

Location Intelligence
Infrastructure Asset Management

Confirm®

Asset Maintenance

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October 02, 2026

Table of Contents

Asset Maintenance

SOR Item 7
- To Create Percentage Items 9
- SOR Banding 10
- More button 12

Maintenance Regimes 13
- Maintenance Regime Form 14
- Repeating Jobs Regimes 17

Regime Allocation 19
- Allocate Applicable Regimes 19
- Allocate Regimes 19
- Remove Regimes 21
- Set Regime Due Date 21

SOR Item Lookups 22
- Schedule 22
- SOR Group 22
- SOR Bookmark 23
- Unit of Measure 23
- SOR Item Rate Uplift 24
- SOR Item Quantity Calc 24
- Import utilities 24

Maintenance Lookups 26
- Priority 26
- Price Factor 27
- Follow Up 28
- Non Working Days 28
- Action Officer 29
- Job Status 31
- Job Alert Type 36
- Period 36
- Week 37
- User Notes - Weeks and Periods for a 12

Period set-up 37
Contacts 39
Customer Type 40
Job Type 40
Hazard Type 41
Operational Attribute Types 41
Operational Attribute Category 44
Workstream 44
Job Seed Numbers 44
Job System Settings 45

Asset Maintenance

The Asset Maintenance folder contains the SOR Item library, the Maintenance Regimes library, and all the tools for setting up the means to maintain Features.

The SOR Items are the units of work that will be carried out. Maintenance Regimes put together SOR items, and give the occasions when the work will be carried out for programmed work.

Supporting the SOR Items and the Maintenance Regimes are Lookup libraries.

In this section

SOR Item	7
Maintenance Regimes	13
Regime Allocation	19
SOR Item Lookups	22
Maintenance Lookups	26

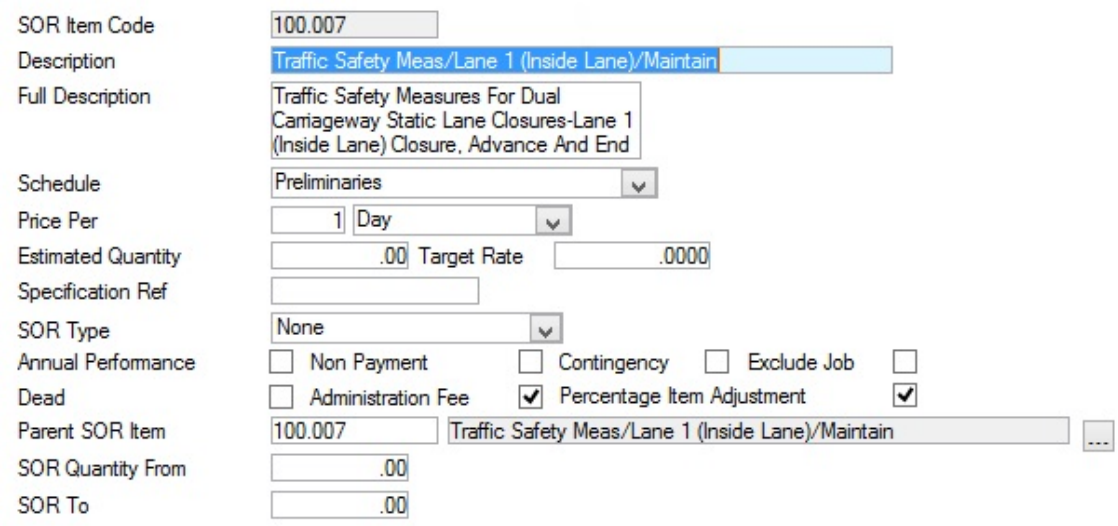
SOR Item

SOR Item Form

An SOR (Schedule of Rates) Item is the unit of work. The SOR Item will usually be defined in the Contract as the items of work the Contractor has bid on.

SOR Items need not necessarily be priced, or included in Contract. Within Confirm the function of an SOR is to provide an instruction for work of a particular kind to be carried out.

All the SOR Items are defined in the SOR Item library. Their function, and the way they will interact with the system, is also defined within the SOR Item library.



SOR Item Code:	Up to eight alphanumeric characters
Description:	Up to 55 characters
Full Description:	An optional free text field. The full description may be optionally displayed on Works Orders, Work Tickets and reports
Schedule:	Select the Schedule from the drop down list. The drop down list references the **Schedule lookup.**
Price Per:	Enter a number in the first field (other than zero). Select a Unit of Measure from the drop down of the second field. The drop down list references the **Unit of Measure Lookup.**
Estimated Quantity:	(Optional) Entering an Estimated Quantity (i.e. Unit of Measure per year) will provide that information on the Contract Bill of Quantities. It is unnecessary to enter an estimated quantity for programmed work since this can be derived by the system from Maintenance Regimes. **Note:** An Estimated Quantity for Non Routine work can be calculated by running the Quantity Calc utility in the SOR Item Lookups. This will derive a quantity based on Non-routine work orders in the system for a past period.
Target Rate:	(Optional)

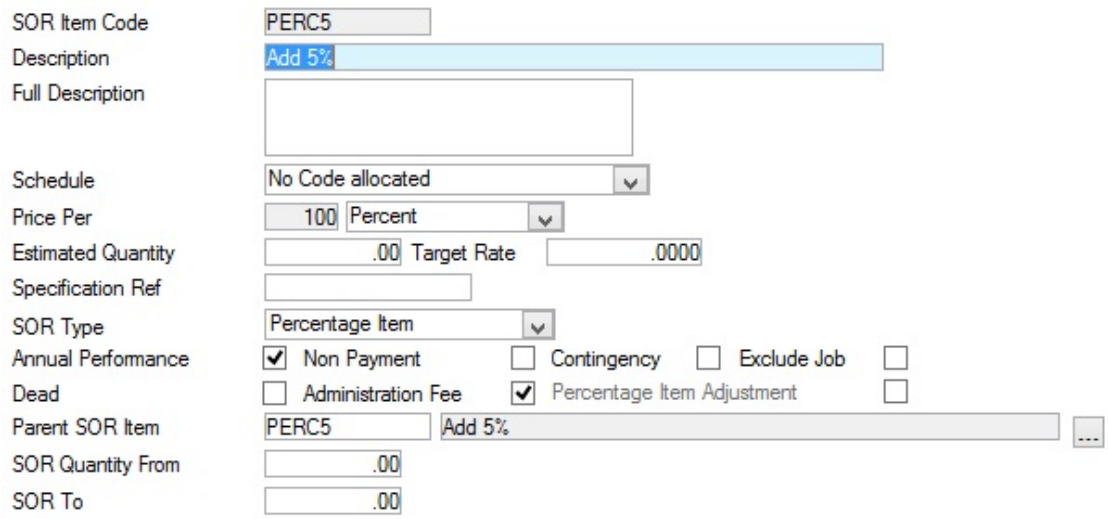
	Entering a Target rate will provide information for reports on the estimated cost of Routine Work, based on Target Rate, and for costing non-Routine Jobs, based on Target Rate. This must be populated for Confirm to correctly to estimate Treatment Costs for UKPMS purposes.
Specification Ref:	An optional free text field for the entry of the specification reference
SOR Type:	Select from the drop down: None: for any item other than the 'Liquidated Damages' Item and the 'Retention' Item Liquidated Damages: for the Liquidated Damages Item. Where Liquidated Damages will be calculated against Non Routine Work. In order to provided the tool for applying a value to the Liquidated damages, one SOR Item is created, measured 'per Pound (£), and identified as a 'Liquidated Damages' Item. Retention item: for the Retention Item. Where part of the value of Non Routine Work will be retained for a guarantee period. In order to provided the tool for applying a value to the retention, one SOR Item is created, measured 'per Pound (£), and identified as the 'Retention' Item Percentage Item: See 'To create Percentage Items' below.
Annual Performance:	(Applicable to the Contract Management module) Check this box to identify the Item as an 'Annual Performance' Item. Annual Performance Items represent a yearly cost for an item of work (so that 'per 100 Sq. metres' is read as 'per 100 square metres per year'), which will be paid for (under the Contract Management module) in equal instalments over a year.
Non-Payment:	(Applicable to the Contract Management module) Check this to identify items that will be included on Routine Maintenance Works Orders but will not be paid for. This might be inspection items, which need to be programmed but for which the Contractor is not paid. Alternatively, there might be a need for instructive items where an Annual Performance Item is being used to make the payments. **Note:** These are not intended for use with Non-Routine Works.
Contingency:	(Applicable to the Contract Management module) Check this to allow this SOR item to be 'hidden' on a Works order. There is usually only one Contingency item - priced per Pound (£), which is used to build extra value into a non-routine works order. The extra value can be hidden on the Order, but registers in committal and budget reports.
Exclude Job:	Check this to exclude Jobs carrying this SOR from being automatically batched onto Orders on upload from the mobile device.
Administration Fee:	(Administration Fee Recovery Module) Check this to allow an administration fee to be calculated on this SOR. **Note:** the field will only be visible where the Administration Fee Recovery module is active.
Percentage Item..:	Checked by default. Uncheck this to exclude the value of this SOR item from the total value of the Job for percentage Item calculation purposes.

The following three fields relate to the SOR Banding module. The default entries should be left in place if the SOR Banding is not being used for this SOR Item.

Parent SOR Item:	The current SOR Item will be entered here by default. Where this is a child SOR Item, the Parent SOR Item which it references should be entered here. **Note:** The following SOR Item Types are not applicable to SOR Banding and will always have their Parent SOR Item Code field set to their own SOR Item Code: **1.** Liquidated Damage SOR Item. **2.** Retention SOR Item.
SOR Quantity From:	Enter the lower limit of the band. The Ordered Quantity must be 'more than or equal to' this quantity to use this band.
SOR Quantity To:	Enter the upper limit of the band. The Ordered Quantity must be 'less than' this quantity to use this band.

To Create Percentage Items

A Percentage Item is one that will automatically calculate the given percentage on the total value of any Order Job that carries it.



To create a Percentage Adjustment SOR Item:

- Set the SOR Type drop-down list box to 'Percent Item'. This will automatically set the Price Per to 100.
- Set the Unit of Measure to 'Percent'. If this Unit of Measure is not available then create such a Unit of Measure (SOR Item Lookups). Ensure that this **Unit of Measure** doesn't have the Rate Uplift checkbox set.
- To create a discount item set the Target Rate to a negative number (e.g. - 1.00). To create a supplement item set the Target Rate to a positive number (e.g. 2.50).
- These Items must be added to the Contract Rates (BoQs) for each Contract and Price Factor that may use them. Ensure that the Rate matches the Target Rate of the SOR Item.

Contract Preparation\Contract Rates

SOR Banding

(SOR Banding Module)

SOR Banding allows for the scenario in which the Rate of an SOR item varies depending on the quantity ordered across a Works Order.

SOR Banding requires the following:

- **SOR Item** on page 7 and Bands need to be created and added to a Contract.
- The **Contract** must have the 'SOR Banding' tickbox ticked.
- 'Band Items on Entry' setting in **Contract Management System Settings** should be set to the required value.

To create Banded SOR Items the 'Parent SOR Item' field of an SOR Item needs to reference another SOR Item. This SOR Item is then known as a 'Child SOR Item'. Changes to the Parent SOR Item will be inherited by the Child SOR Items (e.g. Schedule, Pricing Quantity and Unit of Measure).

Note: The following SOR Item Types are not applicable to SOR Banding and will always have their Parent SOR Item Code field set to their own SOR Item Code:

1. Liquidated Damage SOR Item.
2. Retention SOR Item.

Each SOR Item will then need to have the band levels entered in the 'SOR Quantity From' and 'SOR Quantity To' fields. The Parent SOR Item will cover the band from zero (the lowest quantity band). Each band should begin with the number that finishes the previous band so for example:

BAND 1	0 - 10
BAND 2	10 - 50
BAND 3	50 - 100

In the above example, an ordered quantity of 10 would use the BAND 2 SOR Item.

