager is very important as earlier as you knew it.

UNIT 3.2: Inbound Consignment Process

Unit Objectives

At the end of this module participant will be able to:

1. Agree upon understandings required for inbound consignment process
2. Learn about various documents to be received during inbound operations
3. Inspecting the documents and documents to be produced as acknowledgement
4. Correspond with the issues faced

Explain

- As where will they be finding as how many orders are received for the day?
- How to plan for days orders?
- What is Delivery planning sheet?
- The various documents to be received from different incoming modes.
- What are the inward checks to be performed?
- What is GRN and how to process GRN?

Ask

- The students on what kind of checks will you perform when any goods comes inside a factory
- Why is it important to do inspection?
- What kind of questions will the supervisor may ask regarding to a consignment?
- Will they sign any documents provided by the transport company directly or will they perform any checks?

UNIT 3.3: Outbound Consignment Process

Unit Objectives

At the end of this module participant will be able to:

1. Agree upon understandings required for outbound consignment process
2. Learn about various documents to be prepared during outbound operations
3. Inspecting the documents and documents to be prepared and as how to prepare the documents
4. Correspond with the issues faced

Notes for Facilitation

- Understand Customer Requirements and ensure, what is required is delivered. Meeting the customer requirements is the key to any business.
- Any formats or any procedure, if the customers ask the organization to follow, has to be followed.
- As a documentation Executive, formulate the entire set of documents in the format the customer has requested. Each customer is different and their needs and requests will be different.

Explain

- The steps involved in Outbound process
- The difference between internal and external documents
- The inspection checks to do with the transporter / driver
- The list of documents that are required based on Local/ interstate/Export/Courier movement
- What is Goods consignment note?

Elaborate

- Working of tracking systems and how to update and track
- Full Truck and Less than Truck loads

Role Play

- Prepare a set of documents as a kit for Local/interstate/Export/Courier movement
- Considering a truck is fully loaded, role play as the Documentation Executive explaining the content to the driver about the documents and how to use it?
- Arrange and give the documents to the driver. Explain to driver as which document to be used at what cause.

Answers to the Exercise in PHB

1. A goods received note (GRN) is a record of goods received from suppliers, and the record is shown as a proof that ordered products had been received. The record is used by the buyer for comparing the number of goods ordered to the ones delivered.
2. Refer 3.2 in Participant Handbook
3. Perform inward check
4. Manager



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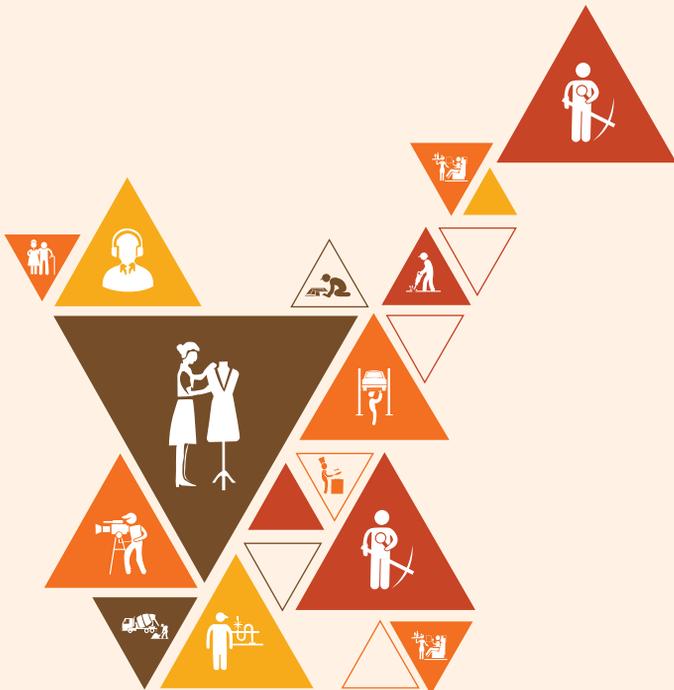
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4. Post Documentation Activities

Unit 4.1 - Support During Inspection

Unit 4.2 - Reporting and Tracking the Consignment



LSC/N1122

Key Learning Outcomes

At the end of this module participant will be able to:

1. Identify as how to handle situations during vehicle inspection
2. Explain the reporting procedures
3. Knowledge on tracking the consignment
4. Evaluate the procedure in handling risk situations
5. Narrate the kind of support required during vehicle inspection at the check post
6. Distinguish between the main documents and auxiliary documents required during the vehicle movement
7. Explain the situations when the driver requires assistance
8. Describe as how to perform on-line tracking and off-line tracking of vehicle
9. Explain the reporting situations and situations of escalations
10. Explain the various risk factors involved during vehicle movement

UNIT 4.1: Support During Inspection

Unit Objectives

At the end of this unit, participant will be able to:

1. Explain as how to handle situations when inspection is done
2. Help out drivers offline
3. Produce supporting documents
4. Narrate the vehicle activities

Role Play

- Consider that a driver calls, when he gets stopped at check post. Explain a scenario as how to explain and handle the situation.

