

Location Intelligence
Infrastructure Asset Management

Confirm®

Contract Preparation

v26.30a.AM

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October 02, 2026

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Contract Preparation

The Contract Preparation folder

The Contract Preparation folder contains details of the Contract set up in Confirm, and utilities for setting up and maintaining those Contracts.

Contracts may be set up in two ways:

'Term Contracts' - Contracts that are let for a fixed period of time to a particular Contractor.

'Non Term Contracts' - (Non Term Bidding module only) usually only one 'open' contract set up within Confirm to allow the issue of work to contractors on a one-off, ad hoc basis.

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Contracts

Contracts are set up in Confirm to provide the instrument for pricing SORs, issuing Work Orders and making Payments.

Each Contract will cover a Contract Area or several Contract Areas. It will define the way in which the SORs are priced as Price Factors. Price Factors can also define Minimum Values for Jobs, Retention and Liquidated damages.

A term Contract will be awarded to a Contractor, and will use that Contractor's prices.

Contract Form

The Contract form in Confirm is used to set up new Contracts and stores the details of existing Contracts.

Code:	Up to 6 alphanumeric characters
Name:	Up to 30 characters
Notes:	An optional free text field
Contractor:	In an awarded term Contract: this field will display the name of the Contractor to whom the Contract was awarded and will not be editable. In a term Contract that has yet to be awarded: this field should be left blank until you are ready to award the Contract. Then select from the Pick list the Contractor to whom the Contract is to be awarded. The pick list references the Contractors entered on the Bidding Contractors tab for this Contract. In a Non-term Contract (Non Term Bidding Module) this field will remain blank.
Start Date:	The date on which the Contract commences. **Note:** Routine Works Orders cannot be raised in this Contract before this date.
Finish Date:	The date on which the Contract ends. **Note:** Routine WorksOrders cannot be issued in this Contract after this date. The date can be subsequently altered to finish the Contract early (providing there is no Routine work issued for a date after the proposed new finish date), or to extend the Contract.
Specify Regimes:	Check this to allow Contract specific Maintenance Regimes to be set for this Contract. See **Contract form-Regimes button** on page 18 for more information on setting Contract Specific Regimes. **Note:** Repeating Job Maintenance Regimes do not need to specify Contracts.
St. Billing:	Site Billing - check this, when setting up the Contract, to provide the facility for SORs at certain Sites to be quoted separately. The Sites, which will be listed separately on the Bill Of Quantities, are those that are flagged as 'Allow Site Rates' on the Site form. **Site Register\Site**

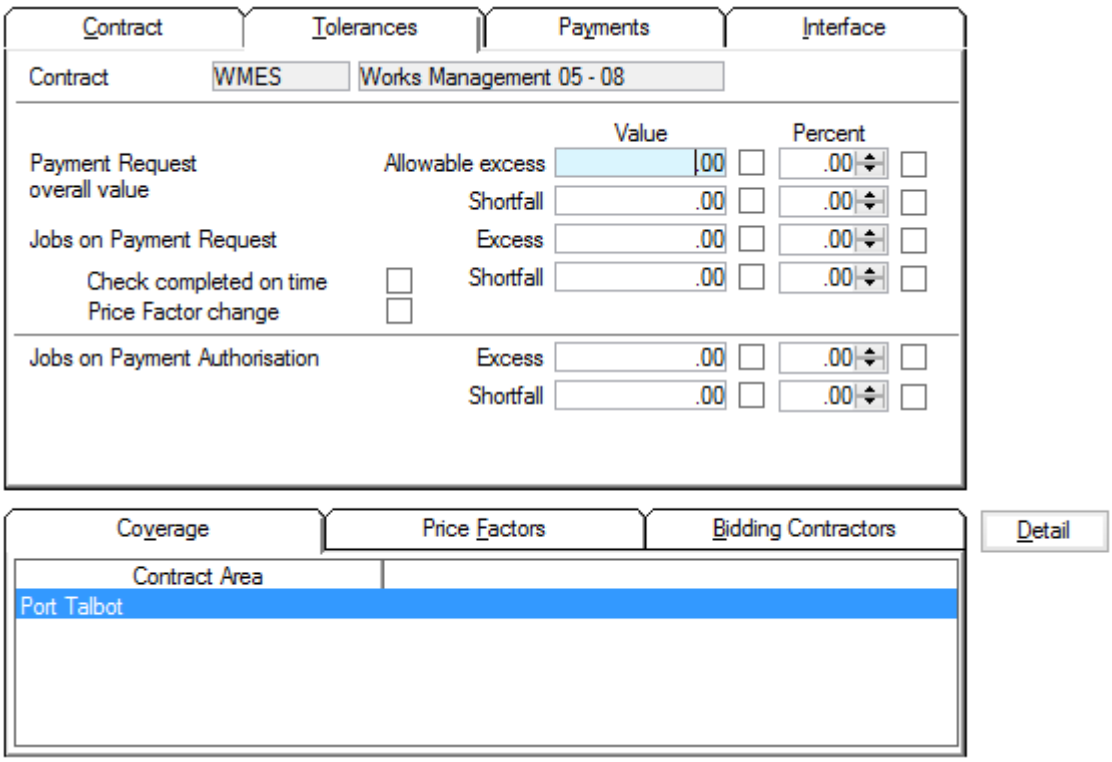
Dead:	Check this to archive the Contract. 'Dead' Contracts are not displayed in filters unless specifically requested in the filter.
SOR Banding:	(SOR Banding module) Check this to indicate that SOR Banding will be used in this Contract to calculate rates based on quantities. Please see the Asset Maintenance manual for further details on **SOR Banding**.
Group Jobs onto Orders by:	This selection will be used by the Batch Jobs on Orders utility, and for Jobs raised on the Ad Hoc route on the mobile device, to determine how the Jobs should be batched onto Orders (taking into account Contract Area and Price Factor) Select from: 'Site' - to place Jobs in the same Site together onto an Order header 'Feature' - to place Jobs in the same Site and on the same Feature together onto an order. **Note:** where Jobs that have been raised from Defects are being uploaded from a mobile device, and batched, Jobs will be batched be Contract Area, Price Factor, and Inspection Route without reference to this setting.
Works Inspected:	(Condition Survey - FBI module) (Jobs in the Field - FBI module) Check this to identify Contracts whose details should be downloaded to a Field Based Unit for Condition Surveying and Jobs in the Field. **Note:** This check box is irrelevant where the Performance Monitoring - FBI module is also present. In this case, all Contracts are always downloaded to the device.
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:** This lookup will still be transferred, it will simply be hidden from the User when logged in.
Prevent Commit of Jobs...:	Check this to prevent Committal of Jobs on this Contract that have no Estimated or Target End Dates set.
Device Job Update will:	Choose from 'Raise Payment Requests' or 'Raise Variations' for what happens when a Job is updated on the Device. SOR Banding is not currently supported on the Raise Variations option so this column is disabled if the SOR Banding option is enabled. Likewise, when the Raise Variations options is chosen then the SOR Banding column is disabled.
Uncommitted Jobs not Available...:	This determines whether Uncommitted Jobs are available to Contractors in Confirm Enterprise, ConfirmConnect and Confirm Web Interface.

Tolerances tab

The Tolerances tab allows the user to set the payment tolerances for this Contract.

These are set for Payment Requests, and for Payment Batches, to define by how much the amount paid may differ from the amount originally ordered.

See "Payment Processing - Payment Requests" and "Payment Processing - Payment Batch" for information on making payments through Requests and Payment Batches.



To set Tolerances:

The tolerances can be expressed as a set value, or as a percentage (of the original value of the work). In order to set a tolerance, set an amount and check the check box to the right of the relevant Value or Percent field.

To set zero tolerance: leave the value and percent fields at zero and check all the check boxes.

To set unlimited tolerances: leave the value and percent fields at zero and leave all the check boxes unchecked.

Payment Request Overall Value:

To set tolerances for the overall value of the work on one Payment Request.

Jobs on Payment Request:

To set tolerances for individual Jobs on Payment Requests. You may also check:

Completed on time: - if this is checked any Jobs whose Actual Completion date is later than the Estimated Completion date will cause the Request to be suspended when a Request check is run.

Price Factor Change: - if this is checked any Jobs whose Price Factor on the Request differs from the Price Factor on the original Job will cause the Request to be suspended when a Request check is run.

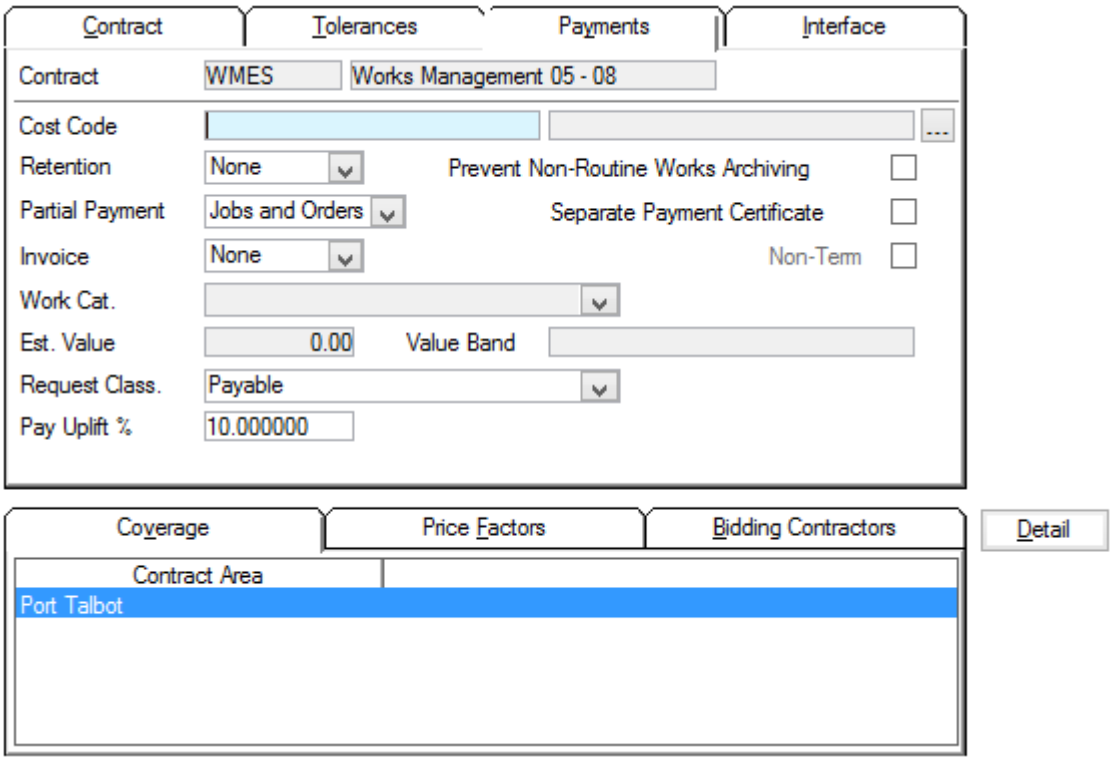
Jobs on Payment Authorisation:

To set tolerances for individual Jobs on a Payment Batch.

Note: This is primarily intended to set tolerances where Payment Requests are not being used. However, where Payment Requests are in use, the tolerance set here for Jobs must match that set for 'Jobs on Payment Request' above.

Payment tab

The Payment Tab sets certain parameters for the way in which payments will be calculated and displayed on a payment Certificate. Where the Tendering module is present, Work Category and Estimated Value are also set.



Cost Code: (Financial Systems Interface module)

A Cost Code, which will normally be the Contractor's income code, used when exporting Ledger batches.

(Contractor Invoices module)

A Cost Code, which will be printed at the top of the Summary Payment Certificate, described as 'Income Code'.

Users who do not use Financial Systems Interface or Contractor Invoices should leave this field blank.

The pick list references the Cost Code library

Site Register\Site Lookups\Operational Lookups

Retention: Select from 'None' or 'Job' to exclude or implement retentions for this Contract

The third option for 'Contract' is presently inactive and should not be selected.

Partial Payment:	Select from: 'Jobs and Orders' - Partial Payments are permitted on Jobs and Jobs on the same Order may be paid in different Payment Batches. 'Orders only' - Partial payments are not permitted on Jobs, but Jobs on the same Order may be paid in different Payment Batches. 'None' - No partial payments are permitted, all the Jobs on an Order must be paid in full, on the same Payment Batch.
Invoice:	(Contractor Invoice module) Choose from 'Optional', 'Mandatory' or 'None' to select whether an Invoice number will optional, mandatory or not required for a Payment Request. The results will be seen in the Fast Request for Payment, and Request for Payment forms where the 'Invoice' check box will be editable, or set and greyed out, or not set and greyed out. See "**Payment Processing\Payment Requests** for information on the effects of checking the 'Invoice' check box.
Work Cat:	(Standing Lists Module) For Term Contracts only: select from the drop down list. The Work Category will define the Standing List(s) from which Contractors can be selected to bid for the Contract. The drop down list references the Work Category Lookup Contract Preparation\Contractor Standing Lists\Standing Lists Lookups **Note:** This field should be left blank for a Non-Term Contract, where the Work Category is specified on a Tender. Choose the Miscellaneous (default) Work Category for Term Contracts where you do not wish to impose restrictions on Bidding Contractors.
Est Value:	(Standing Lists Module) For Term Contracts only: enter the estimated value of the Contract. This will restrict Contractor to those in Standing Lists whose value band contains the estimated value of the Contract. **Note:** This field should be left blank for a Non-Term Contract, where the estimated value is specified on a Tender.
Request Class.:	Set which Request Classification will be used by default on any Payment Requests raised for this Contract. This references the Payment Request Classification lookup. **Payment Processing\Payment Requests\Payment Request Setup**
Pay Uplift %:	Select a percentage that will be used as the default to calculate Job Cost uplift values when they are imported. Any uplift value supplied on imported Job Costs will override the Pay Uplift % value.
Value Band:	Will be automatically entered from the relevant Standing List, when an Estimated Value is entered. Cannot be edited. See **Standing Lists** on page 57 for details.
Prevent Non Routine Works Archiving:	Check this to prevent completed Jobs on a committed Payment Batch from Archiving. Jobs held open in this way will be 'Complete', i.e. any unpaid balance will not be held as an outstanding commitment as it would be on a Partial

Payment Job; but it will be available for further payment in the same way as Partial Payment Jobs.

The flag allows Jobs to be held open for a Contracted period of time against any adjusting payment that may be become due in the agreed time. After that time they can be archived using the Archive Jobs utility.

Maintenance Management\Jobs

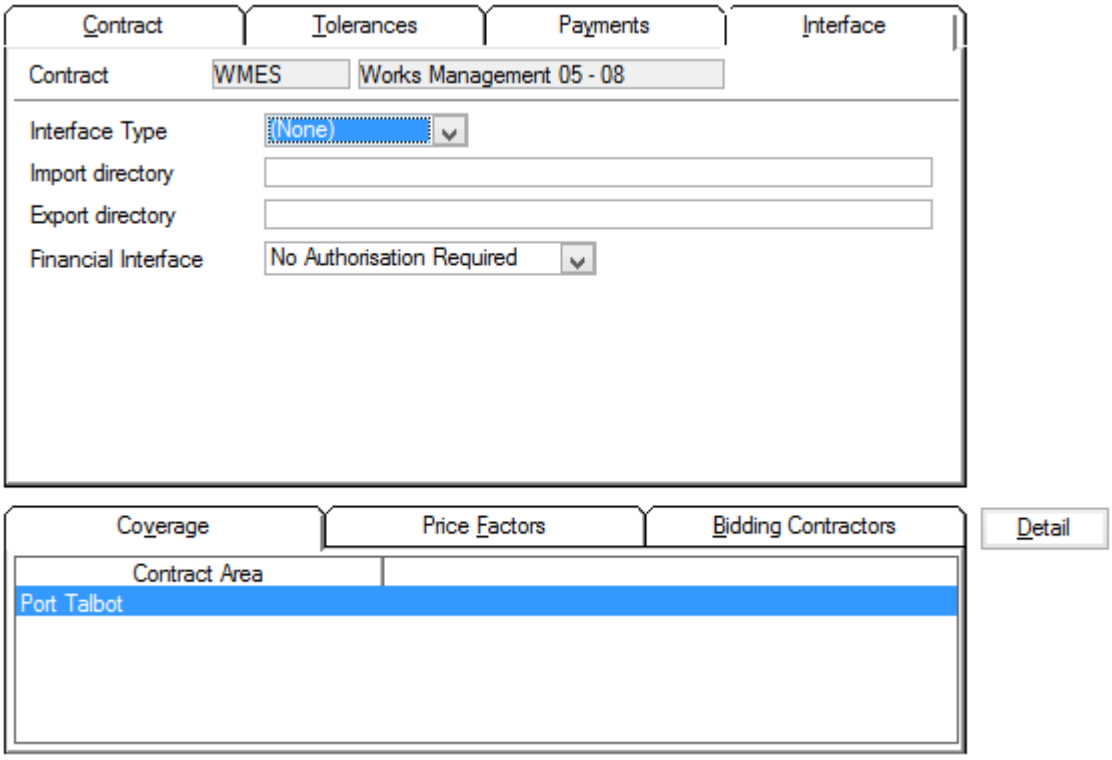
Separate Payment Certificate: Check this to require a separate Payment Batch (and therefore a separate Payment Certificate) for each Non Routine Works order.