The following sections explain how the SOR Banding Functionality works in different scenarios:

Band Items on Order Entry

1. Contract Management System Setting - 'Band Items on Entry' = **Ordered Quantities** or **Completed Quantities**

   When Order Items are entered, the SOR Item Code used will be calculated by adding up all the SOR Item's Quantities on all Jobs across the entire Order when the SOR Item is Saved.

   SOR Items will not be permitted to be entered via the Job Item screen once the Job has been placed on an Order.

   It will not be possible to enter SOR Items via the Defect screens once the Job has been placed on an Order.

2. Contract Management System Setting - 'Band Items on Entry' = **None**

   When Order Items are entered, the SOR Item Code used will be calculated by adding up all the SOR Item's Quantities on all Jobs across the entire Order when the Order is Committed.

Banding SOR Items at Payment Stage

To pay a Job which has SOR Banding, all the Jobs on the same Order must be closed off at the same time so the correct band for the SOR Items can be calculated. This means all Jobs on the same Order must have the 'Complete' tickbox ticked at the same time. It is not possible to close off (archive) particular Jobs on an Order where SOR Banding is in place. Validation of this occurs when one or more of the Payments are Committed.

An Order is only permitted to be on one Uncommitted Variation Order, Payment Request or Payment at a time.

1. Contract Management System Setting - 'Band Items on Entry' = **Ordered Quantities**

   When Payment Request and Payment Request Items are Saved the Rate used for the Banded SOR Item is either the Rate linked to the Band based on the Completed Quantity, or the Rate linked to the Band based on the Ordered Quantity, which ever is greater.

   All Payment Items, with the same SOR Item Parent Code, belonging to the same Order, are updated with the new SOR Item Code and Rate, and the value is recalculated.

   The total quantity is used to determine the child SOR Item and Rate to be stored on all the Payment Request or Payment Items for the whole Order on the Payment Request or Payment.

2. Contract Management System Setting - 'Band Items on Entry' = **Completed Quantities**

   When Payment Request and Payment Request Items are Saved the Order Payment Parent SOR Item total is added to the Completed Quantity total.

   The total quantity is used to determine the child SOR Item and Rate to be stored on all the Payment Request or Payment Items for the whole Order on the Payment Request or Payment.

   The Value on the Payment is calculated by multiplying the Payment Item Quantity by the Banded rate, and subtracting the Completed Value on the corresponding Order Item, i.e. the Payment Quantity multiplied by the Payment Rate will not equal the Payment Value.

   All Payment Items, with the same SOR Item Parent Code, belonging to the Order, are updated with the new code and rate, and the value is recalculated.

3. Contract Management System Setting - 'Band Items on Entry' = **None**

   SOR Banding will only be invoked during Payment Commit.

Banding SOR Items when creating Variations

Variation Items will be banded as they are entered using the total Ordered Quantities for the SOR Item, plus the quantities on the Variation being entered.

In order to retain the integrity of the banding during this process no outstanding Variations, Payment Requests or Payment will be permitted against the Order.

1. Contract Management System Setting - 'Band Items on Entry' = **Ordered Quantities** or **Completed Quantities**

   When a Variation Item is Saved, SOR Banding will be invoked. The total Ordered Quantities for the SOR Item across the Order, excluding those included on the Variation Order, plus the quantities on the Variation Order, for the Order, for the SOR Item, will be used to determine the correctly banded SOR Item.

   If the Variation Item being saved changes the banding for the SOR Item being added: all Order Jobs, for the Order, not present on the Variation Order will automatically be included on the Variation Order, along with the Item.

   If the Variation Item being saved changes the banding for the SOR Item being added: all Variation Items with the SOR Item being banded, for the Order, present on the Variation Order will automatically be amended.

2. Contract Management System Setting - 'Band Items on Entry' = **None**

   SOR Banding will only be invoked during Variation Commit.

Band Items when batching Jobs onto Orders

SOR Banding is applied when using 'Batch Jobs onto Orders', creating Jobs from Enquiries and when uploading data from a mobile device.

When Jobs are added to Orders, all the Items will be banded across the entire Order when the Order Job is Saved.

When Orders are created and Jobs are added to Orders, all the Items will be banded across the entire Order when the Order Job is Saved.

More button

(Contractor Invoices module)

If the Contractor Invoices module is present, a 'More' button will be displayed on the SOR Item form. Click on the button to display the SOR Item Payment Category form.

SORs are placed in to Payment Categories for grouping on the Summary Payment Certificate. The Payment is then displayed as a total for all the work (SORs) in each Category.

To complete the form: select, for each SOR, the appropriate Payment Category. The drop down list references the Payment Category Lookup.

Maintenance Management\Contract Management Lookups

Maintenance Regimes

Three types of Maintenance Regimes can be created within Confirm: Routine Maintenance Regimes, Cyclic Maintenance Regimes and Repeating Jobs Maintenance Regimes. The 'Maintenance Regimes' screen is used for Cyclic and Routine Maintenance and the 'Repeating Jobs Regimes' screen is used only for Repeating Jobs configuration.

Routine and Cyclic Maintenance Regimes give occasions to SOR items so that programmed work can be carried out within Confirm. Repeating Jobs Maintenance Regimes give the Repeating Job Agent the defaults in order to automatically generate Jobs so that programmed work can also be carried out within Confirm

Routine Maintenance assumes that the work is carried out at pre-defined times within a yearly cycle. The work can be specified for periodic (monthly) occasions, weekly occasions, and/or daily occasions.

Where the Contract Management module is active, Routine maintenance Regimes, when applied to Features, are used to calculate Routine Works Orders. These in turn will generate payment batches. Payment is made on the basis of the value of the SORs under the Contract, and the occasions for which they are programmed, except where 'Annual Performance' SOR items are used. In this case the occasions specified on the Regime are taken to be payment profiles. So one occasion in each of 12 periods will pay 1/12th of the yearly price in each period.

See **Maintenance Management - Routine** for details on raising Routine Maintenance Works Orders

Cyclic maintenance assumes that work is carried out in cycles. This usually arises because the work is carried out to batches of Feature in turn (so one third of trees may have epicormic growth removed in three cycles over the year); or because the work is carried out on a recurring cycle of more than a year (so beds may be double-dug, in turn, every two years).

Cyclic Maintenance Regimes are used to 'Create Jobs from Regimes' based on the SORs specified in the Regime, and the Features to which each Cycle has been applied

Where the Contract Management module is active, these Jobs can be placed on a Works Order to go through the Non Routine process.

See **Maintenance Management - Cyclic Works** for details on Creating Jobs from Regimes, and raising Non Routine Works Orders.

Repeating Jobs maintenance assumes that work is carried out in regular repeating periods. The repeating periods used, are those found in the Follow Up lookup.

Repeating Jobs Maintenance Regimes are used to automatically create Jobs, by the Repeating Jobs Agent, according to the given Repeating Period.

Where the Contract Management module is active, these Jobs will be placed on a Works Order to go through the Non Routine process, if a Contract has been specified. They will also be automatically allocated to the specified Gang, if set.

See **Maintenance Management - Job** for details on the Job life cycle.

Maintenance Regimes are applied to Features. This is done by running **Allocate Applicable Regimes** on page 19 or **Allocate Regimes** on page 19.

- 'Allocate Applicable Regimes' requires an applicability to be set in the Regime. Applicability is for Feature Types, and may be combined with Classifications. Use Classification to limit the applicability within a Feature Type, to Features with a particular Site Classification. Applicability is usually set for Routine Regimes. This is not applicable to Repeating Jobs Regimes.
- 'Allocate Regimes' is defined in the filter - and does not require applicability in the Regime. Cyclic & Repeating Jobs Regimes are usually allocated in this way and therefore do not have an applicability set in the Regime.

Maintenance Regime Form

Regime Code: Up to 6 alphanumeric characters.

Description: Up to 50 characters.

Feature Type: For simple applicability, enter (or select from the pick list) the applicable Feature Type. Where the applicability is for multiple Feature Types, or Feature Type in combination with Classification, leave this field blank and use the 'Applicability' tab.

Where 'Allocate Regimes' will be used, and therefore applicability is unnecessary - leave the field blank

Notes: An optional, free text field.

Type: Select from the drop down list:

'Routine' - For Routine Maintenance which will be included on a Routine Maintenance Works Order

'Cyclic' - For Cyclic Maintenance which will be available to the 'Create Jobs from Regimes' utility.

Maximum Cycle: The total number of batches of features that complete the cycle.

Current Cycle: The current cycle being worked. This will usually start at 1 and be updated as the cycles complete, returning to 1 when the final cycle is completed.

Cycle duration: Sets the length of the cycle in days. Used to update the 'Date Next Due' date of the Allocated Regime form on the Feature, where one is set.

Asset Register\Feature-Other button - Regimes

Note: For 'Routine' leave the default settings for Maximum and Current Cycle of 1 in each field. In this case the Cycle Duration field is disabled.

Aggregate: Check this box to aggregate work on the Routine Works Order.

Aggregation will display work within Sites, for all plots carrying the same Regime, Customer, and Cost Code, as a total number of plots, rather than repeatedly listing the work against each plot.

Note: Aggregation, once carried out for Works Orders, will also be present for Contract Monitoring, and for Work Tickets.

Dead Regime: Check this to archive this Regime and prevent any new work from being created for it. If a Regime is flagged as 'Dead' and an Inventory Variation Order is created, any work will be removed from a Committed Routine Maintenance Works Order as it is no longer required.

Job Type: Supply a Job Type which will be used as a default when Jobs are created. This is only available for 'Cyclic' Regimes.

This lookup references the **Job Type lookup**.

Applicability tab Items tab Factoring Items for Cyclic Regimes Regime Item Weeks Contract button

Contract button

Regimes may be made applicable only in certain Contracts. This means that a Feature may carry several Regimes, but when Routine Work is calculated, only those Regimes, which are available to the Contract selected in the 'Calculate Routine Maintenance' filter, will be included in the Routine Maintenance Works Order. See **Maintenance Management\Routine Maintenance** for more information on calculating Routine Works.

Click on the Contract button to display the Maintenance Regime Contracts form.

All the Contracts that have 'Specify Regimes' checked will be listed. Check the Contact(s) that will use the Regime currently displayed in the upper part of the form.

Note: You may also specify the relationship between Regimes and Contracts using the Regime button on the Contract form. See **Contract Preparation\Contract**

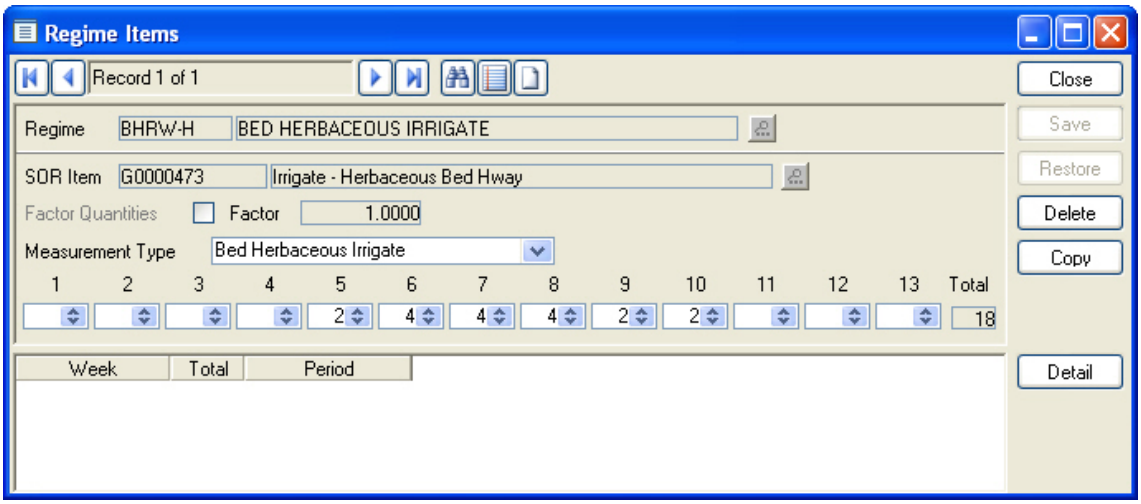
Note: Contracts do not need to be specified for Repeating Job Regimes.

