Location Intelligence
Infrastructure Asset Management

Confirm®

ConfirmWorkzone

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October 02, 2026

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ConfirmWorkzone®

Overview

ConfirmWorkzone provides the ability to schedule Job or Enquiry tasks to work crews in the field quickly and efficiently using a web based interface that can be accessed via a number of browsers.

The following sections describe how to install, configure and use the ConfirmWorkzone functionality.

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Installing, Configuring and Upgrading the ConfirmWorkzone Web Service

This details the installation instructions for the ConfirmWorkzone Web Service.

Introduction

ConfirmWorkzone is a service designed to schedule and monitor Job & Enquiry tasks via a browser based client. It is a "multi-tenant" web service, which means that the web service can be used to connect to multiple databases, for example, Live and Test databases.

Installation

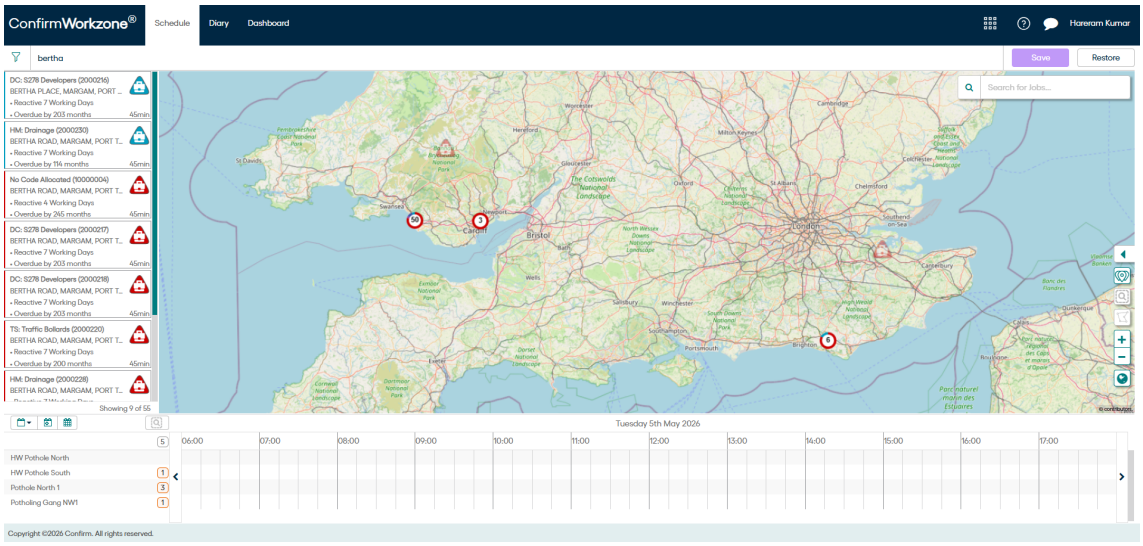
ConfirmWorkzone is included as part of the ConfirmWeb installation. See '**Installing, Configuring and Upgrading the ConfirmWeb platform**' for more information.

Using ConfirmWorkzone

This section describes the components making up the ConfirmWorkzone interface and how they are used.

ConfirmWorkzone

ConfirmWorkzone features an intuitive highly graphical interface, as shown below, that allows users to schedule Jobs or Enquiries:



The band along the top of the screen performs a number of roles.

- It allows the user to switch between the main Schedule view, the Diary view (if Cost Capture is enabled) and the Dashboard view. When scheduling Enquiries, only the Schedule option is available.
- It has an 'App Launcher' to allow other Confirm Web applications to be launched (if configured)
- It shows alerts if there are any newly committed Jobs requiring the attention of the user (Confirm-Workzone will poll the Confirm database frequently to check for these). This function is not available when scheduling Enquiries.
- It shows the currently logged in user with a drop down menu allowing the user to log out or to adjust their preferences and also allows them to select between scheduling Jobs or Enquiries. When a user first logs in, they will be prompted to populate these preferences before they can use ConfirmWorkzone.
- A Task Filter, to filter which tasks are visible in the Unassigned Tasks list and on the map.
- It has a Save button to send changes made in ConfirmWorkzone back to the Confirm database, and a Restore button to discard changes.

