

Location Intelligence
Infrastructure Asset Management

Confirm®

Contractor Access

v26.30a.AM

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October 02, 2026

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Contractor Access

The Contractor Access folder provides Contractor Officers with the tools they will need to access Order information, update Jobs, and request payment.

These are the same forms and utilities as are found in the Maintenance Management and Payment Processing folder, therefore these folders will also be seen, with the same forms in them. The Contractor Access folder merely provides a single point of access to those forms for a Contractor Officer.

Details on the following topics are available in the Maintenance Management & Payment Processing manuals.

- Print Orders
- Print Variations
- Fast Request for Payment
- Request for Payment

A Contractor Officer will only be able to view Orders for their own Contract(s), and will only be able to view Jobs at a Status which is flagged as 'Available to Contractor'. A Contractor Officer will also be able to see their 'Parent Contractor', and any other Contractor with the same 'Parent Contractor'.

When updating Job Statuses, only Statuses which are flagged as 'Available to Contractor' will be seen in the pick list.

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Contractor Officers

A Contractor Officer has a User login, linked to an Action Officer, who is listed in the Contractor form as a Contractor Officer.

It is the link, from User through to a Contractor Officer identified on the **Contractor form**, which will define the rights to within certain Contracts, and to only Jobs at a certain Status.

User Login

The User Login for a Contractor Officer works in the same way as for any Confirm user. A Contractor Officer must have rights to the Contractor Access folder, and may have rights to any other folders.

Regardless of which Work Group the User is in, they will not have access to Contracts and Orders other than their own.

System Administration\Security

Action Officer

Users who are Contractor Officers will be linked to Action Officers in the Action Officer library in the same way as for any user who is also an Action Officer.

Asset Maintenance\Maintenance Lookups

Contractor Officer

In order to define an Action Officer as a Contractor Action Officer, they must be added to the Officer list on the Contractor form.

Contract Preparation\Contractors

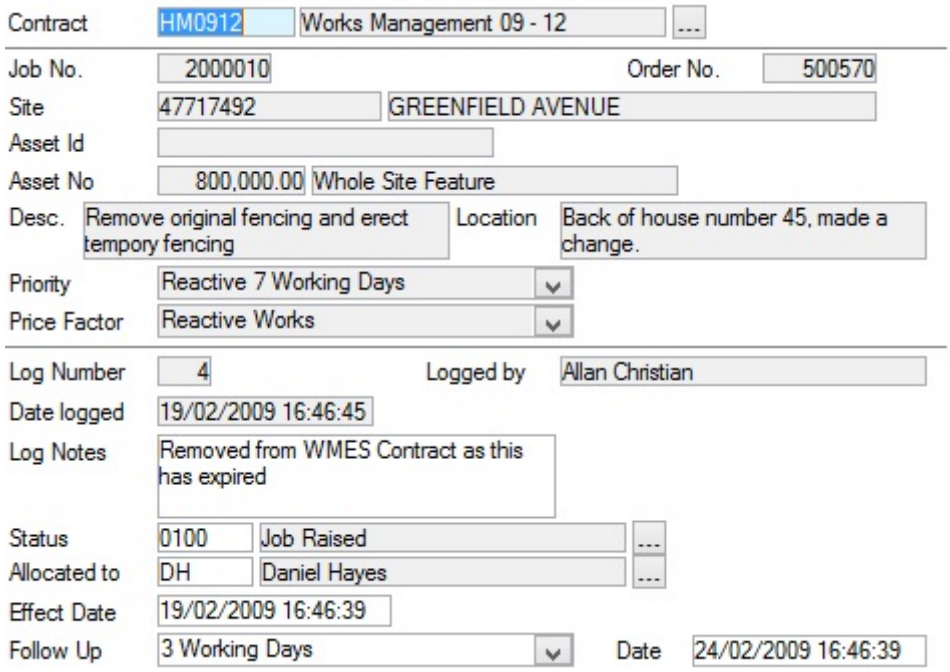
Job Status

Those Job Statuses which are to be available to the Contractor Officer should be flagged 'Available to Contractor' in the Job Status Lookup. Only these statuses will be available to the Contractor officer when updating Job Status.

Asset Maintenance\Maintenance Lookups

Job Status Update

The Job Status update form is used to recall available Jobs, and update the Job Status to reflect the stage the Job has reached. Only Notes, Status, and Effective date fields will be available.



To select a Job:

Enter the Job number in the Job No field.

To select a Range of Jobs:

Click on the Find button, and use the Job Status Update filter to select the required Jobs. The selection will be made from Jobs, which are on Orders, and at a status available to the Contractor. Click OK to place the Jobs into the Job Status Update form where they can be scrolled. Each Job will display the current Status.

To change a Status:

Log notes:	Defaults to last entered notes. Amend or delete.
Status:	Enter a new status, or select from the pick list. The Pick list references the Status Lookup **Asset Maintenance\Maintenance Lookups** Note: Only those Statuses which have 'Available to Contractor' checked in the Job Status Lookup will be seen in the pick list.
Allocated To:	This will default to the last Action Officer and cannot be amended.

Effective Date:	Today's date will be entered by default. Can be amended

Save the record to update the Status of this Job.

Print Variations

Variations can be printed whether they are committed or uncommitted. The Variation print will show whether the Variation is committed or not. Print Variations allows a range of Variations to be printed.