Contract specific Regimes are applied to Features in the normal way.

Regime Form - Applicability Tab

Regime:	Copied from the Regime form - not editable
Feature Type:	Enter (or select from the pick list) a Feature Type. The pick list reference the Feature Type lookup **Asset Register\Feature Lookups**
Classification:	Enter (or select from the drop down list) a Classification The drop down list references the Classification Lookup **Site Register\Site Lookups\Operational Site Lookups**

Regime Form - Items tab



Regime:	Copied from the Regime form not editable.
SOR Item:	Enter (or select from the pick list) the required SOR Item. The pick list references the **SOR Item library.**
Factor Quantities:	This is not used in 'Routine' Maintenance Regimes.

Measurement Type: The drop down list in this field displays only Measurement Types that reference the Unit of Measure for the SOR Item (i.e. the Unit of Measure entered in the Price Per field in the SOR Item library).

You should select, from the list, the Measurement Type appropriate to the Feature Type to which this Regime will be allocated.

Periods: The numbered fields refer to Periods in the year. The number of Periods in the year, and the Period names, should have been defined in the **Period lookup.**

For occasions specified in the Period:

Enter the number of occasions in the relevant period by typing a number or using the spin buttons in each field.

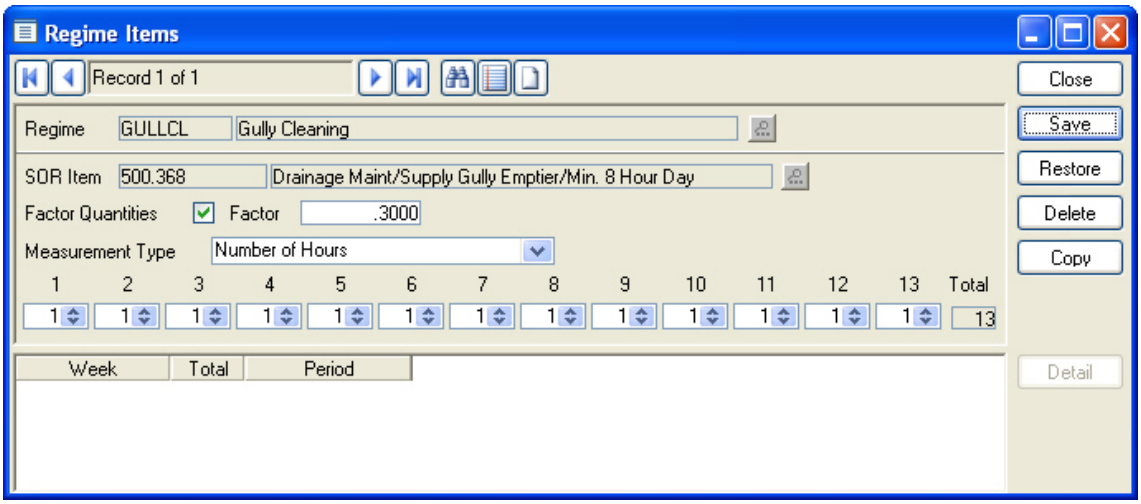
For occasions specified in the Week or Day:

Enter at least one occasion in a Period to allow the record to be saved.

Regimes can be defined at Period level, without weeks being specified.

Factoring Items for Cyclic Regimes

Where the Regime Type has been set to 'Cyclic', you may factor quantities for Regime Items:



Factor Quantities: Tick this box if you wish to Factor quantities for this SOR Item.

Factor: This field will default to '1', and will not be editable if Factor Quantities is not checked.

Enter a multiplication factor for the Feature Quantity. The Feature Quantity will be multiplied by the Factor when a Job is raised using this Regime.

Measurement Type: Where Factor Quantities has been checked, the Measurement Type drop down list will list all available Measurement Types, including those that don't reference the same Unit of Measure as the SOR.

The factor is applied to the Feature Quantity in that Measurement Type to determine the SOR quantity in the Unit of Measure referenced by the SOR.

Regime Item Weeks

(Optional)

Click on the Detail button in the Regime Items form to display the Regime Item Weeks form:

Regime:	Copied from the Regime form - not editable
SOR Item:	Copied from the Regime Items form - not editable
Week:	Enter (or select from the drop down) a week. The drop down list references the **Week lookup.**
Total:	You may enter a number here to specify the number of occasions in the week. Leave blank if you intend to specify the day(s), the total will be automatically entered.
Days:	(Optional) Enter occasions on the required days.

Save the record. A new, blank, Regime Items Week form is displayed for the entry of the next Week occasions. When all the Week occasions have been entered, close the form to return to the Regime Items form. The weeks will be listed and totalled into the Periods.

Repeating Jobs Regimes

Repeating Jobs are for Routine Maintenance where the Repeating Jobs Scheduled Task creates Jobs that can be committed onto Works Orders and Automatically Scheduled to Gangs

Regime Code:	Up to 6 alphanumeric characters.
Description:	Up to 50 characters.
Notes:	An optional, free text field.
Allow Past Due Dates:	Check this box to allow new jobs to be created with a due date set in the past. **Note:** This will only apply to 'Repeating Jobs' regime type.
Dead Regime:	Check this to archive this Regime and prevent any new work from being created for it. If a Regime is flagged as 'Dead' and an Inventory Variation Order is created, any work will be removed from a Committed Routine Maintenance Works Order as it is no longer required.
Job Type:	Supply a Job Type which will be used as a default when Jobs are created. This is only available for 'Cyclic' & 'Repeating Jobs' Regimes. This lookup references the **Job Type lookup**.
Priority:	Supply a Priority which will be used as a default when Jobs are created. This is only available for 'Repeating Jobs' Regimes. This lookup references the **Priority lookup**.
Due Date Rule:	Select a Due Date Rule option to determine when the next Repeating Job will be created for. This is only available for 'Repeating Jobs' Regimes. This Due Date is set when the Repeating Agent next runs after the current Job has been completed.

Where the options which include Actual Start Date are selected then if the Actual Start Date is not actually populated on the Job then the Actual Completion Date will be used instead.

Note: It is possible to prevent Jobs from being created too far into the future by applying a value to the **Job System Settings** on page 45**Repeating Routine Jobs Future Period**field.

Repeating Period: Supply a Follow Up which will be used to determine when the next Repeating Job will be created for. It is override-able on Allocated Regimes. This is only available for 'Repeating Jobs' Regimes.

This lookup references the **Follow Up lookup**.

Cost Code: Only available for Repeating Jobs Regime Type.

Supply a Cost Code to be used on each Job created by the Regime.

Note: This Cost Code can be overriden when Allocating the Regime to Features using the **Allocate Regime** screen.

Note: If Cost Code is not set here and is also not set when using the Allocate Regime screen, the Features **Overriding Cost Code** will be used on the Job Items (SOR) but not on the Job. Where the Features Overriding Cost Code is not set, the **Features** Cost Code will be used instead.

Work Type: Only available for Repeating Jobs Regime Type.

Supply a Work Type to be used when creating Orders.

Note: If Work Type is not set here a Work Type can be specified in the System Setting specific to Repeating Routine Jobs, please contact Confirm support for assistance in configuring this setting. If the Work Type is not specified here and the Repeating Routine Jobs System Setting is not specified, the General System Setting for Work Type will be used.

Regime Allocation

Regimes, once created, must be allocated to the Features that will be maintained by them. This may be done in three ways:

- Manually in the Feature 'Allocated Regime' form. See **Asset Register\Feature\Other button**
- 'Routine' Maintenance Regimes may be batch allocated using the **Allocate Applicable Regimes** on page 19 utility
- 'Cyclic' & 'Repeating Jobs' Maintenance Regimes may be batch allocated using the **Allocate Regimes** on page 19 utility. For 'Cyclic' this allows the Regime(s) to be allocated in cycles.
- **Set Regime Due Date** on page 21 is used to set an initial due date on each Regime Item retrieved from chosen filter criteria. Requires ConfirmConnect®.

Allocate Applicable Regimes

The 'Allocate Applicable Regimes' utility will allocate Regimes according to the applicability set on the Regime, as restricted by any filter entries.

Note: Currently, this utility will not work for a Repeating Job Regime. Please use the **Allocate Regimes** utility instead.

Note: If, by mistake, the Allocate Applicable Regimes is used on a Repeating Job Regime, no Jobs will be created, as the Regime will only be partly applied. It will be necessary to either use the Remove Regime utility or use the **Overwrite Existing** option on the Allocate Regime Filter screen in order to correctly apply the Repeating Jobs Regime to the affected Features.

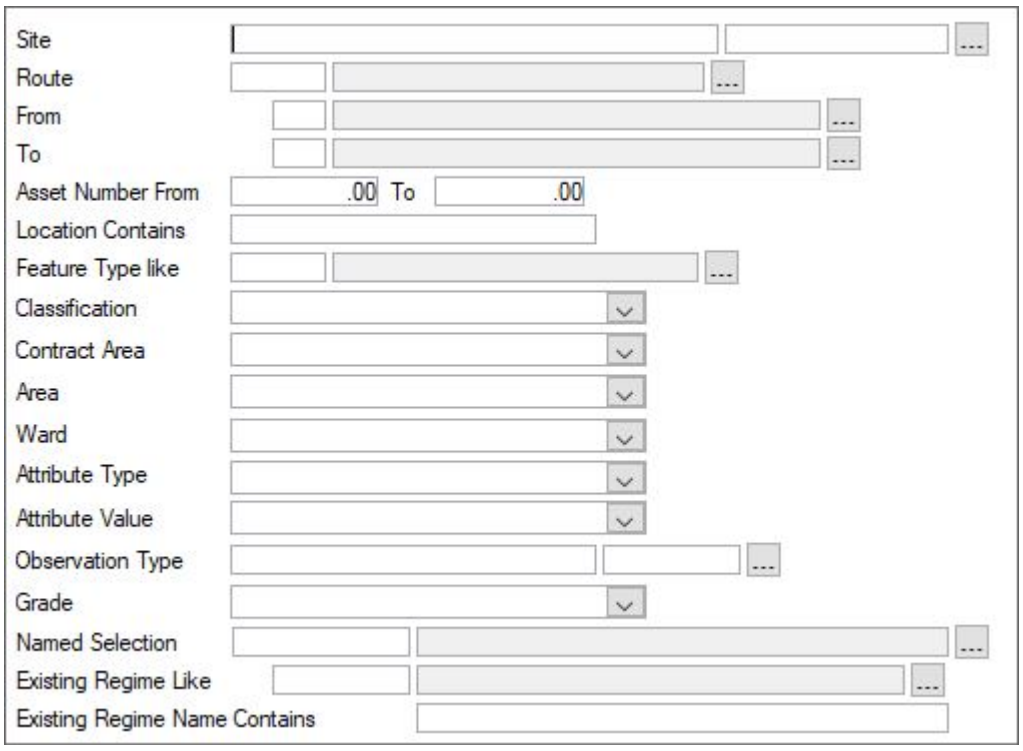
Click OK to display the preview, which will list the selected Regimes, with details of the Features to which the Regimes have been allocated.

Save the Preview to carry out the allocation.