Notes for Facilitation

- Supporting the request of the driver is one of the most critical jobs of the documentation Executive.
- Attend the phone call of driver if in case any queries in documentation while checking by officials or by Police Understand the problem in detail
- Explain the driver as how to handle the situation
- Ask the driver to provide what document to be produced under which type of questions
- Help to provide what to produce as per the authority requirement
- If driver fails, try to communicate with the authority over telephone and explain in detail about the consignment and other related questions Escalate the issues to the manager if required.

UNIT 4.2: Reporting and Tracking the Consignment

Unit Objectives

At the end of this module the student will be able to:

1. Identify as what are the reports to be produced
2. Explain the reporting procedures
3. Knowledge on procedure to handle loss and damages
4. Procedures for tracking

Resource

- Computer
- Projector
- Internet connection
- Live Airway bill number

Say

- It important to understand the courier tracking and understand as how it works
- Customers, nowadays can track their parcel live, including location.

Practical

- Login to the courier website, enter the airway bill details and track
- Convey the students as how to track the courier
- Ask the students to do the same

Explain

- Each step shown in the detailed tracking summary
- The length of journey, time taken for the courier to pick up and reach the customer

Elaborate



- The different types of reports that will be prepared
- The various daily reports, weekly reports and monthly reports

Explain



- Explain the reasons for the missed consignments
- Explain issues faced on the day
- Explain damages occurred, reasons for delay, damages or losses and its reporting procedure

Demonstrate



- How to submit bills and claim reimbursement
 - Use bills attach to a claim sheet
 - Mention the expenses on the sheet and attach the proof of bills

Ask



- What forms will you submit during day closure?
- Day's consignment sheet
- Reimbursement claims forms, if any
- Stationary received and submitted form
- Replacement forms
- Other paperwork as per the organization procedure

Explain



Process for handling Loss and Damages

- The common problem that will be faced during transport will be loss and damages. The loss may happen because of poor packing, poor material handling during loading and unloading, theft or misplacing.
- Damages will also be by improper handling of materials during transit.
- Every organization has a procedure in handling the loss and damages during inbound and outbound.
- Understand the organization policy by which you have to proceed in handling the issues.
- During loading, count the quantity and visually inspect the damages and make a note of it.
- Communicate to the supervisor about the damages and loss.
- Report reasons and investigate the reason for damage. Follow organizational procedures in sorting out the issues.
- Report and communicate to the manager in charge and to the management immediately. Keep a track and history of issues.

Role Play



- How to deal with supervisor, who is very busy
- Reporting to supervisor on days activity at his desk
- What all points will the student share
- Share the feedback of the day

Summary



- Explain the steps to be followed on the missed consignments
- What inspection are you supposed to do before tracking and reporting
- What are the reports that are to be submitted to the supervisor

Key Learning Outcomes

At the end of this module participant will be able to:

1. Identify the safety procedure's
2. Explain the driver safety
3. Gain knowledge on skills to be developed
4. Learn the procedures for Evacuation in work environment
5. Narrate the safety requirements in the work environment
6. Gain knowledge on vehicle parking procedure's
7. Evaluate the safety requirements
8. Explain the skills that are to be developed for safe operations
9. Discover the importance of road signs and rules

UNIT 5.1: Safety Instructions to be Followed in Workplace

Unit Objectives

At the end of this module participant will be able to:

1. Checking the destination.
2. Inspecting the ID of the customer
3. Receiving and storing cash
4. Ensuring the shipment had been received in good condition

Explain

The safety aids and its uses



fig 5.1.1 :Safety Goggles



fig 5.1.2:Safety Helmets



fig 5.1.3: Safety Ear Plugs



fig 5.1.4 :Reflective Jackets



fig 5.1.5 :Safety Hand Gloves



fig 5.1.6:First Aid Box & Safety Ring



Fig 5.1.7:- Fire Extinguisher



Fig 5.1.8: Safety Mask



Fig 5.1.9: - Personal Protective Equipment's

- PPE that should be provided to the HUB staff such as:
 - Gloves
 - Safety Shoes
 - Body Back Support
 - Face mask Etc
 - Motorcycle Personal Protective Equipment (PPE) Requirement
- PPE that should be provided to the motorbike delivery staff are:
 - Helmet with clear visor (Certified by ISI)
 - Covered Shoes
 - Reflective vest
 - Long Sleeve/Arm Cover
 - Long Pants
 - Face mask (optional)