This will be automatically checked (and is not editable) when 'Non Term' is selected (Non Term Bidding module, to ensure that a separate Payment Certificate can be prepared for separate Contractors.

Non Term: (Non Term Bidding module)

Check this to make this Contract a 'Non Term' Contract, i.e. one which will not be awarded to a contractor, but which will remain open to provide the means of issuing work to any contractor listed in the Contractor library. This flag may not be set after a term contract has been awarded.

Interface tab



Interface Type: (Contractor Access - File Transfer)

Import & Export Directory: These settings are to allow the interchange of files between a Contractor's system and Confirm.

These settings will be advised by Confirm for those users with the Contractor Access - Direct module.

Once set, these fields should not be altered except on advice from Confirm.

Financial Interface:	(Financial Interface Agent & Ledger Batch) Select From: 'Authorisation Required' - With this option selected Non Routine Works Orders will be placed into a 'Pending' status when the Commit process is saved. An external system will then reply with or without a Purchase Order (PO) number. If a PO number is returned then Confirm will display this number on the Works Order which will then be fully Committed. If no PO number is returned then the Order will remain as Uncommitted. Contracts with this setting will also be included in exports by the Financial Agent. 'No Authorisation, No Export' - Contracts with this setting will not be included in any export by the Financial Agent or Ledger Batch Export. Works Orders will not require Authorisation (detailed in the first option above). 'No Authorisation Required' - Contracts with this setting will be included in exports by the Financial Agent or Ledger Batch Export. Works Orders will not require Authorisation (detailed in the first option above). Once set, these fields should not be altered except on advice from Confirm.

Coverage tab

The coverage tab lists all the Contract Areas covered by this Contract. This means that only those Features in the specified Contract Area(s) can have work ordered under this Contract.

To add or delete Contract Areas:

Select the Coverage tab and click on the 'Detail' button. The Contract Coverage form is displayed:

Contract Areas can be added at any time in the life of the Contract, but cannot be deleted if work has been raised in that Contract Area under this Contract.

To add a Contract Area, select a blank form, and select the Contract Area from the drop down list.

The drop down list references the Contract Area lookup.

Site Register\Site Lookups\Operational Lookups

To delete a Contract Area from the Coverage, select the unwanted record in the form, click on the 'Delete' button.

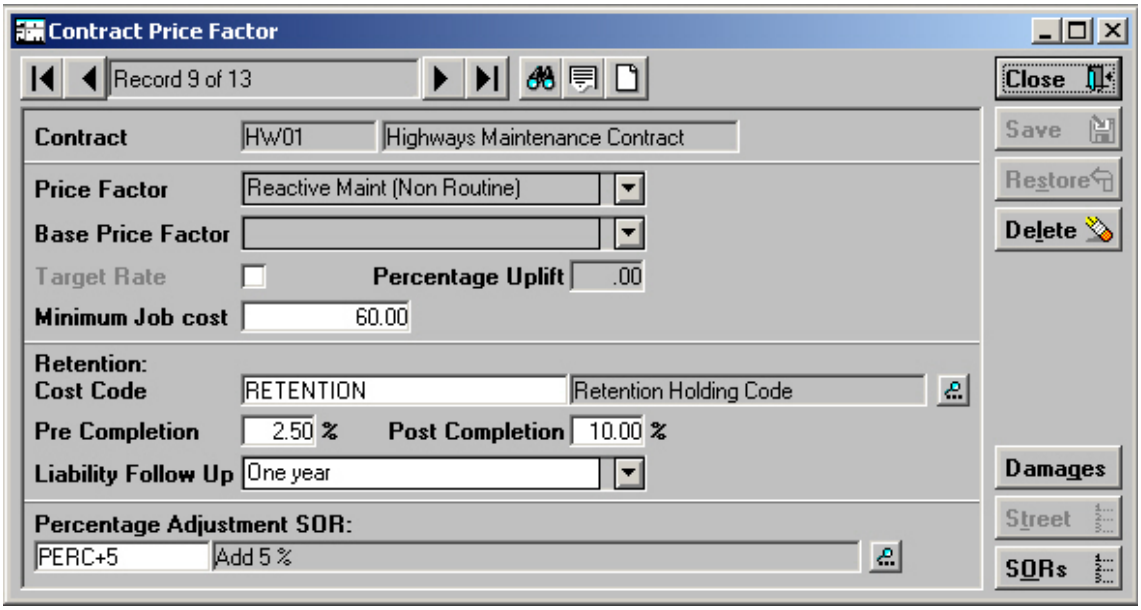
Price Factor tab

The Price Factor tab lists the Price Factors for this Contract. The Price Factor defines the different ways in which an SOR might be priced under the Contract.

The Price Factor also defines the retention, the Liquidated Damages and the minimum Job cost

To add or delete Price Factors:

Select the Price Factor tab and click on 'the 'Detail' button. The Contract Price Factor form is displayed:



Price Factors can be added at any time in the life of the Contract, but cannot be deleted if work has been raised using that Price Factor under this Contract.

To delete a Price Factor from the Contract, select the unwanted record in the form, click on the 'Delete' button.

Price Factor: To add a Price Factor, select a blank form, and select the Price Factor from the drop down list. The drop down list references the Price Factor lookup.

Asset Maintenance\Maintenance Lookups

Base Price Factor: To base the prices in this Price Factor on the prices in a Price Factor already present in the Contract, select from the drop down. The drop down list displays those Price Factors on this Contract that are not based on another Price Factor.

Target Rate: Where a Base Price Factor has not been selected, you may check this box to base the prices in this Price Factor on the Target prices. Target prices are stored against SOR Items in the SOR Item library.

Asset Maintenance\SOR Items

Percentage Uplift: Defines the addition (or subtraction - minus numbers can be entered), to be made to the Base Price Factor Prices, or Target Price, to derive the prices for this Price Factor.

Note: If Price Factors are based on another, Base Price Factor, then only the Base Price Factor can have SORs added, or have existing SOR prices altered. Similarly, only the Base Price Factor is uplifted when a rate uplift is applied. All changes made to the Base Price Factor are reflected in the dependent Price Factors.

See also '**Bidding Contractors tab** on page 17'

Minimum Job Cost: Enter an amount as a minimum cost for a Job. Any Order Jobs that are raised in this Price Factor, and have a value of less than this amount, will be made up to this amount using the Minimum Value SOR Item set in Contract Management System Settings.

Maintenance Management\Contract Management Lookups

Leave the field at zero if you do not wish to impose a Minimum Job Cost.

See also **Bidding Contractors tab** on page 17

Setting Up Liquidated Damages

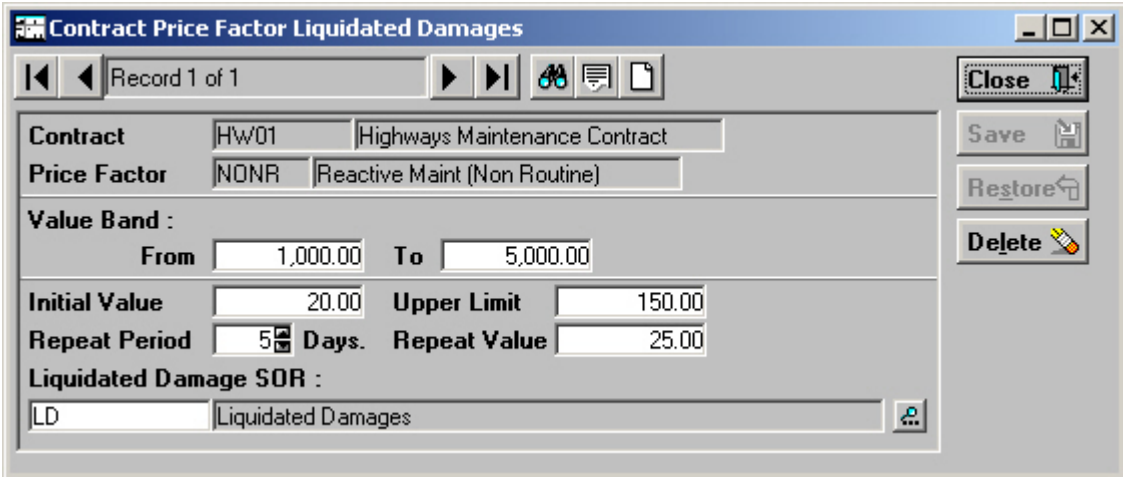
Liquidated Damages are penalties applied under the Contract for late completion of work.

These penalties are applied based on the time between the Estimated Completion date for a Job, and the Actual Completion Date for a job where the Actual Completion is after the Estimated Completion.

Liquidated Damages are Price Factor specific and must be set up for each Price Factor that will attract Liquidated Damages.

Note: Liquidated Damages set up in the Contract provide default for Jobs raised under this Contract in this Price Factor. Any of these parameters can be altered on the Order Job for any individual Job.

To set up parameters for Liquidated Damages click on the 'Damages' button in the Contract Price Factor form:



Value Band:	Defines the Job Value range to which this set of penalties applies. Several records may be set up to define different penalties in different Value Bands.
Initial Value:	A Penalty (in currency) to be applied in the first period after the Estimated Completion date, and before the Actual Completion Date.
Upper Limit:	The total penalty that may be applied - regardless of how long after the Estimated completion date the Job is completed.
Repeat Period:	The time (in days), which must elapse before the next, repeat value penalty can be applied.
Repeat Value:	The penalty (in currency), which will be applied for every Repeat Period before the Actual Completion Date. The Repeat Value is applied for every period except the first after the Estimated Completion - the first Period has the Initial Value applied.
Liquidated Damages SOR:	Enter the SOR that will be used to generate the penalty amounts on the Jobs that attract penalties. The SOR should be flagged 'Liquidated damages' and should be priced 'per 1 [unit of currency]' in the SOR Item library. The pick list references the SOR Item library. **Asset Maintenance\SOR Item**

Setting up Retentions

A retention is an agreed amount of money held back on payment of a Job. The money is held for an agreed amount of time after the works are finished and is released at the end of that time to close the Job.

Retentions are Price Factor specific and must be set up for each Price Factor, which will attract a retention.

Note: Retentions set up in the Contract provide default for Jobs raised under this Contract in this Price Factor. Any of these parameters can be altered on the Order Job for any individual Job.

Cost Code:	Select a Cost Code to be used as a 'holding' code pending the payment of the retention. This provides the means of reporting on monies held in Retentions against Jobs. When final payment is made for the retention, it is made under the Job Cost Code and not this one. The pick list references the Cost Code lookup **Site Register\Site Lookups\Operational lookups**
Pre Completion:	Defines the percentage of the payment, which will be retained on any payment made before the Job is complete.
Post Completion:	Defines the percentage of the final payment which will be held as a retention. **Note:** Where pre-completion retentions are already held, the calculation is based on the whole amount paid to date, less retentions already deducted.
Liability Follow up:	Defines the period of time that must elapse between Job completion and payment of the retained money. The drop down list references the Follow Up Lookup **Asset Maintenance\Maintenance Lookups**

Percentage Adjustment

Percentage Adjustment SOR:	Enter or select from the pick list, the default percentage item to be added to Order Jobs. The pick list references all 'Percentage' type SORs

Note: The default Percentage Item will be added to Jobs on an Order, with a quantity equal to the total value of all the other items on the job. If the percentage Item is not required for a particular Order Job, it may be deleted.

Contract Price Factor Form Buttons

SORs:	Click on this button to display the Contract-wide SORs priced under this Price Factor, with their prices.
Site:	Click on this button to display the Site specific SORs priced under this Price Factor, with their prices.

Bidding Contractors tab

The Bidding Contractors tab is used for Term Contracts only, to list all the contractors who have submitted prices at the time of tendering the Contract. The contractor to whom the Contract is finally awarded will be one of those listed on the Bidding Contractors tab.

Bidding Contractors are added when setting up a new Contract, after the BOQ has been prepared, before the Contract is awarded.

To add or delete Bidding Contractors:

Select the Bidding Contractors tab and click on 'the 'Detail' button. The Bidding Contractors form is displayed:

To add a Bidding Contractor, select a blank form, and select the Contractor from the pick.

The pick references the **Contractors library**.

When Contractors are added, the Price Factors in the Contract, with uplift over Base Price Factor if Base Price Factor is used, are added for each Contractor. The Minimum Job Cost is also copied to each Bidding Contractor

These may be altered for a particular Bidding Contractor, and the new, amended, Price Factor uplift or Minimum Job Cost will be copied back to the Contract Price Factors if the Contract is awarded to this Bidding Contractor

To view each Contractor's Price Factor details, click on the 'Detail' button. The Contractor Price Factor form is displayed. This shows that uplift over Base Price Factor this contractor wishes to apply to dependent Price Factors, and the Minimum Job Value to be applied.

To view the bids supplied, select the Price Factor you wish to view and: click on the 'Bids' button to view contract-wide bids in this Price Factor, or the 'Site' button to view Site specific bids in this Price Factor.

Note: Where the Contractor Standing Lists module is present, only Contractors who are in the appropriate Standing List, and meet the criteria can be added as Bidding Contractors.

Contract form-Penalties button

(Performance Monitoring module)

Click on the 'Penalties' button to display the Contract Penalty form.

The Contract Penalty form is used to define the Failure Types that will be used when monitoring work under this Contract, and the penalties (in terms of points and/or charges) which will applied for each of those Failure Types.

Note: The first time the 'Penalties' button is used on a new Contract, the system will offer to add all the available Failure Types (from the Failure Types Lookup) to the Contract. Click 'Yes' to add all Failure Types. You can then scroll through the Failure Types adding the penalties.

Contract:	Copied from Contract form.
Failure Type:	Select from the pick list (if not already added on first use of the 'Penalties' button) The Pick list references the Failure Type lookups **Performance Monitoring\Monitoring Lookup**
Fixed Points:	Enter a number - up to 4 characters.
Fixed Charge:	Enter an amount (in units of currency).

Contract form-Regimes 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.

The Regimes button will only be available if 'Specify Regimes' is checked on the Contract. Click on the Regimes button to display the Maintenance Regime Contracts form.

All live Maintenance Regimes are listed. Check the Regimes that will be used under the Contract currently displayed in the upper part of the form.

All button

Click on the 'All' button to check all the listed Regimes.