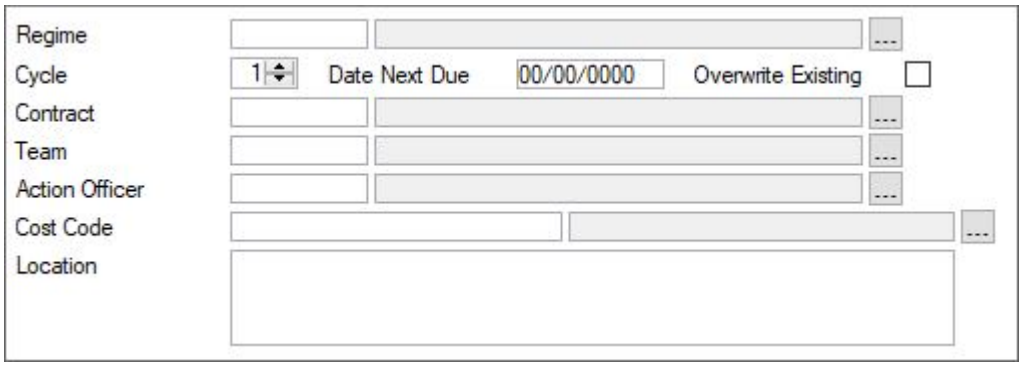
The allocation will have linked the Regime with the Feature Type(s) so that the Regime is displayed with the Feature Type in the Feature Type Lookup. This means that using this Feature Type to create a new Feature will automatically allocate this Regime to the new Feature.

Allocate Regimes

This Filter screen is split into two sections. The top section relates to filtering the Features that the Regime will be applied to.



The bottom section of the screen, below the line, defines the Regime being allocated to the Features.



Click OK to view the preview. Save the preview to carry out the allocation.

For Cyclic maintenance Regimes, the filter would be run for the same Regime in each of its cycles, selecting in the top section of the filter, the Features which are to be maintained by the Regime in that cycle.

Repeating Job Regimes

The following fields only apply for "Repeating Job Regimes" and will set their values for the Regime on the Features:

- Date Next Due: Choose a date for the Next Job to be created. The Repeating Period and Due Date Rule, set against the chosen Regime, will determine when the next Job should be created.
- Overwrite Existing: Will also retrieve Features that already have this Regime applied previously. Overwrite the existing Regime details for Contract, Team, Action Officer and Next Due Date.

Note: Should a Job already exist, the Overwrite Existing option will update the details for the next Job but it will not close, cancel or change any Jobs already created. These Jobs will need to be closed or cancelled before the next Job can be automatically created.

- Contract: Choose a Contract to be applied to each Job created from the Regime Features.
- Team: Choose a Team to apply to each Job created from the Regime Features.
- Action Officer: Choose an Action Officer to be appied to the Jobs created from the Regime Features.
- Cost Code: Choose a Cost Code to be applied to each Job created from the Regime Features.
- Location: Enter a location text to be applied to each Job created from the Regime Features.

Remove Regimes

The Remove Regimes utility will batch-remove Regimes as defined in the Remove Regimes Filter.

Enter the details of the Regime, and the Features, in the filter and click OK. A preview will be displayed of the Features that will lose Regimes. Save the preview to carry out the removal

Note: Running the Remove Regimes utility will remove Regimes from particular Features, but it does not alter Applicability in the Regime where one is set.

Set Regime Due Date

This functionality is for ConfirmConnect® only and requires Confirm module: AM Routine Maintenance (0720).

Allows batch setting of the **Next Due Date** for the chosen Regime, as defined within the filter. This creates Routine Work Tasks that will be downloaded to the team officer as determined by the Default Team Allocation.

To use the utility:

- Select a Regime and enter any remaining filter requirements.
- Set the **Next Due Date** to the date you wish to apply to each of the features defined by your chosen filter options and click OK.
- Use the **Overwrite Existing** check box if you wish to change the **Next Due Date** on Features which already have a **Next Due Date** specified.

  Note: If this option is not set, any Features which already have a Next Due Date specified will not be retrieved.

A preview will be displayed showing all of the Features which have been allocated to the chosen Regime (using the Allocate Regime utilities) and meet the specified filter criteria.

- Click Save on the preview to set the next due date on these Features.

SOR Item Lookups

The SOR Item Lookups folder contains four libraries:

- Schedule - for grouping SORs for reporting, filtering, Bills of Quantities and applying overriding Cost Codes
- SOR Group - for putting together SORs which are used together to raise a Job
- SOR Bookmark - for book marking the lookup list
- Units of Measure - the same library as in Feature Lookups

And five utilities:

- SOR Item Rate Uplift - to uplift the Target Rate
- SOR Item Quantity Calc - to provide an Estimated Quantity for SORs
- Import utilities - for SOR Items, SOR Lookups and Maintenance Regimes.

Schedule

The Schedule lookup contains a list of Schedules that may be applied to the SORs in the SOR Item form. Schedules provide filtering items and reporting tools. Bills of Quantities, when they are prepared for Contracts, will split SOR Items up by Schedule. Schedule is used to define work that will carry an overriding Cost Code - see Overriding Cost Codes in the Asset Register manual section.

To create a Schedule:

Code:	Up to four alphanumeric characters
Name:	Up to 30 characters
Device Data Key:	Optionally specify a Data Key to restrict which Users will have this lookup available on a mobile device.
Fee Work Category:	(Administration Fee Recovery module) Select a Fee Work Category from the drop down list. The drop down list references the Fee Work Category lookup **Finance and Budgets\Administration Fee Recovery** **Note:** This field will not be visible if the Administration Fee Recovery module is not present

SOR Group

The SOR Group provides a short cut for producing standard Jobs by providing all the necessary SORs as a Group.

Groups can be used when creating Jobs - from the Jobs form, from Defects (Condition Survey) and from Enquiries (Customer Services).

SOR Group Code:	Up to four alphanumeric characters
Name:	Up to 30 characters
Notes:	An optional free text field

Click on the 'Detail' button to display the SOR Group Item form.

Items are numbered within the Group, beginning with 10 and incrementing in 10s. You may alter the number if you wish.

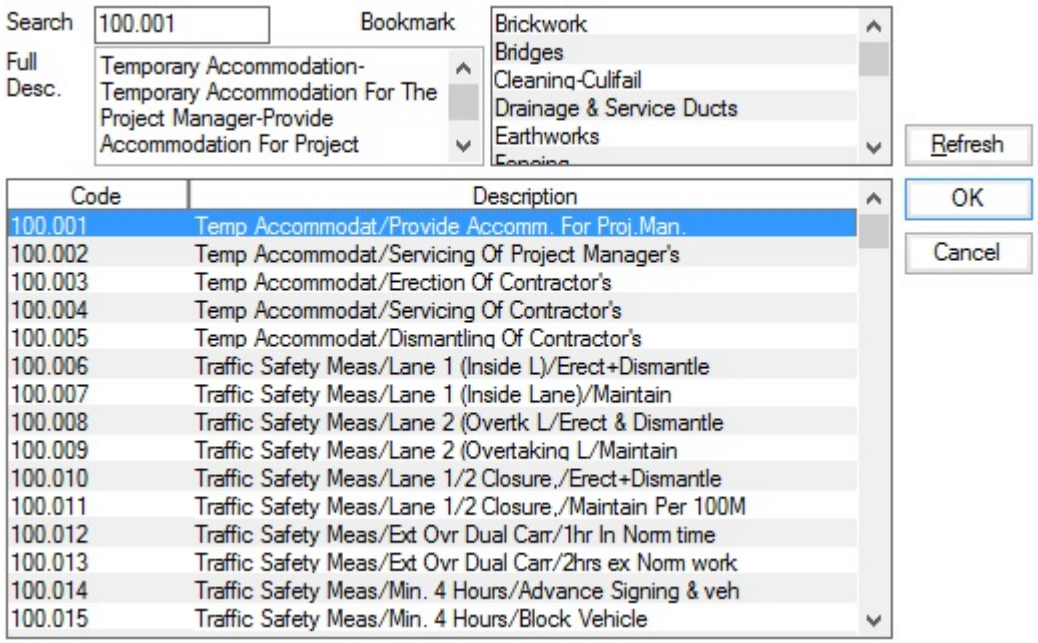
Enter (or select from the pick list) an SOR Item.

The pick list references the **SOR Item lookup.**

Save the record. A new blank form is displayed for the entry of the next SOR in the Group. Enter all the Required SORs.

SOR Bookmark

Book marking the SOR list provides a means of 'jumping' directly to the first SOR Item in a range, in the Lookup list. Bookmarks created in the SOR Bookmark lookup are displayed in the bookmark section of the Lookup list. Double click on a bookmark entry to move the selection to the SOR defined in the Bookmark Lookup.



Bookmarks therefore depend on the SOR coding system providing logical groupings of related SORs in the lookup list.

To create a bookmark:

Code:	Up to four alphanumeric characters
Name:	Up to 30 characters
SOR Item Code:	Enter (or select from the pick list) the SOR Item this bookmark should 'jump' to.

Unit of Measure

The Unit of Measure lookup should contain a list of all the Units of Measure that will be required within Confirm. The library can be added to as units become necessary.

The list would usually comprise the standard metric measures such a Metre and Square Metre, an Hour - for hourly paid work, a Pound (£) for raising work for which a price has been quoted and a Number for counting items.

Code:	Up to four alphanumeric characters
Description:	Up to thirty characters
Rate Uplift:	Checked by default, to indicate that Items priced using this measure (e.g. - per Square Metre), may be uplifted when a Rate Uplift is applied. **Note:** usually only one item is NOT checked for Rate Uplift: the Unit of Measure for a currency unit. An SOR item representing a unit of currency, which is used to directly apply a value to work, should not suddenly acquire a greater value.
This Unit uses:	Check these boxes if you wish to used the relevant components to enter measurements. If you checked Length and Width for the Unit 'Square Metre' for instance - you would be required to enter Length and Width when entering the Measurements for a Job. If you prefer to work directly in Square Metres (and not Length and Width) then do not check these boxes.

SOR Item Rate Uplift

The SOR Item Rate Uplift provides a utility for batch up rating the Target Rate entered in the SOR item library.

Note: This utility is only for the Target Rate - Contract Rates have a separate utility for batch up-rate.

To run the uplift:

1. Enter the percentage rate uplift.
2. In the lower section of the form (under the grey line) you may restrict the uplift by specifying the SORs in the filter. Click on OK to display the preview. The SORs will be displayed, with the old, and new, rates. Save the preview to carry out the uplift.

SOR Item Quantity Calc

The Quantity calculation will be based on SORs used on Jobs that are now archived. The filter allows a selection to be made from archived Jobs.

Complete the required fields in the filter, and click on OK to view the Preview. The order in which the Preview will display the information can be altered in the filter by selecting from the Sort Order drop down list. Save the preview to include the results as Estimated quantity on the SOR Item form.

The Estimated Quantity calculation can be re-run, with different parameters in the filter, at any time. Saving the preview will again enter the results on the SOR Item form, overwriting the result of a previous calculation.

Note: the Estimated Quantity entered against an SOR Item in the SOR Item library will appear against that SOR Item if it is included on the BoQ of a Contract.

Import utilities

The Import utilities provide the tools for importing text files. The method for setting up the import files is described in the Import Specification.

Click on the appropriate Import utility, and enter (or select from the pick button) the path to the import file location, for each file required. Not all of the files are always required. If information is already in the libraries then the library file can be omitted. For instance - An SOR Item import would omit the Schedule file if the Confirm Schedule library already contained all the Schedules referred to in the SOR Item file.

Click on OK to run the import utility. A preview will be displayed, indicating whether all the records can be successfully imported. If a record cannot be imported, the final column of the record will indicate what the problem is. The import can be continued, but the erroneous record(s) will be omitted from the import.

Save the Preview to carry out the import.