The remainder of the Schedule view is divided into three components, whose relative sizes can be adjusted by the user. These components are further described below.

Preferences

Preferences, accessible by clicking on the user name, allows each user to choose between scheduling either Jobs or Enquiries. They can also set which teams to view and some of the visual components of the ConfirmWorkzone interface.

Unassigned Tasks

The unassigned task list shows Jobs and Enquiries that meet the following conditions:

Jobs:

- Are not Scheduled
- Are Committed
- Have no Actual Start Date or are Suspended (Suspended Tasks have been started but are no longer available to a Work Crew)
- Have no Actual Completion Date
- Have at least one SOR Item with an SOR Type of "None"
- Are within the ConfirmWorkzone Cut off dates

Enquiries:

- At an **Enquiry Status** that is flagged as **Can be scheduled**
- Within the ConfirmWorkzone **Earliest and Latest Cut off dates**

The Unassigned Task list is sorted by due date to show the most urgent Tasks at the top of the list. The list can be filtered live by typing any text into the filter box. For Enquiry Tasks, the Due Date shown is the Enquiry's Earliest Outstanding Commitment date or, if there are none, the Enquiry followup (by) date.

Double clicking on any Task opens a screen showing more detail about the chosen Task, including its Status history, Attributes, associated Defects and any attached images and documents. Details displayed differs depending on the Task type (Job or Enquiry).

To assign a Task to a Work Crew, the user can simply drag it from the list onto the desired position on the schedule. Jobs that are started, but not assigned to a Work Crew can appear in the list, these jobs cannot be allocated to a team since they are already in progress.

Holding down the Control key whilst clicking on tasks enables multiple selection, which can then be dragged as a group to be scheduled together. This also applies to the Map and Schedule.

Only the first 100 Tasks that match the filter criteria are displayed in the list.

Map

The map reflects the content of the Unassigned Tasks list, and filtering that list applies the same filter to the Tasks (Jobs or Enquiries) shown on the map.

To assign a Task to a Work Crew, it can be dragged to the schedule from the map as well as from the Unassigned Tasks list.

Double clicking on any Task on the map opens the same detailed view as doing so from the Unassigned Tasks list.

The map also shows Tasks currently assigned to Work Crews, as well as the most recent known locations of the Work Crews.

Schedule

The bottom portion of the main screen shows the Schedule. This lists all the Work Crews of interest to the current user. Alongside each are shown the Tasks assigned to the Work Crew for the current day or week.

Double clicking on any Task on the schedule opens the same detailed view as doing so from the Unassigned Tasks list.

Right-clicking on a Task displays an option to Lock or Unlock the Task. This can be used to prevent accidental re-scheduling or unallocation/re-allocation of Tasks for situations where a Task must be performed at a particular time or by a particular Work Crew.

The schedule also shows an indicator next to each Work Crew of any Tasks that were scheduled to be carried out in the past but were not completed, so these can easily be found and actioned.

Search

The Search box allows you to perform a more general search for Jobs in Confirm that may not currently appear on the Schedule. Typing a Job number here will quickly retrieve that Job, irrespective of its current status.

If text is entered then Committed Jobs whose Description, Location, Customer Reference, Job Type or Street name include the phrases entered will be returned. If no Jobs are found that match based on these criteria then Job Items will also be searched based on their Item description, SOR Item Code and Cost Code.

No more than 10 Jobs will be returned if many match the entered criteria.

Note: The Search bar is not available when scheduling Enquiries.

Dashboard

ConfirmWorkzone also includes a Dashboard showing three standard reports so the user can easily review Work Crew performance and utilisation, as well as overall performance against service levels.

Note: The Dashboard is not available when scheduling Enquiries.

