Location Intelligence
Infrastructure Asset Management

Confirm®

Customer Services

v26.30a.AM

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October 02, 2026

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Customer Services

Customer Services Folders

The Customer Services folders provide the tools and libraries for logging Customer Enquiries and progressing them to closure.

Enquiries are raised by a Customer and linked to a Site. Enquiries are logged under Service Types and Service Subjects, which define the nature of the Enquiry, the area of service provision, and the Action Officer who deals with that service provision on that Site. Service Subjects additionally define the way in which the Enquiry may be progressed.

A system of Enquiry Statuses track the progress of the Enquiry through to its closure.

Action Officers are responsible for Enquiries, and may progress the Enquiry through an Enquiry Trace form, which will provide them with the details and history of outstanding Enquiries.

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Pre-requisites for Customer Services

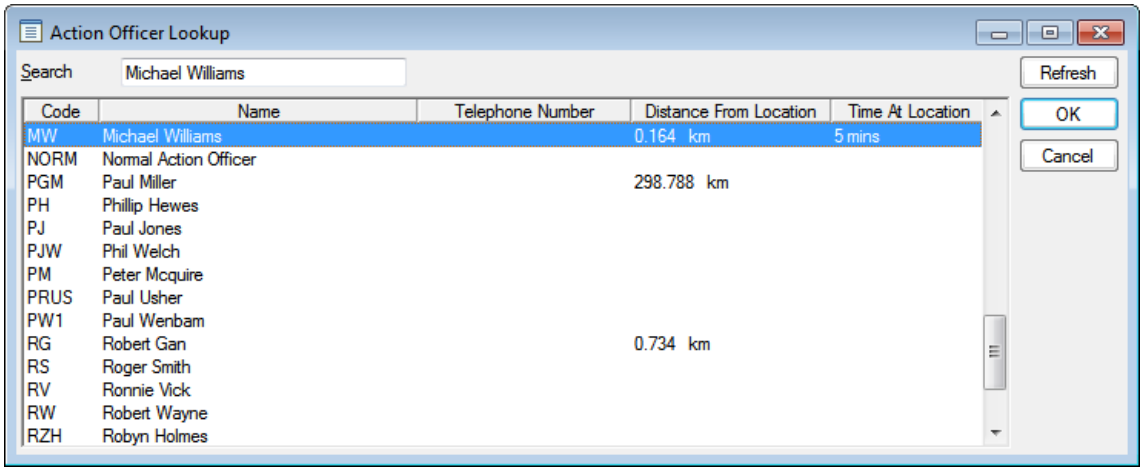
The Customer Services module is largely self-contained and only needs a Site Register to be present to be able to log Enquiries through the Fast Entry Enquiry Screen.

However, to use certain aspects of the functionality of the Customer Services module you will need to have the following in place:

- To link a Councillor with an Enquiry - Sites must be correctly allocated to Wards. See "**Site Register\Site**" for information on setting a Ward for a Site.
- To raise work (a Job and an Order) directly from an Enquiry, you will need to have SOR Groups in place. See "**Asset Maintenance\SOR Lookups\SOR Groups**" for information on creating SOR Groups.
- To raise a Failure (Performance Monitoring module) you will need to have created Non Work Related Failure Types in the Failure Types Lookup. See "**Performance Monitoring\Monitoring Lookups\Failure Type**" for information on setting up Failure Types.
- To raise a Defect (Condition Surveying module) you will need to have created Defect Types in the Defect Type lookup. See "**Condition Survey\Condition Survey Lookups\Defect Type**" for more information on creating Defect Types.

Action Officer GPS Tracking

When GPS Tracking is active and GPS coordinates are available in the Confirm Database two additional columns of information are provided when selecting the Action Officer Lookup from an Entity screen (Enquiry, Job or Defect).



Distance From Location Column

This displays the approximate distance from the current known coordinate position of an Action Officer to the coordinate position of an Entity. The distances are recorded in kilometres and are straight line calculations.

'Lapsed' is displayed if the coordinates are older than the threshold specified in the 'Map System Settings'.

Distance Calculation

The Distance is calculated using the latest coordinate position recorded for each Action Officer, and for each Entity (Enquiry, Job or Defect) the first existing coordinate position from the following hierarchies:

Enquiry:

- Enquiry
- Job linked to Enquiry
- Defect linked to Enquiry
- Site of the Enquiry

Defect/Job:

- Defect/Job
- Feature of the Defect/Job
- Site of the Defect/Job

Time At Location Column

This displays the approximate time an Action Officer has been at their current location in hours and minutes.

Time at Location Calculation

The time at location calculation is controlled by the 'Distance Tolerance for Logging GPS Information' setting on the **ConfirmConnect® Settings** screen. This setting states how far (in metres) an Action Officer must move from their current GPS location before another GPS record is logged.

When an Action Officer first arrives at a location a GPS coordinate is stored on their Confirm mobile device with a date/time stamp. If the Action Officer remains at a location and does not move out of the distance tolerance the next GPS coordinate is recorded with the same GPS position but a later date/time stamp.

When Confirm Host receives the latest two GPS records with the same coordinates but different date/time stamps it uses these records to calculate the Action Officers time at the location. If the Action Officer remains within the distance tolerance the next GPS coordinate record to be transferred again has the same coordinates but an updated date/time stamp to keep the time at location calculation up to date.

When the Action Officer moves out of the distance tolerance GPS coordinates are returned in future transfers.

'Lapsed' is displayed if the coordinates are older than the threshold specified in the 'Frequency of storing GPS information' field on the **ConfirmConnect® Settings** screen.

Note:

These columns can be removed from the Action Officer lookup view by checking the 'Hide Action Officer distance column on lookups' option in the '**System Administration\Security\General System Settings**

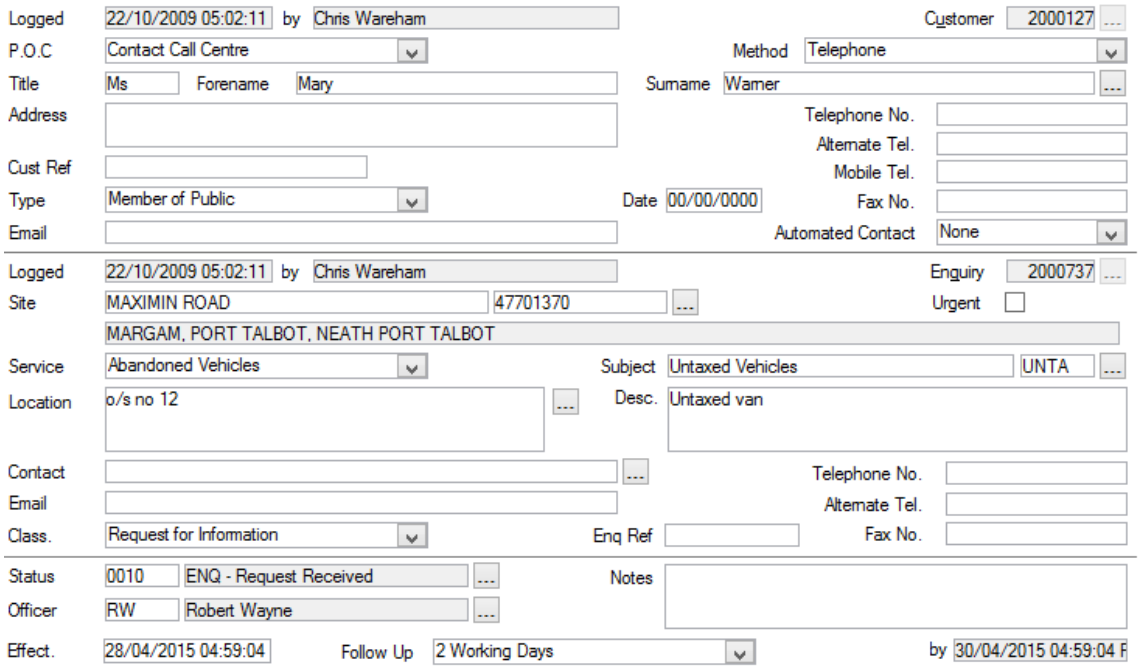
It is also possible to view the Action Officer Location on a Map. Please see the '**GPS Tracking**' section of the Map manual for details.'

Fast Entry Enquiries

The Fast Entry Enquiries screen provides the means of entering the details of the Customer and the Enquiry.