The import would usually be carried out in the following order:

- Import SOR Items - this can include files for Schedule and Unit of Measure
- Import Maintenance Regimes - this can include a file detailing Weekly occasions of work.
- SOR Lookups - for importing SOR Groups, this import can be carried out at any stage after import of the SOR Items.

These Imports may be carried out to populate an empty database, or to add to already existing records, providing Codes are unique. SOR, Regime and SOR Group records carrying codes already existing in the database will be rejected - existing records cannot be overwritten.

Note: Import Specification provide detailed information on all Import Specifications used throughout Confirm.

Maintenance Lookups

Maintenance Lookups contain libraries of information for Routine and Non-Routine work.

- The Price Factor library will need to be populated in order to set up Contracts or raise Jobs.
- The Action Officer library will need to be set up to provide a link a with Users, and set an Action officer for Jobs
- Period and Week libraries set up the work year for Routine Work
- Follow-up, and Job Status are linked through with Priority to set parameters for Jobs.
- Non Working days set the days to be left out (because they are Bank Holidays for instance) from calculation of 'working days' for a Follow-up'

Priority

The Priority library provides the means of linking Status, Price Factor and Follow Up to create the starting point, and proposed duration, for a Job. One Priority is set as the default, providing a new Job with a Price Factor, and its first Status. An estimated completion for the Job may also be calculated based on the Follow Up entered in the 'Completion' field (if the Contract Management System Settings allow it).

Priority Code	Up to four alphanumeric characters.
Dead	If a Priority is flagged as dead, this will prevent this Priority from being selected interactively by a user creating or updating a Job (or Defect).
Name	Up to 30 characters.
Notes	Free text to supply more information about this Priority.
Status	Enter (or select from the pick list) the status for this Priority. The pick list references the Status Lookup.
Price Factor	Select the Price Factor for this Priority. The drop down list references the Price Factor lookup.
Completion	Select a time-scale. The drop down references the Follow Up lookup. **Note:** When raising Street Works Notices from Jobs, Confirm does NOT count the current day in the duration calculation for the Work Type. The Completion Follow Up should therefore be set one day shorter than normally required. E.g. a Minor Works is normally 3 Working Days which therefore requires a 2 Working Day Follow up.
Device Creation of Orders	Select from: 'Do Not Create' - do not create an Order for Jobs with this Priority. 'Group but do not Commit' - group the Jobs with this Priority onto an Order but do not commit the Order. 'Group and Commit' - group the Jobs with this Priority onto an Order and commit. 'Do not group and do not commit' - each Job with this Priority will be placed on it's own uncomitted Order.

	'Do not group but commit' - each Job with this Priority will be placed on it's own committed Order.
Device and Web Data Key	Optionally specify a Data Key to restrict which Users will have this lookup available on a mobile device or via Confirm on the web. **Note:** For mobile devices, this lookup will still be transferred, it will simply be hidden from the User when logged in.
Urgency	(Street Works Initiation module) This field can be used to automatically trigger the creation of Street Works Notices from Jobs. Refer to the **Street Works Initiation from Jobs** help section for more information.
Raise a Defect Job	(Condition Survey module) This is checked by default for a new record, and will set the 'Raise Job' flag on the Defect automatically when this Priority is selected for the Defect. Uncheck this for Priorities in which a Job will not be automatically raised from the Defect. This setting is also used when uploading Defects from a device to tell Confirm if a Job should be raised. **Note:** Confirm will ignore this setting if a Contract, Cost Code or Items are supplied with a Defect imported from a device. A Job will be raised so that this information is not lost.
Ranking Order	(PMS Treatment Selection - Automatic module) Enter a ranking which will be used to when running the Budget Optimisation Report. Confirm will allocate available funds to all priority 1 treatments before it proceeds to look at priority 2 and so on.
Scheduling Priority	Enter a ranking which will be used to when running Smart Scheduling. Confirm will allocate available Resources to priority 1 Jobs before it proceeds to look at priority 2 and so on.
Nominal Value	(Applicable for **Defect Priority Calculation** in ConfirmConnect® only) This field indicates the numeric value for a defect priority. This should be greater than or equal to its Minimum and less than its Maximum. Valid Range: 0.01 till 9999999.99 (both values inclusive). **Note:** Nominal Value is required for Defect Default Priority. If not populated than Default Priority won't be adjusted automatically.
Minimum/Maximum	(Applicable for **Defect Priority Calculation** in ConfirmConnect® only) These fields specifies the range of a defect priority. Maximum is un-editable and is derived from the minimum of next priority if available. Valid Range: 0.01 till 9999999.99 (both values inclusive).

Price Factor

A Price Factor will define the factors affecting the cost of work under the Contract. By defining Price Factors, an SOR Item can carry different prices under the Contract, based on the Price Factor.

The Price Factor lookup already contains one Price Factor: R - Routine Maintenance, which is used in the Routine Maintenance Priority.

Price Factor Code:	Up to four alphanumeric characters
Name:	Up to 30 characters

Follow Up

The Follow Up library contains a list of time-scales which will be used to calculate dates for the progression and completion of various items in Confirm e.g. Jobs, Street Works and Enquiries.

Confirm, by default contains one Follow Up 'D1 - One Day', which is used in the Routine Maintenance Priority, and in System Settings where a Follow Up is required.

Follow Up Code:	Up to 4 alphanumeric characters.
Name:	Up to 30 characters.
Number of Months:	Up to 4 numbers. Supply the number of calendar months to calculate the date. This will take into account where the literal date would be incorrect i.e. a one month follow up from 30th January would become 28th February and not 30th February. **Note:** If the Follow Up is in use by a Condition Survey Inspection Type then it will not be possible to alter the months, days or hours fields. **Condition Survey\Condition Survey Lookups**
Number of Days:	Up to 4 numbers. Number of days will be counted sequentially, including weekends and Non Working Days, unless 'Working Days' is checked
Number of Hours:	Up to 2 numbers, to 2 decimal places. Minutes are represented as decimal fractions of an hour. So 30 minutes should be entered as 0.50. Hours will be counted sequentially through 24 hours per day, unless the start and end times for the working day have been set in the General System Settings.
Working Days:	Check this to show that the 'Number of Days' excludes weekends and dates entered in the Non Working Days lookup. This field is disabled if a 'Number of Months' is supplied.

Non Working Days

The Non Working Days lookup lists the dates that should be excluded from date calculations e.g. followups and Overrun calculations. Weekends are automatically excluded so do not need to be entered in the Non Working Days library.

Non Working Date:	Enter the date.
Name:	Up to 30 characters

Action Officer

Action Officers have responsibility for certain actions carried out within Confirm. For instance: Jobs are assigned to Action Officers, and each stage (Status) of the Job's life is associated with an Action Officer.

Action Officers can be linked to Users, so that when a User logs in to Confirm they are recognised as a particular Action Officer. Action Officers need not be users - they can be created independently of User logins.

Code:	Up to four alphanumeric characters
Inactive:	Tick this to prevent new records from being assigned to the current Action Officer. Confirm will not allow an Action Officer to be 'Inactive' if it is used on the Enquiry Subject or Enquiry Subject Site records. If an Action Officer needs to be active again, untick this setting. If the linked User is also 'Inactive' Confirm will request that the User is activated first before the Action Officer can be.
Name:	Up to 30 characters
Telephone Number:	(Optional) Up to 20 alphanumeric characters
External Ref.	(Optional) Up to 20 alphanumeric characters. A reference used by external systems to identify this Action Officer
Corresponds to User:	(Optional) Select a User to link this Action Officer to. By linking an Action Officer to a User, Confirm will know which Action Officer to use by default when using various entry screens within Confirm. The User ID can be typed directly into the field or the pick button can be used to search for a User to link the Action Officer to. **System Administration\Security** **Note:** Contractor Users are not able to remove the value in this field.
Work Group:	Where the Action Officer is linked with a User - the Work Group to which the User belongs is entered and the field cannot be edited. Where an Action Officer is not linked with a User - a Work Group must be selected. The drop down list references the Work Groups list. **System Administration\Security**
Enquiries Data Key:	Setting this value gives Enquiries assigned to this Action Officer additional security. Where an Enquiry is assigned to an Action Officer with this Data Key set, only Users with Data Key access to the Enquiry Subject and the assigned Action Officer's Enquiries Data Key will be able to view the Enquiry.
Inspecting Officer:	(Performance Monitoring module) Where Monitoring Batches are created automatically at Request Checking, the Action Officer associated with the last Job Status log on the Job is used to determine who should be the Inspecting officer based on the entry in this field.

Device Settings

Default Priority: (Optional - ConfirmConnect® - Condition Survey)

Enter the Priority that will be assigned to Jobs raised through the 'Fast Defect' functionality in Condition Survey on the device.

Device Data Key: (Confirm Connector)

Optionally specify a Data Key to restrict which Users will have this lookup available on the device. Please see **the Confirm Connect manual** for further details.

Note: This lookup will still be transferred, it will simply be hidden from the User when logged into the device.

Device Job Officer: (Jobs in the Field module)

Check this to set the current Action Officer as an Officer which will have 'Job' tasks sent to the device when they transfer their tasks.

Task Redirect Officer: Redirect Tasks to the selected Officer in case of absence. It is only possible to redirect to an Officer in the same Workgroup.

Note: It is possible to redirect multiple Officers to the same Officer. If the Officer has other Officers redirecting to them, it will not be possible to redirect this Officer to another. Use the Action Officer List to view any existing Officer Redirects.

Street Works Settings

Route: (Optional - Street Works module)

Select a Route. The pick list references the Site Route lookup.

Site Register\Site Lookups\Operational Lookups

Note: The Route provides a default entry for Inspection Sampling in Street Works. It is not relevant in any other context.

No of Inspections: (Optional - Street Works module)

Enter the maximum number of Sampled Programmed Inspections an Action Officer may have outstanding at any time. This limit does not include non Sampled Programmed Inspections, such as Defect Follow Up Inspections, which are already assigned to the Action Officer.

Note: Street Manager Performance Based Inspection Sampling for Category B and C will be downloaded and automatically assigned to an Officer using the following rules: -

- If the Sampled Inspection's Site is in a Route, which is assigned to one or more active Officers, then the Officer with the highest remaining number of Inspections will be allocated this Inspection.
- Should more than one Officer, have the same remaining number of Inspections, the inspection will be allocated by Officer Code.
- If the Sampled Inspection's Site is not in a Route or there are no Officers assigned to a Route, that covers the Site, then the Officer will be set to the **Sample Inspection Default Action Officer** (Confirm Web Settings).

  Note: An empty value is treated as 0 and the first Inspection allocated to the Officer is exceeding their quota.

Organisation: (Optional - Street Works module)

Enter an Organisation to provide a default entry in the 'From' field of the Street Work Notice window for this Action Officer

Note: The default is only provided where the Action Officer is linked to a User, since the identification of the Action Officer is made by reference to the User who is currently logged in.

Labour Type: (Optional - Works Management module)

Select the Labour Type for the Action Officer if they are the member of a Gang. The pick list references the Labour lookup.

Works Management\Works Costing\Works Costing Lookups

Cost per hour: (Optional - Works Management module)

This will override the Cost per hour specified in the linked Labour Type. Cost per hour on Action Officer is multiplied with Cost per hour multiplier on the Labour Type Lookup to determine the Action Officer's labour rate.

Action Officers can be assigned an area of specialism defined by Feature Groups, with the Asset Specialist module. Please see the **Specialist** section for details.

Action Officer - Specialist

(Asset Register - Asset Specialists module)

(Not used by Confirm Mobile or ConfirmConnect®)

Action Officers can be made 'Specialists'. This is defined as a list of Feature Groups they may modify. They will be able to view all Features their Work Group allows them, but they will only be able to modify those Features that are in the Feature Groups included in their 'Specialism'.