Fig 5.1.10:- Two wheeler Driver PPE's

- Lorry Drivers & Attendants Requirement
- PPE that should be provided to the motorbike delivery staff are:
 - Safety Shoes
 - Reflective vest
 - Body Back Support (Load and unload process)
 - Face Mask (for dusty condition)

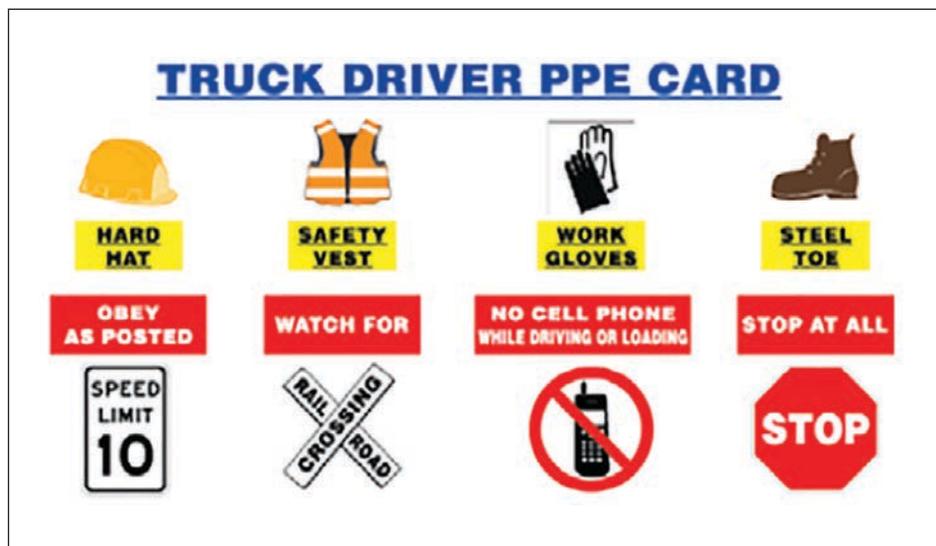


Fig 5.1.11: Truck Driver PPE's

Say

A valid driver's license should be maintained and should be updated. Report unsafe conditions if found any during loading, unloading or during transit or during storage of packages. Companies follow standard operating procedure (SOP) for each of the processes. If in case there is an emergency or a situation arises, follow the SOP to solve the issue. Every organization has a plan of action in terms of occurrence of any kind of event. So, plan and work accordingly based on the plan.

Ask

- What are the PPE's required for a motorcycle driver
- What are the PPE's required for a van / truck driver
- When should one wear safety helmets?
- While working in a warehouse where loads are stacked above head

UNIT 5.2: Vehicle Safety Procedures

Unit Objectives

At the end of this module participant will be able to:

1. Explain the importance of safety and security required for documents

Say

- What are the Vehicle Daily Checks to be performed

As per the organization requirements, the vehicle checks differs, but the macro observations will include

- Vehicle fault recording and reporting;
- Safety, maintenance and inspection plans;
- Safety inspection, maintenance and repair facilities;
- Maintenance record;
- Training and education for maintenance and safety inspection;
- Driver license; and
- Vehicle cleanliness.

Explain

Process for handling Loss and Damages

- Considering the load safety is very essential in terms of loading the packages
- No vehicle should be loaded beyond its rated capacity or beyond the legal limit of gross weight for that vehicle.
- The driver is responsible for ensuring the load is secure and should give instructions on positioning of loads to lift truck drivers.



Fig 5.2.1- Correct way and wrong way of loading



Fig 5.2.2: No mobile Phone while Driving



Fig 5.2.3:- Follow Traffic Rules



fig 5.2.4:safety



Fig 5.2.5 - Park only at Parking Spaces



Fig 5.2.6: Improper Parking may lead to fine

- Security Packages may carry the sensitive information of an organization or an individual and, therefore, protecting the packages is a prime responsibility.
- Do not share log in id and Password of email of software applications
- Do not keep the packages unattended
- Do not hand over packages to unauthorized people
- Handle all packages with utmost care in front of you

Elaborate

The types of risk that shall happen during the transport

- Traffic
- Verification/inspection by Police or government officials
- Breakdown of vehicle
- Flood
- Other delays

Explain

Process for handling Loss and Damages

- The safety driving procedures
 - DO's and Don'ts while driving
- Vehicle inspection process
 - Checklist to be viewed before commencing the vehicle
 - Precautions to be noted before starting the vehicle
- Steps on Accident reporting
- The situations of Emergency response plan
 - Accidents
 - Delays
 - Spillage of goods
 - Theft from vehicle
 - Damage to goods externally
 - Damage due to rain / flood / fire
 - Hazard indicators from goods

Activity

- Place traffic sign boards and ask the participants to explain the symbols, its meaning and understanding.