Clear button

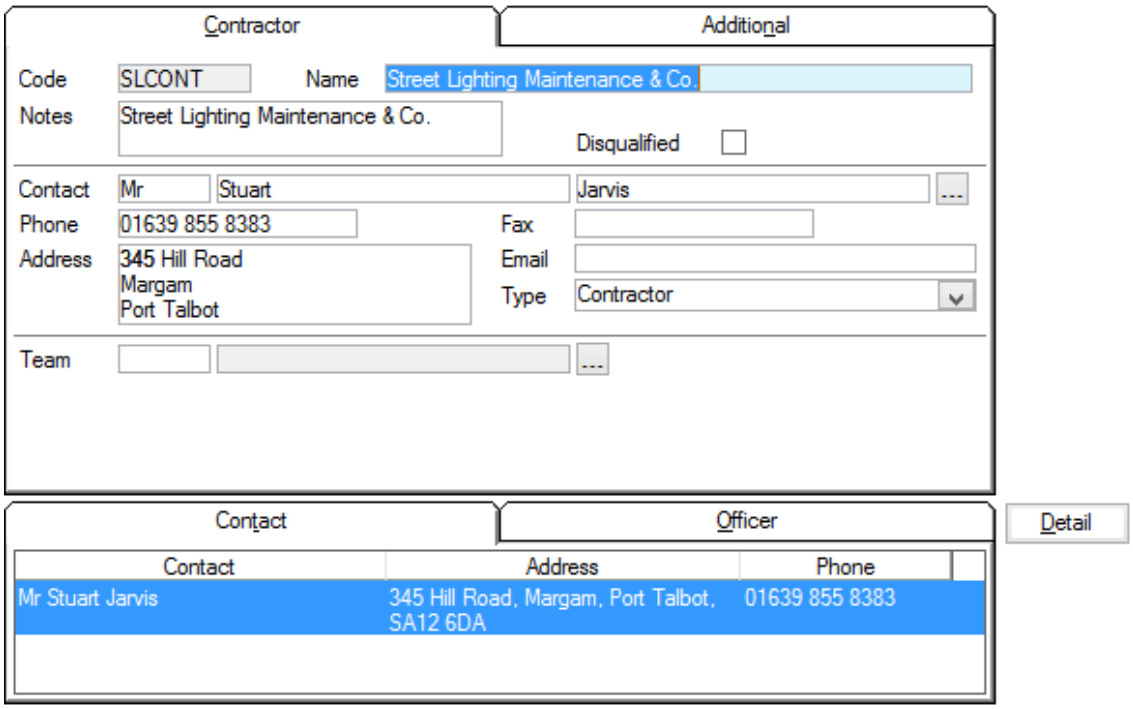
Click on the 'Clear' button to clear all the checkboxes.

Note: You may also specify the relationship between Regimes and Contracts using the Contract button on the Maintenance Regime form.

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

Contractors

The Contractors library stores information on all the Contractors who will be bidding for Term Contracts and non-term contracts (under the Non-Term bidding module), as well as those who will be issued work under a Non Term Contract (Non Term Jobs module).



Code:	Up to six alphanumeric characters.
Name:	Up to 50 characters.
Notes:	An optional free text field.
Disqualified	(Contractor Standing Lists module) Check this to update this Contractor in all Value Bands to an Approval Status of 'Pending' (unless it is already set to 'Fail'). You will be warned when saving that the Approval Status will be changed. If the Disqualified flag is already set, un-checking the box will update this Contractor in all Value Bands to an Approval Status of 'Approved' (if they meet all the approval criteria) or 'Pending' (unless it is already set to 'Fail'). You will be warned when saving that the Approval Status will be changed.
Contact:	The name of the Contact can be entered directly into the field, or derived from the Contact lookup. The Customer does not have to be present in the Contact lookup in order to be entered into this field. A Contact entered into this field will be automatically entered into the Contact lookup together with Contact details. See **Asset Maintenance\Maintenance Lookups\Contacts** for more information on the Contact lookup library If the Contact Lookup Adaptor module is active Confirm can link to an external Contact/Customer database when searching for a Contact. The external Contact database will merge with the results of the Confirm Contact Lookup, updating any

details where the Contacts are the same as each other (identified by having the same Contact Reference). Once a Contact has been selected in the form and saved, the selected Contact will be updated within Confirm with the details from the external database if it already exists, if not then a new Contact will be created.

Address: If the Contact name was selected from the Contact Lookup, then associated address information will be automatically entered into this Address field.

If no address is entered, or the Contact was not entered from the Contact lookup, then placing the cursor in the Address field will launch the Address form.

If the Customer Services - Address/Property link module is active, and the Site Register has been populated with Property details, then entering the Post Code in the Post Code field will display a list of all the properties carrying that Post Code. Select the correct property from the list to enter the full address into the Address form.

Where the Address/Property link is not available address details are typed into the fields. Click on OK to place the Address information into the Address field of the Contractor screen.

Phone: Optional

Fax:

E Mail:

Type: Optional field.

If the Contact name was selected from the Contact Lookup, then associated Customer Type information will be automatically entered into this field.

If no Customer Type is entered, or the Contact was not entered from the Contact lookup, select an appropriate Customer Type from the drop down list. The drop down list references the Customer Type lookup.

Asset Maintenance\Maintenance Lookups

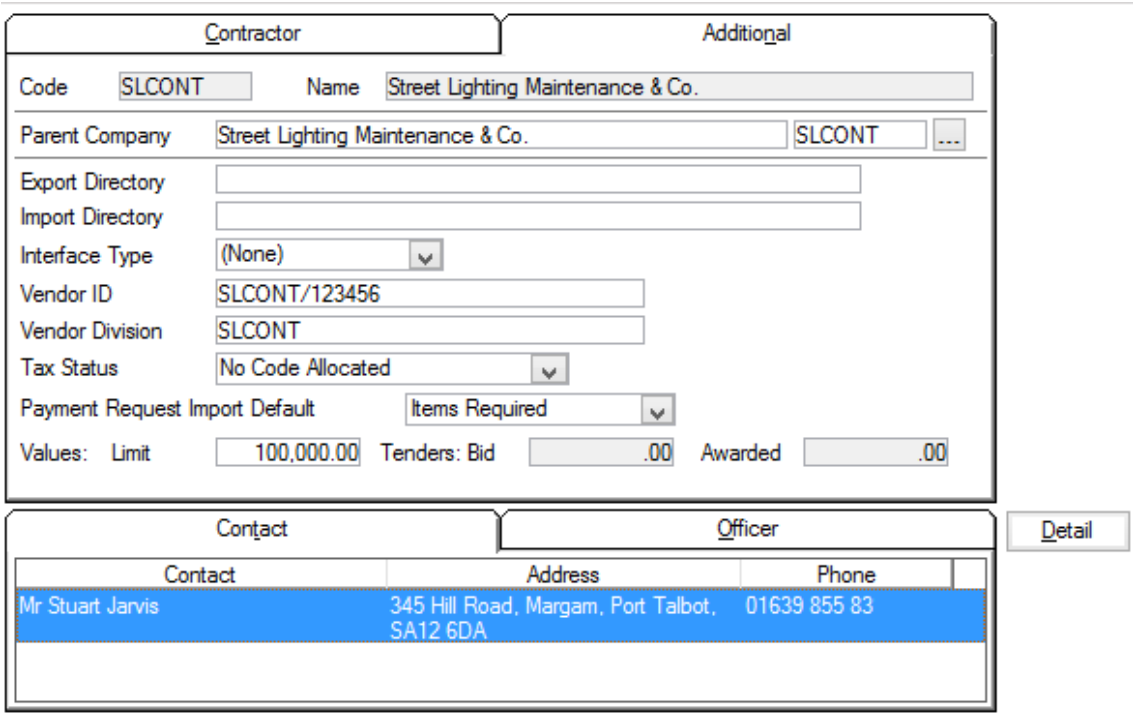
Default Gang: (Works Management module)

Enter here the Default Gang associated with this Contractor. This Gang will then 'mop-up' any work that cannot be allocated according to Gang allocation rules.

The pick list references the Gang Lookup

Works Management\Gang Allocation\Gang Lookups

Additional tab



Parent Company: (Contractor Standing Lists module)

Select from the pick list the Parent Company for this Contractor. The pick list references the Contractor library. The default is for the current Contractor to be entered.

Setting a Parent Company will limit the creation, or amendment of Contractor Credentials to the Parent Company. All changes made to the Parent Company are automatically made also to all the 'child' companies.

You may not select as a Parent Company any Contractor who is already a 'child' - that is one who has as their Parent Company any Contractor other than themselves.

Export and Import Directories, and Interface Type:

(Contractor Access - File Transfer)

The settings in these fields are to allow the interchange of files between the contractor's system and Confirm. These settings will be advised by Confirm Software for those users with the Contractor Access - File Transfer module. Once set, these fields should not be altered except on advice from Confirm.

Vendor ID \ Vendor Division (Contractor Invoices module)

Vendor details are used on the Summary Payment Certificate print. These should not be edited once populated.

Tax Status: (Contractor Invoices module)

A Tax Status is applied to the Contractor to determine whether or not Tax will be charged in this Contractor's invoices.

Select from the drop down list. The drop down list references the Tax Status Lookup.

Maintenance Management\Contract Management Lookups

Payment Request Import Default:	(Contractor Access Agent) Select from the drop down list whether you wish to permit the import of Jobs without Items, or make them mandatory.
Value: Limit	(Contractor Standing Lists module) Enter here the total value of work that this Contractor may have in train, and be bidding for, at any time.
Tenders: Bid	(Contractor Standing Lists module) The total amount that this Contractor is currently bidding for, derived from the un-awarded Tenders for which this Contractor is a Bidding Contractor.
Awarded:	The total amount of Tenders that have been awarded to this contractor, where the related Jobs are still live. When the work is finished, and the Job archived, this total will reduce by the value of that work.

Note: The values in the values fields relate to work processed through the Tendering System, and do not include work that has been directly issued, or Term Contracts that the Contractor has been awarded.

Contact tab

Select the Contact tab and click on the Detail button to display the Contractor Contact form.

The Contact entered on the Contractor tab of the Contractor form will already be entered. To enter other Contacts, click on the new page button.

Contact:	The name of the Contact can be entered directly into the field, or derived from the Contact lookup. The Customer does not have to be present in the Contact lookup in order to be entered into this field. A Contact entered into this field will be automatically entered into the Contact lookup together with Contact details. See **Asset Maintenance\Maintenance Lookups\Contacts** for more information on the Contact lookup library If the Contact Lookup Adaptor module is active Confirm can link to an external Contact/Customer database when searching for a Contact. The external Contact database will merge with the results of the Confirm Contact Lookup, updating any details where the Contacts are the same as each other (identified by having the same Contact Reference). Once a Contact has been selected in the form and saved, the selected Contact will be updated within Confirm with the details from the external database if it already exists, if not then a new Contact will be created.
Address:	If the Contact name was selected from the Contact Lookup, then associated address information will be automatically entered into this Address field. If no address is entered, or the Contact was not entered from the Contact lookup, then placing the cursor in the Address field will launch the Address form: If the Customer Services - Address/Property link module is active, and the Site Register has been populated with Property details, then entering the Post Code in the Post Code field will display a list of all the properties carrying that Post Code. Select the correct property from the list to enter the full address into the Address form.

Where the Address/Property link is not available address details are typed into the fields. Click on OK to place the Address information into the Address field of the Contractor screen.

Phone: Optional

Fax:

E Mail:

Type: Optional field.

If the Contact name was selected from the Contact Lookup, then associated Customer Type information will be automatically entered into this field.

If no Customer Type is entered, or the Contact was not entered from the Contact lookup, select an appropriate Type from the drop down list. The drop down list references the Customer Type lookup.

Asset Maintenance\Maintenance Lookup

Officer tab

(Contractor Access - Direct)

Users who are linked to Action Officers identified, as Contractor Officers will be restricted to seeing data that is for their own Contractor. This is policed in areas where the Contract / Contractor Code is held.

Contractors will only be able to see Jobs which have the Preferred Contract set to their own Contract.

The availability of Job Statuses is restricted to those in which 'Available to Contractor' is flagged. See the Asset Maintenance manual for further details.

Asset Maintenance\Maintenance Lookups\Job Status

Note: User Security should be carefully considered to make sure that Contractors have suitable privileges as many lookup tables are not Contract specific, e.g. Priorities, Price Factors, Labour Types, etc. See the System Administration manual for further details.

System Administration\Security\User Security

The ability for a Contractor to access Confirm screens is only available to Term Contractors. Non-term Contracts can only be accessed via the options within the Contractor Access menu.

When logged in as a Contractor, the Confirm window title will show the Contractor Name in brackets after the User Login Name.

Select the Officer tab, and click on the 'Detail' button to display the Contractor Officer form.

Officer: Enter, or select from the pick list, an Action Officer. The pick list references the Action Officer Lookup.

Asset Maintenance\Maintenance Lookups

You may enter as many Action Officers as necessary against the Contractor.

Note: Contractors are restricted from removing Officers.

Creds button

(Contractor Standing Lists module)

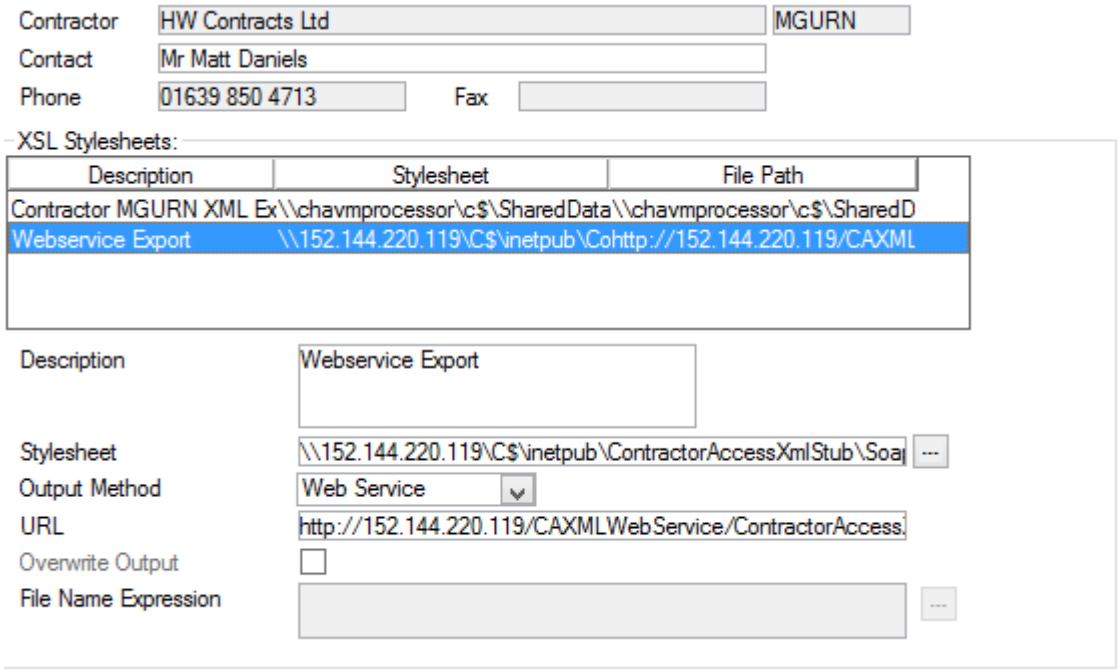
Click on the Creds button to display the Contractor Credentials form.

See **Contractor Credential** for information on the Contractor Credential form.

Export button

(Contractor Access Agent module)

Display the Contractor Export Transformations form, for use by the Task Processor when exporting Orders and Payments for the currently selected Contractor.



The upper part of the form copies the Contractor details from the Contractor form and may not be edited.

The central pane lists the Transformations currently stored. The details of the currently highlighted Transformation are displayed in the lower fields.

The lower fields are used to edit existing transformations, or to add new ones.

To add a new transformation:

Click on the 'New' button to clear the fields:

Description:	A free text field for a description of the transformation
Stylesheet:	Enter the location of the stylesheet. You may use the pick button to browse directories.
Output Method:	Select from: File per Order: to create a separate output file for each Order in the batch. File: to create one file for all the data being output. Web Service: Send XML to a Web Service (all data). **Note:** Transformations set to export a File per Order will only transform Works Orders.