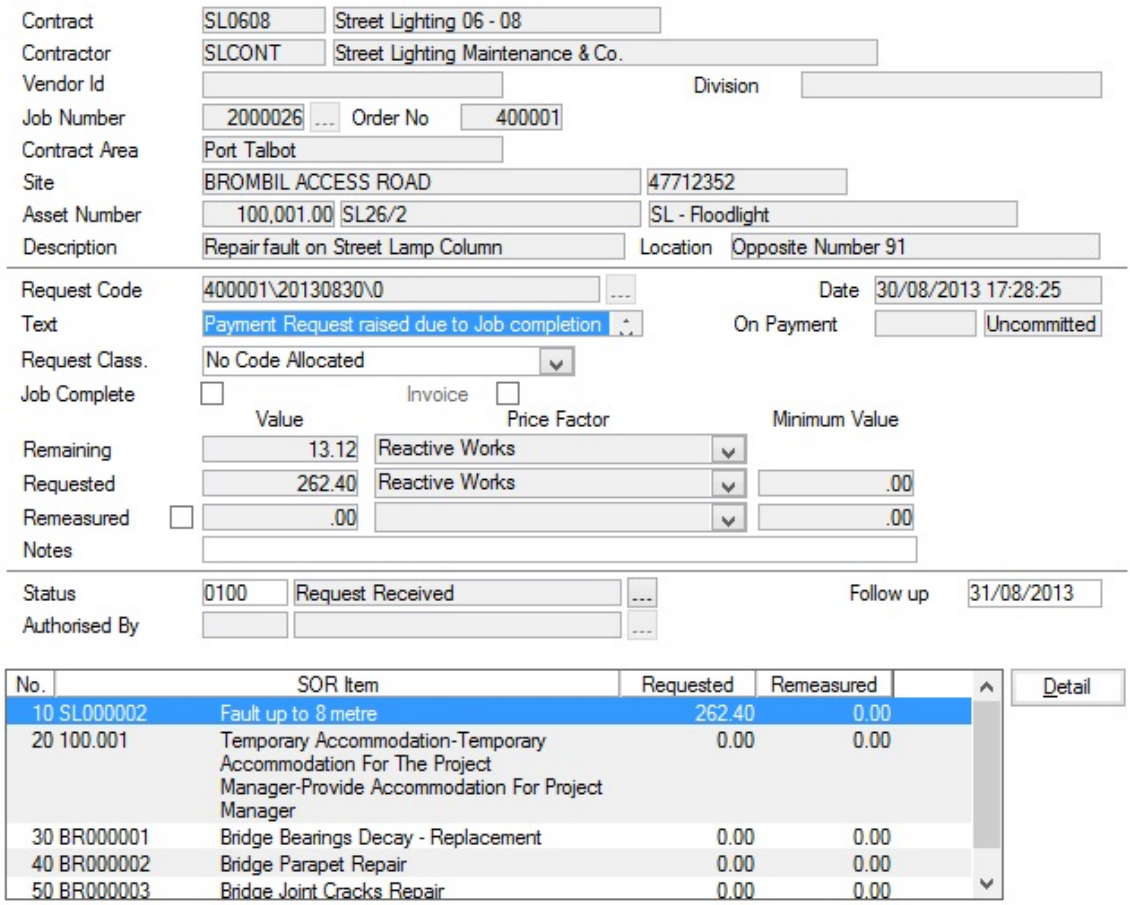
Contract:	A Contract must be entered.
Variation Number:	A Variation number or range of numbers can be entered here.
Route:	If a (Site) Route is entered, the Variation Order print will list the Variation Jobs in Route order. Variation Jobs on Sites that are not in the Route will appear at the end of the order print in alphabetical order.
Status:	Select from drop down list - Committed Only, Uncommitted Only, Archived, or Live. **Note:** This selection will only be effective where a range of Variations has been selected. Where a single Variation is to be printed, the system will ignore any selections in this field and print the selected Variation.
Commit Date From / To:	Select a specific or range of Commitment dates to restrict the Variation print by.
Order Copy:	Select the range of Order Copies from the pick lists. The pick list references the Order Copy library. See "Works\Non Routine Works\Order Print Copy" for information on setting up Order copies.

Click OK to display the Preview. Click on the Print Button in the Preview to send the Variation to the printer.

Fast Request for Payment

The Fast Request for Payment screen allows information about the Job to be recalled, and the requested payment to be entered against the Job.

The Fast Request form can also be used to recall and view existing Payment Requests



Job Number:	Enter the Job number, or select from the pick list. The pick list displays all Jobs on Committed Orders.

Entering a Job number will enter the other Job details in the top portion of the form (above the grey line). All the fields will be greyed out and cannot be altered.

Request Code:	Enter a new code to create a new Request, or enter an existing code (or select from the pick list) to add this Job to an existing Request. The pick list references all Requests that are not on Payment Batches
Date:	Today's date is automatically entered. This can be edited. This date will be used as the 'Invoice received' date in the Contractor Invoices module.
Text:	An optional free text field
Request Class:	This will default to the selected Contract's Payment Request Classification. This can be changed to any live Payment Request Classification in the database.

Job Complete: The Job Complete flag will be ticked where the original Job was not checked for 'Partial Payment'.

The Job Complete flag tells the Payment Job whether it will be finished with when this Payment is made (and therefore should deduct the Post Completion Retention and start calculating the Retention period, and/or calculate the Liquidated Damages; or archive the Job), or whether it will need to be held open for further Payment(s) to be made.

It is possible to override the original selection on Partial Payment by changing the selection here. A Job not originally flagged for 'Partial Payment' can now be paid in instalments by un-checking the 'Job Complete' flag. A Job originally flagged for 'Partial Payment' can now be paid and closed by checking the Job Complete flag.

This will not be available if the Request is Suspended, the 'Remeasured' flag has been checked and the Payment System Setting 'Block Remeasure on Final Payment Request' setting has been turned on.

Note: The deciding factor in whether a Job is closed or not is not whether the original amount has been paid in full - only whether is it flagged as 'Job Complete' or not. So paying £50 of a Job originally worth £75 will hold the remaining £25 for payment at another time if not flagged as 'Job Complete', or simply close with the remaining £25 unpaid if flagged as 'Job Complete'

Invoice: (Contractor Invoices module)

This is to specify whether an Invoice number must be specified on the Payment Batch (therefore effectively raising a separate Payment Certificate for each Invoice or Request). If an Invoice number is to be given, then the system assumes the Invoice number is the code you have entered in the Request Code field.

When the 'Invoice' is ticked and there is more than one Job on the current Request, when **Batch Create Payments** is run all of the Jobs are put on the same Payment Batch so they have the same Invoice Number and Received Date (which is taken from the Payment Request Header).

The appearance of this check box is governed by the default for it set on the Contract Payment tab. If either 'None', or 'Mandatory' have been selected, then this checkbox will already be set and greyed out. If 'Optional' has been selected on the Contract Payment tab, then you can select, on the Request, whether an Invoice number is required.

Contract Preparation\Contract - Payment tab

Remaining/Value: The balance of payment* due will be entered here - this may not be edited.

*The balance of payment will be calculated as the committal cost of the work (as amended by any Variations committed against the Job), less any payments already made, where the Job was not 'complete' when the payment was made.

Requested/Value: You may enter the requested amount in this field (or leave this blank and enter values against the individual Items on the Job).

Note: Where a Request is made at Job level, the system will pay all the current SOR Items at zero, and make up the amount claimed with the Adjustment Item specified in the Request System Settings (usually the 'Pound' item). These adjustments will be made at Payment committal.

Requested/Price Factor: Defaults to the Price Factor originally selected for the Job. May be altered by selecting a new Price Factor from the drop down list. The drop down list references the Price Factors for the Contract.

Contract Preparation\Contract - Price Factor tab

Minimum Value: Copied from the Job.