Say

The offences related to traffic and violations include the following but not limited to:

- Exceeding imposed speed limit;
- Causing death by reckless or dangerous driving;
- Reckless and dangerous driving;
- Careless and inconsiderate driving which includes inattentive driving;
- Driving under the influence of alcohol or drugs;
- Driving when he is aware of his disease or disability;
- Obstructing the road with the vehicle which includes parking in prohibited area;
- Driving the vehicle without the registered owner's consent; and
- Not stopping when being involved in an accident.

Explain

Process for handling Loss and Damages

- Security issues and related risk in not maintaining the security of documents
- The impact of not maintaining the security of the delivery items / documents /key information

Say

The offences related to traffic and violations include the following but not limited to:

- Do not share log in id and Password of email of software applications
- Do not keep the packages unattended
- Do not hand over packages to unauthorized people
- Handle all packages with utmost care in front of you
- Sharing of information to any unknown resources will lead to legal consequences.
- Do not share any confidential information will lead to imprisonment
- Inform students that they represent the organization and any information against the organization should not be shared anytime.

UNIT 5.3 - Vehicle Safety Procedures

Unit Objectives

At the end of this module participant will be able to:

1. Describe vehicle safety procedures
2. Explain parking instructions of vehicles
3. Describe package protection responsibility

Say

- To be more productive, it is essential to plan and manage time
- Planning and organization make efficient use of your time at the office by keeping you focused from beginning to completion of a project.
- An organizational plan also facilitates collaboration and information sharing with other team members who play a role in the completion of the activities.
- What is planning? Action planning is a process which helps you to focus your ideas and decide on the steps you need to take in order to achieve a particular goal. Planning is vital at all levels in the work place. You need to plan your own tasks and time.

Explain

- What is attitude?

An attitude can be defined as a positive or negative evaluation of people, objects, event, activities, ideas, or just about anything in your environment.

- How can positive attitude bring harmony in work atmosphere?

Attitude determines your productivity. More positive you are, more productive you will be.

Notes for Facilitation

- Ask the students as what is time management?
- What is Problem solving?
- What is their idea about handling pressure situations as what will they do?

Say

- Ways to be more productive?
 - Help People
 - Avoid Complaining
 - Keep high energy
 - Build team works
 - Determine confidence
 - Solve problems
 - Do not react to emotions, make good decisions
- What is “Time Management?”

“Time management” refers to the way that you organize and plan how long you spend on specific activities.

 - Carry your schedule all the time
 - Plan your day and start your day
 - Schedule activities without interruptions
 - Block distractions and get disconnected from distractions
 - Example- Facebook, whatsapp etc

Explain

- Problem solving
 - A fundamental part of your role is finding ways to solve them. So, being a confident problem solver is really important to your success

There are four basic steps in solving a problem:

 - Defining the problem.
 - Generating alternatives
 - Evaluating and selecting alternatives
 - Implementing solutions
- Analytical Skills
 - Think and find ideas step by step
 - Break down any issues into simpler set of issues
 - Start thinking in multiple ways and find alternate reasons
- Decision Making
 - You have multiple choices before you decide

- So selecting the right one is a challenge
- Think about the positive and negative impacts before finalizing the decision
- Learn from past experiences, from your own mistakes and others mistakes
- Do not repeat any mistake for the second time
- Communication
 - It is very much required to communicate in a very professional etiquette.
 - Good staff communication is essential to business success.
 - Effective communication is a two-way street.
 - Communication is about more than just exchanging information. It's about understanding the emotion and intentions behind the information.
- Engaged Listener
 - Hearing is different from listening
 - While listening get connected and do not loose attention on the subject.
 - Focus fully on the speaker
 - Favor your right ear
 - Avoid interrupting or trying to redirect the conversation to your concerns
 - Show your interest in what's being said
 - Try to set aside judgment
 - Provide feedback

Activity

Process for handling Loss and Damages

- Security issues and related risk in not maintaining the security of documents
- The impact of not maintaining the security of the delivery items / documents /key information



Fig 5.3.1: Non Verbal Expressions

Say

- Stay Calm under pressure
 - On the daily work environment, it will be hard to manage work, emotions, thought process and physical activities. Loosing yourselves will have fair chances. Hence to keep focused, it is always better to think and react by staying calm.
 - Decisions under pressure and in angry may not come right
 - Make a point and support your point by providing enough information.
 - Deliver words clearly, do not fumble
 - Clarify your statement and talk to the point
- Listening Skills
 - Listening is the ability to accurately receive and interpret messages in the communication process.
 - Listening is key to all effective communication, without the ability to listen effectively messages are easily misunderstood - communication breaks down and the sender of the message can easily become frustrated or irritated.
 - Good listening skills also have benefits in our personal lives
 - Listening requires focus and attention