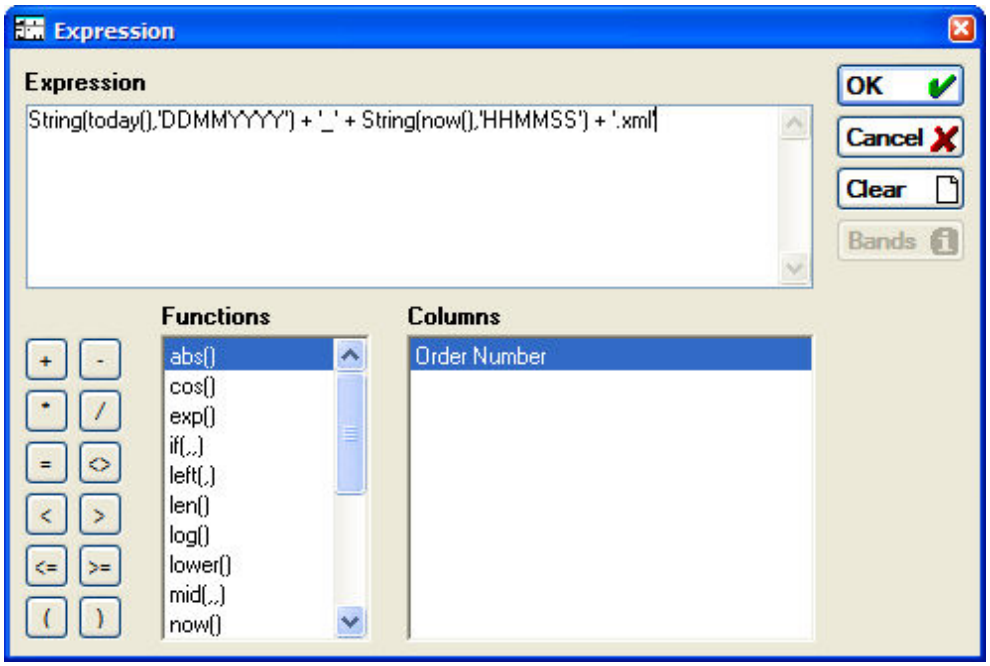
Note: To export to a SOAP web service the full SOAP request, including the SOAP Wrapper needs to be included in the output from the exports transformation stylesheet.

Output Directory: Enter a location for the exporting XML files. (Only applies to file based Output Methods)

URL: Enter the web service URL. (Only applies to web service Output Method)

Overwrite Output: This is not checked by default, so that if a new export carries the same file name as an existing one in the same directory, the original export will not be overwritten. You make check this box to allow existing files to be overwritten.

File Name Expression: Enter a file name and location for the output file(s). You may use an expression to define a naming structure for outgoing files such that each file may be uniquely named. You may use the expression builder to construct the expression:



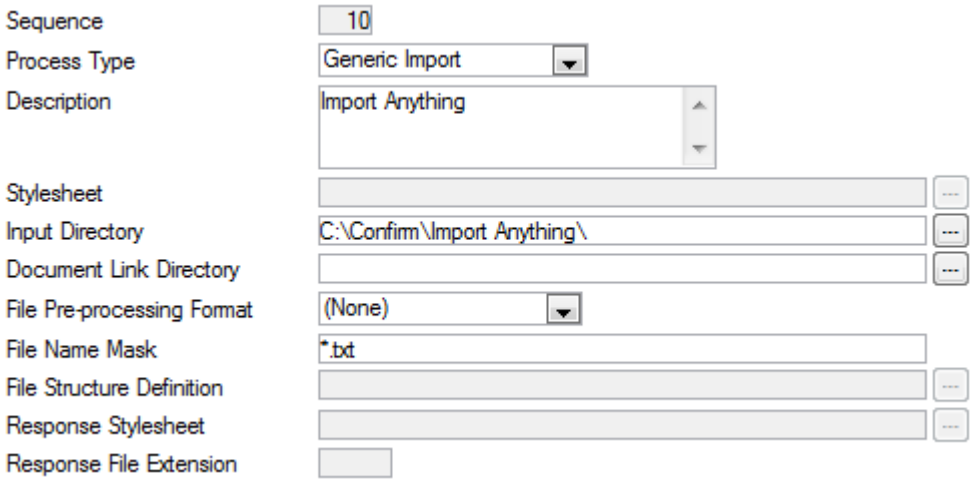
Double click on Functions in the Function list, and Columns in the Columns list, to build up an Expression in the Expression field. You may also directly edit the Expression, and add operators from the buttons on the left-hand side.

Click on OK to return the expression to the File Name Expression field.

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

Import Transformations

Import Transformations define the parameters for locating data import files and for converting them into a format suitable for import into Confirm.



Sequence: A unique numerical identifier will be suggested by the system but can be changed if desired.

Contractor: (Contractor Access Agent module)

This will only be visible if opened from the Contractor 'Import' button and will display the currently displayed Contractor.

Process Type: Select from:

'Contractor XML Import' - For importing Contractor data with the Contractor Access XML Agent e.g. Payment Requests and Job Status updates. This will only be displayed if opened from the Contractor 'Import' button.

'Financial XML Agent' - For importing Order commit authorisation data from an external Financial system with the Financial XML Agent.

'Generic Import' - For importing Defects, Jobs, Features, Inventory, Performance Monitoring inspection results and Asset Valuation Logs with the Import Anything Agent or the equivalent Import Data option on the menu.

'EToN Import' - For importing non-standard Street Works EToN data with the EToN Hub module.

'Connector Agent' - For importing data with the Confirm Connector invoked by the Task Processor. The Task Processor will then pole the supplied directory for files to pass to the Connector.

'Import Address' - For importing or updating address records in Confirm system.

Description: A free text field for a description of the transformation.

Stylesheet: This field is only enabled when ‘File Pre-processing Format’ is not set to (None) or ‘Process Type’ is set to ‘EToN Import’. Enter or find the location of the Stylesheet (.XSL) that will be used to convert the import file into the required Confirm format. This is not required if import files are in Confirm format.

Please see the **Import Preprocessing** section below for further details.

Input Directory: Enter the location of the directory where the import file(s) can be found.

Document Link Directory: If a directory is specified here the import file will be copied to this location and a document link created to it. The file can then be accessed directly from the relevant Confirm screen. This is applicable to Inspection Batches, Defects and Jobs imported with the Import Anything Agent.

File Pre-processing Format: Select the field delimiter being used in the import file. The system will use this to convert the import file to XML format and then apply a Stylesheet to convert it to Confirm format.

Note: Set this to '(None)' if import files are in Confirm format, and to 'XML' if import files are XML files to be converted to Confirm format using a Stylesheet.

Note: Tab and comma delimited files are assumed to have an end of record denoted by the Carriage Return and Line Feed characters. Pipe delimited files are assumed to have an end of record denoted by tilde (~).

File Name Mask: You may restrict the selection of files from the Input Directory by specifying the name, or part name of the files to be used. Wildcards may be used. The File Name Mask defaults to *.* meaning all files in the Input Directory will be processed.

File Structure Definition: (EToN Hub module)

EToN Import transformations have to convert EToN text files into XML so that they can be transformed by the EToN Agent. An XML structure definition file tells the EToN Agent the structure of the file it is transforming.

Response Sylesheet: Only available with the 'Connector Agent' Process Type. The response given by the Connector can then be passed through the supplied Stylesheet.

Response File Extension: Only available with the 'Connector Agent' Process Type. Provide the file extension for the response files so that they can be processed by the stylesheet suppled above.

Test: When a Stylesheet is being used to transform data into Confirm format, this button can be used to test that the settings specified are correct and the Stylesheet is correctly constructed. The Test button will examine each file in the Input Directory matching the File Name Mask, and generate test file(s) as follows.

If File Pre-processing Format is set to 'XML' then the Stylesheet will be applied directly to the XML import file and the result created as a .TMP file.

If any other File Pre-processing Format is being used, an .XML file will be generated by applying the Pre-processing Format to the import file. The Stylesheet will then be applied to this and the result created as a .TMP file.

In either case, the .TMP file contains the data that would be imported into Confirm so its content can be checked against the Import Specification for the relevant Agent.

Note: The Test button will not proceed with processing if more than 10 files are found. This is a safety measure in case the wrong Input Directory is chosen.

Note: If the File Name Mask is one that includes .XML and .TMP files (such as *.* which includes both of these), clicking the Test button a second time will attempt to process any .XML and .TMP files present. The Task Processor will also attempt to process these files if they are left in the import folder.

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

Import Preprocessing

The import file is processed, depending on its format, as follows:

Text files requiring transformation

These are transformed into XML. An example is used to explain how a delimited text file is converted into XML and the XML notation used for this process.

The following is an example of a supplied Pipe Delimited text file, to be converted into XML, with two rows:

Order1|Job5|50|1.5|75.00

Order2|Job8|100|3|300.00

This file is converted into the following XML:

```
<table>
  <tr>
    <td>Order1</td>
    <td>Job5</td>
    <td>50</td>
    <td>1.5</td>
    <td>75.00</td>
  </tr>
  <tr>
    <td>Order2</td>
    <td>Job8</td>
    <td>100</td>
    <td>3</td>
    <td>300.00</td>
  </tr>
</table>
```

XML

XML files, either produced by the above process or supplied, are transformed into SBSCSV format by the stylesheet held on the XSL Transform record.

Text files in SBSCSV format

These files, either produced by the above process or supplied, are processed by the import utility against which the preprocessor is running.

Contract Rates

The Contract Rates form allows you to view the Contract-wide SORs contained on the BoQ for the Contract.

When the Contract is awarded (for a Term Contract) the current Contract Rates are shown for each SOR in each Price Factor.

SOR Items may be added at any stage.

SOR Items cannot be deleted for awarded Term Contracts, or for un-awarded Term Contracts once a Bidding Contractor has been entered on the Bidding Contractors tab.

Contract:	Enter, or select from the pick list. The pick list displays all live Contracts.
Price Factor:	Enter or select from the drop down list. The drop down list displays all the Price Factors associated with the selected Contract.
SOR Item:	Enter or select from the pick list. Where the SOR is already on the BOQ for this Contract, the relevant details will be will be filled into the rest of the fields.
Quantity:	For SORs manually added, this field will display a quantity derived from the SOR Item library. **Asset Maintenance\SOR Item** For SORs which came onto the BoQ as a result of the 'Calculate BoQ' utility: this field will display the quantity derived from the Feature measurement for all Features in the appropriate Contract Areas which have Maintenance Regimes using this SOR allocated. In either case the field cannot be edited.
Frequency:	For SORs manually added, this field will display '1' where a Quantity has been derived from the SOR item library. For SORs that came onto the BoQ as a result of the 'Calculate BoQ' utility: this field will display the total (yearly) frequency specified in the Maintenance Regimes that were used in the calculation. In either case the field cannot be edited.
Total Quantity:	The total quantity is the Quantity multiplied by the Frequency to give the yearly Contract Quantity. This field cannot be edited.
Rate:	The current Contract Price for this SOR in this Price Factor. This will have been copied from the Contractor Item Costs when the Contract was awarded. For SORs that are added after the award of the Contract, a price can be entered. Existing SORs can have the current rate altered.
Per:	The pricing quantity as given in the SOR Item library. **Asset Maintenance\SOR Item**

Contract BoQ - Batch button

The Batch utility is used to batch SORs onto the BoQ.

Contract:	Enter, or select from the pick list. The pick list displays all live Contracts. **Note:** This field will already have the Contract copied from the Contract BoQ form if the Contract BoQ form was populated when the 'batch' button was selected.
Price Factor:	Enter or select from the drop down list. The drop down list displays all the Price Factors associated with the selected Contract. **Note:** This field will already have the Price Factor copied from the Contract BoQ form if the Contract BoQ form was populated when the 'batch' button was selected.

Use the fields under the grey line to select the SORs to be batched onto the BoQ.

Click OK to carry out the batching.

Contract Site Rates

The Contract Site Rates form allows you to view the Site level SORs contained on the BoQ for the Contract.

When the Contract is awarded (for a Term Contract) the current Contract Rates are shown for each SOR in each Price Factor.

SOR Items may be added at any stage.

SOR Items cannot be deleted for awarded Term Contracts, or for un-awarded Term Contracts once a Bidding Contractor has been entered on the Bidding Contractors tab.

Contract:	Enter, or select from the pick list. The pick list displays all live Contracts that allow Site Billing. See **Contract Form** on page 7 for information on allowing Site Rates.
Price Factor:	Enter or select from the drop down list. The drop down list displays all the Price Factors associated with the selected Contract.
Site:	Enter or select from the pick list. The pick list displays all Sites in which 'Allow Site Rates' is flagged. **Site Register\Site**
SOR Item:	Enter or select from the pick list. Where the SOR is already on the BOQ for this Contract, the relevant details will be filled into the rest of the fields.
Quantity:	For SORs manually added, this field will display a quantity derived from the SOR Item library. **Asset Maintenance\SOR Item** For SORs which came onto the BoQ as a result of the 'Calculate BoQ' utility: this field will display the quantity derived from the Feature measurement for all Features in the Site which have Maintenance Regimes using this SOR allocated. In either case the field cannot be edited.
Frequency:	For SORs manually added, this field will display '1' where a Quantity has been derived from the SOR item library. For SORs that came onto the BoQ as a result of the 'Calculate BoQ' utility: this field will display the total (yearly) frequency specified in the Maintenance Regimes that were used in the calculation. In either case the field cannot be edited.
Total Quantity:	The total quantity is the Quantity multiplied by the Frequency to give the yearly Contract Quantity. This field cannot be edited.
Rate:	The current Contract Price for this SOR in this Price Factor. The price can be entered for new SORs, or can be amended for existing SORs.
Per:	The pricing quantity as given in the SOR Item library. **Asset Maintenance\SOR Item**

Site Level BoQ - Batch button

The Batch utility is used to batch SORs onto the BoQ.

Contract:	Enter, or select from the pick list. The pick list displays all live Contracts that allow Site Billing. **Note:** This field will already have the Contract copied from the Contract BoQ form if the Contract BoQ form was populated when the 'batch' button was selected.
Price Factor:	Enter or select from the drop down list. The drop down list displays all the Price Factors associated with the selected Contract. **Note:** This field will already have the Price Factor copied from the Contract BoQ form if the Contract BoQ form was populated when the 'batch' button was selected.
Site:	Enter or select from the pick list. The pick list displays all Sites in which 'Allow Site Rates' is flagged. **Note:** This field will already have the Site copied from the Site Level BoQ form if the Site level BoQ form was populated when the 'batch' button was selected.

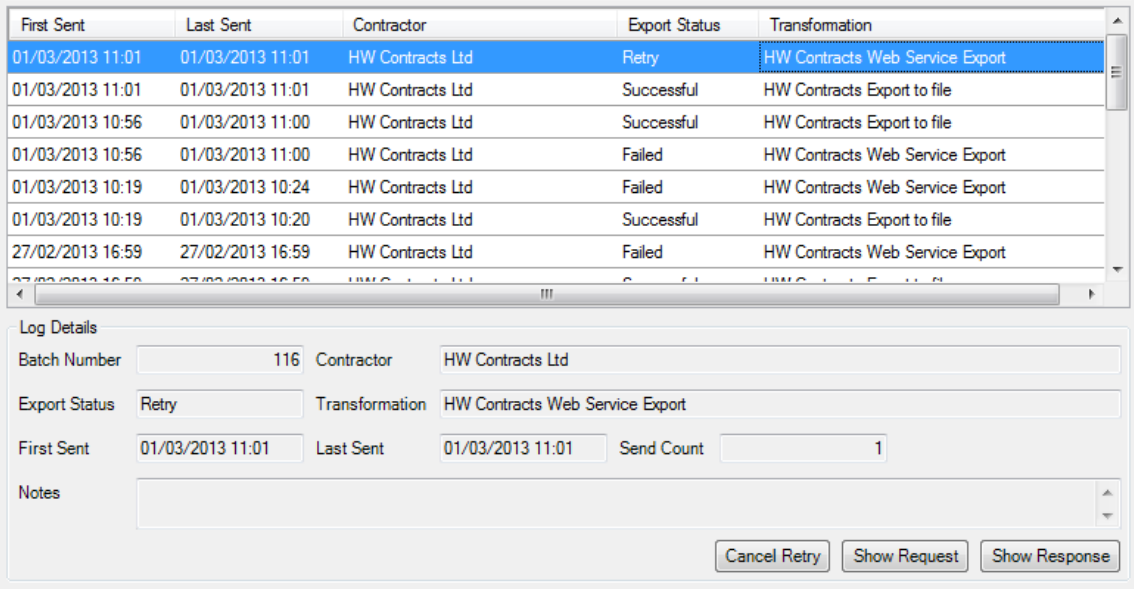
Use the fields under the grey line to select the SORs to be batched onto the Site Level BoQ.

Click OK to carry out the batching.

Contractor Access XML Agent Log

This screen enables the user to view a log of all exports from the Contractor Access XML Agent and check their current status. It also gives the user the ability to resend exported data when necessary.

When the screen first opens it will show all exports logged for the last week. The filter can be used to control the amount of export logs that are shown on the screen.