To set up Specialist Action Officers:

Select the required Officer in the Action Officer form and click on the Specialist button. The Officer Feature Group Specialist form for that officer is then displayed.

Tick the Feature Groups that this Officer should have rights to modify.

Feature Group Security must be enabled in the Feature Systems Settings by checking the 'Enable Feature Group Security' setting.

Asset Register\Feature Lookups

Note: This does not effect feature editing on Confirm Mobile or ConfirmConnect®. This would be achieved using Data Security Keys instead.

Job Status

The progress of a Job through the system will be defined in terms of Statuses. Changing the Status of a Job is to indicate that it has moved onto the next stage of its life, and that it is now available for the actions relevant to that stage. Jobs will be raised, placed on an order and committed, may

be printed, may be varied. The work will be completed, the Job paid and finally closed. These stages are set as Statuses and the systems defaults set to recognise stages that require certain actions. A Status of Payment Authorised, for instance, might ensure that the Job is included on the next Payment Batch.

The first step to setting up the process is to ensure that all the stages you may want to record are set as Statuses, and that each Status has the correct options checked.

Status Code	Up to four alphanumeric characters
Dead	If a Job Status is flagged as dead, this will prevent this Job Status from being selected interactively by a user creating or updating a Job. When filtering for Jobs on the Job screen or a report, a dead Job Status will not be found by the pick button initially but clicking Refresh will include it.
Name	Up to 30 characters
Notes	Free text to supply more information about this Job Status.
Default Follow Up	Optionally enter a follow up to indicate the period of time which would be expected to elapse before the Job should move on to the next Status. Entering a Follow up provides the basis for reporting on Jobs that have passed their Follow Up date for the Status.
Commit	Check to indicate that a Job bearing this status may be committed, or has been committed. This flags controls whether the Job can be committed or not. Jobs with statuses that do not have this flag checked cause the Order committal to fail.
Outstanding	This flag should be set for all 'Live' statuses. It is only removed for statuses that indicate the Job is closed, or can be closed.
In Progress	Indicates that work is taking place on site. When a status with this flag checked is reached for the first time, the Actual Start Date field will be set automatically from the Log Effective Date when the Job Status is updated. This field can be used to automatically trigger the creation of Street Works Notices from Jobs. Refer to the **Street Works Initiation from Jobs** help section for more information. When checked, the 'Complete' setting is disabled.
Complete	Check this to indicate that work has been completed. The date, on which a Job has the first Status bearing this flag set, will be entered as the Actual Completion date on the Job. This field can be used to automatically trigger the creation of Street Works Notices from Jobs. Refer to the **Street Works Initiation from Jobs** help section for more information. When checked, the 'Actual Start' setting is disabled.
Payment	Check this flag to indicate that Payment may be made, or that payment has been made. If the Job Status does not have the payment flag set, it cannot be included on a payment batch. **Note:** Inclusion on a Payment Batch is governed by the Payment flag, and the Contract Management Systems Defaults - see **Maintenance Management\Contract Management Lookups**

Initiate Street Works	This field can be used to automatically trigger the creation of Street Works Notices from Jobs. Refer to the **Street Works Initiation from Jobs** help section for more information.
Prevent Payment Request Authorisation	Jobs carrying a status in which the Prevent Payment Request Authorisation flag is set will not be authorised for payment through the Payment Request system.
Status Locked	Check this flag to enable the 'Data Key to Override' field. When checking this flag the 'Requires Monitoring' and 'Needs Inspecting' check boxes are cleared and disabled. The flag is unchecked by default for new Job Status records.
Data Key to Override	This field becomes active when the 'Status Locked' flag is checked. This field references the Data Security Key Lookup. The field defaults to the 'All Users' Data Security Key. Choosing a Data Security Key restricts all Jobs whose current Status is the same as the restricted Job Status. Only Users that have 'update' access to the Data Security Key, set in the User's Data Security Group, can edit the Job Status of the Jobs. If the User does not have update access to the Data Security Key the Job Status field is disabled. Updating a restricted Job Status causes the Status Notes field to become mandatory. If the Job is saved without Status Notes then a warning message will occur preventing the User from saving the Job until the Status Notes have been edited. Automatic updates of a Job's Status, including committing a Works Order, authorising a Payment Request, committing a Payment Batch, raising a Variation Order and the Archive Jobs utility, will not be affected by this field.
Needs Inspecting	Indicates that an outstanding Job with this Status needs to be included with the information exported with an Asset/Condition Survey Inspection. All Jobs assigned to an Action Officer, at a status with this option checked will be downloaded to ConfirmConnect®.
Send Jobs to Device for Officer	(Jobs in the Field module) Check this to indicate that Jobs at this Status should be exported if they are assigned to a suitable Officer. This is not available if the 'Status Locked' setting is ticked.
Include in reduced Status list on Device	(Jobs in the Field module) Check this to indicate that this particular Job Status should be available on the device in the reduced list of Statuses. This allows a subset of Job Statuses to be defined which are most commonly used on the device. This is not available if the 'Status Locked' setting is ticked. Not used by ConfirmConnect®.
Requires Monitoring	(Performance Monitoring module) Jobs carrying a Status with the 'Requires Monitoring' flag set will be available for inclusion in a Performance Monitoring Inspection Batch. See 'Performance Monitoring' for more information on Monitoring Non-Routine Work.
Available to Contractor	(Contractor Access module)

This flag governs whether the Status is available to the Contractor to use, when accessing the Jobs through the Contractor Access module.

A Contractor user may see any Job that is assigned to their Contractor regardless of Status, but can only choose Statuses that are 'Available to Contractor'.

This flag is also the trigger for various Validation processes. Please refer to the **Job System Settings** on page 45 section.

See 'Contractor Access' for more information on working with Jobs.

Can be Scheduled (ConfirmWorkzone®)

Only Jobs at a Status that has this flag ticked will be available for scheduling in ConfirmWorkzone®. This flag does not affect Jobs that are already scheduled.

Export Jobs to Contractor (Contractor Access Agent module)

This flag is only available when 'Available to Contractor' has been checked.

Check this to allow the Contractor Access XML Agent to export Jobs with this Job Status.

Import Contractor Quote (Contractor Access Agent module)

This flag is only available when 'Available to Contractor' has been checked.

Check this to allow the Contractor Access XML Agent to import a job quote for an existing Job (that is: allow a contractor to set the Job Items).

Send Jobs to Device for Gang (Jobs in the Field module)

If a Job is set to this Job Status, and is allocated to an appropriate Gang, the Job can be transferred to the mobile device as a 'Job' task.

This setting is only available if the 'Available to Contractor' setting is ticked and the 'Status Locked' setting is not ticked.

Note: If the Job Status has both **Send Jobs to Device for Officer** and **Send Jobs to Device for Gang** are set then only the Gang will see the Job.

Enquiry Status (Customer Service module)

You may set an Enquiry Status, which will be set on the linked Enquiry when the Job achieves this Job Status. The Enquiry Status Notes will be annotated to indicate which Job Status has been set on the linked Job and the Job Number.

Select the linked Enquiry Status.

The pick list references the Enquiry Status Lookup.

Customer Services\Enquiry Lookups

See 'Customer Services' for more information on linking Jobs with Enquiries

Device Data Key (Confirm Connector)

Optionally specify a Data Key to restrict which Users will have this lookup available on the mobile device.

Please see **the ConfirmConnect® manual** for further details.

Note: Jobs at this status will still be sent to the mobile device. Only the list of available Job statuses is restricted when the Device Data Key has been specified.

Note: A history of changes made to Job Status records will automatically be recorded. Click on the History button to see the full Entity History Report for the current record.

A Standard Status library

The following Statuses will serve the needs of most Asset Maintenance scenarios for Non Routine Work:

Code	Name	Com	Comp	Pay	O/s	Insp	Mon	Cont	Prev Auth
J10	Job Raised	X			X				
J20	Work Committed	X			X			X	
J30	Order Printed	X			X			X	
J40	Variation Committed	X			X			X	
J50	Contractor Completed	X	X		X	X	X	X	
J60	Payment Authorised	X		X	X				
J70	Partial Payment Committed	X			X			X	
J80	Job Closed	X	X	X					

You will also need the following Status where you will want to carry out Variations on Price:

Code	Name	Com	Comp	Pay	O/s	Insp	Mon	Cont	Prev Auth
J45	Price Variation Committed	X	X	X	X				

This Job Status will be allocated to those Jobs that have already been paid and are included in a committed variation on price.

You may also want to include the following Status where Jobs will be archived without being committed or paid:

Code	Name	Com	Comp	Pay	O/s	Insp	Mon	Cont	Prev Auth
J90	Job Archived Unpaid	X							

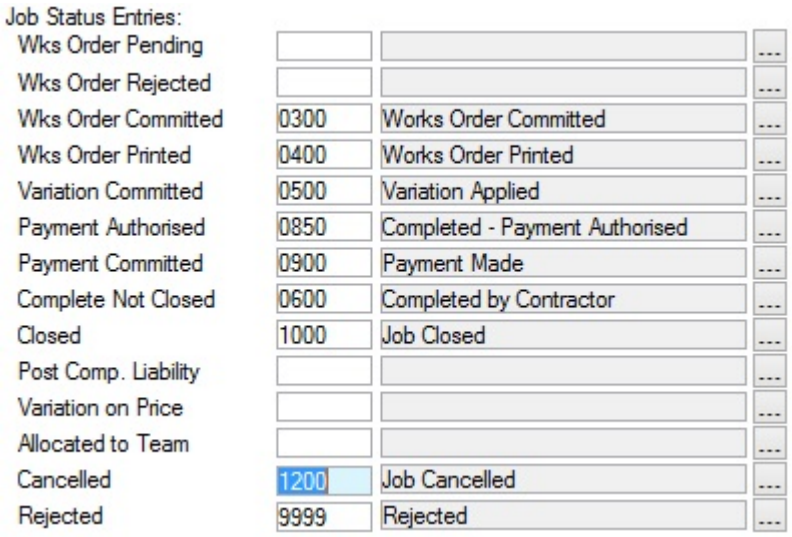
You will need to assign this status to (uncommitted) Jobs that are to be archived.

Note: The four right-hand columns are for check boxes which relate to the: Condition Survey module (Insp), the Contract Monitoring module (Mon) and the Contractor Access module (Cont). Where these modules are not present - the checkboxes can be left blank.

Linking Statuses to System Defaults:

Statuses will only work correctly if they are linked to the system defaults to indicate what their intended function is. The following is an illustration of the way in which some of the statuses in the above table of standard statuses should be entered in the Contract Management System Settings:

Maintenance Management\Contract Management Lookups



See **Maintenance Management\Contract Management Lookups** for more information on linking Statuses to System defaults.

Job Alert Type

(Job Alerts Module)

Alerts can be configured to send Job details to a selected person/people triggered by the parameters set in an Alert Type.

See **Alerts** manual for more information.

Period

The Period library is already populated with 13 Periods. These cannot be added to, or deleted. The Periods are for use in Routine Work. They identify the Periods given in the Maintenance Regime form, and give the tools for linking work Periods with Finance Periods

The Name, and Short Name can be overwritten to identify the Periods. So Period 1 might be re-named: January, with the Short Name JAN.

If only 12 periods are used for Routine Work - then the thirteenth Period can be re-named as 'Not Used'

Week

The Week Library is already populated with 53 weeks, numbered from 1 to 53. Each Week is designated a Period so that four weeks fall into each of the 13 Periods, beginning with Weeks 1 to 4 in Period 1.

Weeks can be renamed if necessary.

If only 12 Periods are used, then the 53 weeks need to be redistributed so that no weeks fall into Period 13. To do this some weeks will need to be moved from the Period they sit in by Default. To do this, scroll to the relevant week - and re-set the Period by selecting the correct Period for this week from the Period Drop down list

The Period Drop down list references the **Period lookup.**

Note: Changes to the Week to Period relationship can only be made prior to entering, or importing Regimes.