Information on how allocation data is stored can be found here: **Storing of Job Allocation Information**. This information can be used when writing reports on current and historical Job allocations.

Enquiry Workflow

Works Management Gangs are now being used as a “Schedulable Resource” and Action Officers to whom Enquiries are to be scheduled need to be set up as a Gang. There is **terminology** associated with “Gang”, which means that any meaningful term could be used to replace “Gang”.

Initial Setup

In order to use Enquiries in ConfirmWorkzone the user must first sign in and set their preferences to use Enquiries. Enquiries will then be shown if following conditions are met:

- At an **Enquiry Status** that is flagged as **Can be scheduled**
- Within the ConfirmWorkzone **Earliest and Latest Cut off dates**

Workflow

Once an Enquiry task is available to be scheduled in ConfirmWorkzone the expected workflow would be as follows:

- Enquiry is scheduled to a Gang. This is done by dragging the Enquiry to the required Gang.
- In ConfirmConnect the Officer opens the Enquiry and performs a status update by selecting an **Enquiry Status** which is set for **In Progress** to indicate that work has begun.
- The **In Progress** flag on the chosen status indicates that the Enquiry is being worked on, which prevents it from being re-scheduled. In Progress Enquiries are displayed in purple and cannot be dragged to a different time or Gang.

  Note: A refresh of tasks in ConfirmWorkzone is needed to see the Enquiry updates from ConfirmConnect.

- Once the work is completed, the Officer performs a status update in ConfirmConnect to one that does not have the **Send to Device** flag checked.
- ConfirmWorkzone shows completed Enquiries in green if they were completed today.

Additional Workflow options

In addition to the above, it is also possible to perform the following:

- The scheduler in ConfirmWorkzone can re-schedule the Enquiry up to the point where the Enquiry has been marked as **In Progress**.
- **Reassign** - In ConfirmConnect the Officer can reassign the Enquiry to another Officer. Doing so will remove the Enquiry from the current Officer's device and ConfirmWorkzone will consider the Enquiry as Completed even if the status has not changed from **In Progress**.

  Note: In the above scenario an Enquiry must have its status changed from **In Progress** to one that **Can be Scheduled** for it to be scheduleable by ConfirmWorkzone.

Officer Redirect

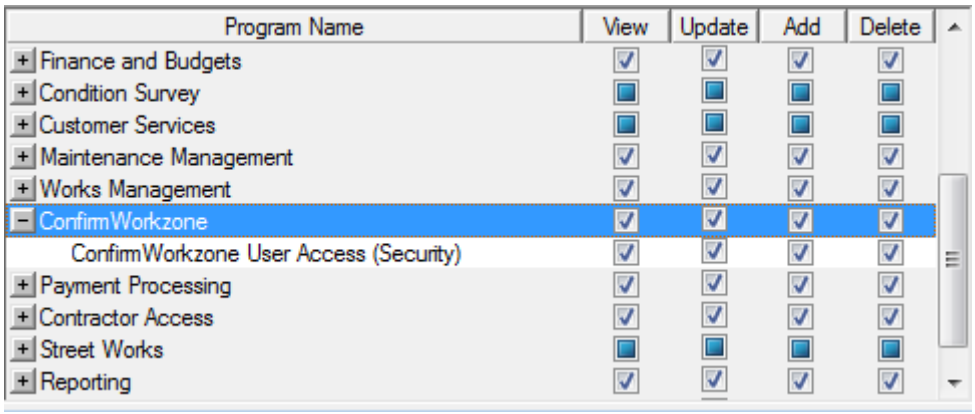
Currently ConfirmWorkzone does not indicate that the Enquiries (or Jobs) have been re-directed to another Team.

Configuring the Confirm Database

Once the web service has been installed and configured there is some configuration required in Confirm to ensure that ConfirmWorkzone can be used successfully and that the correct data is available.

Configure the ConfirmWorkzone User Security

In order for a user to be able to log in to ConfirmWorkzone, their user access and permissions needs to be set in the Confirm Client. There is an entry for ConfirmWorkzone that can be used to set view only or edit permissions.