Remeasured:	Tick this to 'Remeasure' the Request, that is to enter a revised amount after the initial request is suspended. This will not be available if the Request is Suspended, the 'Job Complete' flag has been ticked and the Payment System Setting 'Block Remeasure on Final Payment Request' setting has been turned on. **Note:** Remeasured quantities must be entered against individual SOR items, therefore this field is not editable, it will only reflect the total of all quantities entered in the Remeasurement field of each SOR item on the Request Job.
Notes:	A free text field. This field is only available for uncommitted Payment Requests. If the Payment System Setting 'Mandatory Comments for Remeasurement' setting has been turned on, Notes must be supplied if the 'Remeasured' flag has been ticked. Notes may also be required if the current Status has ‘Job Notes mandatory…’ ticked to indicate that Notes are mandatory for that Status.
Status:	The current Status of the Request is displayed. For a new Request the Status is set from the Payment Systems Setting. **Payment System Settings** The Starting Status cannot be amended directly from the Fast Request Screen. Subsequent Statuses can be amended by selecting from the pick list. The pick list references the Request Status library. If the Status is changed to one that has ‘Job Notes mandatory…’ ticked then Notes must be entered before the Status change can be saved. If other Jobs linked to the same Payment Request have no Notes then the Status change will be prevented until Notes have been entered on the other Jobs. **Request Status**
Follow Up:	The date is calculated by adding the Follow up period assigned to the current Status to the date set in the 'Date' field. The date may be amended.
Authorised By:	Where the Status is changed in such a way as to require an Action Officer, the Action Officer will be entered in this field. Some Statuses will allow this to be amended - some will not. The starting Status does not require an Action Officer.

Delete button

If a Payment Request Header has been created but is not required it can be removed from the database with the 'Delete' button.

Note: This button will not be available if the Request has been 'Checked' or 'Authorised'.

Links button

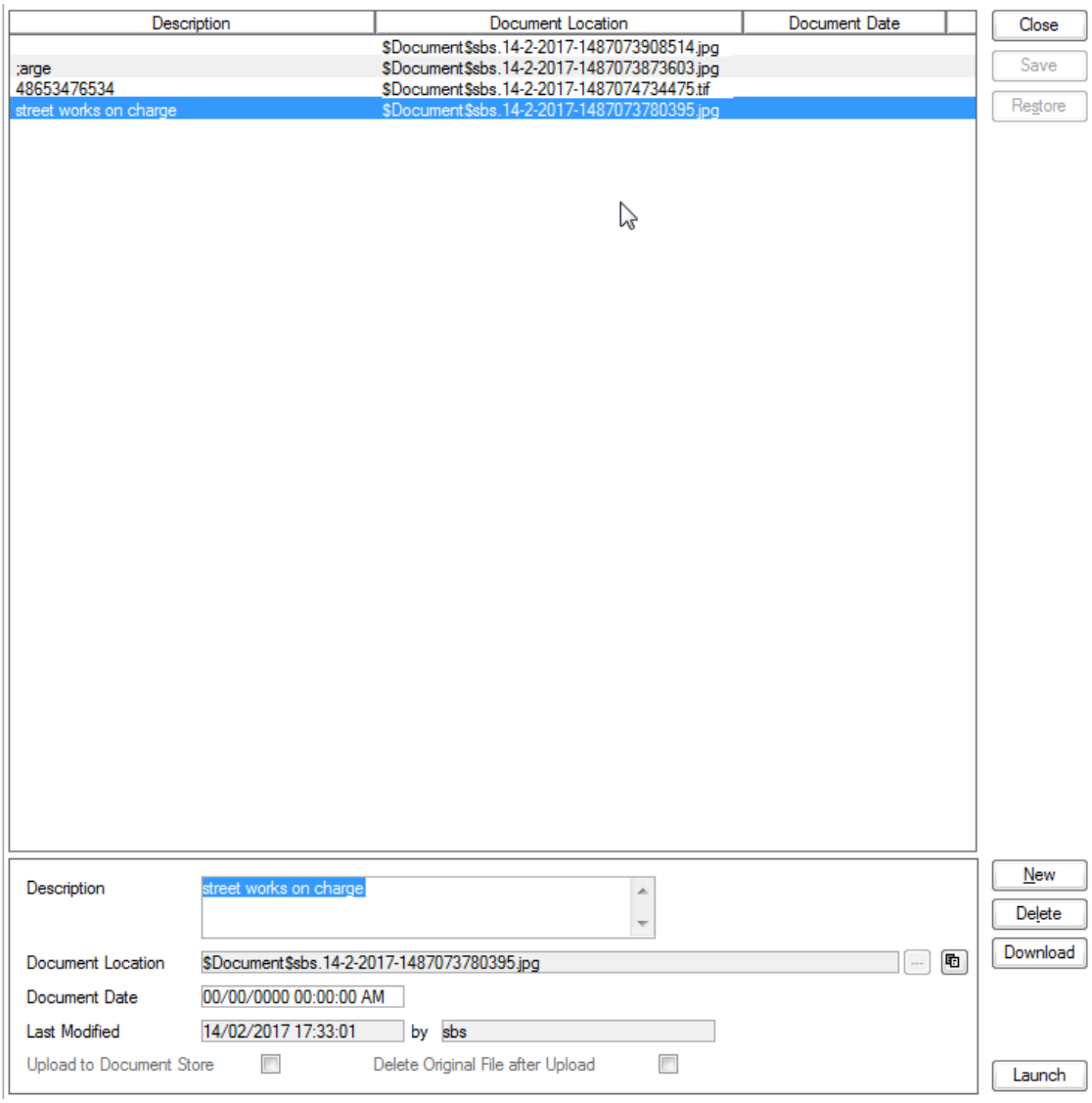
Document Links can be created to point to any file in the system, allowing relevant photographs or text documents to be associated with a record.

Click the Links button



todisplay

the Document Links form, listing the documents linked to the corresponding record. If there are already Document Links associated with the record then the Links button will be highlighted with a border 
.



The screen lists the currently linked files. The fields below the list give specific information about the selected Link.

Note: For Documents Links created from Street Works Notice, Inspections and Fixed Penalty Notices an extra column will be displayed. This column will notify whether this document was received via EToN or not. This column will not be displayed for Document Links on Features, Enquiry or Jobs.

To add new Links:

Click on the New button and enter the document details .

Description	A free text field used to annotate the file.This field is required while publishing a document from Street Works, otherwise it is optional.

Document Location	Enter or select the path to the required document.  Copy Button: This button will copy the fully-qualified path of the Document Location to the clipboard, resolving any location prefixes.
Document Date	A date and time for the Link. This defaults to the current system time but can be edited freely.
Last Modified (by)	The date and time when this Link was last modified, and the User who made the change. This cannot be edited.
Upload to Document Store	This is only available if a 'Document Store Folder' or a 'Web Service URL' has been specified in the **Document Link System Settings** screen. If this is ticked, the Document will be transferred from its current location to a central document store when the screen is saved. After uploading the file to a central document store the 'Document Location' value will be changed to reflect the new location of the document, and depending on the type of document store being used the location may be prefixed with either '$Document Store$' if the central document store is set to 'Folder', or '$Document URL$' if set to 'Web (PUT)' or 'Web (POST)'. This prefix will be applied to all links uploaded to a Folder document store, but this may not be true for a 'Web' document store if no part of the returned URL matches the 'Document Link URL Prefix'. For more information on Document Stores see **Document Link System Settings**.
Delete Original File after Upload	This is only available if Upload to Document Store is ticked. If this is ticked, the local file will be deleted after it has been successfully transferred to the Document Store.
Download	Allow to browse to an accessible location and download the attachment.
Identification Image	This is only available when viewing Feature Document Links, where the Feature belongs to a Feature Group for which an image is shown on the Feature screen. By default, the first appropriate Document Link in the list will be used as the image. This field may be ticked to override this behaviour and choose a specific image for display. The Description of the Document Link record will be updated to show that this has been done. For more details see **Feature Identification Image**.
Dead	*This option is only available when viewing Job Type or Site Document Links.* This option is enabled only when 'Reference' is selected in the 'Document Copy To' option. When checked, it will prevent any further linking while creating or updating Jobs.
Document End Date	*This option is only available when viewing Job Type or Site Document Links.* By default, the Current Date is populated when the 'Dead' field is checked. Once populated, it will automatically end date the document after the specified date.
Document Copy To	*This option is only available when viewing Job Type or Site Document Links.* The options are: • None • Copy • Reference