Customers and Enquiries are linked, but are separate entities. Customers make an Enquiry, or a series of Enquiries, and are sequentially numbered from Seed numbers. Enquiries are raised by a Customer, or by several Customers, and are sequentially numbered from a separate set of Seed numbers.

Although the Customer and Enquiry appear in the same screen, it is possible for one Customer to be linked to several Enquiries (all raised at the same time), and for one Enquiry to be raised by several Customers.



Customer

The top part of the Customer Enquiry form deals with the Customer. This Customer will be linked with all the Enquiries that they raise at the same time and by the same method (in a letter for instance).

This Customer may be the same person who has raised Enquires on other occasions, but for the purposes of this Enquiry (and any other Enquiries they are raising on this occasion); they are a 'new' Customer and will receive a new Customer number.

Logged:	Date and time entered automatically - not editable
By:	Entered from the User Login. Not editable
Customer:	Each Customer is numbered from the **Customer Services Seed Numbers**. Enter the number of an Existing Customer to recall a record
P.O.C:	Point of Contact. Select from the drop down list. The Drop list references the **Point of Contact Lookup**. This will default to the last entry made (for each individual PC)

Method:	A default entry can be set for this field in the **Customer Services System Settings** on page 91. To make an entry, or change the default, select from the drop down list. The Drop list references the **Enquiry Method lookup**.
Title \ Forename\ Surname:	The name of the Customer 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. An 'Address' button is available on the Contact Lookup when accessed from the Fast Entry Enquiry screen and the 'Customer' button via the Fast Entry Issues screen. Selecting the 'Address' button copies the Address details from the selected Contact to the Enquiry. The Title, Forename and Surname fields are left blank.
Address:	If the Customer name was entered from the Contact Lookup, then associated address information will be automatically entered into this Address field. If no address is entered, or the Customer 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 Customer Enquiry screen.
Telephone No.:	Free text fields for recording the Customer contact numbers.
Alternate Tel.:	
Mobile Tel.:	
Fax No.:	
Cust Ref:	An optional free text field intended for a reference that the Customer supplies. This reference may be included in form letters and will appear on the Enquiry Trace Form if 'Show Customer' is selected from the print options. The Reference will also be entered into the Cust Ref field of the Job, if a Job is raised from this Enquiry.
Type:	A default entry can be set for this field in the Customer Systems Settings. To make an entry, or change the default, select from the drop down list. The drop down list references the **Customer Type lookup**.
Date:	An optional date field into which any relevant date can be entered.
Email:	Free text field for recording the Customers email address. Setting an email address automatically changes the 'Automated Contact' field to 'Email'. **Note:** This field should be populated if **Email Alerts** have been configured to be sent to 'All Enquiry Customers'.
Automated Contact:	(Alerts & Notifications module)

Select from the drop down list how this Customer should be contacted when using Enquiry Alerts. Select from:

'None' - No email notification will be sent to this Customer regardless of whether the Enquiry meets the Alert criteria.

'Email' - An email notification will be sent to the email address specified for the customer. If no email address has been supplied then 'None' will be selected by default.

'Other' - Email notifications will be sent to the Enquiry Action Officer.

'SMS' - Email notifications will be sent as SMS (text message) to the number specified in the 'Mobile Tel.' field. The email sent will be truncated to the character limit configured in the **Customer Services Agent System Settings**.

Note: The 'SMS' option is not displayed if the 'SMS Email Expression' field has not been configured on the **Customer Services Agent System Settings**.

Enquiry

The lower portion of the Customer Enquiry form deals with the Enquiry. This Enquiry may be raised by several Customers, and the 'Duplicate' checking system will identify whether an Enquiry already exists based on the Site, Service and Subject entered for the Enquiry. If an existing outstanding Enquiry is found which proves to be the same Enquiry as this one, then this Customer can be linked to the existing Enquiry. The Enquiry will then be linked to two Customers.

The lower section of the Enquiry portion of the form deals with the progress of the Enquiry, and gives the Action Officer currently responsible for the Enquiry.

Logged:	Date and time entered automatically. Not editable.
By:	Entered from the User Login. Not editable.
Enquiry:	Each Enquiry is numbered from the **Customer Services Seed Numbers**.
Site:	Select from the pick list. The pick list references the **Site Register\Site**.
Urgent:	Checking this will mark the Enquiry as Urgent and activate the 'Send Urgent' option on the Action menu.
Service:	Select from the drop down list. The drop down list references the **Type of Service lookup**.
Subject:	Select from the pick list. The pick list references all the **Enquiry Subjects** listed against the Service entered in the field above.

Entering the Subject will populate the Location field from the Customer's address and the Contact field from the Customer's name (if 'Copy Customer' has been checked in the Enquiry Subject lookup for this Subject).

The 'Class.' Field will be completed from the Enquiry Classification assigned to this Subject.

The Status, Action Officer and Follow Up details will be completed from the information entered against this Subject.

Entering the Site and Subject may display a list of all outstanding Enquiries with the same Site, Service and Subject, if 'Duplication Check' has been flagged for this Subject. If one of the displayed Enquiries is the same as the Enquiry currently being raised, select it from the list and click on OK

to link the existing Enquiry with this Customer. If the list does not display a true duplicate, click on Cancel to continue entering this, new, Enquiry.

Note: Where the automatic Duplicate Check is not in place for this Subject, a check can still be carried out once a Site, Service and Subject have been entered, by clicking on the 'Info' button and selecting 'Duplicates' from the drop down menu.

Desc:	A free text field. The information entered into this field will be copied into the Description field of a Defect and Job raised from this Enquiry, and will appear on the Trace Form and Contractor Notification prints.
Location:	This field may be populated with the Customer's address if 'Copy Customer' has been checked in the Enquiry Subject lookup for this Subject. An address can be found by clicking on the pick button to make a selection form the Property Gazetteer (Address library). Alternatively, a free text entry may be made. If the Subject allows it, the field may be left blank.
Contact:	A free text field for the entry of a Contact name. This may default from the related Customer details if 'Copy Customer' is checked for the Subject in the Enquiry Subject Lookup. The name may be entered from the Contact lookup - but need not be present in the Contact Lookup in order to be entered here. Where 'Include Contact Name' has been checked for the Service Subject, the name entered here will be transferred into the Location field of a Job raised from this Enquiry. An 'Address' button is available on the Contact Lookup when accessed from the Fast Entry Enquiry screen and the 'Customer' button via the Fast Entry Issues screen. Selecting the 'Address' button copies the Address details from the selected Contact to the Enquiry. The Title, Forename and Surname fields are left blank.
Telephone No: Alternate Tel: Fax No: E Mail:	Free text fields for recording contact details.
Class:	Is entered by default from the Subject. This may be changed by selection from the drop down list. The drop down list references the **Enquiry Classification lookup**.
Enq Ref:	An optional text field for the entry of a related reference. Any reference entered here will be available as a filter option and will be seen on a Trace form and a Contractor Notification.
Status:	Is entered by default from the Subject. This may be changed by selection from the pick list. The pick list references the **Status lookup**.
Officer:	Is entered by default from the Subject. This may be changed by selection from the pick list. The pick list references the **Action Officer lookup**. If GPS Tracking is being used, the Action Officer lookup will display the approximate distance from the position of the Enquiry for each Action Officer. Please refer to the **Action Officer GPS Tracking information** for further details.

Notes:	A free text field for notes associated with the Enquiry at this status. New notes may be entered each time the Enquiry is saved, and the Status log will record each entry regardless of whether the Status has changed.
Effect:	Today's date is entered by default. This may be changed.
Follow Up:	Is entered by default from the Service. This may be changed by selection from the drop down list. The drop down list references the **Follow up lookup**.
By:	Derived by adding the Follow up to the Effective date. This may not be edited, but may be altered by changing either the Effective date or the Follow Up.

Buttons

The Customer Enquiry screen contains a series of buttons down the right-hand side:

Another

Click on the 'Another' button to clear the Enquiry to a new, blank, Enquiry form, while retaining the same Customer.

This is done when a Customer has raised several Enquiries at the same time (in the same letter or during the same phone call for instance).

Note: The 'Another' button must not be used to link a Customer from an old Enquiry, raised on a previous occasion, to a new Enquiry.

Copy

The 'Copy' button will copy an existing Customers information into a new Customer record.

After the copy, the Enquiry fields will be blank enabling the User to continue as if the Customer details had just been entered.

Print

The 'Print' button will launch the Letter Batch utility to mail merge new letters associated with this Customer Enquiry.