The top part of the screen is a list showing a summary of all data exported logged by the Contractor Access XML Agent. Each time data is exported to a Contractor, a new entry is added to the log. Where a Contractor has more than one Export Transformation defined, a log entry will be displayed for each one.

The following information is displayed in the list:

First Sent	The Date and Time the Agent first attempted to export.
Last Sent	The Date and Time the Agent last attempted to export. This will be the same as the First Sent date for data that was successfully exported on the first attempt.
Contractor	The name of the Contractor that the export data is for.
Status	The current status of the export. Possible values are: • Successful • Failed • Retry
Transformation	The Description of the particular Contractor Export Transformation record that the export data is for.

Below this is a section showing additional details for the log row currently selected in the list.

Batch Number	The internal Batch Number of the selected export data as stored in the database.
Send Count	The total number of times the Agent has attempted to export the given data.

Notes	This text gives further information about the Status of the selected export data, e.g. names of exported files or reasons for failing to export.

Buttons

View Request:	View the request for the selected export data. **Note:** Only for web service Export Transformations and if a request exists for that exported data.
View Response:	View the response for the selected export data. **Note:** Only for web service Export Transformations and if a response exists for that exported data.
Cancel Retry / Set to Retry:	For export data with a status of 'Retry', this button will set the status to 'Failed' to prevent the Agent from making any further attempts to export it. For export data with any other status, this will attempt to export the currently selected export again. This does not export immediately, but sets the export data to a Retry status so that the Agent will process it on its next run.

Contract Utilities

The Contract Utilities folder contains utilities for:

Contract Rate Uplift

The Contract Rate Uplift utility will increase the rate of all Contract BoQ Items within the specified Contract and Price Factor by the percentage entered.

Contract:	Enter, or select from the pick list. The pick list displays all live Contracts.
Price Factor:	Enter or select from the drop down list. The drop down list displays all the Base Price Factors associated with the selected Contract. **Note:** Only 'Base Price Factors' need be uplifted. Price Factors based on these will automatically update their rates in line with the new Base Price Factor rates.
Percentage Uplift:	Enter the percentage uplift.* (This may be a minus figure, which will calculate a reduction in the Contract Rates).

The fields under the grey line may be left blank to carry out the uplift to all Contract Rates, or used to restrict the uplift to an SOR range or Schedule.

Click OK to display the preview - this will show each Item with the old rate and the new rate. Save the preview to carry out the uplift.

Note: Uplifting Contract Rates will not alter the rates held on committed Works Orders within Confirm. These will continue through the system at the Rate that was current at the time they were committed.

Site Rate Uplift

The Site Rate Uplift utility will increase the rate of all Site Level BoQ Items within the specified Contract and Price Factor by the percentage entered.

Contract:	Enter, or select from the pick list. The pick list displays all live Contracts that allow Site Billing.
Price Factor:	Enter or select from the drop down list. The drop down list displays all the Base Price Factors associated with the selected Contract **Note:** Only 'Base Price Factors' need be uplifted. Price Factors based on these will automatically update their rates in line with the new Base Price Factor rates.
Percentage Uplift:	Enter the percentage uplift.* (This may be a minus figure, which will calculate a reduction in the Site Rates)

The fields under the grey line may be left blank to carry out the uplift to all Site Level Rates, or used to restrict the uplift by any of the parameters shown.

Click OK to display the preview - this will show each Item with the old rate and the new rate. Save the preview to carry out the uplift.

Note: Uplifting Contract Rates will not alter the rates held on committed Works Orders within Confirm. These will continue through the system at the Rate that was current at the time they were committed.

Import Contract BoQ

Import Contract BoQ allows the importing of BoQ items and prices directly into the Contract Rates library. This may be done for:

- Un-awarded contracts where no bidding contractor is entered on the Bidding Contractors tab of the Contract.
- Awarded Contracts

Where there is no existing BoQ Item, one will be inserted; and where there is an existing BOQ, the rate will be updated.

When a site BOQ is being imported, a Contract BoQ Item must already exist or be in the import file.

Price Factors which are based on another Price Factor cannot be imported - however, these will be updated in line with changes in rate of the Base Price Factor as a result of the import.

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

Contract Letting

The Contract Letting folder contains forms and utilities to be used when setting up a Contract. For creating a Bill of Quantities, for printing the BoQ and for entering the returned bids against each of the Contractors who is bidding for the Contract.

Before using these utilities, an outline Contract must be in place with a Coverage defined, Price Factors entered. Bidding Contractors should not be entered to Calculate BoQ, or to import Contractor Bids. Bidding Contractor(s) must be entered before Contractor Item Costs, or Contractor Site Costs can be entered.

Calculate BoQ

The Calculate BoQ utility will raise a Bill of Quantities based on Maintenance Regimes allocated to Features within the Contract Area covered by the Contract. From that information it will derive SORs, with total (Contract) measurements, frequencies and Contract Quantities (i.e. Measurement X frequency).

To calculate the BoQ: enter, or select, the Contract in the Calculate BoQ filter. The pick list references un-awarded Contracts with no Bidding Contractor entered on the Bidding Contractor tab.

Click OK to display the preview. Save the preview to create the BoQ. You will be warned if a BoQ already exists and asked if you wish to overwrite it.

Note: This utility can only create a BoQ for Routine Work based on Maintenance Regimes allocated to Features. Other Items must be added manually to the BoQ, or batched onto the BoQ, using the Contract Rates form, or Contract Site Rates form.

Print Bill of Quantities

Contract:	Enter, or select from the pick list. The pick list references all live Contracts.

The field under the grey line may be used to restrict the BoQ print within the parameters shown.

The BoQ appearance can be altered by selecting:

Short Description: checked by default. Uncheck to substitute the full SOR description in the printout.

Report Level: select from 'Standard' which will give Annual Quantity and Unit Quantity, and 'Frequency' which will also show the Average Frequency for each SOR.

Import Contractor Bids

Import Contractor Bids allows the importing of BoQ item bids into the Contractor Item Cost and Contractor Site Costs libraries. A BoQ must be in place, which contains all the Items that are being priced on the import file.

The Contractor should not be entered on the Bidding Contractor tab of the Contract - this will be done automatically as a result of the import.

Use the import filter to enter the Contract, the Contractor and specify the location of the import file. Click OK to display the import report which will detail the Item and give a status report on whether Items are 'Okay' to import. Save the report to carry out the import of those items that are 'Okay'.

Note: the layout of the import file is specified in the **Import Specification**.

Contractor Item Costs

The Contractor Item Costs form will display the BoQ items with the Bids submitted for each Contractor.

These will be the bids that were submitted by each Contractor.

To enter Bids:

Each Contractor whose bids will be entered must be entered as a Bidding Contractor in the Bidding Contractor tab of the Contract before their bids can be manually entered.

Contract:	Enter, or select from the pick list. The pick list displays all live Contracts.
Contractor:	Enter, or select from the pick list. The pick list references all Contractors entered on the Bidding Contractor tab of the selected Contract.
Price Factor:	Enter or select from the drop down list. The drop down list displays all the Price Factors associated with the selected Contract.

Click on the 'Find' button, and on 'OK' in the filter, to bring into the form all the Site level BoQ items associated with this Contract and Price Factor.

Alternatively you may simply enter each SOR item code and its price.

SOR Item:	Will be already entered if you have used the 'find' button to recall all BoQ items. If not, enter of select from the pick list. The pick list references SOR Items included on the Site level BoQ for this Contract in this Price Factor on this Site.
Rate:	Enter the rate bid by this Contractor for this SOR Item.
Rate Supplied:	This will be automatically checked when a bid is entered to indicate that a bid had been made. If the bid is zero, then check the Rate Supplied box to indicate that a bid has been made for this SOR. All SORs on the BoQ must have a Rate Supplied before the Contract can be awarded.

Contractor Site Costs

The Contractor Site Costs form will display the Site level BoQ items with the Bids submitted for each Contractor.

These will be the bids that were submitted by each Contractor.

To enter Bids:

Each Contractor whose bids will be entered must be entered as a Bidding Contractor on the Bidding Contractor tab of the Contract before their bids can be manually entered.

Contract:	Enter, or select from the pick list. The pick list displays all live Contracts that allow Site Billing.
Contractor:	Enter, or select from the pick list. The pick list references all Contractors entered on the Bidding Contractor tab of the selected Contract.
Price Factor:	Enter or select from the drop down list. The drop down list displays all the Price Factors associated with the selected Contract.

Site:	Enter, or select from the pick list. The pick list references Sites that 'Allow Site Rates'. See **Contract Form** on page 7 for information on allowing Site Rates.

Click on the 'Find' button, and on 'OK' in the filter, to bring into the form all the BoQ items associated with this Contract, Price Factor and Site.

Alternatively you may simply enter each SOR item code and its price.

SOR Item:	Will be already entered if you have used the 'find' button to recall all Site BoQ items. If not, enter or select from the pick list. The pick list references SOR Items included on the BoQ for this Contract in this Price Factor on this Site.
Rate:	Enter the rate bid by this Contractor for this SOR Item.
Rate Supplied:	This will be automatically checked when a bid is entered to indicate that a bid had been made. If the bid is zero, then check the Rate Supplied box to indicate that a bid has been made for this SOR. All SORs on the BoQ must have a Rate Supplied before the Contract can be awarded.

Evaluate Bids

The Evaluate Bids report will report on the cost for the Contract based on each Contractor's bids. This may be done as a Summary report which will simply give the total Contract Cost for each Contractor, or at details level which will show each SOR on the BoQ with the price bid, as well as the total at the end of the report.

Contract:	A Contract must be entered. Enter, or select from the pick list. The pick list references all live Contracts.
Price Factor:	Enter a Price Factor to restrict the report to one Price Factor. The drop down list references all Price Factors for the selected Contract.
Contractor:	Enter a Contractor to restrict the report to one Contractor. The pick list references all Contractors entered on the Bidding Contractor tab of the selected Contract.
Report Level:	Select from: 'Detail' - To display all SORs on the BoQ with the bids for each of the Contractor's. 'Summary' - To display a total for each Contractor and Price Factor.

Import Contractors

Import Contractors allows the importing of Contractor details into the Contractor library.

Use the import filter to specify the location of the import file. Click OK to display the import report which will detail the records and give a status report on whether records are 'Okay' to import. Save the report to carry out the import of those records that are 'Okay'.

Note: The layout of the import file is specified in the Import Specification documents available from Confirm.

Forecast Cost Reports

The Forecast Cost reports will use information in the Inventory and against the Contracts to report on the cost of scheduled work.

In order to derive useful reports, Maintenance Regimes must be allocated to Features.

Note: These reports will not work for Repeating Job Regimes.

These Reports divide into three categories:

Forecast Costs by Cost Code, Customer or Contract: These reports can be run before Contracts are awarded for each of the bidding contractors. They can also be run at any time after Contracts are awarded to derive costs based on current rates.

Annual Routine Maintenance does not give work costs and therefore can be run at any time before or after Contracts are set up.

Annual and Periodic Priced and Target Routine Maintenance: the Priced reports rely on awarded Contracts for costs, and the Target reports derive costs from target prices entered against SOR Items in the SOR Item library

Asset Maintenance\SOR item.

Forecast Costs

These reports will display information by Cost Code, by Customer, or by Contract. The filter for each report is similar:

Filter options include:

Contractor:	Enter a Contractor to derive the costs for the report from the Contractor's bids. Leave the field blank if the Contract is awarded and you wish to derive costs for the report from the current Contract rates. The pick list references the Contractors on the Bidding Contractor tab of the selected Contract.
Period From/To:	Enter period numbers to select a range of Work Periods for the report. The Periods refer to those set up in the Period Lookup. **Asset Maintenance\Maintenance Lookups**
Report Level:	Select the required level of detail for the report from the drop down list.

The report will display Contract Costs based on Regimes and Features, using Contractor's bids (if a Contractor is entered in the Contractor field) or current Contract Rates (if the Contractor field is left blank).

Annual Routine Maintenance

This Report displays Sites and Features/Regimes, listing the SORs and giving the occasions in a year at a Period level. No prices are given in this report.

Priced Routine Maintenance

These reports will give Site and Feature/Regime detail, listing the Regime Items, with the quantities and costs associated with each Regime Item.

Annual Priced Routine Maintenance:

Gives results based on a year's work as scheduled into Confirm by Maintenance Regimes. Costs are derived from the current Contract Rates.

Annual Target Priced Routine Maintenance:

Gives results based on a year's work as scheduled into Confirm by Maintenance Regimes. Costs are derived from target prices entered against SOR Items in the SOR Item library.

Periodic Priced Routine Maintenance:

Gives results based on work for the selected Period as scheduled into Confirm by Maintenance Regimes. Costs are derived from the current Contract Rates.

Periodic Target Priced Routine Maintenance:

Gives results based on work for the selected Period as scheduled into Confirm by Maintenance Regimes. Costs are derived from target prices entered against SOR Items in the SOR Item library.

Creating a Term Contract - step-by-step

The following must be in place before a Contract can be let:

- Contract Areas in the Contract Areas Lookup.

Site Register\Site Lookups\Operational Lookups

- Price factors in the Price Factor Lookup.

Asset Maintenance\Maintenance Lookups

- SOR Items - with Quantity calculation carried out if appropriate. See **Asset Maintenance - SOR Item Lookups** for information on carrying out quantity calculation for Non Routine items.
- Where Routine Maintenance is included in the Contract: Sites, Features and Maintenance Regimes. Maintenance Regimes must be allocated to the appropriate Features. See "Maintenance Regimes" for information on creating and allocating Maintenance Regimes.

To Set up a Term Contract

In the Contract from, enter a Code and a name. Set a Start and End date. Enter the Coverage on the Coverage tab, and the Price Factors on the Price Factor tab. Save.

- Use **Calculate BoQ** on page 37 to bring all SORs used in Routine Maintenance for the Contract Areas defined into the BoQ.
- Use **Contract Rates** on page 29 to add, or batch, any other SORs which are required for non-Routine Work, or in other Price Factors.
- Use **Print Bill of Quantities** on page 37 to print if necessary.

To add Contractor's bids

- Use the 'Contractors' form to enter a code and name for all the bidding Contractors.
- If importing Bids, use 'Import Contractors Bids'.
- If entering Bids manually, recall the Contact into the Contract form and add the bidding Contractors onto the Bidding Contractors tab. You may then use 'Contractor Item Costs' and 'Contractor Site Costs' to enter the bids against each BoQ item for each bidding contractor.
- You may run the Evaluate Bids report, or the Forecast Cost report (with the Contractor entered into the Contractor field) to derive information on the cost of the Contract based on the bids from each Contractor.

To Award the Contract

- Recall the Contract into the Contract form.
- In the 'Contractor' field on the Contract tab of the Contract form, enter, or select from the pick list, the Contractor to whom the Contract is being awarded. The pick list references the contractors entered on the bidding Contractor's tab of the Contract.
- Save the Contract.

Note: The Contract cannot be awarded if there are any Contractor's Bids without the 'Rate Supplied' box checked. Zero rated bids can be included, but you will be warned that these exist.

Creating a Non-Term Contract - step-by-step

The following must be in place before a Non-Term Contract can be set up:

- Contract Areas in the Contract Areas Lookup.
- Price Factors in the Price Factor Lookup.
- Appropriate SOR Items.

To Set up a Non Term Contract

- In the Contract from, enter a Code and a name. Set a Start and End date. Enter the Coverage on the Coverage tab, and the Price Factors on the Price Factor tab (usually only one Price Factor is necessary). Check the 'Non Term' check box on the Payment tab of the Contract form. Save.
- Use the **Contract Rates** on page 29 to add, or batch, SORs that are required. This will usually be one item priced 'per [unit of currency]'. Enter the prices for the SOR items.

A Non Term Contract is not awarded, therefore you do not need to enter Contractor's onto the Bidding Contractor tab, enter Bids, or award the Contract.

A Non Term Contract is used to issue work to any Contractor who is listed in the **Contractor library**.

Tendering

(Non-Term Bidding module)

The Tendering module allows a Job, or a series of Jobs, to be tendered and bid for. When the Tender is awarded an Order is created and the work then progresses through the usual Maintenance Management system to payment.