	By default, 'None' is selected, No document link is copied to the Job. If 'Copy' is selected, both the document link and the document itself is copied to the specified Document path of the Job, with the description of the copied document link including the suffix 'Copied from Job Type/Site'. If 'Reference' is selected, only the document link is copied to the Job and the document is referenced from the actual Document path, with the description of the copied document link including the suffix 'Referenced from Job Type/Site'. **Note:** The Job Standard Document functionality will only be available when the Document Store setting is set to "Folder".

Once the details for one or more Links have been entered, click Save to store the details.

Document Location Prefixes

If a document was selected for transfer to a central document store, or was a Street Works link that was published, then part of the path or URL to that file is often replaced with a prefix. There are several prefixes in use and each has a different value.

$Document$	This is used for photos uploaded from a hand held device via the Confirm connector. Its value is equivalent to the 'Document Store Folder' setting in the Document links System Settings screen.
$Document Store$	This is used for documents uploaded to a central document store that is set to be a 'Folder' type. Its value is also equivalent to the 'Document Store Folder' setting in the Document links System Settings screen.
$Document URL$	This is used for documents uploaded to a central document store that is set to be a 'Web (PUT)' or 'Web (POST)' types. Its value is also equivalent to the 'Document Link URL Prefix' setting in the Document links System Settings screen.
ORG_PREFIX	This is specific to Street Works document links and is used when a document is Published. It's value is dependant on the Organisation that the document link is related to. The value is equivalent to the 'Attach. URL' setting in the Organisation screen, for the Organisation that the link is related to.

To modify an existing Link:

Click the link in the list and modify the Description or Document Location as required, then click Save.

To view a currently linked file:

With the required file highlighted, click on the 'Launch' button. The associated program is launched and the file displayed.

To delete a Link:

Click the link in the list, then click the 'Delete' button. The link will be removed from the list, but the file will not be deleted.

Security of Linked items:

There is a generic User Security option which can be used to selectively prevent Users from either adding, deleting or modifying (e.g. changing the Description or Document Location) items linked to entities in Confirm. This option appears in the Security section of the menu when configuring privileges on the User Security and Group Security screens.

Problems Uploading to the Document Store

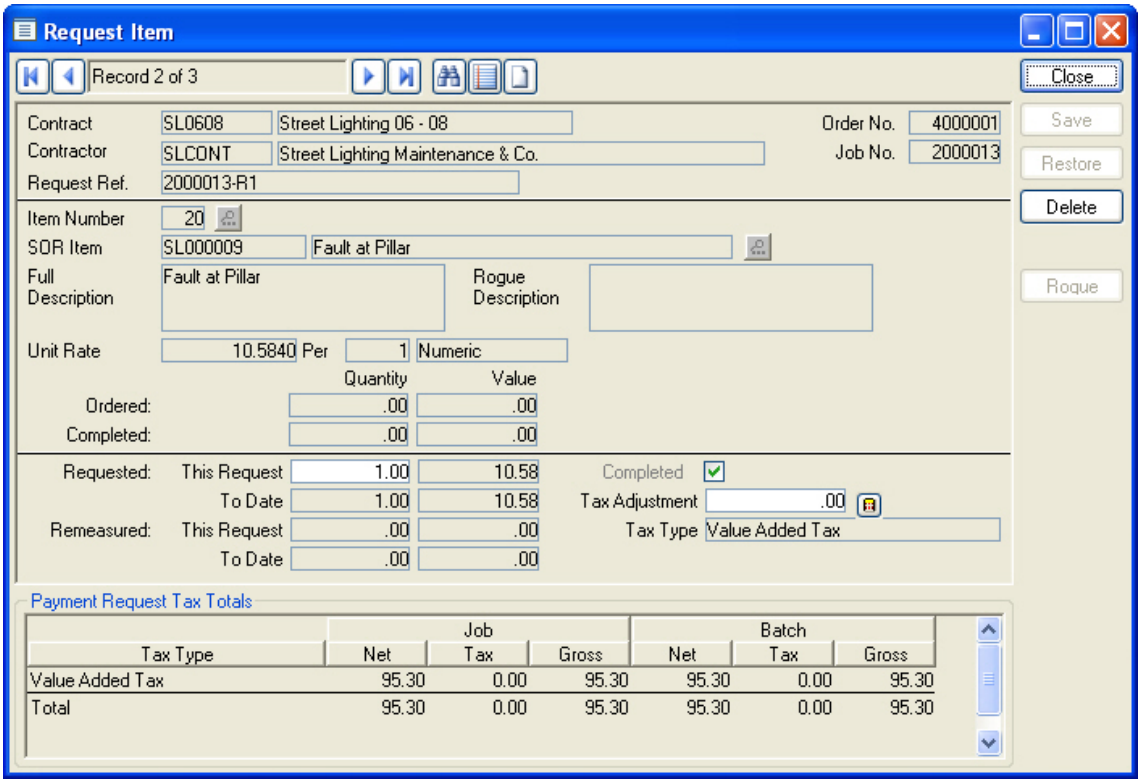
Problems may be encountered when using the 'Upload to Document Store' setting, especially when using a web service document store, where the document may travel across a network to an external application.

If problems do arise then any changes made to the document link details, such as dates and description, will still be saved to the Confirm database, however the document link will not be updated and the document will remain in its original location. It will not be deleted, even if 'Delete Original File after upload' was selected.

Uploading to a Web Service is highly dependant on external applications, and it is not possible for Confirm to interpret all of the possible errors that may arise once the document is sent out. If an error does occur then Confirm will display "Failed to upload - the following error was returned by the Web Service:" followed by the error message that is returned to it from the external application.

Request Items

To recall or view the SOR Items, click on the 'Detail' button. The Request Item is displayed:



Request Items are copied from the Job, and may include Items generated by the system for Retentions and Liquidated Damages. Most fields will be greyed out.

Items may be added to Request, whether it is checked as 'Job Complete' or not. Any item priced under the Contract may be added, and given a Quantity to generate a value.