Note: Before the 'Print' button will operate correctly and create a Letter, the default 'Directory' and 'File Type' must have been set. If these fields are blank then the **Letter Batch filter screen** will appear automatically and allow the user to set these values.

Trace

Click on 'Trace' to print an Enquiry Trace Form for this Customer Enquiry. See **Enquiry Trace Form** for more information on Enquiry Trace forms.

Notice

This option will be available for all Enquiry Subjects when the 'SWR - Street Works Initiation' (3420) module is active. It is used to create a new Street Works Notice from the current Enquiry.

To create a Notice from an Enquiry, click on the 'Notice' button in and then select one of the following options.

New Planned Street Works

New Immediate Street Works

New Unattributable Works

New Defective Apparatus Works

New Street Works Licence

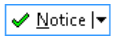
New Event (if Map Module (0425) and SWR - Events and Diversion Routes Module (3460) are active.)

The following table lists the Notice fields and where they are defaulted from:

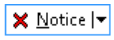
Notice Field	Origin
From:	Set from the Organisation of the Users Action Officer if set, otherwise left blank.
Internal Reference:	Enquiry number.
Description:	Enquiry Description. Set to the Enquiry Subject name if the Description is blank.
Site:	Enquiry Site.
Location:	Enquiry Location.
Easting & Northing:	Set from the Enquiry Easting & Northing if the Enquiry has been located on a Map.
To:	The Notice Recipients are populated from the Street Gazetteer.

The **Street Works Notice Default System Settings** are used to populate the Works Type, Notice Type, Works Status, Site Status, Collaboration Type, Street Category, Traffic Management, Position, Depth and Excavation Type fields.

Once the Notice has been created, it will be automatically linked with the current Enquiry. The Notice button will change to the following:



A green tick indicates that a Notice has been created and flagged to be Sent.



A red cross indicates that a Notice has been created but not flagged to be Sent.

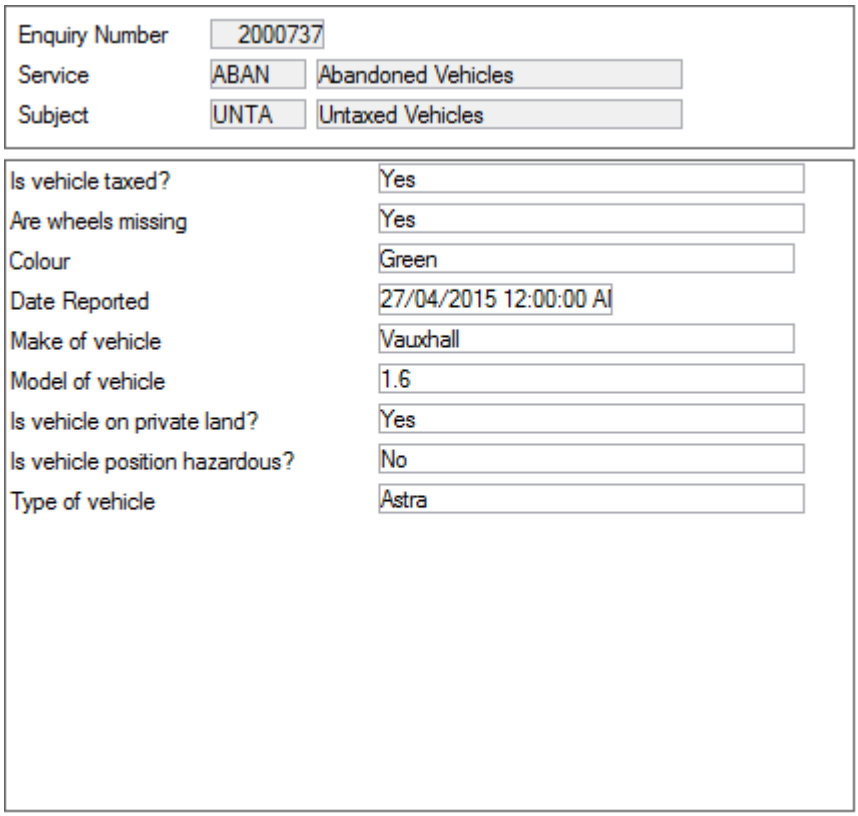
Other options on the Notice button include:

Display Notice:	Click on this option to open a Notice which has already been linked to the Enquiry.
Link to Notice:	Click on this option to open a filter which can be used to find an existing Notice to link to the Enquiry.
Clear Link to Notice:	The Clear Links option can be used to remove the link between the Enquiry and the Notice.

Attrib

CS - Extended Attributes module

Click on the Attribs button to display the Enquiry Attribute screen



Enquiry Attributes are user defined. Attributes are created in the **Operational Attribute Type lookup**.

Attributes are assigned to a Subject in the **Enquiry Subject Lookup**.

Add button

You may add Attributes to this Enquiry by clicking on the 'Add' button. The Attribute filter will be displayed for selection of the required attribute. The Attribute will be added to Enquiry Attribute form, with the default value, and may be assigned a value according to the Attribute's type and rules.

Remove Button

You may remove previously added Attributes (not attributes linked with the Subject) by selecting the Attribute and clicking on the 'Remove' button.

Note: When an Enquiry's Subject is changed, Attributes entered are retained if they are relevant to the new Subject, or if they have been changed from their default value.

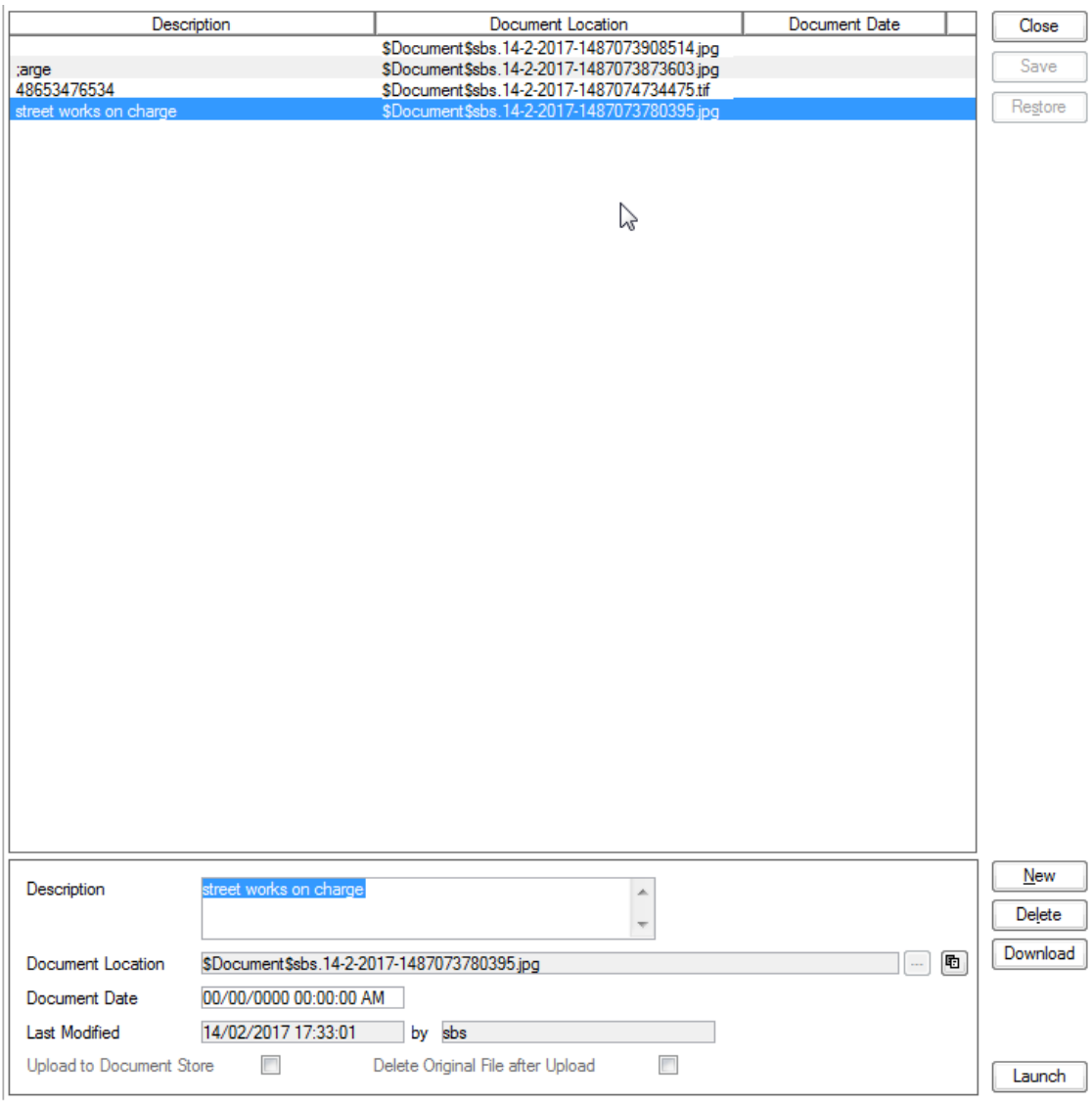
Document Links

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.