Configure the ConfirmWorkzone Settings

There are a number of configuration settings for ConfirmWorkzone, for example to control logging and to set cut off dates to prevent large numbers of historical Tasks from being downloaded. These settings are provided in the Confirm Client under the **ConfirmWorkzone® Settings** screen.

Team/Gang Setup

All Teams/Gangs that are to be allocated Tasks will need to be setup via the **Team/Gang** lookup.

Job Status Setup

Can be Scheduled

Only Jobs at a status with the *Can be Scheduled* flag ticked are available to be allocated. This flag does not affect the visibility of Jobs that are already allocated.

Allocated Status

To allocate Jobs a specific Job status must set against the *Allocated to Team/Gang* setting in the **Contract Management System Settings** screen.

The Job Status assigned must have its *Commit*, *Outstanding*, and *Send Jobs to Device for Gang* flags ticked. When Jobs have been assigned to a Team/Gang via the ConfirmWorkzone user interface and a save takes place the Jobs' status will change to this assigned status.

In Progress Status (called Actual Start in earlier versions of Confirm)

If a Job is, or has been, at a Status that has the *In Progress* flag ticked and the Job is not currently Suspended then the Effective Date of the first *In Progress* Status Log will be used to position the Job task on the schedule grid in ConfirmWorkzone. Started Job tasks on the schedule grid will be displayed in purple.

Suspended Status

The suspended status is used to show that work on a Job has stopped, but the Job is not yet complete and may required rescheduling before the remainder of the work can continue.

A suspended status is any Job Status that does not have the *Complete*, *Send Jobs to Device for Officer* or *Send Jobs to Device for Gang* flags ticked. Suspended statuses are the same as those linked to the *Remove* button on the Job screen in ConfirmConnect. Suspended Job tasks will be displayed in light blue.

Job Dates

It is important to review the dates that are present on the Job records as these affect how the Job tasks are displayed in ConfirmWorkzone. The descriptions below outline which Job dates affect the display of Job tasks and how. With the exception of Target Completion Date a Job must be allocated to a team/gang for the date field to have any effect on its display within ConfirmWorkzone.

Target Completion Date

This date is used as the *due date* for the Job. When Job tasks are displayed in ConfirmWorkzone they are shown in due date order. It is recommended to have target dates set against Jobs so that they can be prioritised more easily but it is not mandatory.

Estimated Start Date

This date is used as the scheduled start date for the Job. When a Job task is scheduled using Confirm-Workzone the estimated start date field on the Confirm Job record is set to the date and time that were selected on the schedule grid.

The estimated start date can be set within the *Job* screen on the Confirm Client but this is not recommended as this can result in overlapping Job tasks being displayed on the schedule grid. Scheduled Job tasks are coloured dark blue on the schedule grid in ConfirmWorkzone.

Actual Completion Date

When this date is set against a scheduled Job task it is completed. The ConfirmWorkzone schedule grid will not show Jobs completed in the past. The position of completed Job tasks on the grid will be determined by the Jobs actual start and completion date and times and they will be displayed in green.

Enquiry Status Setup

Can be Scheduled

Only Enquiries at a **Status** with the *Can be Scheduled* flag ticked will be downloaded and shown to the user.

In Progress Status

If an Enquiry is at a Status that has the *In Progress* flag ticked then the Effective Date of the Status Log will be used to position the Enquiry task on the schedule grid in ConfirmWorkzone. Started Enquiry tasks on the schedule grid will be displayed in purple and cannot be moved or unassigned.

Enquiry Dates

Enquiry Tasks display a Due Date on the Task, this is showing is the Enquiry's Earliest Outstanding Commitment date or, if there are none or there are no outstanding commitments, it will show the Enquiry followup (by) date.

Enquiry Subject Setup

The Default Duration can be configured on Enquiry Subjects such that Enquiries with this Subject will be given this duration in preference to the value of the Enquiry Default Duration System Setting, found on the **ConfirmWorkzone® Settings** screen.