The following fields may be edited for Requests but not on a Payment Batch:

Complete:	This check box will be automatically checked, and cannot be unchecked, if the 'Job Complete' flag on the Request Job is checked. If the 'Job Complete' flag on the Request Job is not checked, the individual Items can be checked as 'Complete', or not. Items checked as 'Complete' will pay the amount shown in the This Request field, and will not be available for further payment on this Job. Items not checked as 'Complete' will pay the amount shown in the 'This Request' field and retain the balance for payment at a future date.
Requested: This Request:	Two fields are shown under this heading: 'Quantity' - May be edited. For a 'Complete' item, this will be the final payment made - regardless of whether this represents the full original value. For an item that it not 'Complete' the amount entered represents a partial payment, the rest of the Quantity being held for further payment Note:Percentage items cannot be updated. 'Value' - Displays the value calculated from the quantity and the SOR item rate. This will alter if the quantity is altered.
Requested: To Date:	The total which has been requested on this and other Requests for Partial Payment Jobs

Note: Where Cumulative Quantities has been enabled, The 'To Date' field will be labelled: Cumulative.

For Cumulative Quantities the 'This Request' field is not editable and shows what has already been requested. To make a further claim, the full amount due to-date is entered in the 'Cumulative' field. For example: to request a payment quantity of 200 when there has already been a previous payment of 100 you would enter 300 in the Cumulative field

Remeasured: This Request:	This field will be available if: The job is on a Request which has a status of 'Suspended' or 'Random Sample' And The Remeasured check box on the Request Job form has been checked. Use this field to enter the remeasured quantity.
Remeasured: To Date:	The total which has been remeasured on this and other Requests for Partial Payment Jobs
Tax Type:	The Tax Type(s) which are allocated to SORs via Payment Category on this request are listed.
Job:	'Net' - For non 'Remeasured' Payments, the values for the Job will be computed as the sum of each 'Requested Value' for Request Items on the Job within the Tax Type. For 'Remeasured' Payments, the values for the Job will be computed as the sum of each 'Remeasured Value' for Request Items on the Job within the Tax Type. 'Tax' - The Tax figure is calculated for this Job. 'Gross' - Calculated as the sum of the 'Net' and 'Tax' Job values for this Tax Type.
Batch:	'Net' - The value for the Payment Request will be computed as the sum of each 'Requested Value' (for non 'Remeasured' Payment Items) and each 'Remeasured Value' (for 'Remeasured' Payment Items) on the Batch within the Tax Type. 'Tax' - The Tax figure is calculated for the whole Payment Request. 'Gross' - The 'Gross' values for the Payment Request will be computed as the sum of the 'Net' and 'Tax' Batch values for the Tax Type.

Delete button

Items may be removed from Request Jobs as long as:

1. The Request is not on a Payment Batch.
2. The Request Job is not checked as 'Job Complete'. If the Request Job is checked as 'Job Complete', then only Items added in this Request may be removed.

To remove an Item - scroll to the Item and click on the 'Delete' button. If the 'Delete' button is inactive, the Item cannot be deleted because one of the above conditions applies.

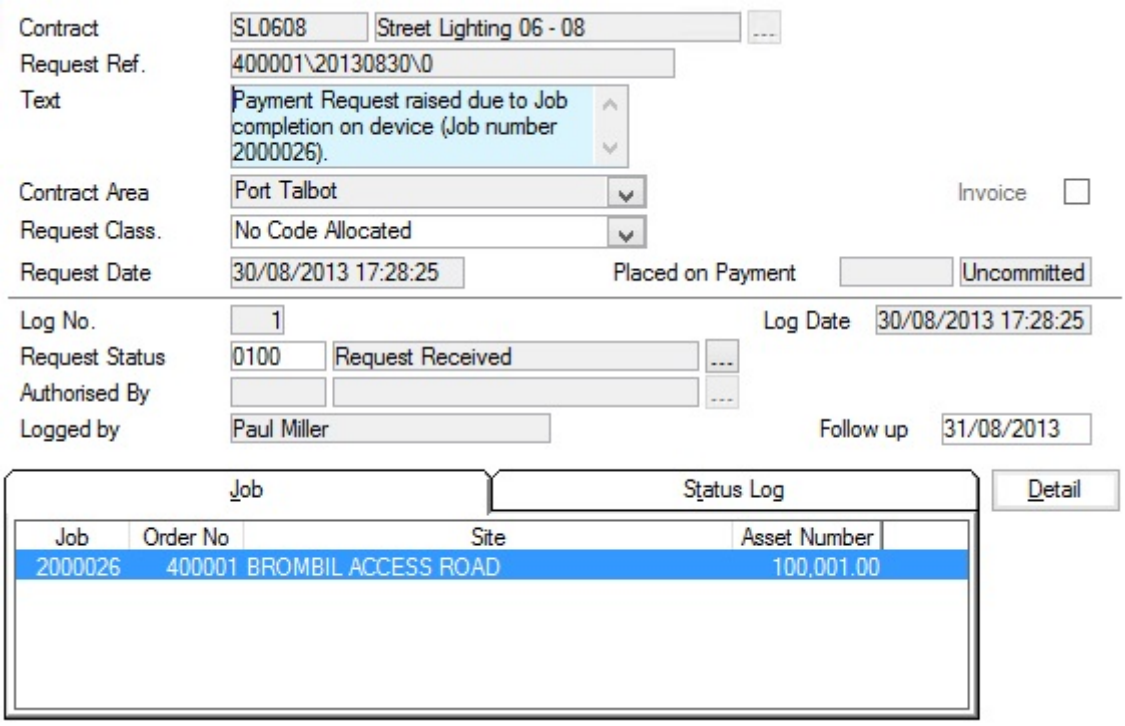
Note: Deleting an Item from a Request removes only removes it from this Request. Where the Item was on the original Job, the item remains on the Job and is available for payment on another Request.

Request for Payment

The Request for Payment displays the Payment Request header. Existing Requests can be viewed by recalling the records into the form with the 'Find' button. Only Uncommitted Requests are recalled by default, Select 'All' or 'Committed Only' to view Requests on committed Payment batches.

Each Request selected can then be scrolled and viewed.

Jobs may be added, amended or removed on uncommitted Payment Requests.