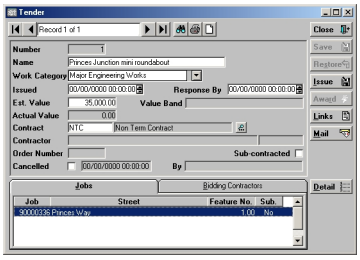
The functionality described is designed to address the following issues:

- Preparation of Tender documentation
- Tender evaluation and negotiation
- Award of Contract
- Enforcement of proper procedures / audit trails

The Tendering module may be used with the Contractor Standing Lists module to further automate the selection of Bidding Contractors for Tenders. See **Contractor Standing Lists** on page 57.

Tender

Details of the Tenders are stored in the Tender Library. The Tender form is used to define the Tender (by adding Jobs), to list the bidding Contractors and enter their bids, and finally to award the Tender (or contract) to the successful bidding Contractor.



Number: The System will assign a number from **Seed numbers** when the Tender is first saved.

Name: Up to 40 characters.

Work Category: Select from the Drop Down list. The drop down list references the **Work Category lookup**.

Issued: This date may be set in two ways:

1. Using the 'Issue' button on the Tender form will set the Issue date to the current date and time.
2. Enter a date in the Issued field to indicate the Tender was issued on this date.

Before a Tender can be successfully Issued the Tender must have at least one Job and one bidding Contractor.

When a Tender has been Issued it will no longer be possible to add/delete/alter the Jobs on the Tender, add/delete Contractors to the Tender or alter the Issued date. To achieve any of the above the Tender must be cancelled and the details entered again.

Response By:	Enter a date by which the bids should be returned (this may be included in the Tender Documents)
Est. Value:	Enter an estimated value for the Tender. (Contractor Standing Lists module) - This will place the Tender in a Value Band, which in turn will indicate which Standing List(s) the bidding Contractor may be drawn from.
Value Band:	(Contractor Standing Lists module) A Value Band will be entered, based on the Estimated Value, which will indicate which Standing List(s) the bidding Contractor may be drawn from.
Actual Value:	Will be automatically entered when the Tender is awarded.
Contract:	Select the Contract under which this Tender will be issued. This should be a Non-Term Contract. The pick list references non-term Contracts. See **Payment tab** on page 10 for details on Non Term Contracts.
Contractor:	The winning Contractor will be automatically entered when the Tender is Awarded.
Order No:	Will be entered automatically when the Order is created on Award of the Tender. **Note:** subcontracted Tenders will not have an Order created and therefore will not have an Order number entered on Award.
Subcontracted:	Check this box to indicate that this Tender is subcontracted to another Tender. Checking this box will have two effects on the Tender: **1.** it will be possible to include this Tender Job(s) in a main Tender **2.** Award of the sub-contract tender will not raise a Works Order.
Cancelled:	Check this box to cancel the Tender and release its Job(s) for inclusion on another Tender. The current date\time and User will be entered on saving the cancelled Tender. Cancelled Tenders cannot be edited.

Issue button

When the Tender has at least one Job and at least one Bidding Contractor on it, it may be Issued. Issuing Tender fixes the Tender and the details may not be altered.

Click on the Issue button to Issue the Tender. A warning will be displayed.

Click 'Yes' to proceed. The current date and time will be entered in the 'Issued' field of the Tender form.

Where the Contractor Standing Lists module is present further warnings may follow if the bidding Contractors do not conform to the criteria set in the Standing List.

Award button

Before a Tender can be Awarded the statuses of all Bidding Contractors must be set correctly. There are only five acceptable statuses for these Tender Bids: 'Not Interested', 'No Bid', 'Dropped', 'Accepted' or 'Rejected'. In addition there must be one (and only one) Tender Bid with an 'Accepted' status, and this accepted Contractor must not be disqualified (under the Contractor Standing Lists module).

If the Tender passes this validation process (and it is not a sub-contracted Tender) then the value of the winning Contractors bid values will be written to the Job(s) and a Works Order will be creating and committed. The winning Contractor and Order Number (for non sub-contracted) will also be written to the Tender. (N.B. if the Contract concerned doesn't have Contract Rates for any of the Items on the Job(s) on the Tender the Works Order will be created with a zero rate for the Items concerned.)

Once a Tender is Awarded it is considered finished and most of its attributes become non-editable.

To award the Tender, click on the 'Award button. A warning will be displayed to the User.

Click on 'Yes' to Award the Tender and create the Works Order.

Mail button

(Contractor Standing Lists module)

The mail button drop down list will display the available Mail Types for the Tender. The mail Types listed correspond to those on the Standing List form (Invite, Issues, Reject and Accept)

The mail type available in the drop down list is dependent on the status of the Tender Bid Contractor as detailed below:

Bidding Contractor Status	Mail option available
Interested	Issue
Invited	Invite
Accepted	Accept
Rejected	Reject

Click on the Mail Type to launch the linked word processor document and carry out a mail merge of the appropriate fields from the current Tender records.

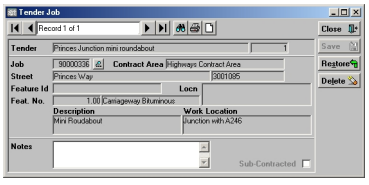
See **Standing Lists** on page 57 for information on defining and setting up Mail Types.

Jobs tab

The Jobs for inclusion in the Tender should be created in advance. Unit Currency rated ("pound value") items should always be used on the Job. When creating Jobs the Quantity should be set at zero, and the Bidding Contractor will supply this quantity (hence value) of each item in their bid. The exception to this is for fixed price items, such as contingencies, which will be identified by specifying a quantity of the SOR before collating the Job onto a Tender.

When a Job is on an issued Tender it will behave as a committed Job i.e. only certain fields will be editable and all its Items will not be editable.

Select the Jobs tab and click on the 'Detail' button to display the Tender Job form:



Use the 'Job' field pick button to select the Job, or type in the Job number. The Job details will be entered in the appropriate fields. You may only add uncommitted Jobs, and you may not add Jobs that are on another Tender with the following exceptions:

- Jobs that are on Tenders that have been cancelled
- Jobs that are on Sub-Contracted Tenders (however you cannot add a Job from a sub-contracted Tender to a Tender that is itself sub-contracted)

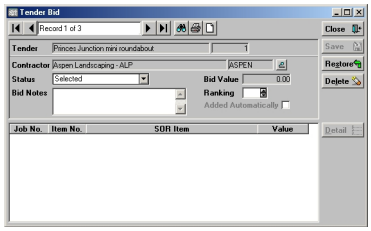
Notes:	A free text optional field
Subcontracted	A read only checkbox which indicates whether the Job is sub-contracted (that is, present on another, sub-contracted, Tender)

You may add as many Jobs as you wish, provided that they all comply with the above requirements, and they are all in the same Contract Area as the first Job added to the Tender.

Bidding Contractors tab

Bidding Contractors are added to a Tender before the Tender is Issued. Each Contractor's progress through the process is then tracked by a system of Statuses that define the next set of available statuses, and what may be done to the Tender.

Bidding Contractors may be added manually, or, where the Contractors Standing Lists module is present, opening the Tender Bid form for the first time may automatically add Contractors according to the criteria set in the Standing Lists. See **Standing Lists** on page 57



Tender:	Copied from Tender
Contractor:	Enter or select from pick list. Where the Contractor Standing Lists module is present, the selection will be limited to Contractors who are on the appropriate Standing list (as defined by the Value Band), and are 'Approved' or 'Pending'. **Note:** You may add only one Contractor from Contractors who are linked to the same Parent company. See **Additional tab** on page 20 for information on Parent Company
Status:	Select the appropriate status from the drop-down list. The current status defines the statuses available from the drop down list:

Current Status	Next permitted Status
Selected	Invited to Express Interest | Dropped
Invited to Express Interest (not Issued)	Selected | Dropped
Invited to Express Interest (Issued)	Interested | Declined Interest | Dropped
Dropped (not Issued)	Selected | Invited to Express Interest
Dropped (Issued)	(none)
Declined Interest	Interested | Dropped
Interested	Bid In | No Bid | Dropped

Bid In	Accepted | Rejected | No Bid | Dropped
No Bid	Bid In | Dropped
Accepted	Bid In | Rejected | Dropped
Rejected	Bib In | Accepted | Dropped

Tenders may only be Awarded when Bidding Contractors carry one of the following statuses: 'Dropped', 'Not Interested', 'No Bid', 'Accepted' or 'Rejected'

Bid Value:	Derived from all the Bid Item Quantities entered on this Tender for this Contractor.
Bid Notes:	A free text optional field
Ranking:	A Ranking will be entered when the Tender Bid Evaluation report is saved. This will rank the Tender Bids by value, the lowest bid ranking 1, the next lowest 2, and so on.
Added Automatically:	(Contractor Standing Lists module) Will be checked for Bidding Contractors who were added automatically.

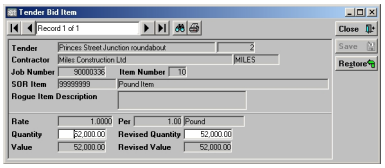
Tender Bid Item

In order to enter the bids for this Bidding Contractor, click on the 'Detail button.

Note: Tender bids may only be accessed if the Tender is 'Issued'

The Tender bid items will be derived from all the Jobs present on the Tender form.

The Tender Bid Item form is displayed:



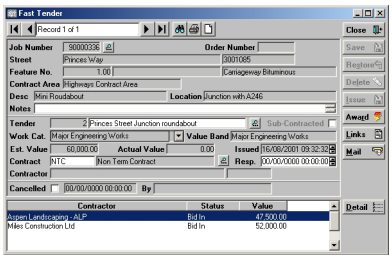
For Issued Tenders that haven't yet been awarded (or cancelled), the Quantity, and Revised Quantity field will be available except in the following cases:

- The Item had a quantity entered against it in the original Job. In this case the Item is treated as a Contingency Item and is not editable.
- The Item derives from a Sub-contracted Job. In this case, the bidding is carried out on the Sub-contracted Tender, and that Tender should be awarded before this one. Where the Sub-contracted Tender has been awarded, the value of this item will be displayed in this Tender.

In all other cases both Quantity and Revised Quantity remain editable until the Tender is Awarded or Cancelled.

Fast Tender

The Fast Tender is a Job orientated version of Tender, and can also be opened from the 'Other' button on the Job form to directly add that Job to a Tender.



Job Number: Use the pick button, or enter a Job number to retrieve an existing Tender Job or to pick an uncommitted Job to add to a new or existing Tender.

When retrieving a Tender Job which is on more than one Tender (i.e. it is on a sub-contracted and non sub-contracted Tender) then the sub-contracted Tender is the one that will be retrieved (as this is the one whose Tender Bid Items can be set if the Tender is Issued).

Job details will be entered in the remaining fields in this section of the form (above the grey line)

Tender: Where the retrieved Job is on a Tender - The details of that Tender will be entered.

When retrieving a Tender Job which is on more than one Tender (i.e. it is on a sub-contracted and non sub-contracted Tender) then the sub-contracted Tender is the one that will be retrieved (as this is the one whose Tender Bid Items can be set if the Tender is Issued).

Use this field to select an Un-issued Tender (the Tender must either have no Tender Jobs or its Tender Jobs must be in the same Contract Area as the Job to be added) to add this Job to an existing Tender

To create a new Tender for this Job, leave the first part of the Tender field blank (the System will assign a number from Seed numbers when the Tender is saved) and enter a name for the Tender (up to 40 characters) in the second part of the field.

Subcontracted: Check this box to indicate that this Tender is subcontracted to another Tender. Checking this box will have two effects on the Tender:

- it will be possible to include this Tender Job(s) in a main Tender
- Award of the sub-contract tender will not raise a Works Order.

Work Category: Select from the Drop Down list. The drop down list references the **Work Category lookup**.

Value Band: (Contractor Standing Lists module)

A Value Band will be entered, based on the Estimated Value, which will indicate which Standing List(s) the bidding Contractor may be drawn from.

Est. Value: Enter an estimated value for the Tender.

(Contractor Standing Lists module) - This will place the Tender in a Value Band, which in turn will indicate which Standing List(s) the bidding Contractor may be drawn from.

Actual Value: Will be automatically entered when the Tender is awarded.

Issued: This date may be set in two ways:

1. Using the 'Issue' button on the Tender form will set the Issue date to the current date and time.
2. Enter a date in the Issued field to indicate the Tender was issued on this date.

Before a Tender can be successfully Issued the Tender must have at least one Job and one bidding Contractor.

When a Tender has been Issued it will no longer be possible to add/delete/alter the Jobs on the Tender, add/delete Contractors to the Tender or alter the Issued date. To achieve any of the above the Tender must be cancelled and the details entered again.

Contract: Select the Contract under which this Tender will be issued. This should be a Non-Term Contract. The pick list references non-term Contracts.

See **Payment tab** on page 10 for details on Non Term Contracts.

Resp: Enter a date by which the bids should be returned (this may be included in the Tender Documents)

Contractor: The winning Contractor will be automatically entered when the Tender is Awarded.

Cancelled: Check this box to cancel the Tender and release its Job(s) for inclusion on another Tender. The current date\time and User will be entered on saving the cancelled Tender. Cancelled Tenders cannot be edited.

Issue button

When the Tender has at least one Job and at least one Bidding Contractor on it, it may be Issued. Issuing Tender fixes the Tender and the details may not be altered.

Click on the Issue button to Issue the Tender. A warning will be displayed.

Click 'Yes' to proceed. The current date and time will be entered in the 'Issued' field of the Tender form.

Where the Contractor Standing Lists module is present further warnings may follow if the bidding Contractors do not conform to the criteria set in the Standing List.

Award button

Before a Tender can be Awarded the statuses of all Bidding Contractors must be set correctly. There are only five acceptable statuses for these Tender Bids: 'Not Interested', 'No Bid', 'Dropped', 'Accepted' or 'Rejected'. In addition there must be one (and only one) Tender Bid with an 'Accepted' status, and this accepted Contractor must not be disqualified (under the Contractor Standing Lists module).

If the Tender passes this validation process (and it is not a sub-contracted Tender) then the value of the winning Contractors bid values will be written to the Job(s) and a Works Order will be creating and committed. The winning Contractor and Order Number (for non sub-contracted) will also be written to the Tender. (N.B. if the Contract concerned doesn't have Contract Rates for any of the Items on the Job(s) on the Tender the Works Order will be created with a zero rate for the Items concerned.)

Once a Tender is Awarded it is considered finished and most of its attributes become non-editable.

To award the Tender, click on the 'Award button. A warning will be displayed to the User.

Click on 'Yes' to Award the Tender and create the Works Order.

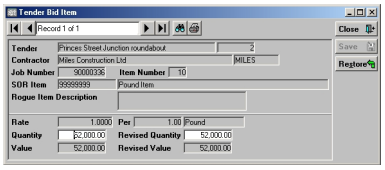
Tender Bid Item

In order to enter the bids for this Bidding Contractor, click on the 'Detail button.

Note: Tender bids may only be accessed if the Tender is 'Issued'

The Tender bid items will be derived from all the Jobs present on the Tender form.

The Tender Bid Item form is displayed:



For Issued Tenders that haven't yet been awarded (or cancelled), the Quantity, and Revised Quantity field will be available except in the following cases:

- The Item had a quantity entered against it in the original Job. In this case the Item is treated as a Contingency Item and is not editable.
- The Item derives from a Sub-contracted Job. In this case, the bidding is carried out on the Sub-contracted Tender, and that Tender should be awarded before this one. Where the Sub-contracted Tender has been awarded, the value of this item will be displayed in this Tender.

In all other cases both Quantity and Revised Quantity remain editable until the Tender is Awarded or Cancelled.

Tendering Schedule

The Tendering Schedule provides a report to be sent to the Bidding Contractors so that they can return their bids.

Filter option include:

Include Sub-Contracted Jobs:	Sub-contracted Jobs included on this Tender may be included for information only. Bidding for the Sub-Contracted Job is carried out under the Sub-contracted Tender. Where that Tender has already been awarded, the value of this Job will be shown.
Include Contingency Items:	Contingency Items (that is Items which had a value ascribed when the Job was raised) included on this Tender may be included for information only.

Schedule of Tenders Received

The Schedule of Tenders Received report shows bid values provided by Contractors.

The filter is similar to the Tendering Schedule filter.

Tender Bid Evaluation Report

The Tender Bid Evaluation Report lists the Tender bids by value, the lowest at the top.