User Notes - Weeks and Periods for a 12 Period set-up

The Period Lookup provides 13 Periods for Routine Works. The Week Lookup provides 53 Weeks. The default set-up if for four Weeks in each Period, with Week 1 being the first week in Period 1. The 53rd week is in Period 13. For a 13 Period set-up this default can be left.

Where 12 monthly Periods are required for Routine Work, the Weeks will have to be redistributed into the first 12 Periods.

The Period and Weeks libraries should be set-up prior to the entry (or importation) of Maintenance Regimes, and should not be changed subsequently. So the distribution of Weeks to Periods should not be done on the basis of the distribution in any particular year since this will be superseded in the next year.

A simple distribution, which everyone can understand and work with, is best. Something like:

Week Number	Week Name	Period Number	Period Name
1	Week 01	1	January
2	Week 02	1	January
3	Week 03	1	January
4	Week 04	1	January
5	Week 05	2	February
6	Week 06	2	February
7	Week 07	2	February
8	Week 08	2	February
9	Week 09	3	March
10	Week 10	3	March
11	Week 11	3	March
12	Week 12	3	March
13	Week 13	3	March

Week Number	Week Name	Period Number	Period Name
14	Week 14	4	April
15	Week 15	4	April
16	Week 16	4	April
17	Week 17	4	April
18	Week 18	5	May
19	Week 19	5	May
20	Week 20	5	May
21	Week 21	5	May
22	Week 22	6	June
23	Week 23	6	June
24	Week 24	6	June
25	Week 25	6	June
26	Week 26	6	June
27	Week 27	7	July
28	Week 28	7	July
29	Week 29	7	July
30	Week 30	7	July
31	Week 31	8	August
32	Week 32	8	August
33	Week 33	8	August
34	Week 34	8	August
35	Week 35	9	September
36	Week 36	9	September
37	Week 37	9	September
38	Week 38	9	September
39	Week 39	9	September
40	Week 40	10	October
41	Week 41	10	October
42	Week 42	10	October
43	Week 43	10	October
44	Week 44	11	November

Week Number	Week Name	Period Number	Period Name
45	Week 45	11	November
46	Week 46	11	November
47	Week 47	11	November
48	Week 48	12	December
49	Week 49	12	December
50	Week 50	12	December
51	Week 51	12	December
52	Week 52	12	December
53	Week 53	12	December

In this example, Periods have been renamed with the month name, and Weeks have been redistributed so that there are 4 weeks in Period 1, 4 weeks in Period 2 and 5 weeks in Period 3. This 4-4-5 pattern is repeated to the end of the year. Period 12 has week 53 in it but since work would not normally be scheduled into week 53, this week will be effectively ignored and need only be used when an extra week is required before the New Year can start.

Note: the distribution of Weeks to Period must be set up before inputting Maintenance Regimes, and should not subsequently be altered.

Linking with Finance Periods

Finance Periods are created for each Year, and will have specific start and end dates set. Each Finance Period is then linked to a Work Period by selection from the 'Period' drop down list in the Finance Period form. There must therefore be the same number of Work Periods as Finance Periods. This is done so that Routine Works scheduled into a particular Work Period, may be identified as belonging in a particular Finance Period for Ordering and Payment purposes.

In any year, Finance Periods may not match with the work Periods in terms of the number of weeks in the Period. January may be a 5-week month in 2001, but the Work Period January is set to 4 weeks. Finance Periods are intended to reflect what is paid during that period, so in the Finance Period January 2001, the Routine Work scheduled for work Period January will be ordered and paid. At the end of the year, the total due for the scheduled works will have been paid.

Contacts

The Contacts library contains the details of regular Customers. They can then be entered quickly into the Customer Enquiry form by selection from a pick list referencing the Contact library.

Where the Customer Accounts module is present, all Customers in the Customer Account library are added automatically to the Contacts Lookup.

Note: The Contact library is intended to hold the details of those who regularly raise Enquiries. You do not have to have entered a Customer in the Contacts lookup in order to enter their details into the Customer Enquiry form. Nor will entering them into the Customer Enquiry form add them to the Contact list.

Any fields for which there is no information can be left blank.

Address: The Address field references the Property detail of the Site library, if the CS - Address/Property link module is active.

Site Register\Site - Other button

Contact Reference:	An optional free text field.
Customer Type:	Select from the drop down. The drop down list references the Customer Type Lookup in the Customer lookups. **Customer Services\Customer Lookups** The Customer Type associated with this Contact will be entered by default into the Customer Enquiry form if this Contact is selected as the Customer.

Customer Type

The Customer Type library defines the types of Customer.

Code:	Up to four alphanumeric characters.
Description:	Up to thirty characters.

Job Type

Job Types categorise Jobs and set rules which will be used when Jobs of that type are created and progressed. For example the Job Type specifies if and how Street Works Notices should be raised when Jobs are created.

Code:	Supply a Code for this Job Type - up to 4 characters.
Name:	Supply a name for this Job Type. This name will appear in the Job Type drop down list.
External Description:	When a Notice is created against a Job the External Description entered here is set in the Description of the Notice. If the External Description is left blank then the Job's Description is used instead.
Default Traffic Management:	If this Job Type is selected on a Job, the Traffic Management field on the Additional tab is populated with this default Traffic Management.
Street Works Noticing:	This field can be used to automatically trigger the creation of Street Works Notices from Jobs. Refer to the **Street Works Initiation from Jobs** help section for more information. If this functionality is not required then this field should be set to 'None Required'.
Default Hazard Type:	(Module 2310 - Hazard Awareness) Select the Hazard Type to be assigned to Jobs created with this Job Type.
Link Multiple Jobs:	If this is ticked, and an initial Notice is being created for a number of Jobs on one Order, one Notice will be created for the Order and linked to all the Jobs. This only happens if all the Jobs have the same Job Type and the Jobs are on the same Site.
Excavation Required:	Check this to determine the Notice Excavation Type when raising Notices from a Job of this Job Type.
Dead:	Check this to prevent new Jobs from being raised with this Job Type.
Street Works Duration:	Set the value for defaulting the duration of the Automatic Notice Permit being created while scheduling the Job from ConfirmWorkzone. This will be enabled

if Street Works Notice is selected as either 'Automatic Noticing' or 'Initial Notice Manually Raised'

Hazard Type

(Module 2310 Hazard Awareness)

The Hazard Type Lookup is used to add, edit and delete Hazard Types. In addition attributes can be applied to a Hazard Type from this lookup which will be applied as Job Attributes.

Code:	Supply a Code for this Hazard Type up to 6 characters.
Name:	Supply a name for this Hazard Type. This name will appear in the Hazard Type drop down list.
Description:	Supply a description for the Hazard Type.
Mandatory Photo on Start:	When checked, in ConfirmConnect® taking a Photo before starting the Job is now mandatory. When unchecked taking a Photo is optional before starting the Job.
Mandatory Photo on Complete;	When checked, in ConfirmConnect® taking a Photo before completing the Job is now mandatory. When unchecked taking a Photo is optional before completing the Job.
Dead:	Check this to prevent new Jobs from being raised with this Hazard Type. It is not possible to check this if the Hazard Type is currently assigned as the Default Hazard Type on one or more Job Types.

Note: An NCA Hazard Type will have been created automatically by the system, and is used to set the Default Hazard Type for new Job Types. It is therefore not possible to delete this Hazard Type, although it can be renamed.

Attrib button

(Module 2310 Hazard Awareness)

Click on the Attrib button to add Operational Attributes to the Hazard Type. These define the extra data that should be recorded for a Job with this Hazard Type. Once Attributes have been defined, the Attrib button on the Job screen will be enabled when the Hazard Type is selected.

Attribute:	Select the Operational Attribute that is to be recorded.
Display Order:	Set the order in which the Attributes will be displayed on screens where they appear.

Note: Adding and removing Hazard Type Attributes will not affect existing Jobs with this Hazard Type already assigned.

Operational Attribute Types

(Modules 0510 - Defect Attributes, 0715 - Job Attributes, 1416 - CS - Extended Attributes)

The Operational Attribute Type lookup allows user defined Attribute Types to be set up to store Text, Number, Date and Pick List values against records. These Attribute Types may be used for the following types of operational records:

- Enquiry Attributes (Module 1460). Default Attributes for an Enquiry are specified on the Enquiry Subject.
- Defect Attributes (Module 0510). Default Attributes for a Defect are specified on the Defect Type.

- Job Attributes (Module 0715). Default Attributes for a Job may be specified on the Hazard Type if Module 2310 is present.

Code:	Supply a code of up to four characters.
Name:	Supply a name for this Attribute which will be displayed to the user.
Description:	An optional, free text field. This value is used in ConfirmConnect® to give further information about the Attribute Type in order to aid the setting of the Value.
Parameter Type:	Select from:
Text:	Select this to provide a free text field for the entry of values. Selecting 'Text', provides the 'Must change Default' check box. Check this to force an entry to be made against this Attribute type. For a Text entry you must also specify default text (what will be entered against the Attribute until specific text is entered).
Date:	Select this to provide a date field for the entry of values. Selecting 'Date', provides the following checkboxes: 'Must change Default' - check this to force an entry to be made against this Attribute type. 'Default to System Date' - check this to enter the current date when this attribute is set.
Number:	Select this to provide a number field for the entry of values. Selecting 'Number', provides the following checkbox: 'Must change Default' - check this to force an entry to be made against this Attribute type. And Default Value - enter the value to be entered by default when using this Attribute. Min and Max fields - you may limit the values that can be entered by entering minimum and maximum values.
Pick:	Select this to set up a Pick list from which the user must select a value. Selecting 'Pick' provides the following checkbox: 'Must change Default' - check this to force an entry to be made against this Attribute type. You must also provide a default value for the pick list. To enter values for the Pick list, click on the Detail button and use the Enquiry Attribute Value form to enter a code and a description for each of the values to be included in the pick list. '**Priority multiplier on ConfirmConnect®**' in Attribute Value form is a numeric multiplier value which is used to calculate the defect priority in ConfirmConnect®. Valid Range for priority multiplier: 0.01 till 9999999.99 (both values inclusive). If this value isn't populated than the corresponding attribute won't be considered for **Defect Priority Calculation**.

Note: Pick attributes can be configured to allow multiple pick values to be selected from within Confirm Web Lookup Manager.

Category: Select the Category under which the Attribute Type will be shown in Confirm-Connect.

Note: Operational Attribute Categories will only display for Jobs in Confirm-Connect. Other task types will continue to show all attributes in a list.

Must Change Default: Select this to make an Attribute mandatory. This means that Confirm will prevent the save of an Enquiry, Defect or Job record where the Attribute is still set to its Default Value.

ConfirmConnect will prevent the sending of a task update if the attribute is set to the default value.

ConfirmConnect will ignore the attribute if the value is blank. Instead, the existing value will be retained when uploaded to Confirm. This is true even when Must Change default is enabled and contains a blank value.

Mandatory on ConfirmConnect® Jobs: (0715 - Job Attributes)

Set Mandatory Job (operational) attributes in ConfirmConnect® can be used to enforce when officers must enter a value on the chosen attributes in order to progress the Job.

Mandatory, for this setting, means that if the value is blank or set to the default value, then the Officer must enter a new value.

Note: Changing the default value is enforced even when the Must Change Default option is not enabled.

When this option is set to any value, other than Off, the attribute value will be cleared on the initial download of the Job. This means the officer will not see a value in this attribute when they first open the Job.