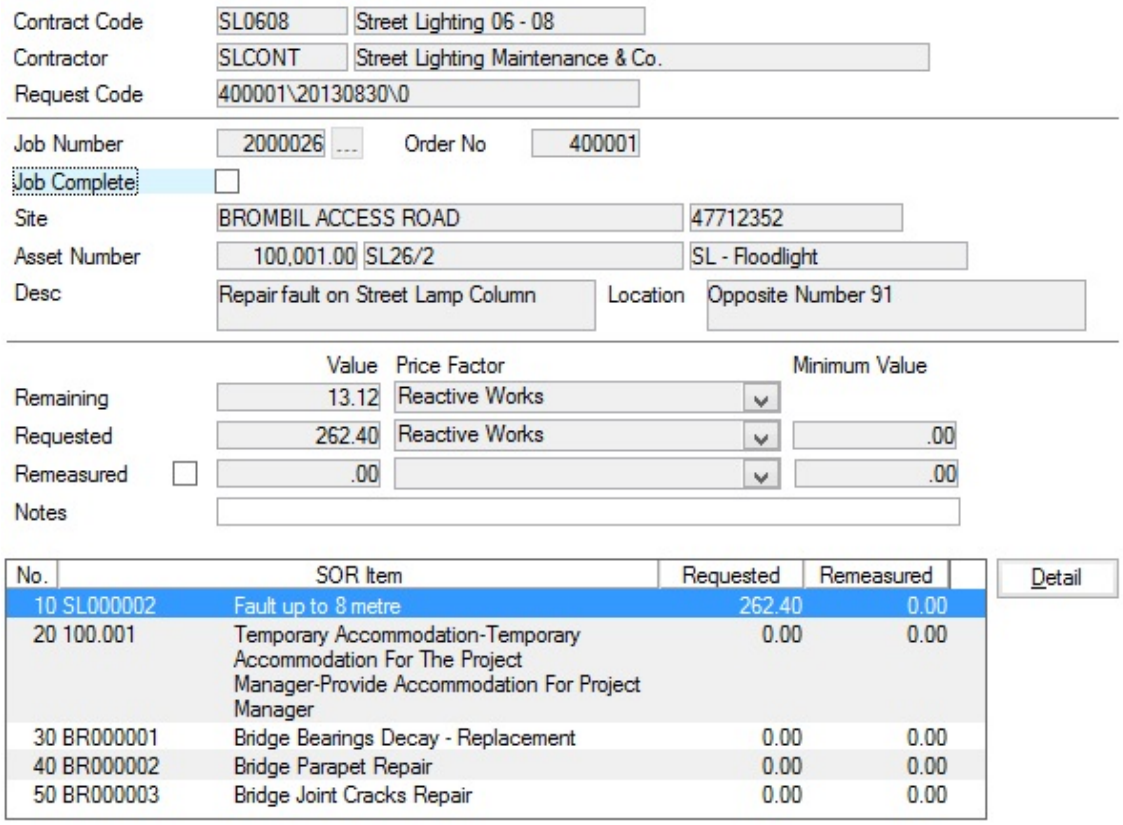


When Requests are retrieved into the Payment Request Header, the current Request details are displayed, including the Payment Number, if the Request is on a Payment Batch, and whether the Payment Batch is committed or Uncommitted. The Current Status is also shown, and the past statuses are displayed on the Status Log tab.

If the Request Status is changed to one that has the ‘Job Notes mandatory…’ ticked then all of the Jobs listed for the Payment Request must have Notes before the Status change can be saved.

Request Job

Select the Job tab, and click on the 'Detail' button. The Request Job form is displayed:



Request Jobs on Committed Payment Batches: may not be altered in any way.

Request Jobs on uncommitted Payment Batches may not be amended in the Request header - however, some alterations to items can be made directly in the Payment Batch.

Request Jobs not on a Payment batch may be amended in the following ways:

Job Complete: Please see the 'Fast Request for Payment' section.

Remaining/Value: The balance of Payment due will be entered here - this may not be edited.

Note: The balance of payment will be calculated as the committal cost of the work (as amended by any Variations committed against the Job), less any payments already made, where the Job was not 'complete' when the payment was made.

Requested/Value: You may enter the requested amount in this field (or leave this blank and enter values against the individual Items on the Job).

Requested/Price Factor: Defaults to the Price Factor originally selected for the Job. May be altered by selecting a new Price Factor from the drop down list. The drop down list references the Price Factors for the Contract.

Contract Preparation\Contract - Price Factor tab

Minimum Value: Copied from the Job.

Remeasured: Tick this to indicate that you wish to enter remeasured quantities against the Items on this Job. When this check box is ticked on Request Jobs at a Request Status of 'Suspended' or 'Random Sample', the remeasured field on each of the item becomes available for the entry of a remeasured quantity.

This will not be available if the Request is Suspended, the 'Job Complete' flag has been ticked and the Payment System Setting 'Block Remeasure on Final Payment Request' setting has been ticked.

Note: When SOR Banding is active this must be ticked before any Remeasured Quantity values can be entered against Request Items.

Notes: An optional free text field. This field is only available for uncommitted Payment Requests.

If the Payment System Setting 'Mandatory Comments for Remeasurement' setting has been turned on, Notes must be supplied if the 'Remeasured' flag has been ticked.

If the Request Status is currently one that has the ‘Job Notes mandatory…’ ticked then it will not be possible to save the Job without Notes.

Requests not on a Payment Batch may have Jobs added or removed. Jobs and Items on these Requests may be amended in the ways described for **Fast Request for Payment**.

Click on the 'Clear' button. Enter the Job number, or select from the Pick list. The pick list displays committed Jobs in the Contract and Contract area, which are entered on the Request Header. A Job can only be added to the batch if it is not already on another (committed or uncommitted) Request - except for Partial Payment Jobs that are not 'complete'.

Delete button

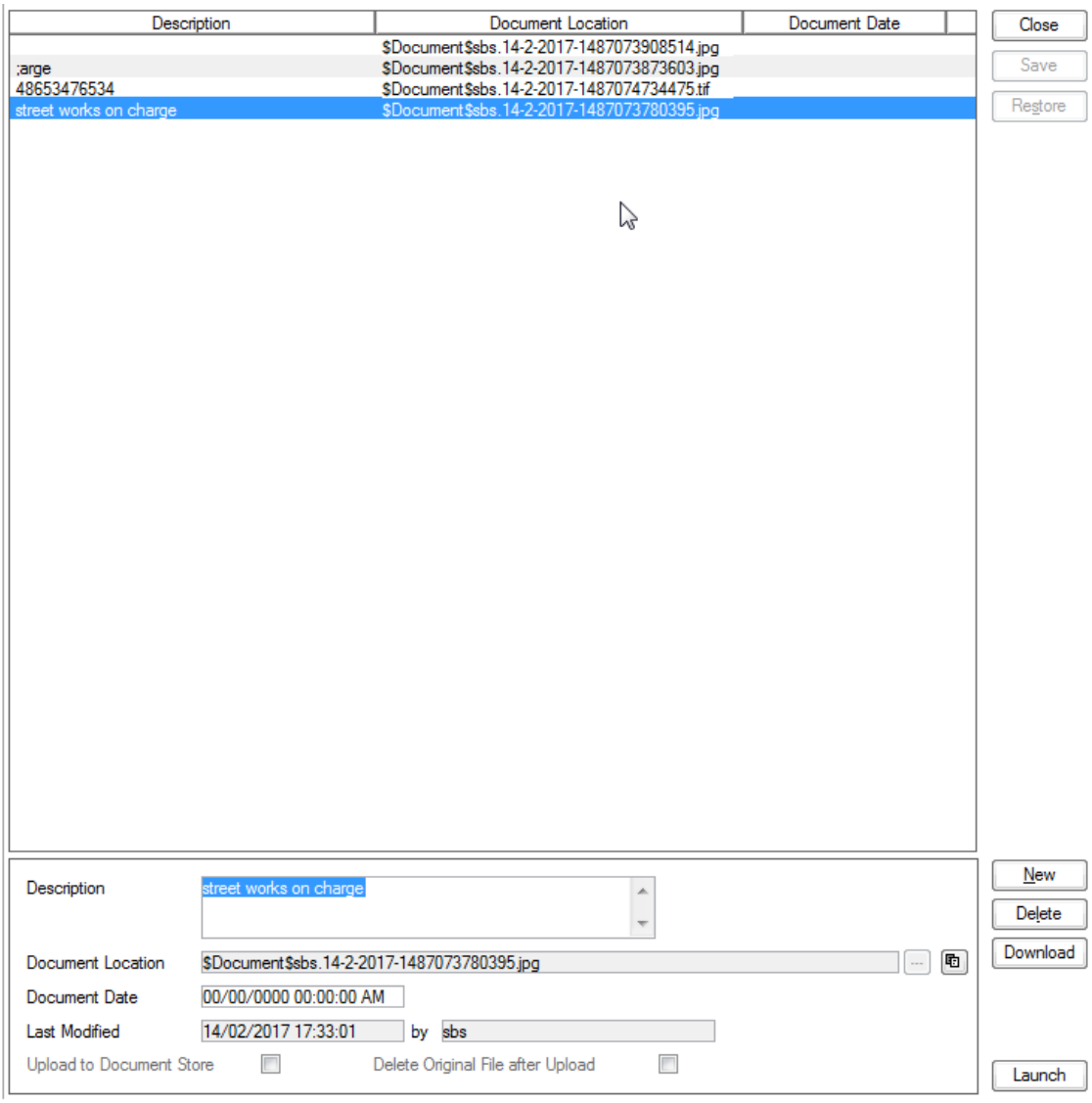
If a Payment Request Header has been created but is not required it can be removed from the database with the 'Delete' button.