Saving the report applies a 'Ranking' in the Ranking field of the Tender Bid Item. See **Tender Bid Item** on page 48.

The filter is similar to the Tendering Schedule filter.

Tendering Lookups

Work Category

Work Categories are applied to Tenders and Standing Lists and define the Value Bands that are applied. Value bands must be contiguous for the same Category, but another set of different contiguous value bands can be set up for another Work Category.

Code:	Up to four alphanumeric characters
Name:	Up to 30 characters.

Tender Seed Numbers

Tenders are numbered from the Tender seed numbers that are set for each Work Group. Two ranges are available allowing you to issues two batches of non-contiguous numbers.

Bear in mind that:

Only Work Groups who will be raising Tenders will need Seed numbers.

Each Work Group must have a unique range of numbers, but if you issue one range to start with, which proves to be too few numbers, you can later come back and use the second range. You can also amend the 'Maximum' number to make room for a range of numbers for a new Work Groups.

The total range of numbers is from 1 to 99999999. These numbers need to be distributed amongst the Work Groups working with Tenders.

Work Group:	Enter a Work Group Code, or use the 'Find' button to recall all Work Groups. **System Administration\Security\Work Groups**
Tender:	Enter the number ranges for this Work Group.

Tender System Settings

The Tender Systems Settings sets a default for the Work Type for Works Orders created when Awarding a (non sub-contracted) Tender.

Use the drop down list to select a Work Type. The drop down list references the Work Type Lookup.

Maintenance Management\Contract Management Lookups

Entity History Report

(Audit Trail Module)

Click on ' Entity History Report' to view an Entity History Report for all the Historical Log entries associated with this Feature record.

See '**Entity History Report**' for more information on Entity History Report.

Entity History Report

Key Codes

Entity History can be recorded for the following:

Entity	Key	Module Required
Feature	Site Code / Plot Number	0115 – Audit Trails
Feature Attributes Feature Measurements Feature Dates Feature Smart Attributes	Site Code / Plot Number / Type Code	0115 – Audit Trails
Inventory	Site Code / Plot Number / Inv Item Id	0115 – Audit Trails
Inventory Attributes	Site Code / Plot Number / Inv Item Id / Type Code	0115 – Audit Trails
SOR Item	SOR Item Code	None
Defect	Defect Number	0500 – Condition Survey
Enquiry Customer Details	Customer Number	1200 – Customer Services
Enquiry Contact Details	Enquiry Number	1200 – Customer Services
Job	Job Number	0700 – Asset Maintenance
Job Attribute Type	Job Number / Type Code	0715 – Job Attributes
Job Status	Status Code	0700 – Asset Maintenance
Tender Bids	Tender Number / Contractor Code	0945 – Non-Term Bidding
Standing List Prerequisite	Work Band Key / Credential Code	1810 – Contractor Standing Lists
Listed Contractor	Work Band Key / Contractor Code	1810 – Contractor Standing Lists
Contractor Credentials	Contractor Code / Credential Code	1810 – Contractor Standing Lists
Consequence Type	Consequence Type Code	2300 – Risk Management
Consequence Severity	Consequence Type / Severity	2300 – Risk Management
Consequence of Failure (Matrix)	Feature Group / Risk Type / Risk Class / Failure Mode / Consequence Type / Severity	2300 – Risk Management
Feature Activity	Site Code / Plot Number / Activity Number	2300 – Risk Management
Statement Item	Organise Code / Statement Number / Statement Item Number	3400 - Street Works Register
User Security	Login Name	None
User Security - Program Rights	Login Name / Program Code	None
Note: The 'All' button on the User Security screen,	For example, Key Like USER1/* returns all changes to the ac-	

Entity	Key	Module Required
and the 'Users' button on the Group Security screen, delete Program Rights and insert new ones. **Note:** Only manual changes to the 'User Locked Out' flag will be shown in the Entity History. For example, if a User is locked out by exceeding the password retry limit, this will not be shown.	cess for User USER1, and Key Like */JOB returns all changes to accesss to the Job screen.	
Group Security	Group Code	None
Group Security - Program Rights **Note:** The 'All' button on the Group Security screen deletes Program Rights and inserts new ones.	Group Code / Program Code For example, Key Like GRP1/* returns all changes to the access for Group GRP1, and Key Like */JOB returns all changes to accesss to the Job screen.	None
Data Security Key	Data Key	None
Data Security Group	Data Group Key	None
Data Security Group - Access	Data Group Key / Data Key For example, Key Like 1/* returns all changes to the access for Group 1, and Key Like */1 returns all changes to accesss to Data Key 1.	None
ConfirmConnect Profile	Profile Code	None
Import Transformation (includes Contractor Import and Export Transformation)	Transformation Key	None

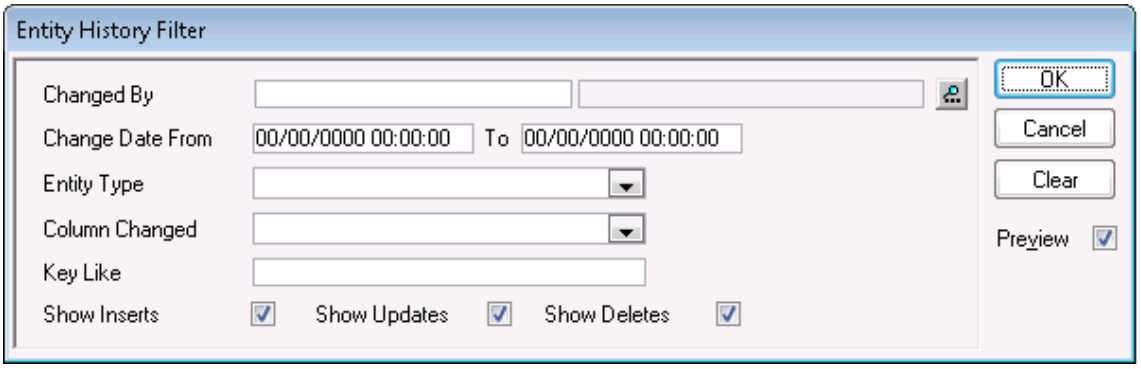
Note: Plot Number is stored without trailing zeroes. For example Entity History for a Feature with a Plot Number of 100.00 is stored with a Key value in the form 47701370/100 rather than 47701370/100.00.

Note: Entity History will only record the first 500 characters of text fields, such as Feature Location, Feature Description, Defect Notes, Attribute Notes etc.

Click on the OK button to retrieve the results.

The Entity History Report will open and display the results that met the filter criteria. Displaying all Historical Log entries associated with Entity Date along with any changes made.

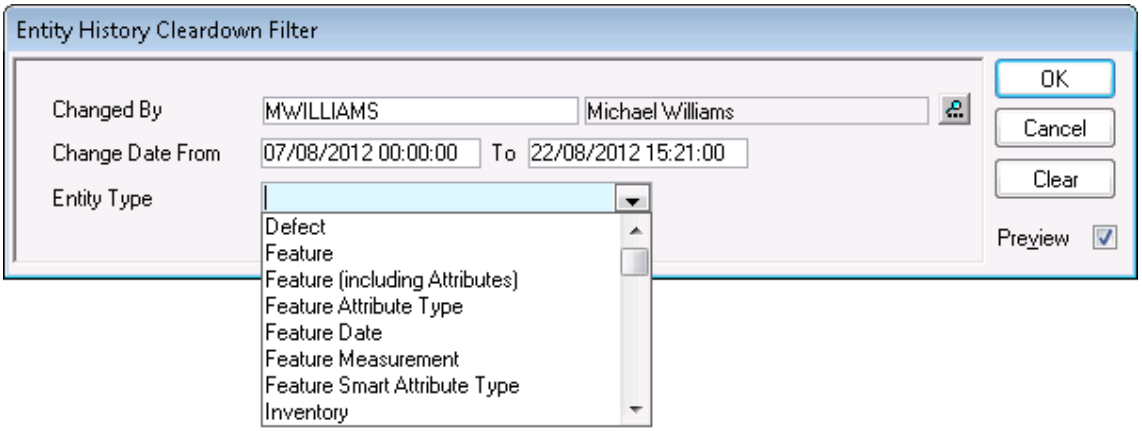
Note: For Enquiry, only 'Updates' to an existing Enquiry are recorded in Entity History.



Changed By:	Select a User from the User library. **System Administration\Security\User Security**
Change Date From \ To:	Select the date range to report on.
Entity Type:	Enter the section of data to report on. The drop down list shows the data sections as defined in the Entity History System Settings.
Column Changed:	A list of fields will be displayed which will reflect the selection made in the Entity Type field. Select from the list.
Key Like:	A free Text field in which key codes may be entered. Each code is separated by a slash. See the 'Key Codes' section for example codes.
Show Inserts:	Check this to include newly created records in the report.
Show Updates:	Check this to include changes to existing records.
Show Deletes:	Check this to include records that have been deleted from the database.

Entity History Cleardown

The Entity History Cleardown will delete Entity History records based on the parameters set in the filter.



Changed By	Restricts the Cleardown utility to clear changes made by the selected User only.

Change Date From \ To	Restricts the removal of Entity History records to only those created between the dates set. These are optional and if not provided then no date restriction will be applied.
Entity Type	Restricts the Cleardown utility to only particular Entity Types. The drop down list shows the entire list of Entities that Entity History can be recorded for.

The Preview Report will display the Entity History records retrieved based on the filter criteria, and all of these displayed records will be removed from Confirm. The records will not be removed until the 'Save' button is clicked, and upon completion the Report Title will change from “Entity History Cleardown Report” to “Entity History Cleardown – Result”.

Tendering Entity History Settings

The Tendering Entity History Settings define the Tendering data for which changes are tracked and recorded.

Tender Bid:	Record changes to the Tender Bid Status.

Contractor Standing Lists

Contractor Standing Lists applies to both non-term and term Contracts. However most of the functionality described below applies mainly to non-term Contracts. In addition, to get full functionality the Tendering module should also be active.

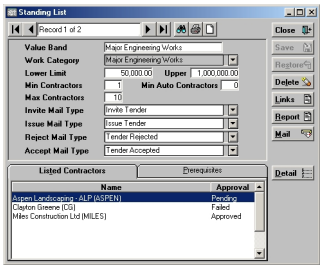
A Standing List is defined as a list of Contractors who have been approved to do work of a given Work Category in a Value Band. For example, Property Renovation works between £5,000 and £40,000.

Each Standing List has a defined set of prerequisites (Contractor Credentials), which the Contractors must comply with in order to be Approved for that Standing List. Examples of prerequisites might be valid insurance certificates, references, or health and safety procedures.

Standing Lists

A Standing List is defined by its Work Category and a Value Band. A Value Band has a Lower and Upper monetary limits and a name.

Note: Standing Lists can only be deleted if they do not have any Listed Contractors or Prerequisites. As these cannot be deleted once added to a Standing List caution should be exercised when creating Standing Lists.



Value Band:	Up to 30 characters
Work Category:	Select from the drop down list. The drop down list references the **Work Category lookup**.
Lower Limit:	Enter a number from zero
Upper:	Enter a number up to 99,999,999.99

The Lower and Upper limits will define the value of Tenders (or Contracts) for which the Contractors on this list may bid

Within a particular Work Category the value limits must be contiguous. Altering these values (or adding and deleting a Standing List) will affect adjoining Value Bands (a warning to this effect will be given) and in certain cases will not be permitted (e.g. increasing the Upper Limit so that it is greater than the Upper Limit of the next Value Band up).

Min Contractors:	The minimum number of Contractors that must be Invited before a Tender can be Issued
Max Contractors:	The maximum number of Contractors that can be Invited before a Tender can be Issued
Min Auto Contractors	The minimum number of Contractors that must be automatically added to a Tender before it can be Issued.

Note: entering a number in this field will automatically enter this number of Contractors, from this Standing list, when the Tender Bid form is opened for the first time on the Tender.

Only 'Approved' Contractors can be automatically added to a Tender.

The order in which the Contractors are selected for automatic addition to a Tender is based on the date they were last Invited to bid for a Tender on the current Standing List. Those who have not yet been Invited will be selected first and those who have most recently been Invited will be selected last. This 'Invited' date is displayed on the Listed Contractor window

Mail Types: Enter, from the drop down list, the mail types to be used on the Tender at the following stages:

Invite Mail Type: Mail Merge definitions associated with the Invitation to Tender

Issue Mail Type: Mail Merge definitions associated with the Issuing a Tender

Reject Mail Type: Mail Merge definitions associated with rejecting a bid from a Tender Bidding Contractor

Accept Mail Type: Mail Merge definitions associated with accepting a bid from a Tender Bidding Contractor.

The drop down lists reference the Mail Merge Types set up in the Mail merge manager. See for more information on setting up mail merge types in the Mail merge manager.

Report button

The Report button displays the Listed Contractor Filter

Use the filter to select for a list of Contractors, by Value band, showing the details stored against each Contractor in the selected Standing Lists.

Mail button

Use the Mail button to view, or create, mail merge types for Tenders. Letters can be created to send at the following stages of the Tender: when Inviting Interest, when issuing the Tender Schedule, when rejecting a bid, and when accepting a bid.

Click on the 'Mail' button to display the Mail Merge Manager:

Code: Up to four alphanumeric characters

Name: Up to 30 characters

Data File: Enter, or browse to select, the data transport file. This file will be used as the data source file by your word processor.

Note: This file need not be present in the selected directory. You can enter the path and then type a file name - the file will be created in the specified directory when this record is saved.

Mail Merge Document: Enter, or browse to select, the mail merge document. This is the word-processed document into which the merge fields are placed to create the merge letters.

Note: This file must be created before creating this Mail Merge Manager record. You need only open a new document in your word processor and save it, blank, with the required name.

File Format:	Select from the drop down list a file format suitable for the Data File, (that is the format most acceptable to your word processor)

The specified word processor document will be launched when the mail type is selected from the Mail button on the Tender form.

The first time the mail type is selected in the Tender form, the document launched will be the blank document saved in order to create the Mail Merge Manager record.

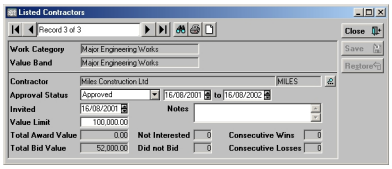
You should then follow the Mail Merge procedure for your word processor, selecting the Data File specified in the Mail Merge Manager when prompted for a Data Source (you do not need to specify a Header file, the Data File has headers included).

The letter can then be created, with merge fields inserted at the appropriate places. Save the word processor file.

Subsequently, when the mail type is selected in the Tender form, the word processor will be launched and the merge will be carried out automatically based on the data then present in the Tender form.

Listed Contractor tab

The Listed Contractors tab contains all the Contractors in the Standing List for this Value Band. A Contractor may be entered on several Standing Lists.



Contractor:	Select from the pick list. The pick list references the **Contractor library**.
Approval Status:	Select from the drop down: Pending: to indicate that approval is not yet given based on the prerequisites set for this Standing List. A Contractor whose Approval Status is Pending may be manually added to a Tender - but may not be awarded the Tender until the Approval Status is updated to 'Approved' Approved: Indicates that the Contractor has met all the prerequisites. An 'Approved' contractor may be automatically added to the Tender, and only 'Approved' Contractors may be awarded a Tender Failed: Contractors at this status may not be added to Tenders.
Approval Status: (dates)	The date range indicates the currency of the present Approval Status The 'To' date defaults to the periods specified by Standing List System Settings when the Approval Status is changed to 'Approved' or 'Failed', and to no date when the Approval Status is changed to 'Pending'. The 'From' date will default to the current date for 'Approved' or 'Failed' statuses. Both dates can be set manually.
Invited:	The last date on which this Contractor was invited to Tender within this Standing List. The date is used when selecting Contractor for automatic addition to a Tender.

Notes:	A free text optional field
Value Limit:	Enter the maximum value of work that this Contractor can be committed to for the current Standing List. **Note:** When adding Bidding Contractors to a Tender the system will check that the value of the current Tender plus the two values below (Total Award Value and Total Bid Value) do not exceed this Value Limit.
Total Award Value:	Shows the total value of Tenders that the Contractor has been Awarded that relate to this Standing List. This value will incremented on an Award of a Tenders (that relate to this Standing List) and will be decrement by the same amount when the Works Order that was created on Award of the Tender is Archived.
Total Bid Value:	Shows the total value of Tender Bids that the Contractor currently has in the system that relate to this Standing List. This value will be updated every time one of the Contractor's Tender Bid Items (that relate to this Standing List) is changed.