Explain



- Grooming is an essential requirement in today's work environment
- Any shabby appearance in these days represents organizational culture



Fig 5.3.2 - Grooming

Ask



- What is your knowledge on computer and its usage?
- Have they used any software or apps?
- Do the participants know as how to order online a mobile phone or order food?
- Understanding of candidates on ERP

Explain



- What is MS Excel, MS word, Outlook and PowerPoint?
- When and how to use

Demonstrate

- How to use Excel, Word, Outlook and PowerPoint
- As how to use each of the basic icons and tools
- As how to print

Elaborate

- Handheld devices
 - Its usages
 - Demonstrate with one if available
- Tracking devices
 - Devices which are helpful to track the vehicle
 - Example OLA / UBER or any taxi application
- GPS devices
 - Activate the location symbol of the mobile phone
 - Open Google maps
 - Identify the location you are present
- Barcode Scanners
 - Example – scanners in the retail supermarket at the till where billing is made

Explain

- The excel workbook
- The icons in excel
- Excel ribbon
- Menus
- Saving
- Printing
- Copy and Paste
- Filling Color
- Alignment
- Using Formulae's

Summary



- Explain Health and Safety requirements for the job role
- Describe Safety procedures and Security requirements, its importance
- Vehicle requirements, its inspection and Safety requirements
- Safe driving conditions and terms to understand
- Evaluating the responsibility of safety
- Requirements to follow parking instructions
- Initiating the skills enhancement and its requirements
- Requirements of communication skills and thinking skills
- Narrate the computer skills to be developed

UNIT 5.4: Skills to Develop

Unit Objectives

At the end of this module participant will be able to:

1. Narrate the skills required for a professional
2. Enhance problem solving skills
3. Initiate critical thinking skills
4. Educate on steps to improve communication skills
5. Explain the Usefulness of computer skills

Say

- To be more productive, it is essential to plan and manage time
- Planning and organization make efficient use of your time at the office by keeping you focused from beginning to completion of a project.
- An organizational plan also facilitates collaboration and information sharing with other team members who play a role in the completion of the activities.
- What is planning? Action planning is a process which helps you to focus your ideas and decide on the steps you need to take in order to achieve a particular goal. Planning is vital at all levels in the work place. You need to plan your own tasks and time.

Explain

- What is attitude?
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- How can positive attitude bring harmony in work atmosphere?
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- What is their idea about handling pressure situations as what will they do?

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Activity

Process for handling Loss and Damages

- Security issues and related risk in not maintaining the security of documents
- The impact of not maintaining the security of the delivery items / documents /key information



Fig 5.4.1 - Non Verbal Expressions

Say

- Stay Calm under pressure
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 - Listening requires focus and attention

Explain



- Grooming is an essential requirement in today's work environment
- Any shabby appearance in these days represents organizational culture



Fig 5.4.2 - Grooming

Ask



- What is your knowledge on computer and its usage?
- Have they used any software or apps?
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- Excel ribbon
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- Copy and Paste
- Filling Color
- Alignment
- Using Formulae's

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- Evaluating the responsibility of safety
- Requirements to follow parking instructions
- Initiating the skills enhancement and its requirements
- Requirements of communication skills and thinking skills
- Narrate the computer skills to be developed.

Answers to the Exercise in PHB

1. clean , hygiene
2. no,because document are mandatory
3. No
4. an electronic security device which allows you to monitor the location of a person or object, esp a vehicle
5. A handheld is any portable device that can be carried and held in one's palm. A handheld can be any computing or electronic device that is compact and portable enough to be held and used in one or both hands. A handheld may contain cellular communication, but this category can also include other computing devices.
6. A road sign is a sign near a road giving information or instructions to drivers.
7. Group discusion
8. Role play.



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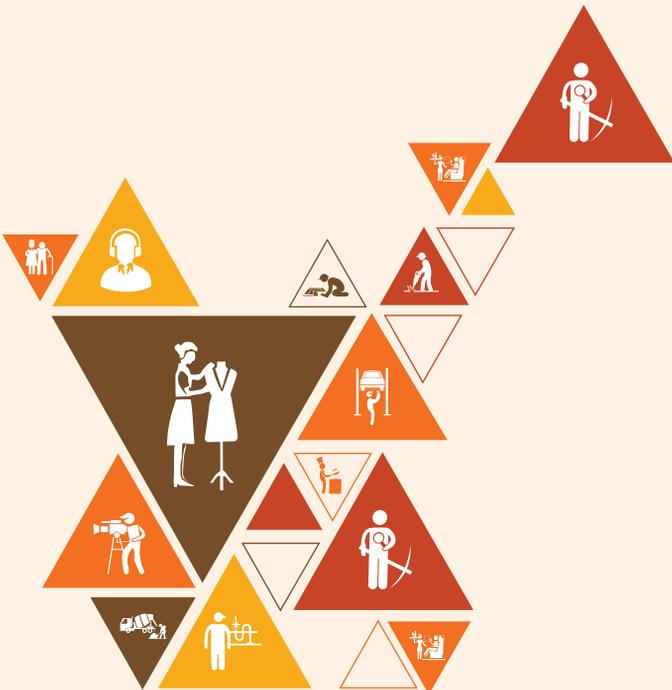
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Transforming the skill landscape