Note: This button will not be available if the Request has been 'Checked' or 'Authorised'.

Links button

Document Links can be created to point to any file in the system, allowing relevant photographs or text documents to be associated with a record.

Click the Links button  todisplay the Document Links form, listing the documents linked to the corresponding record. If there are already Document Links associated with the record then the Links button will be highlighted with a border 
.



The screen lists the currently linked files. The fields below the list give specific information about the selected Link.

Note: For Documents Links created from Street Works Notice, Inspections and Fixed Penalty Notices an extra column will be displayed. This column will notify whether this document was received via EToN or not. This column will not be displayed for Document Links on Features, Enquiry or Jobs.

To add new Links:

Click on the New button and enter the document details .

Description	A free text field used to annotate the file.This field is required while publishing a document from Street Works, otherwise it is optional.
Document Location	Enter or select the path to the required document. Copy Button: This button will copy the fully-qualified path of the Document Location to the clipboard, resolving any location prefixes.

Document Date	A date and time for the Link. This defaults to the current system time but can be edited freely.
Last Modified (by)	The date and time when this Link was last modified, and the User who made the change. This cannot be edited.
Upload to Document Store	This is only available if a 'Document Store Folder' or a 'Web Service URL' has been specified in the **Document Link System Settings** screen. If this is ticked, the Document will be transferred from its current location to a central document store when the screen is saved. After uploading the file to a central document store the 'Document Location' value will be changed to reflect the new location of the document, and depending on the type of document store being used the location may be prefixed with either '$Document Store$' if the central document store is set to 'Folder', or '$Document URL$' if set to 'Web (PUT)' or 'Web (POST)'. This prefix will be applied to all links uploaded to a Folder document store, but this may not be true for a 'Web' document store if no part of the returned URL matches the 'Document Link URL Prefix'. For more information on Document Stores see **Document Link System Settings**.
Delete Original File after Upload	This is only available if Upload to Document Store is ticked. If this is ticked, the local file will be deleted after it has been successfully transferred to the Document Store.
Download	Allow to browse to an accessible location and download the attachment.
Identification Image	This is only available when viewing Feature Document Links, where the Feature belongs to a Feature Group for which an image is shown on the Feature screen. By default, the first appropriate Document Link in the list will be used as the image. This field may be ticked to override this behaviour and choose a specific image for display. The Description of the Document Link record will be updated to show that this has been done. For more details see **Feature Identification Image**.
Dead	*This option is only available when viewing Job Type or Site Document Links.* This option is enabled only when 'Reference' is selected in the 'Document Copy To' option. When checked, it will prevent any further linking while creating or updating Jobs.
Document End Date	*This option is only available when viewing Job Type or Site Document Links.* By default, the Current Date is populated when the 'Dead' field is checked. Once populated, it will automatically end date the document after the specified date.
Document Copy To	*This option is only available when viewing Job Type or Site Document Links.* The options are: • None • Copy • Reference By default, 'None' is selected, No document link is copied to the Job. If 'Copy' is selected, both the document link and the document itself is copied to the specified Document path of the Job, with the description of the copied document link including the suffix 'Copied from Job Type/Site'.

	If 'Reference' is selected, only the document link is copied to the Job and the document is referenced from the actual Document path, with the description of the copied document link including the suffix 'Referenced from Job Type/Site'. **Note:** The Job Standard Document functionality will only be available when the Document Store setting is set to "Folder".

Once the details for one or more Links have been entered, click Save to store the details.

Document Location Prefixes

If a document was selected for transfer to a central document store, or was a Street Works link that was published, then part of the path or URL to that file is often replaced with a prefix. There are several prefixes in use and each has a different value.

$Document$	This is used for photos uploaded from a hand held device via the Confirm connector. Its value is equivalent to the 'Document Store Folder' setting in the Document links System Settings screen.
$Document Store$	This is used for documents uploaded to a central document store that is set to be a 'Folder' type. Its value is also equivalent to the 'Document Store Folder' setting in the Document links System Settings screen.
$Document URL$	This is used for documents uploaded to a central document store that is set to be a 'Web (PUT)' or 'Web (POST)' types. Its value is also equivalent to the 'Document Link URL Prefix' setting in the Document links System Settings screen.
ORG_PREFIX	This is specific to Street Works document links and is used when a document is Published. It's value is dependant on the Organisation that the document link is related to. The value is equivalent to the 'Attach. URL' setting in the Organisation screen, for the Organisation that the link is related to.

To modify an existing Link:

Click the link in the list and modify the Description or Document Location as required, then click Save.

To view a currently linked file:

With the required file highlighted, click on the 'Launch' button. The associated program is launched and the file displayed.

To delete a Link:

Click the link in the list, then click the 'Delete' button. The link will be removed from the list, but the file will not be deleted.

Security of Linked items:

There is a generic User Security option which can be used to selectively prevent Users from either adding, deleting or modifying (e.g. changing the Description or Document Location) items linked to entities in Confirm. This option appears in the Security section of the menu when configuring privileges on the User Security and Group Security screens.