Document Links in Street Works

The document links feature within Street Works has extended functionality. Refer to the document links section of the Street Works help for more information.

Street Works\Document Links

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.

Document Visibility

When a new document is uploaded in Confirm Enterprise,it will default to private if no specific user or tenant-level settings are configured.

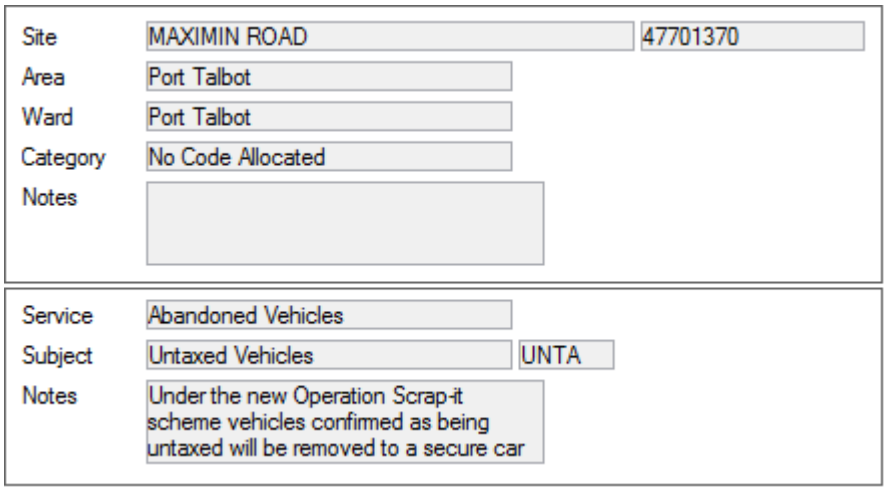
Additionally users now has the ability to tag documents on entities as "Public" or "Private" using the Confirm Web Interface. To change the default enterprise visibility setting, users can switch the document's visibility through the Confirm Web Interface. For more information, please refer to the Confirm Web Help Documentation for Document Links.

Info

The 'Info' button displays information linked with this Customer Enquiry. Click on the 'Info' button and select from the drop down menu:

Additional

Displays the Enquiry Additional Information form:



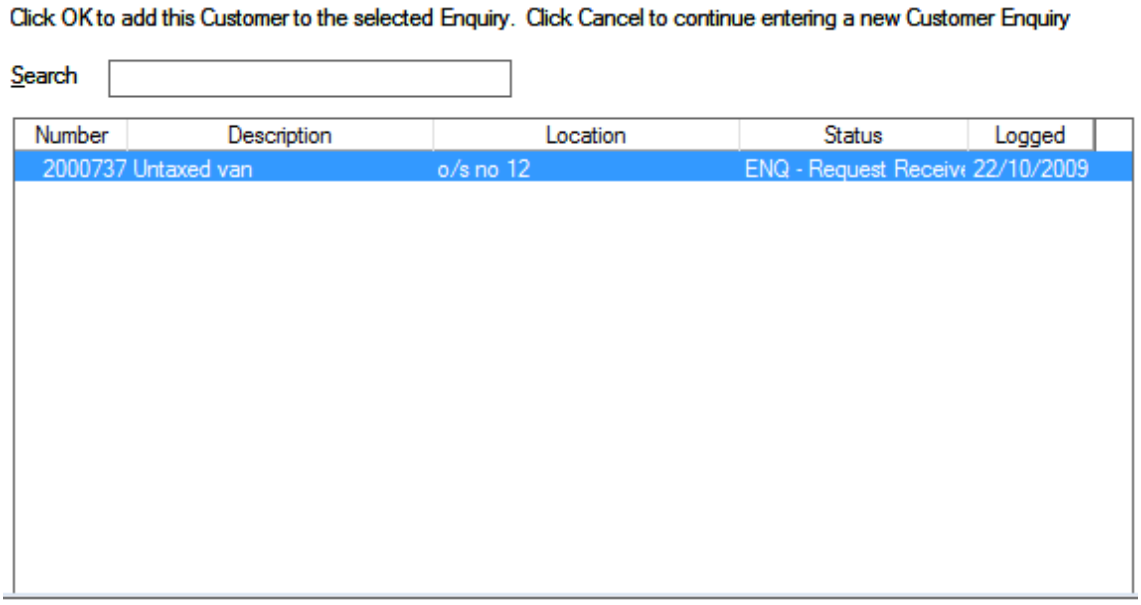
The upper part of the form displays the Site, and Site related information, including any Central Site Notes.

The lower part of the form displays the Service and Subject, together with any notes entered against the Subject in the Enquiry Subject lookups.

Duplicates

Select the 'Duplicates' option from the 'Info' button to check for existing outstanding Enquiries of the same Subject on the same Site.

If no other outstanding Enquiries match these criteria, the message No possible duplicates found will be displayed. If Enquiries are found, the following screen will be displayed:



Note: The duplicate check will be carried out automatically when the Enquiry is entered where Duplicate Check is ticked on the selected Enquiry Subject.

Councillors

The Councillor library provides a list of Councillors, associated with their Wards. If Sites are also correctly assigned to Wards, the Enquiry can display the Councillors with an interest as soon as a Site is entered in the Enquiry.

Ward:	Select from the drop down list. The drop down list references the Ward Lookup.
Code:	Up to four alphanumeric characters. The code must be unique within the Ward
Councillor:	Up to fifty characters.
Address:	An optional free text field.
Telephone Number:	Optional free text fields.
Fax Number:	An optional free text field.
Email Address:	An optional free text field.
Political Tendency:	Select from the drop down list. The drop down list references the Political Tendency library.

Info button

Click on the 'Info' button to display the Street Information form.

This gives details of any other work being carried out in the Street (within the number of days set in the 'Work Tolerance' field of the Street Works System Settings), and the Designation of the Street as set in the Street Register.

Street Register\Street - Other Button

All Designation details displayed and selected in the Street Information form will be applied to the Notice if the 'OK' button is used. You may select of de-select Designation by double clicking in the Designation list. If you do not wish to apply the Designation to the Notice, deselect the Designations and click 'Ok'. To exit the Street Information form without making any changed use the 'Cancel' button.

Detail

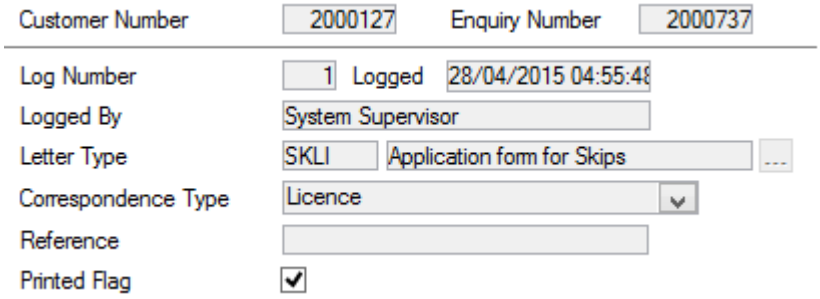
Select from the drop down menu:

Status

The Status Log form is displayed, detailing as separate records, each Status which this Enquiry has held and the notes from that Status.

Letters

Displays the Correspondence Log. The Correspondence Log displays details of letters that have been sent and letters that are waiting to be sent. The Correspondence Log is also used to add new letters to be sent, and to print individual letters. The function of the Correspondence Log depends on the Letter Type and Correspondence Type lookups having been correctly completed.