6. Annexures

Annexure I: Training Delivery Plan

Annexure II: QR codes



Annexure I

Training Delivery Plan

Training Delivery Plan			
Program Name:	Certificate Course in Documentation Executive		
Qualification Pack Name & Ref. ID	LSC/Q1122, Version 2.0		
Version No.	2.0	Version Update Date	25/11/2021
Pre-requisites to Training (if any)	Minimum qualification – Class XII + 1 year of relevant experience or Class X + 3 years of relevant experience or Class X with 2 years of ITI + 1 year of relevant experience or Class X with 1 year of ITI + 2 years of relevant experience or Certificate-NSQF (Land Transportation Associate - level 3) with 2 Years of relevant experience, 18 Years		
Training Outcomes	<p>By the end of this program, the participants will be able to:</p> <ol style="list-style-type: none"> 1. Describe the basic structure and function of supply chain 2. Identify various activities in Land Transportation 3. Detail the various tasks to be performed while preparing for processing documents 4. Describe each document and its requirements 5. Perform documentation of inbound and outbound consignments as per standard operating procedure 6. Perform the necessary tasks post documentation 7. Demonstrate health, safety and security measures while performing documentation 		

Sl. No	Module Name	Session Name	Session Objectives	NOS Reference	Methodology	Training Tools/Aids	Duration
1	Introduction	Ice breaker	• Introduce each other		Group Activity: Passing the Parcel	Book, pen, duster etc.	2
		Describe Supply Chain and Logistics Management	• Build rapport with fellow students and the facilitator			Projector/Slides/Board/ Video	3
		Organizational Structure	• Describe Supply Chain and Logistics Management			Facilitator-led-discussion	Carton Box

		Objective of course	<ul style="list-style-type: none"> Define your job roles and responsibilities 				2
		About the Course	<ul style="list-style-type: none"> Explain the activities in warehouse services 				8
		Role of Documentation Executive	<ul style="list-style-type: none"> Explain the importance of warehouse service 				4
		Employment opportunities	<ul style="list-style-type: none"> Describe about the employment opportunities for in the industry 				8
		Warehouse role in Supply Chain	<ul style="list-style-type: none"> Explain warehouse management system 				6
		Activities in Warehouse	<ul style="list-style-type: none"> Roles of Documentation Executive 				8
		Warehouse Layout	<ul style="list-style-type: none"> Describe the functions involved for Documentation Executive 				6
		Exercise	<ul style="list-style-type: none"> Narrate the layout of warehouse & operations involved 				1
		Summary	<ul style="list-style-type: none"> Know the prerequisites of joining the industry 				2
2	Documents and its Requirements	Document Explanation	<ul style="list-style-type: none"> Explain the various types of documents 	LSC/N1120 KB1, KB3, KB4, Kb5, KB6,KB7 SA3,SA4	Facilitator-led-discussion	Book, pen, duster etc.	2
		Invoice and its details	<ul style="list-style-type: none"> Describe each document and its requirements 		Activity- Tracking of Consignment	Projector/Slides/ Board/ Video	4
		Waybill and its details	<ul style="list-style-type: none"> Distinguish documents required for exports with other documents 	LSC/N1121 KA1, KA8, KB4, Kb6	Activity-Inter-state tax details	Airway Bill	4
		Tax and Entry forms	<ul style="list-style-type: none"> Key out documents used for interstate movement of goods 	KB1,KB2, KB3,KB4, KB5, Kb6, KB7		Different Labels	4
		Packing List and Invoice details	<ul style="list-style-type: none"> Explain the importance of documents 	LSC/N1122 KA1, Ka8, KB4, KB6		Barcodes	4
		Export Documents	<ul style="list-style-type: none"> Identify as which document to be used at what needs 	KB1,KB2, KB3,KB4, KB5, Kb6, KB7		Courier Slip	6
		Interstate tax documents	<ul style="list-style-type: none"> Educate the Documents requirement at check posts and during inspection 			Computer with Internet Connection	6
		Activity in understanding interstate documents	<ul style="list-style-type: none"> Distinguish the different documents used during exports 			Prohibited goods List	6
		Organizational Understanding	<ul style="list-style-type: none"> Narrate the tax parameters 			Invoices	2
		Labelling & Coding				Export documents	6
		Tracking of Couriers				Interstate documents	6