Problems Uploading to the Document Store

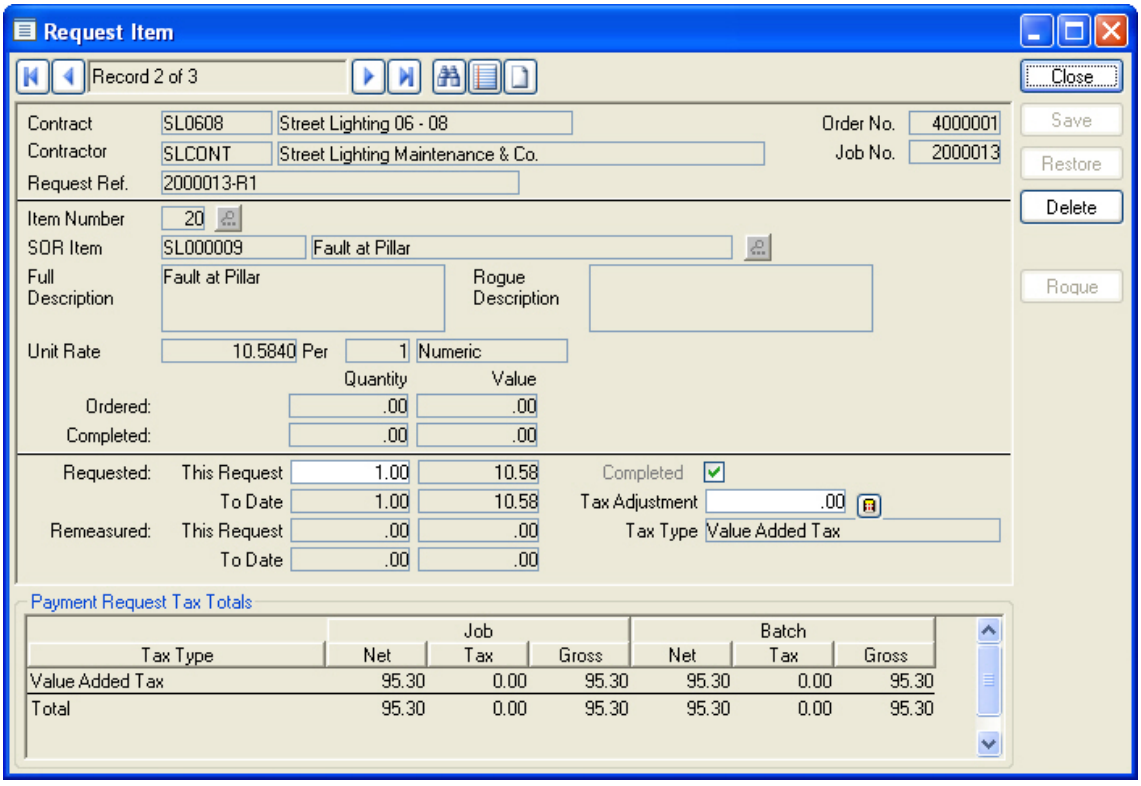
Problems may be encountered when using the 'Upload to Document Store' setting, especially when using a web service document store, where the document may travel across a network to an external application.

If problems do arise then any changes made to the document link details, such as dates and description, will still be saved to the Confirm database, however the document link will not be updated and the document will remain in its original location. It will not be deleted, even if 'Delete Original File after upload' was selected.

Uploading to a Web Service is highly dependant on external applications, and it is not possible for Confirm to interpret all of the possible errors that may arise once the document is sent out. If an error does occur then Confirm will display "Failed to upload - the following error was returned by the Web Service:" followed by the error message that is returned to it from the external application.

Request Items

To recall or view the SOR Items, click on the 'Detail' button. The Request Item is displayed:



Request Items are copied from the Job, and may include Items generated by the system for Retentions and Liquidated Damages. Most fields will be greyed out.

Items may be added to Request, whether it is checked as 'Job Complete' or not. Any item priced under the Contract may be added, and given a Quantity to generate a value.

The following fields may be edited for Requests but not on a Payment Batch:

Complete:	This check box will be automatically checked, and cannot be unchecked, if the 'Job Complete' flag on the Request Job is checked. If the 'Job Complete' flag on the Request Job is not checked, the individual Items can be checked as 'Complete', or not. Items checked as 'Complete' will pay the amount shown in the This Request field, and will not be available for further payment on this Job. Items not checked as 'Complete' will pay the amount shown in the 'This Request' field and retain the balance for payment at a future date.
Requested: This Request:	Two fields are shown under this heading: 'Quantity' - May be edited. For a 'Complete' item, this will be the final payment made - regardless of whether this represents the full original value. For an item that it not 'Complete' the amount entered represents a partial payment, the rest of the Quantity being held for further payment Note:Percentage items cannot be updated. 'Value' - Displays the value calculated from the quantity and the SOR item rate. This will alter if the quantity is altered.
Requested: To Date:	The total which has been requested on this and other Requests for Partial Payment Jobs

Note: Where Cumulative Quantities has been enabled, The 'To Date' field will be labelled: Cumulative.

For Cumulative Quantities the 'This Request' field is not editable and shows what has already been requested. To make a further claim, the full amount due to-date is entered in the 'Cumulative' field. For example: to request a payment quantity of 200 when there has already been a previous payment of 100 you would enter 300 in the Cumulative field

Remeasured: This Request:	This field will be available if: The job is on a Request which has a status of 'Suspended' or 'Random Sample' And The Remeasured check box on the Request Job form has been checked. Use this field to enter the remeasured quantity.
Remeasured: To Date:	The total which has been remeasured on this and other Requests for Partial Payment Jobs
Tax Type:	The Tax Type(s) which are allocated to SORs via Payment Category on this request are listed.
Job:	'Net' - For non 'Remeasured' Payments, the values for the Job will be computed as the sum of each 'Requested Value' for Request Items on the Job within the Tax Type. For 'Remeasured' Payments, the values for the Job will be computed as the sum of each 'Remeasured Value' for Request Items on the Job within the Tax Type. 'Tax' - The Tax figure is calculated for this Job. 'Gross' - Calculated as the sum of the 'Net' and 'Tax' Job values for this Tax Type.

Batch:	'Net' - The value for the Payment Request will be computed as the sum of each 'Requested Value' (for non 'Remeasured' Payment Items) and each 'Remeasured Value' (for 'Remeasured' Payment Items) on the Batch within the Tax Type. 'Tax' - The Tax figure is calculated for the whole Payment Request. 'Gross' - The 'Gross' values for the Payment Request will be computed as the sum of the 'Net' and 'Tax' Batch values for the Tax Type.

Delete button

Items may be removed from Request Jobs as long as:

1. The Request is not on a Payment Batch.
2. The Request Job is not checked as 'Job Complete'. If the Request Job is checked as 'Job Complete', then only Items added in this Request may be removed.

To remove an Item - scroll to the Item and click on the 'Delete' button. If the 'Delete' button is in-active, the Item cannot be deleted because one of the above conditions applies.

Note: Deleting an Item from a Request removes only removes it from this Request. Where the Item was on the original Job, the item remains on the Job and is available for payment on another Request.