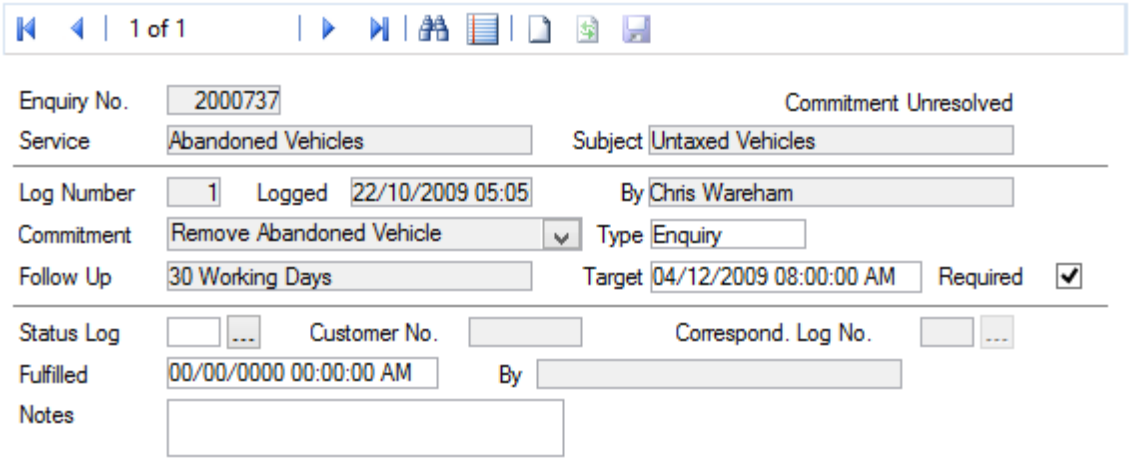
To add a new Letter to be sent to the Correspondence Log:

Letter Type:	Select from the pick list. The pick list references the Letter Type Lookup.
Correspondence Type:	Will be automatically entered when a Letter Type is selected.
Printed flag:	This is unchecked for new and un-sent letters. When a Letter Batch is saved, the letters that were included on the batch have the Printed flag checked automatically so that they are not sent again in future batches.

Commitments

(CS Commitment Tracking module)

Displays the Enquiry Commitment form:



The upper part of the form copies the Enquiry Number, Service and Subject from the Enquiry. It also carries a statement as to whether the Commitment is Unresolved or Resolved.

The central part of the form details the Commitment. This may have been added automatically from the Subject, or may be added manually by selecting a Commitment from the drop down list. The drop down list references the Commitment Lookup

The lower part of the form details the resolution of the Commitment and will be blank if the Commitment is unresolved. If the Commitment is resolved, the Status Log number, or the Correspondence Log number that resolved the Commitment will be entered, together with the resolution date.

Note: A Customer Enquiry may carry more than one Commitment.

View Offences

(Fixed Penalty Notice module 2700)

Launches the Offences and Fixed Penalty Notices screen showing details of any linked Offences. If no Offences are linked this option will be disabled.

Action

The Action button allows actions to be carried out to progress the Enquiry. A drop down menu is displayed in which only those options that the Subject allows will be active.

Feature

Select 'Feature' to view a list of all the Plots on the Site entered on the Enquiry. Select a plot to establish a link between the Enquiry and the Feature.

The link, once established, will display the Feature Details form when the 'Feature' option is selected, populated with the linked Feature.

Failure

(Performance Monitoring module)

This option will be available if the Failure check box has been checked for the Enquiry Subject.

If a Failure has already been raised through this Enquiry, the Failure will be displayed. A new Failure may be added by clicking on the New Page button.

If no Failure has been entered against this Enquiry the Failure Creation filter is displayed.

- Enter the Contract from the Pick list. The pick list references all live Contracts.
- Enter the Failure Type from the pick list. The pick list references all Non Work Related Failures that are associated with Contract entered above.

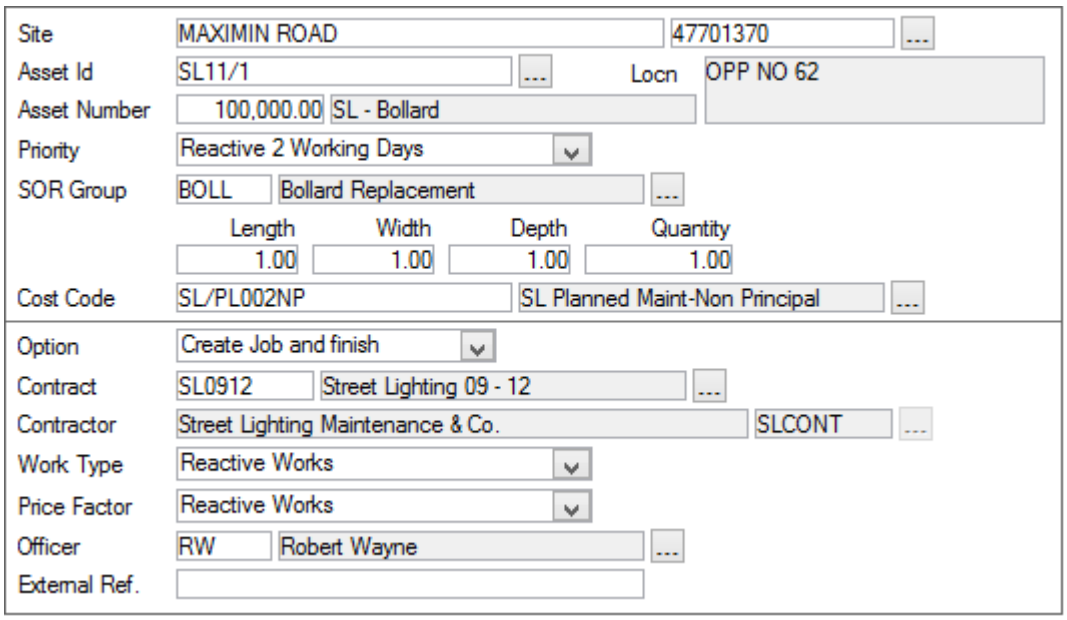
Click OK to create the Failure. The Failure will be added to the Failure library and may be included in future Notices.

Works

The 'Works' Option is only available if the Works check box has been checked for the Enquiry Subject and the Type of Service for this Enquiry is assigned to the database Asset Type that is currently logged in to.

If work has been previously created for this Enquiry, clicking on the Works option will display the Job(s) linked to this Enquiry.

If no work exists for this Enquiry, the Job Creation Filter will be displayed:



Site: The Site will be pre-populated when the filter opens.

Plot number:	Enter or select from the pick list. The pick list references the Feature library. Note: The plot Number will be already selected if a link has already been created with the plot by issuing a Contractor Notification, or establishing a Feature link. This can be changed by typing in a different Plot Number, or using the Pick Button to select a different Feature. If a 'Primary Job' is created on a different Feature then this will change the Feature linked to the Enquiry.
Priority:	Select from the drop down list. This will default to the Priority specified for the current Enquiry Subject, if one has been specified using the 'Job' button on the Enquiry Subject screen.
SOR Group:	Select from the pick list. Only the SOR Groups with at least one SOR Item included in the BOQ of Contractor and Price Factor can be selected.
Length, Width, Depth, Quantity:	Enter the values to be allocated to the SOR items within the selected SOR Group. Note: Confirm will check each SOR Item's Unit of Measure and only apply the relevant values.
Cost Code:	Leave blank to use the Feature Cost Code (or overriding Cost Code). Select from the pick list to use another Cost Code.
Option:	Select from: 'Create Job and finish' - This shall create the Job but does not display the Job afterwards. 'View Created Job' - This shall create a Job and display it in the Job screen. 'Create Works Order' - This shall create a Job and Works Order. This option does not display the Job or Works Order afterwards. 'Commit Created Works Order' - As above, but shall attempt to Commit the Order. 'Print Committed Works Order' - As above, but shall display the Order Print Filter, ready to print the Works Order. Note: A default for the 'Option' field can be set in the Customer Services System Settings.

The following fields need only be completed if Create Works Order, Commit Created Works Order, or Print Committed Works Order are selected from the Option drop down list:

Contract:	Select from the pick list. The pick list references awarded Term Contracts and Non Term Contracts.
Contractor:	Entered automatically if a Term Contract is selected. If a Non Term Contract has been selected, select a Contractor from the pick list.
Work Type:	Select from the Drop Down menu.
Price Factor:	Select from the Drop Down menu. The Drop down list references Price Factors associated with the selected Contract.
Officer:	Specify the Action Officer that the created Job shall be assigned to. This defaults to the current Enquiry Action Officer but can be changed if required.
External Ref:	An optional free text field for the Order header.