When an option below is selected, the corresponding button on the Job form in ConfirmConnect will be disabled and the attribute values will have been cleared:

- Off - Not Mandatory. Job may progress.
- On Start - Start button is disabled.
- On Start and Resume - Start and Resume buttons are disabled.
- On Pause and Complete - Pause and Complete buttons are disabled.
- On Complete - Complete button is disabled.

For example: When "On Start and Resume" is chosen, the Attribute value will be cleared and the Start button will be disabled preventing the Job from Starting and, if the Job was previously Paused, the Resume button will be disabled because the Attribute value will have been cleared upon Starting the Job.

The officer will also see warning messages indicating why the Job may not be progressed.

Show Inline on ConfirmConnect®: (Optional)

Only valid on Pick Operational Attribute Types containing three or fewer values. When checked the Attribute Type values display on ConfirmConnect® as an inline selection instead of a Pick List.

Default Value:	This value will be used as the default value when a record is created. For a pick Attribute this defaults to 'NK' and 'Not Known' but the Code and Description may be changed.

For information on the configuration of Dependent Attributes, please see **Dependent Attributes**

Attribute Types can be marked as dead or have a Data Security Key set against them. These values can be set using the Lookup Manager in the Confirm web interface. Only non-dead attributes and attributes that a user has security access to can be added to Jobs, Defects and Enquiries.

Operational Attribute Category

The Operational Attribute Category lookup allows Operational Attribute Types to be grouped into the selected Category. By default, all Attributes will be placed into a default Category called Attributes and ConfirmConnect will still display all Attributes on the Job as a list.

Once a second Category has been created with one or more Attributes set to the new Category, ConfirmConnect can then display the Category groups in place of the list of Attributes, on the Jobs page. When each Category is tapped, a list of all Attributes, applicable to the chosen Category, will be displayed.

Note: Operational Attribute Categories will only be shown on the Attributes panel for Jobs in ConfirmConnect, where the Attributes currently on the Job are within more than one Category. Other task types will continue to show all attributes in a list, as well as the list shown when Attributes are Added to a Task (including for Jobs).

Code:	Supply a code of up to four characters.
Name:	Supply a name for this Attribute Category which will be displayed to the user.
Display Order:	You may assign a display order to the Attribute Category. The lower the number, the higher up the lookup list the Attribute Category will appear. Where several Attribute Category are assigned the same sort number, they will sort alphabetically by Attribute Category Name within the sort number. **Note:** Categories with no Order number assigned will appear first in the list, followed by those with Order numbers in the assigned order.

Workstream

Jobs can be placed in different Workstreams, to allow them to be more easily scheduled in ConfirmWorkzone.

The Workstream of a Job can be set on the Job screen in the Confirm web interface.

In ConfirmWorkzone a User's preferences are configured so that Jobs in certain Workstreams are visible to them. It is also possible to filter by Workstream using the text filter in ConfirmWorkzone.

A Workstream may optionally be associated with a Contractor.

Job Seed Numbers

Jobs are sequentially numbered, drawing the next available number from the pool of numbers held as Seed numbers. Each Work Group containing Users responsible for raising Jobs will need a range of Job Seed numbers from which to issue the Jobs. These ranges are set in the Job Seed Numbers.

Jobs: This Range - Current:	Enter the first number in the Range. **Note:** this number will increment as Jobs are issued within this Work Group. The 'Current' number is therefore the last number that was issued.
Jobs: This Range - Maximum:	The last number in the range.
Jobs: Next Range:	These fields can be used to issue another, non-contiguous, range of numbers. This can be done at a later date if it becomes necessary.

Job System Settings

Priority:	The Priority entered here will provide the default Priority for Jobs. Select a Priority from the drop down list. The drop down list references the **Priority lookup**.
Check for Duplicates:	Check this to enable the Job duplication check. Jobs will then be checked to determine whether another live Job (i.e. one at a Status checked as 'Outstanding') for the same Site and Feature exists. Where duplicate Jobs are found these are displayed as a lookup list, and may be selected and viewed. Duplication check operates for Jobs, Order Jobs, Job raised in the Defect screen, Jobs raised from the 'Works' menu-item of the Action button on the Customer Enquiry screen.
Activity Alert:	(Activity Log module) This flag will warn users that 'proposed' Activities exist on the Feature for which a Job is being raised. If the flag is checked, then a list of all 'Proposed' Activities will be displayed to the User as soon as the Feature details have been entered into the Job form.
Decimal Places for Rounding Unit... :	Select 1, 2, 3 or 4 decimal places. This will be used for SOR Target Rates, in the SOR Item library and Contract Rates in the Contract Rate library.
Append Defect Type Name to Job... :	Check this to enter the Defect Type name, as well as the Defect description, into the Job Description field when raising a Job from a Defect.
Job 'Est. Completion' name:	Enter here the text to appear against the Est. Completion date field on the Job form and the Order Job form, and on the Order print.
Job Partial Payments Flag Default:	Check this to set the Partial Payment flag on Jobs by default when a new Job (or Order Job) form is opened.
Set Est. Completion Date When Job... :	Check this to set the Estimated and Target Completion Dates (Job form - additional tab) when the Job is raised. The dates will be set by applying the 'Completion' Follow Up from the Priority of the Job to the Entered Date. **Note:** When raising a Job from an Enquiry, the Estimated and Target Completion dates may be set based on the Enquiry Logged date. This is dependent on a setting on the **Customer Services System Settings** screen. If this option is not checked, then the Estimated and Target Completion Dates are blank when the Job is raised (unless manually supplied).

Additionally, if this setting is not checked, then the Estimated and Target Completion Dates are calculated on Committal of the Job based on the Committal date and the 'Completion' set for the Priority.

Modify Features on Committed Jobs:

Check this to allow the Site and Plot to be changed for another on a Committed Job. The Status Log will record the details of the original Site and Plot.

The new Feature must be in the same Contract Area as the old one.

Note: Where the Contract uses Site Rates users should be aware that changing the Feature for one in another Site may affect the SOR rate for the Job.

Estimated Start Date Editable on Committed Jobs:

Check this to allow the Start Date on Committed Jobs to be edited.

Note: The Start Date on Archived Jobs remains uneditable.

Cost Code protected on Job and Order Items:

Check this to prevent the Cost Code on Job SOR Items, Order SOR Items, Payment SOR Items, and Variation SOR Items from being modified. All SOR Items will inherit the parent Job or Order Cost Code, and if the Cost Code on an Uncommitted Job or Order is changed, then all the Items will be assigned the new Cost Code automatically.

Maintenance Management\Job

Cost Code protected on Committed Jobs and Order Jobs:

Check this to prevent the user changing the Code Code on Committed Jobs and Orders.

Maintenance Management\Job

Add Jobs to Committed Orders:

Check this to allow Uncommitted Jobs to be added to a Committed Order. When this option is switched on the 'Add Job' button will be visible on the Order Header screen for Committed Orders.

Maintenance Management\Add Job Button

Job Status Validation Stylesheet:

Confirm can be configured with a custom written XSL Stylesheet that is processed against the data entered for a new Job or when a Job's Status is changed. If the processing detects a problem with the Job then it is deemed to have failed Validation.

- If Validation fails during automated Job creation then the Job will be put into a Rejected Status. This Rejected Status must be configured from the Contract Management System Settings.
- If the Validation fails during interactive Job creation or any Status change then the Status transition is blocked and a message will be shown.

The check box should be checked to enable this Validation process, and the check box cannot be checked if the Rejected Status is not set up correctly on the Contract Management Lookup.

Maintenance Management\Contract Management System Settings

The schema for the Validation Stylesheet is custom. If this needs to be modified then users should contact Confirm and request document CHA17905.

The pick button allows the XSL Stylesheet file to be selected. This file will be loaded and stored in the database. It is possible to double-click on this box to view the stored Stylesheet. The text cannot be modified but can be copy and pasted. The Stylesheet does not need to be available on disk once it has been stored within the Confirm database.

Job Status Validation Data Source:

Confirm can be configured with a custom written Data Source that is processed against the data when a Job is entered or updated in the Job and Order Job screens. The validation occurs after the changes have been saved to the

database and will display errors and/or warnings to the user, but does not prevent any updates being made.

If a Rejected Status is specified in **Contract Management System Settings**, then a Job is automatically moved to that Status if one or more errors is generated, with the Validation Errors being entered into the Status Log. Note that subsequent Validation Errors while the Job is already at the Rejected Status will not result in an additional Status Log being created.

For details on configuring the Data Source to be used see **Validation Data Sources**

Block Jobs with no Description on...:

There are two configuration options here.

- Commit will prevent the Committal of Jobs that have no entries in the 'Description' field.
- Export to Contractor will reject or prevent the Job Status changing to any Status that has the 'Available to Contractor' option set if there is no 'Description' field.

If 'Export to Contractor' option is selected then the 'Commit' option is always automatically selected.

If the Job is blocked when it is being created then the Job will be put into a Rejected Status. This Rejected Status must be configured from the Contract Management Lookup.

If the Job is blocked during any other Status change then the Status transition is blocked and a message will be shown.

The Rejected Status must be set up correctly on the Contract Management Lookup before this Stylesheet Validation process can be used.

Maintenance Management\Contract Management Lookup

Block Jobs on Whole Site Feature with no Location on...:

There are two configuration options here for Jobs on Whole Site Features.

- Commit: Check this to prevent the Committal of Jobs on that have no Location.
- Export to Contractor will prevent the Job Status changing to any Status that has the 'Available to Contractor' option set if there is no 'Description' field.

If 'Export to Contractor' option is selected then the 'Commit' option is always automatically selected.

If the Job is blocked when it is being created then the Job will be put into a Rejected Status. This Rejected Status must be configured from the Contract Management Lookup.

If the Job is blocked during any other Status change then the Status transition is blocked and a message will be shown.

The Rejected Status must be set up correctly on the Contract Management Lookup before this Stylesheet Validation process can be used.

Maintenance Management\Contract Management Lookup

Export Job Geometry to Contractor... :

(Contractor Access XML Agent)

Check this to export geometry for jobs.

Prevent Commit of Jobs with No Start... :

Check this to prevent the Committal of Jobs that have no Start Date entered.

Include Warranty Items:

(Warranty Dates module)

	Check this to check the 'Include Warranty Items' box on the Create Jobs from Regimes filter by default.
Warranty Expiry Date Tolerance:	(Warranty Dates module) This will indicate a period of days before the expiry of a warranty during which it will be possible to raise a job (on the basis that the warranty will have expired by the time the Job is done).
Device Job future Start Date Tolerance:	(ConfirmConnect® Jobs (7030) module required) Supply a number of days which will be used by Confirm to restrict the Jobs being sent to the mobile device based on the Job Estimated Start date. If a Job does not have a Start date then it will be transferred to the device. Setting of 1 means Jobs for Today. Setting of 0 means no restriction will be applied to the Start Date.
Download Feature Conditions and Attributes with Job:	(ConfirmConnect® Asset (7020 for attributes) and/or Condition (7010) Survey modules are required) Check this to allow the updating of Feature Conditions and Attributes from a Job Task.
Default Job Type:	Supply a Job Type which will be used as a default when Jobs are created. This setting does not apply when Jobs are raised from Defects, Enquiries, Regimes or on Orders as each of these processes have their own default. This lookup references the **Job Type lookup**.
Blocker Job Type:	Prevents the Committal of Jobs carrying this Job Type. This lookup references the **Job Type lookup**.
Repeating Routine Jobs Future Period:	Supply a Follow Up which will be used to prevent Repeating Jobs from being created too far into the future. Only Allocated Regimes where the next Job due date is within the specified Future Period will get Repeating Jobs created when the Agent runs. Allocated Regimes that are not currently within this Future Period will get picked up as soon as it does fall within the period. **Note:** Changing the **Due Date Rule** on a **Regime** whilst within the period where the last Job was completed and this Future period, the next Job will still be created using the previous rule. This lookup references the **Follow Up lookup**.