Checking the ConfirmWorkzone Configuration

Once ConfirmWorkzone has been installed and setup it is recommended that the following actions are carried out to ensure that the system has been setup correctly.

1. Check that you can get to the login screen via the configured URL

Using one of the supported browsers you should be able to view the login screen. If there is a problem check the following:

- *Check the Tenant ID name is correct in the URL and matches a database connection name in the ConfirmWeb config file.*
- *Ensure any spaces in the URL are represented as %20. Some browsers convert spaces automatically but some do not.*
- *Ensure that the browser version you are using is supported.*
- *Check that the ConfirmWeb Web Service is started and functioning. Try restarting the Web Service.*

If the login screen appears then the ConfirmWeb Web Service is working. If there are still issues viewing the login screen refer to the **ConfirmWeb** Install guide.

2. Check you can log onto ConfirmWorkzone successfully with a valid Confirm user

If you are unable to login into ConfirmWorkzone with your chosen Confirm user check the following:

- *Error messages will appear on the screen if an invalid Confirm User Login Name or password is used. Check the user login details within the Confirm Client to clarify details.*
- *Check that the user has the permissions setup to access ConfirmWorkzone. This can be viewed in the User Security screen in Confirm v15 or above. For earlier versions of Confirm these permissions would have been added using the supplied SQL.*
- *Check that the URL has the correct database connection name.*
- *Check that the user is not locked out in the Confirm Client.*

3. Check that the Map view is present and that it zooms to show all of your tasks

Once the user is logged in they should be able to see a Map view where scheduled and unscheduled tasks will be displayed. If the Map view is not correct check the following:

- *Check that the PC you are running your browser from has an external internet connection. The Map requires an internet connection to download background map layers.*
- *Try altering the zoom level using the mouse wheel or zoom controls on the Map.*

4. Check the correct tasks are displayed on the List within ConfirmWorkzone:

Jobs

Only Jobs that have been committed and that are not at a completed, cancelled or archived status will appear on the list. Any Job that has estimated start set and/or has been at an "In Progress" Job Status and is assigned to a team/gang will not be displayed on the list, they will be displayed in the schedule grid.

- *Check that the signed-in user can see all required Tasks in the Confirm Client. If the user is a contractor user, the list of Tasks that they can see may be restricted.*

- *Check that the user preferences within ConfirmWorkzone are set correctly e.g. Jobs is the chosen task type, the desired Contract Areas are selected.*

Enquiries

Only Enquiries with a status set with the "Can be Scheduled" flag will be downloaded.

- *Check that the user preferences within ConfirmWorkzone are set correctly e.g. Enquiry is the chosen task type.*

5. Check that all required Teams/Gangs are shown to the left of the schedule

All Teams/Gangs that are available to the signed-in user will be displayed.

- *Check that the signed-in user can see all required Teams/Gangs in the Confirm Client. If the user is a contractor user, the list of Teams/Gangs that they can see may be restricted.*
- *Check that the user preferences within ConfirmWorkzone are set correctly e.g. the desired Contract Areas are selected.*

6. Check that a task can be assigned to a Team/Gang

Schedule the task by dragging it from the list or map. Then click on *Save* and check the task in the Confirm Client. The following changes will have been registered as shown below:

Jobs

- The Job's status was changed to the *Allocated to Team/Gang* status that has been configured in the *Contract Management System Settings* screen.
- The Job's *Estimated Start Date* was changed to the date and time that the Job was scheduled in ConfirmWorkzone.
- The Job was assigned to the scheduled Team/Gang. This can be checked by going to the Job screen and clicking on the *other* > *allocate* button.
- The Job has a new status record added that outlines that the Job has been allocated and who it was allocated to.

Enquiries

- The Enquiry was assigned to the scheduled Team/Gang. This can be checked by going to the Enquiry screen and checking that the Officer is now the Device Action Officer from the Team/Gang.
- The Enquiry has a new status record, recording the change of Officer.