Click 'OK' to process the Job (and Order, if selected) through to the stage requested in the Option field.

When a Job is raised from the Fast Entry Issue screen or Officer Enquiry screen, the Job's Customer Reference is set to the Enquiry Reference. When a Job is raised from the Fast Entry Enquiry screen the Customer Reference is used. If the Customer Reference is blank the Enquiry Reference will be used instead.

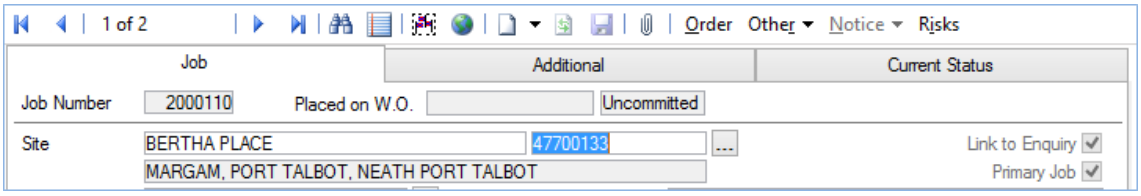
Note: When a Job is selected from the Duplication Check window (when a Feature is entered) and the 'View Created Job' Option is active, the Job will be displayed after the Ok button is pressed.

Raising Jobs from Enquiries

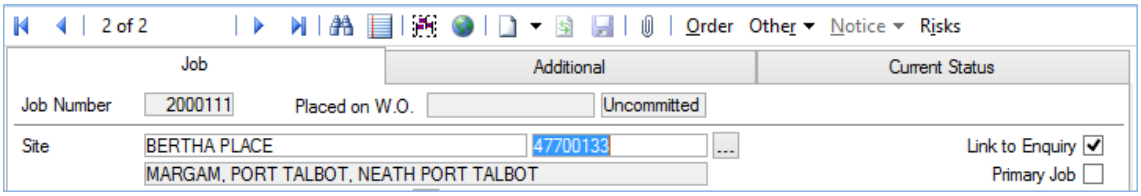
When a Job is raised directly from an Enquiry it is automatically flagged 'Link to Enquiry' and 'Primary Job'. The 'Primary Job' is the Job linked to the Enquiry that will update the Enquiry's Status in line with its own, the Status of the other Jobs has no effect on that of the Enquiry. When a linked Job is opened from the Enquiry screen it is possible, by ticking the 'Link to Enquiry' a box, to link additional new or existing Jobs (even on a different Feature or Site) to the Enquiry.

If a Job on a different Site and Feature has been selected as the 'Primary Job' then the Enquiry will be updated to carry the same details.

When multiple Jobs have been linked to an Enquiry the 'Primary Job' can be changed. If a new Job is being flagged as 'Primary' then the Enquiry Status will be updated and the Enquiry Status Notes will reflect the Job number that caused this change.



If a Job has been linked to an Enquiry by mistake, then the 'Link to Enquiry' flag can be un-ticked as long as there is another Job linked and flagged as 'Primary Job'. The 'Primary Job' can only be unlinked if there are no other Jobs linked to the Enquiry.



Note: Only Users with Update access to the 'Clear Links' User Security option are able to Clear Links from an Enquiry, or to remove a link to a Job.

If the Binoculars button is used Jobs linked to the Enquiry will always be retrieved in addition to Jobs matching the criteria entered in the filter.

There is an 'Enquiry Job List' available from the List button on the Enquiry screens which shows all the Jobs linked to a selection of Enquiries, and indicates which of those Jobs is the Primary one.

Find Job button

When the 'Find Job' button is selected Confirm will initially display a list of the Jobs on the current Site/plot combination of the Enquiry. If the Enquiry is not linked to a Feature, then all Jobs on that Site are displayed.

Using the 'Refresh' button allows the user to pick any Job on any Feature. Picking a Job on a different Feature updates the Enquiry to link to the Feature of the Job.

Notification

This Option will be available if the Non Provision check box has been checked for the Enquiry Subject.

The Contractor Notification will produce a printout detailing the Enquiry for the attention of the Contractor.

Click on Notification to display the Enquiry Contractor Notification form:

The top part of the form copies the Enquiry Number and Site from the Enquiry.

Plot number:	Enter or select from the pick list. The pick list references the Feature library. Note: The plot Number will be already selected if a link has already been created with the plot by raising work, or establishing a Feature link.
Contract:	Select from the pick list. The pick list references awarded Term Contracts and Non Term Contracts.
Contractor:	Will be entered automatically if an awarded Contract is selected. If a Non Term Contract has been selected, select a Contractor from the pick list.
Notification Sent:	Is unchecked for new and un-sent Notifications. The check box will be checked when this Notification is printed or included on a Notification Batch which is printed.

Defect

When the Defect option is selected from the Action menu it is possible to raise a Defect to be linked to the Enquiry (as shown in the window names).

The Site information, Description, Work Location and Cust. Ref. will all default from the values on the Enquiry. The Job 'Officer' and the Defect 'Raised by Officer' fields are set to the associated Enquiry Officer. If the Defect Type has been linked to a Type of Service and Enquiry Subject then this will also default on the Defect.

If a Feature has been linked to the Enquiry then this will also be set on the Defect, if this is not the case then a Feature must be selected. It is possible to select a different Site code/plot number combination to that of the Enquiry. If the Enquiry does not have a Job associated with it, creating a Defect with a different Site code/plot number combination the Enquiry is updated to have the same combination. If the Enquiry is associated with a Job, then the Enquiry keeps its current Site code/plot number combination.

For further details on the Defect form please refer to the Condition Survey manual.

Clear Links

This option will clear links to Jobs, Defects and Features established by raising Jobs and Defects from the 'Action' button and by using the Feature option described above.

Only Users with Update access to the Clear Links User Security option are able to Clear Links from an Enquiry, or to remove a link on the Job screen when opened from an Enquiry.

Bookings

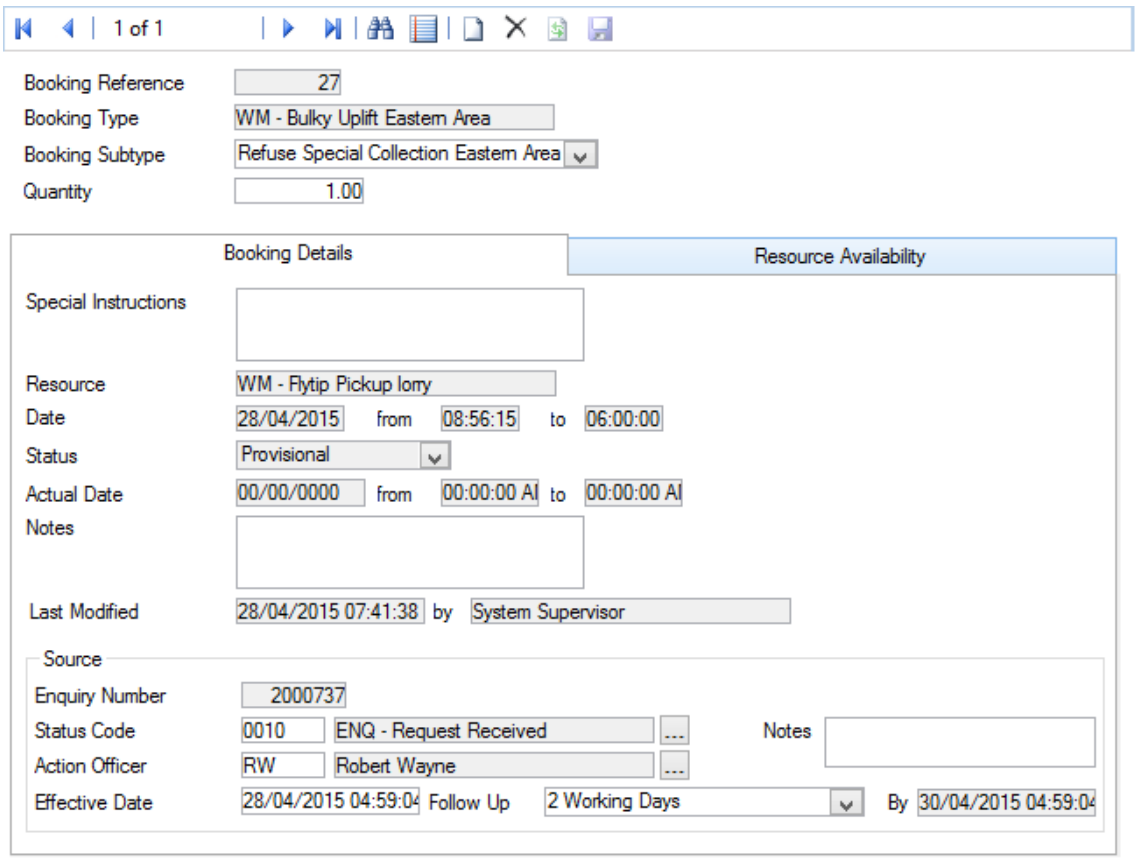
The Bookings form is used to enter new Bookings, and to view and update existing Bookings.