The following four fields record the Contractor's performance within this Standing list based on the Tender Bid Statuses that have been applied on the relevant Tenders.

The fields are updated when a Tender is awarded.

Not Interested:	Shows the number of times a Tender Bid Contractor 'Declined Interest' after being 'Invited to Express Interest' in a Tender. This will get reset to zero when the Contractor provides a Bid.
Did Not Bid:	Shows the number of times a Tender Bid Contractor provides 'No Bid' after being 'Interested' in a Tender. This will get reset to zero when the Contractor provides a Bid.
Consecutive Wins:	Shows the number of consecutive times a Tender Bid Contractor has been Awarded a Tender ('Accepted'). This will get reset to zero when the Contractor doesn't win a Tender they have been 'Invited to Express Interest' in.
Consecutive Loses:	Shows the number of consecutive times a Tender Bid Contractor has not been Awarded a Tender ('Rejected' or 'No Bid'). This will get reset to zero when the Contractor does win a Tender they have been 'Invited to Express Interest' in.

Prerequisites tab

The Prerequisites tab stores the prerequisites that apply to the Standing List. In order for a Contractor to have an Approval Status of 'Approved' for a Standing List they must have Contractor Credentials for all of these Credential Types. Contractor Credentials are stored against the Contractor in the Contractor Credential library.

Contract Preparation\Contractor Standing Lists\Contractor Credential

Select the Prerequisites tab and click on the 'Detail' button to display the Standing List Prerequisite form.

Credential:	Select from the Drop down list. The drop down list references the **Credential Type lookup**.
Notes:	A free text optional field

Cancelled:	Check this to cancel this prerequisite. Cancelled records can be un-cancelled by un-checking the Cancelled box.

Contractor Credential

The Contractor Credentials stored against each Contractor the Credentials that they have obtained, are about to obtain, or have failed to obtain.

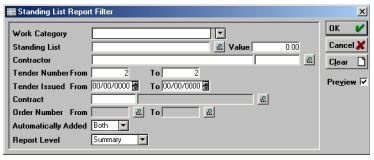
When a Contractor is added to a Standing List, they must have all the Credentials specified in the Prerequisites for the Standing List, before the Contractor can be assigned an Approval Status of 'Approved'.

Contractor:	Enter or select from the pick list. The pick list references the Contractor library
Credential:	Select from the drop down list. The drop down list references the **Credential Type lookup**.
Parent Type:	Where a 'Parent Type' Credential is being added to a Parent Company, this box will be automatically checked. Adding a Parent Type Credential to a Parent Company will add the Credential, and its associated details, to all the 'child' Contractors (all those that reference this Contractor as the 'Parent Company') **Note:** You cannot add a Parent Type credential to a 'child' Contractor - it must be added to the Parent Company contractor form where it will be assigned to the 'child'.
Approval:	Select from: Pending: set this for credentials that require verification, or will be achieved soon. Approved: Set this where the Credential has been achieved and verified. Failed: set this where the Contractor does not have the credential. **Note:** Contractor's must be 'Approved' for all the Credentials on the prerequisites tab of a Standing List before they can gain an Approval Status of 'Approved' for the Standing List.

To create merge letters for Credential Renewal, use the 'Print' button in the Contractor Credential form and select 'Contractor Credential Renewal Dates' when prompted to Select the List Required. Complete the filter to select the required records. A list is displayed. Use the 'Mail' button, in the list window, to launch the specified Word processor and carry out a merge on the Contractors selected in the list.

Reports

The Standing List reports all use a similar filter:



Automatically Added:	Select from: Both, Yes, or No to report on all Tenders on which the Contractor was included, only those on which they were automatically included, or only those on which they were manually included.
Report level:	Select Summary for a simple list of Contractors. Select Detail to split the report by Work Category and Value band

Tender Bid Ranking List

Displays each Contractor and lists the rankings they have achieved for the Tenders they were included on.

Note: ranking is set by running and saving the Tender Bid Evaluation Report - See **Tender Bid Evaluation Report** on page 51.

Tender Bidding Contractor List

Lists Contractors, with Bid Status (Various is entered where records at different statuses are included), Number of Bids, and the total value of the bids.

The Tender Bidding Contractor List gives all the Contractors bidding for each Tender, with primary Contact Details.

The Report can be used with the Mail Merge option to provide a cover letter to be sent with the Tender Schedule.

Interested \ Declined Tender Bid List

Gives the number of times each Contractor has been Invited to express an interest and the number of times they have declined. This is given as a percentage (of declined invitations), and shows the total value of declined invitations.

Invited \ No Bid Tender Bid List

Gives the number of times each Contractor has expressed an Interest and the number of times they have not submitted a Bid. This is given as a percentage (of expressions of interest which were not followed with a bid), and shows the total value of the Tenders involved.

Completed Tender Report

This Report will include only Tenders where the work has been completed and payment made. Estimated Value, Amount Tendered, and amount paid are shown for each Contractor

Entity History Report

(Audit Trail Module)

Click on ' Entity History Report' to view an Entity History Report for all the Historical Log entries associated with this Feature record.

See '**Entity History Report**' for more information on Entity History Report.

Entity History Report

Key Codes

Entity History can be recorded for the following:

Entity	Key	Module Required
Feature	Site Code / Plot Number	0115 – Audit Trails
Feature Attributes Feature Measurements Feature Dates Feature Smart Attributes	Site Code / Plot Number / Type Code	0115 – Audit Trails
Inventory	Site Code / Plot Number / Inv Item Id	0115 – Audit Trails
Inventory Attributes	Site Code / Plot Number / Inv Item Id / Type Code	0115 – Audit Trails
SOR Item	SOR Item Code	None
Defect	Defect Number	0500 – Condition Survey
Enquiry Customer Details	Customer Number	1200 – Customer Services
Enquiry Contact Details	Enquiry Number	1200 – Customer Services
Job	Job Number	0700 – Asset Maintenance
Job Attribute Type	Job Number / Type Code	0715 – Job Attributes
Job Status	Status Code	0700 – Asset Maintenance
Tender Bids	Tender Number / Contractor Code	0945 – Non-Term Bidding
Standing List Prerequisite	Work Band Key / Credential Code	1810 – Contractor Standing Lists
Listed Contractor	Work Band Key / Contractor Code	1810 – Contractor Standing Lists
Contractor Credentials	Contractor Code / Credential Code	1810 – Contractor Standing Lists
Consequence Type	Consequence Type Code	2300 – Risk Management
Consequence Severity	Consequence Type / Severity	2300 – Risk Management
Consequence of Failure (Matrix)	Feature Group / Risk Type / Risk Class / Failure Mode / Consequence Type / Severity	2300 – Risk Management
Feature Activity	Site Code / Plot Number / Activity Number	2300 – Risk Management
Statement Item	Organise Code / Statement Number / Statement Item Number	3400 - Street Works Register
User Security	Login Name	None
User Security - Program Rights	Login Name / Program Code	None
Note: The 'All' button on the User Security screen,	For example, Key Like USER1/* returns all changes to the ac-	

Entity	Key	Module Required
and the 'Users' button on the Group Security screen, delete Program Rights and insert new ones. **Note:** Only manual changes to the 'User Locked Out' flag will be shown in the Entity History. For example, if a User is locked out by exceeding the password retry limit, this will not be shown.	cess for User USER1, and Key Like */JOB returns all changes to accesss to the Job screen.	
Group Security	Group Code	None
Group Security - Program Rights **Note:** The 'All' button on the Group Security screen deletes Program Rights and inserts new ones.	Group Code / Program Code For example, Key Like GRP1/* returns all changes to the access for Group GRP1, and Key Like */JOB returns all changes to accesss to the Job screen.	None
Data Security Key	Data Key	None
Data Security Group	Data Group Key	None
Data Security Group - Access	Data Group Key / Data Key For example, Key Like 1/* returns all changes to the access for Group 1, and Key Like */1 returns all changes to accesss to Data Key 1.	None
ConfirmConnect Profile	Profile Code	None
Import Transformation (includes Contractor Import and Export Transformation)	Transformation Key	None

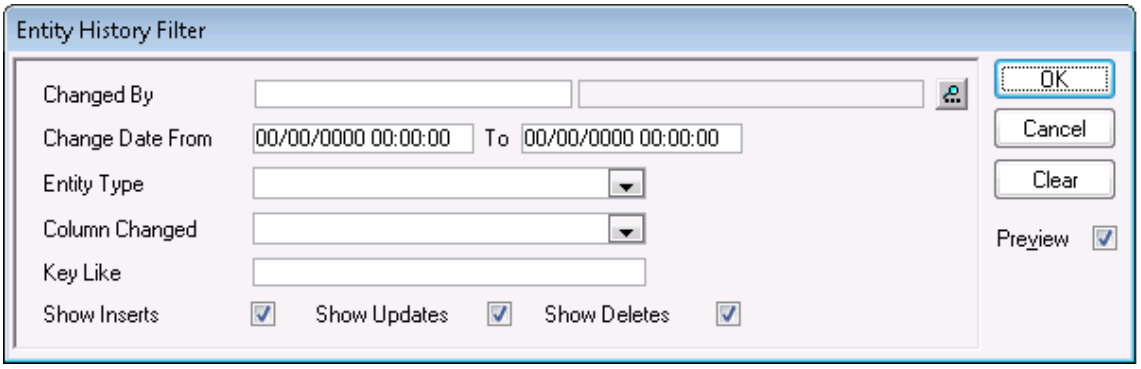
Note: Plot Number is stored without trailing zeroes. For example Entity History for a Feature with a Plot Number of 100.00 is stored with a Key value in the form 47701370/100 rather than 47701370/100.00.

Note: Entity History will only record the first 500 characters of text fields, such as Feature Location, Feature Description, Defect Notes, Attribute Notes etc.

Click on the OK button to retrieve the results.

The Entity History Report will open and display the results that met the filter criteria. Displaying all Historical Log entries associated with Entity Date along with any changes made.

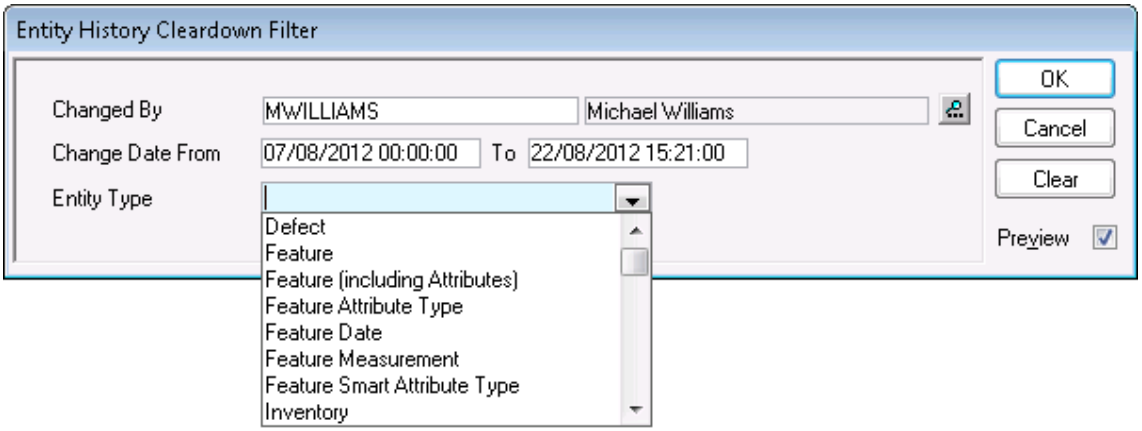
Note: For Enquiry, only 'Updates' to an existing Enquiry are recorded in Entity History.



Changed By:	Select a User from the User library. **System Administration\Security\User Security**
Change Date From \ To:	Select the date range to report on.
Entity Type:	Enter the section of data to report on. The drop down list shows the data sections as defined in the Entity History System Settings.
Column Changed:	A list of fields will be displayed which will reflect the selection made in the Entity Type field. Select from the list.
Key Like:	A free Text field in which key codes may be entered. Each code is separated by a slash. See the 'Key Codes' section for example codes.
Show Inserts:	Check this to include newly created records in the report.
Show Updates:	Check this to include changes to existing records.
Show Deletes:	Check this to include records that have been deleted from the database.

Entity History Cleardown

The Entity History Cleardown will delete Entity History records based on the parameters set in the filter.



Changed By	Restricts the Cleardown utility to clear changes made by the selected User only.

Change Date From \ To	Restricts the removal of Entity History records to only those created between the dates set. These are optional and if not provided then no date restriction will be applied.
Entity Type	Restricts the Cleardown utility to only particular Entity Types. The drop down list shows the entire list of Entities that Entity History can be recorded for.

The Preview Report will display the Entity History records retrieved based on the filter criteria, and all of these displayed records will be removed from Confirm. The records will not be removed until the 'Save' button is clicked, and upon completion the Report Title will change from “Entity History Cleardown Report” to “Entity History Cleardown – Result”.

Standing Lists Entity History Settings

The Standing List Entity History Settings define the Standing List data for which changes are tracked and recorded.

Standing List Pre-requisite:	Record the Cancellation (or un-cancellation) of a Pre-requisite in the Standing List library.
Listed Contractor:	Record changes on the Listed Contractor tab of the Standing List to the following: Approval Status and Approval Status dates, Invited date, Value limit.
Contractor Credential:	Record changes in the Contractor Credentials library to the following: Approval status, Renewal date, The Contact held in the Contractor Credential library.

Standing Lists Lookups

Credential Type

Credential Types are used in Contractor Credentials to list the Credentials that the Contractor has obtained, and in the Standing List - prerequisites tab to indicate which are the necessary prerequisites for Contractors on that Standing List.

Code:	Up to four alphanumeric characters
Name:	Up to 30 characters.
Notes:	A free text optional field
Follow Up:	Select a Follow Up from the drop down list to set a default renewal for this Credential Type in the Contractor Credential library when the 'Approved' status is set. The Drop down list references the Follow Up lookup. **Asset Maintenance\Maintenance Lookups**
Mail Merge:	You may optionally enter, from the drop down list, a mail type to be used for Contractor Credential renewals. The drop down lists reference the Mail Merge Type set up in the Mail Merge Manager, accessed by clicking on the 'Mail' button.
Parent Type:	Check this to define this as a Parent Type Credential Type. A Parent Type Credential is set on a Parent Company (Contractor) and all its child Contractors.

Parent Type Credentials are amended in the Parent Company's Contractor Credential record, and the amendment passes automatically to all that Contractor's 'children' who carry the same Credential Type.

'Child' Contractor's Credentials cannot be amended where the Credential Type has been flagged 'Parent Type'.

Press 'Detail' to assign Action Officers to this Credential Type.

Creating Merge Documents

To create merge letters for Credential Renewal letters, you will need to use the 'Print' button in the Contractor Credential report and select 'Contractor Credential Renewal Dates' when prompted to Select the List Required. Complete the filter to select the required record. A list is displayed. Use the 'Mail' button, in the list window, to launch the specified Word processor document.

The first time the mail button is selected in the Contractor Credential Renewal Dates list window, the document launched will be the blank document saved in order to create the Mail Merge Document. See 'Mail Merge Document' above.

You should then follow the Mail Merge procedure for your word processor, selecting the Data File specified in the Mail Merge Manager when prompted for a Data Source (you do not need to specify a Header file, the Data File has headers included).

The letter can then be created, with merge fields inserted at the appropriate places. Save the word processor file.

Subsequently, when the Mail button is used in the list window, the word processor will be launched and the merge will be carried out automatically for all the Contractors selected in the list.

Work Category

Work Categories are applied to Tenders and Standing Lists and define the Value Bands that are applied. Value bands must be contiguous for the same Category, but another set of different contiguous value bands can be set up for another Work Category.

Code:	Up to four alphanumeric characters
Name:	Up to 30 characters.

Standing List System Settings

The periods set in the System Settings provide default periods for the Listed Contractors in the Standing Lists form.

When the Approval Status is changed to 'Approved', or 'Failed', a default 'To' date is generated by adding the number of days specified here to the current date.