		Tracking of Couriers-Activity					8
		Packaging and Labelling					2
		Prohibited Goods					2
		Summary					2
3.	Procedure in Handling Documents	Steps in Processing Documents	<ul style="list-style-type: none"> • Narrate as what are the steps involved in preparing documents • Identify the Do's and Don'ts while preparing documents 	LSC/N1120 PC1, PC2, PC3, Pc4 PC5,PC6, PC7, PC8, PC9	Facilitator-led-discussion	Book, pen, duster etc.	6
		Organization Structure	<ul style="list-style-type: none"> • Process the inbound and outbound consignment process • Plan parameters and considerations before scheduling activities 	KB1,KB3, KB4, KB5, KB6,KB7 SA2 LSC/N1121 PC1, PC2, PC3, PC4, PC5, PC6, PC7, PC8, PC9, PC10, PC11, Pc12, PC13, Pc14, PC15, PC16, PC17,PC18, PC19, Pc20	Activity - Inbound processing Inspection Demonstration- Handling Goods	Projector/Slides/ Board/ Video	6
		How to process documents	<ul style="list-style-type: none"> • Source out information's required for planning the day • Prioritize the activities for the day • Educate in identifying the right type of documents required • Explain the steps in inbound and outbound transportation movement • Inspect the documents and documents to be produced as acknowledgment 	LSC/N1122 KB1,KB3, KB4, KB5, KB6,KB7 SA2	Activity - Outbound processing Inspection	Stationary	8
		Inbound Consignment processing				Packing Accessories	8
		Planning & Coordinating Inbound Consignment				Road Map of India and States	8
		Outbound Consignment Processing				Carton Box	8
		Planning & Coordinating Inbound Consignment				Phone	8
		Activity - Inbound processing					6
		Inspection					6
		Activity - Outbound processing					6
		Inspection					6
		Document Arrangement					6
		Summary					2
4	Post Documentation Activities	Support during Inspection	<ul style="list-style-type: none"> • Identify as how to handle situations during vehicle inspection • Explain the reporting procedures • Knowledge on tracking the consignment 	LSC/N1120 SA3, SA6, SA7, Sa8 SB1, Sb2, SB3, SB4, SB5, SB6, SB11, SB12, SB13	Facilitator-led-discussion	Book, pen, duster etc.	8
		Roleplay-Support during Inspection			Roleplay-Support during Inspection	Projector/Slides/ Board/ Video	4
		Tracking of Consignment			Roleplay-Tracking of Consignment	Local Map	8

		Roleplay- Tracking of Consignment Reporting	<ul style="list-style-type: none"> Evaluate the procedure in handling risk situations Narrate the kind of support required during vehicle inspection at the check post 	LSC/N1121, KA2,KA3, KA4 SA1,SA3, SA6, SA7, SA8 SB1, SB2, , SB3, SB4, SB5, SB6, SB11, SB12, SB13,	Activity- Mannerism on handling drivers Prepare Reports Demonstration	Cash Memo Carton Box	4 8
		Prepare Reports- Demos- tration	<ul style="list-style-type: none"> Distinguish between the main documents and auxiliary documents required during the vehicle movement 	, ,			6
		Risk Management	<ul style="list-style-type: none"> Explain the situations when the driver requires assistance 	, ,			6
		Dealing with Supervisor & Colleagues	<ul style="list-style-type: none"> Describe as how to perform on-line tracking and off-line tracking of vehicle 	LSC/N1122 PC1, PC2, PC3, PC4, PC5, PC6, PC7, PC8, PC9, PC10, PC11			2
		Exercise	<ul style="list-style-type: none"> Explain the reporting situations and situations of escalations 	KA2,KA3, KA4 SA1,SA3, SA6, SA7, SA8 SB1, SB2, SB3, SB4, SB5, SB6, SB11, SB12, SB13			2
		Summary	<ul style="list-style-type: none"> Explain the various risk factors involved during vehicle movement 				2
5	Maintain Health, Safety and Security measures during ship- ment delivery	Workplace safety	<ul style="list-style-type: none"> Identify the safety procedure's 	LSC/N1120 KA5, KA7, KB2, KB8, KB9 SA5, SA6, SA7	Facilitator-led- discussion	PPE's	6
		Motorcycle & Vehicle Safety Requirement	<ul style="list-style-type: none"> Narrate the driver safety 	SB1, SB2, SB3, SB4, SB5, SB6, SB11, SB12	Demonstration- PPE's and Safety Equipment description	Traffic Signages	1
		Vehicle Safety Proceedure	<ul style="list-style-type: none"> Gain knowledge on skills to be developed 		Demonstration- Trafic Signs	Computer with MS office	8
		Traffic Rules- Activity	<ul style="list-style-type: none"> Learn the procedures for Evacuation in work environment 		Demonstration- Computer Handling	Book, pen, duster etc.	2
		Security on Information	<ul style="list-style-type: none"> Explain the safety requirements in the work environment 	LSC/N1121 SB1, SB2, SB3, SB4, SB5, SB6, SB11, SB12		Projector/Slides/ Board/ Video	3
		Professional Skills	<ul style="list-style-type: none"> Gain knowledge on vehicle parking procedure's 				8