The Bookings form will be displayed when an Enquiry is entered with a Site and Subject which have a Booking Type assigned. When the Bookings form is accessed in this way it may be used to enter new Bookings.

The Bookings form may also be viewed from the menu item in the root of the Customer Services folder. When the Bookings form is accessed in this way it may be used to edit and update existing Bookings.

(0850 - Gang Allocation & Scheduling)

The Scheduling screen creates Booking records for each Job that is Scheduled to a Gang. The Booking screen can be opened by double-clicking the Booking Slot, or directly from the menu option.



Booking Reference:	An unique number up to 8 numbers. You may enter a reference, or leave the field blank to have the reference assigned from seed numbers.
Booking Type:	The Booking Type is derived from the Enquiry Subject and may not be edited.
Booking Subtype:	The default Booking Subtype will be entered (as defined in the Booking Type Lookup). You may select another Subtype by selection from the drop down list. The drop down list references the Booking Subtypes for the current Booking Type.
Quantity:	The quantity to be applied in this Booking, of the Unit of Measure assigned to the Booking Type in the Booking Type Lookup.

Making a Booking

Please see the **Bookings section** for details on how to create a Booking.

Send Urgent

(Not used by ConfirmConnect®)

If an Enquiry has been marked as 'Urgent' then this option will be available to the User. When this is selected the Enquiry will be transferred to the assigned Action Officer's mobile device if automatic transfers have been configured.

New Offence

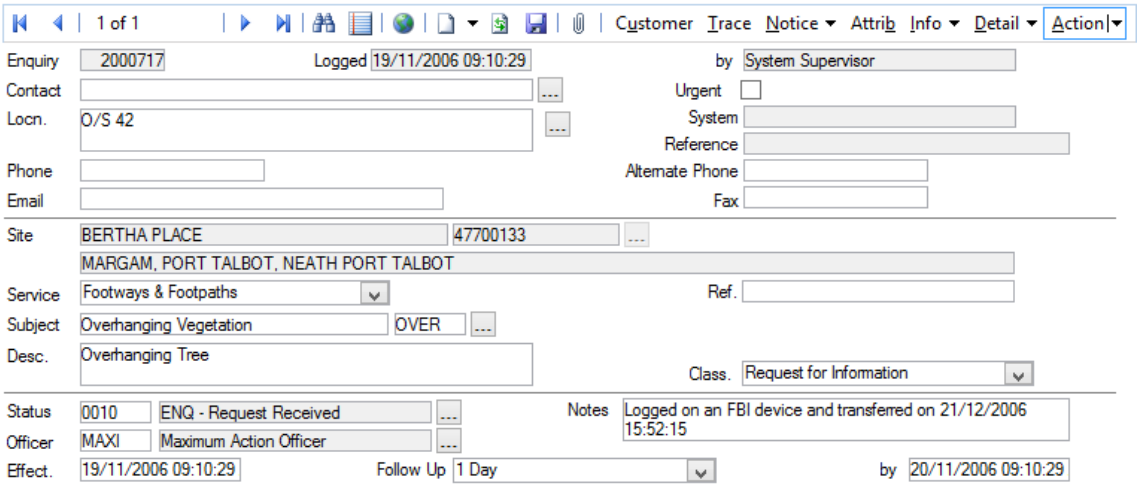
(Fixed Penalty Notice module 2700)

Allows FPNs to be created against this Enquiry by launching the **New Offence Wizard**.

Note: When launching the **New Offence Wizard** from the Enquiry, it will restrict the choice of **Penalty Scheme** to those which have their **Related Entity** set to 'Enquiry'.

Fast Entry Issues

The Fast Entry Issues item displays the Enquiry screen.



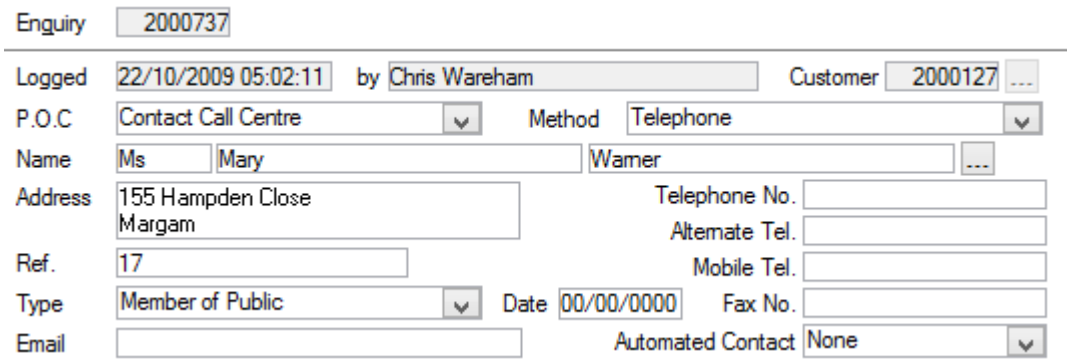
The Enquiry screen may be used to view existing Enquiries and to enter new ones.

The fields in the Enquiry form are the same as the fields in the **Enquiry** on page 13, and are used in the same way to raise an Enquiry.

Buttons

Customer

Click the 'Customer' button to display the Enquiry Customer's details form. This will contain details of all the Customers who are linked with this Enquiry.



The Enquiry Customer's Details form may be used to add a new Customer to the Enquiry. Customer details are completed in the same way as for a Customer Enquiry form.

See **Customer** on page 11 for information on entering Customer details.

The 'Detail' button of the Enquiry Customer's Details form displays the 'Letters' and the 'Commitment' options, which are the same as those, obtained from the **'Detail' button** on the Customer.

Note: The Commitment option of the 'Detail' button menu will only display 'Customer' Commitments and will only allow the addition of 'Customer' commitments.

Copy

Select the 'Copy' button to copy the currently selected Enquiry to create a new Enquiry record.

Note: Any Enquiries created with the 'Copy' button will not be available to view in the Fast Entry Enquiry screen unless Customer details are added to them with the 'Customer' button.

Trace

Click on 'Trace' to print an Enquiry Trace Form for this Customer Enquiry. See **Enquiry Trace Form** for more information on Enquiry Trace forms.

Notice

This option will be available for all Enquiry Subjects when the 'SWR - Street Works Initiation' (3420) module is active. It is used to create a new Street Works Notice from the current Enquiry.

To create a Notice from an Enquiry, click on the 'Notice' button in and then select one of the following options.

New Planned Street Works

New Immediate Street Works

New Unattributable Works

New Defective Apparatus Works

New Street Works Licence

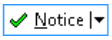
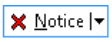
New Event (if Map Module (0425) and SWR - Events and Diversion Routes Module (3460) are active.)

The following table lists the Notice fields and where they are defaulted from:

Notice Field	Origin
From:	Set from the Organisation of the Users Action Officer if set, otherwise left blank.
Internal Reference:	Enquiry number.
Description:	Enquiry Description. Set to the Enquiry Subject name if the Description is blank.
Site:	Enquiry Site.
Location:	Enquiry Location.
Easting & Northing:	Set from the Enquiry Easting & Northing if the Enquiry has been located on a Map.
To:	The Notice Recipients are populated from the Street Gazetteer.

The **Street Works Notice Default System Settings** are used to populate the Works Type, Notice Type, Works Status, Site Status, Collaboration Type, Street Category, Traffic Management, Position, Depth and Excavation Type fields.

Once the Notice has been created, it will be automatically linked with the current Enquiry. The Notice button will change to the following:

	A green tick indicates that a Notice has been created and flagged to be Sent.
	A red cross indicates that a Notice has been created but not flagged to be Sent.

Other options on the Notice button include:

Display Notice:	Click on this option to open a Notice which has already been linked to the Enquiry.
Link to Notice:	Click on this option to open a filter which can be used to find an existing Notice to link to the Enquiry.
Clear Link to Notice:	The Clear Links option can be used to remove the link between the Enquiry and the Notice.