	Communi- cation Skill - Activity	• Evaluate the safety requirements	LSC/N1122 SB1, SB2, SB3, SB4, SB5, SB6, SB11, SB12			2
	Computer Skills	• Describe the skills that are to be developed for safe operations	LSC/N1129 PC1, PC2, PC3, PC4, PC5, PC6, PC7, PC8, PC9			8
	Computer Skills- Activity	• Discover the importance of road signs and rules	SB1, SB2, SB3, SB4, SB5, SB6, SB11, SB12			8
	Exercise Summary				2	2

Annexure – QR Codes

S. No	Chapter No.	Unit No.	Topic Name	URL	Page No.	QR Code (s)
1	Chapter 1 - Introduction	Unit 1.1 - Supply Chain Management	1.1.2 Introduction to Supply Chain Management	https://www.youtube.com/watch?v=VuZ9nvvNYCU	5	 Supply Chain Management
2	Chapter 1 - Introduction	Unit 1.1 - Supply Chain Management	1.1.2 Introduction to Supply Chain Management	https://www.youtube.com/watch?v=800MVBm91s8	5	 Transportation in Supply Chain Management
3	Chapter 1 - Introduction	Unit 1.1 - Supply Chain Management	1.1.2 Introduction to Supply Chain Management	https://www.youtube.com/watch?v=4-QU7WivXh8	5	 Logistics Management
4	Chapter 1 - Introduction	Unit 1.2 - About the Course	1.2.1 Documentation Executive	https://www.youtube.com/watch?v=mFQgRpUjVJo	8	 Job Description - Documentation Executive
5	Chapter 1 - Introduction	Unit 1.2 - About the Course	1.2.6 Description of Functions	https://www.youtube.com/watch?v=nv4QwsY0mBA	10	 Inbound Receiving
6	Chapter 1 - Introduction	Unit 1.2 - About the Course	1.2.6 Description of Functions	https://www.youtube.com/watch?v=PYkN24PMKd8	10	 General Transportation

7	Chapter 1 - Introduction	Unit 1.2 - About the Course	1.2.6 Description of Functions	https://www.youtube.com/watch?v=LkeY9GdF2D0	10	 Documents in Transportation
8	Chapter 1 - Introduction	Unit 1.2 - About the Course	1.2.7 Employment Opportunities in Documentation	https://www.youtube.com/watch?v=yd3GVIFVxD0	12	 Export Shipment
9	Chapter 1 - Introduction	Unit 1.2 - About the Course	1.2.7 Employment Opportunities in Documentation	https://www.youtube.com/watch?v=reAjDV9j09g	12	 Bill of Lading
10	Chapter 1 - Introduction	Unit 1.2 - About the Course	1.2.7 Employment Opportunities in Documentation	https://www.youtube.com/watch?v=nl6ENNxBJD4	12	 Invoice & Packing List
11	Chapter 2 - Documents and its Requirements (LSC/N1120)	Unit 2.3 - Documents required during interstate transfer and General Parameters on Tax	2.3.11 Prohibited Goods	https://www.youtube.com/watch?v=iEhtOuz_NQg	50	 Dangerous Goods Handling
12	Chapter 5 - Safety, Security, Health and other Soft Skills (LSC/N1129)	Unit 5.1 - Safety Instructions to be followed in workplace	5.1.3 Personal Protective Equipment (PPE)	https://www.youtube.com/watch?v=kcM9u4heDVk	95	 PPE
13	Chapter 5 - Safety, Security, Health and other Soft Skills (LSC/N1129)	Unit 5.3 - Skills to develop	5.3.3 Risk Classification	https://www.youtube.com/watch?v=J3-5DPWQlj8	106	 Safety Procedures
14	Chapter 5 - Safety, Security, Health and other Soft Skills (LSC/N1129)	Unit 5.3 - Skills to develop	5.3.6 Computer skills	https://www.youtube.com/watch?v=wCcARVbL_Dk	145	 GPS



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Address : No. 480 A, 7th floor Khivraj Complex 2,
Anna Salai, Nandanam, Chennai - 600 035
Email : reena@lsc-india.com
Web : www.lsc-india.com
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