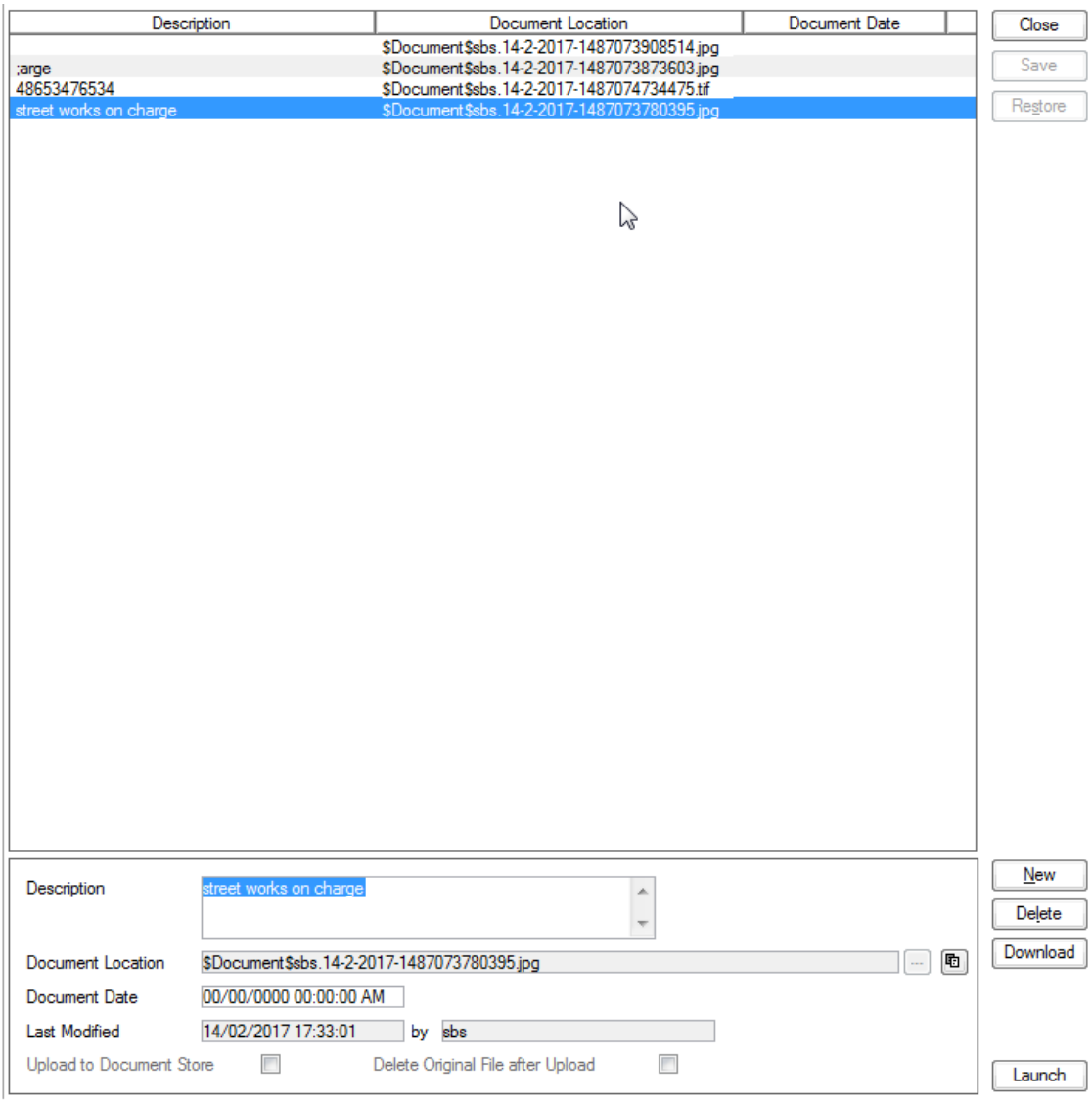
Attrib

Please refer to the Fast Entry Enquiries section for details on the **'Attrib' button**.

Document Links

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.

Document Links in Street Works

The document links feature within Street Works has extended functionality. Refer to the document links section of the Street Works help for more information.

Street Works\Document Links

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.

Document Visibility

When a new document is uploaded in Confirm Enterprise,it will default to private if no specific user or tenant-level settings are configured.

Additionally users now has the ability to tag documents on entities as "Public" or "Private" using the Confirm Web Interface. To change the default enterprise visibility setting, users can switch the document's visibility through the Confirm Web Interface. For more information, please refer to the Confirm Web Help Documentation for Document Links.

Info

Please refer to the Fast Entry Enquiries section for details on the **'Info' button**.

Detail

Please refer to the Fast Entry Enquiries section for details on the **'Detail' button**.

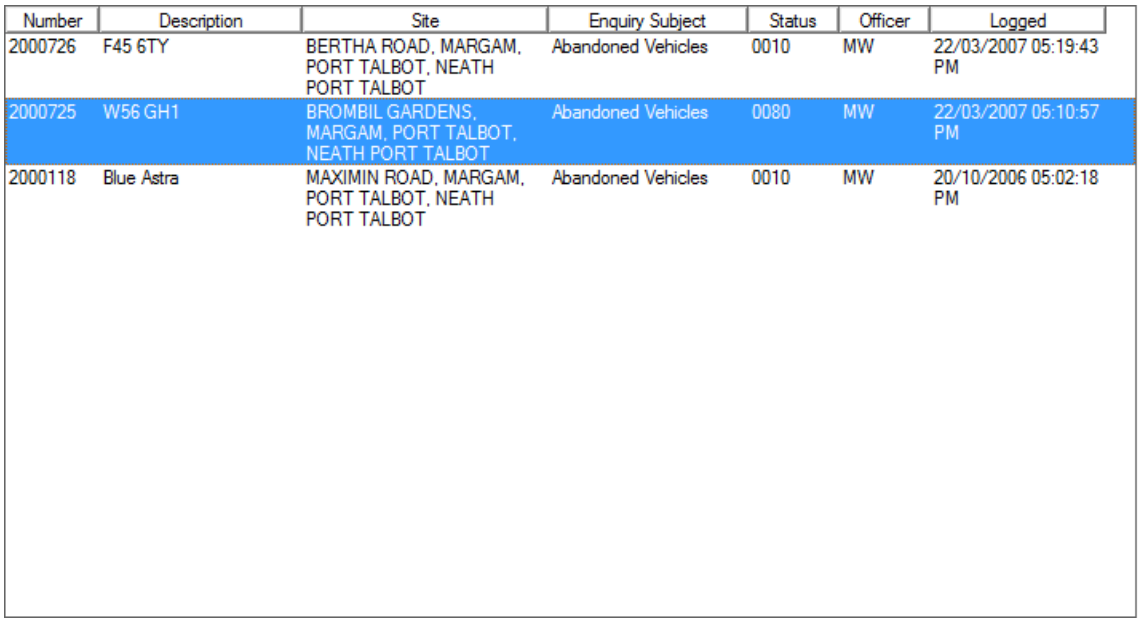
Action

Please refer to the Fast Entry Enquiries section for details on the **'Action' button**.

Officer Enquiries

The Officer Enquiries directly displays the Officers Enquiries form, listing outstanding Enquiries for the current Action Officer.

The current Action Officer is defined as the Action Officer who is linked to the User login of the user accessing the Officer Enquires.



Number	Description	Site	Enquiry Subject	Status	Officer	Logged
2000726	F45 6TY	BERTHA ROAD, MARGAM, PORT TALBOT, NEATH PORT TALBOT	Abandoned Vehicles	0010	MW	22/03/2007 05:19:43 PM
2000725	W56 GH1	BROMBIL GARDENS, MARGAM, PORT TALBOT, NEATH PORT TALBOT	Abandoned Vehicles	0080	MW	22/03/2007 05:10:57 PM
2000118	Blue Astra	MAXIMIN ROAD, MARGAM, PORT TALBOT, NEATH PORT TALBOT	Abandoned Vehicles	0010	MW	20/10/2006 05:02:18 PM

Users are linked to Action Officers in the Action Officer lookup.

Print:	Displays the Outstanding Enquiries filter. See **Outstanding Enquiries** on page 47
Detail:	Displays the selected Enquiry in the Enquiry form.

Bookings

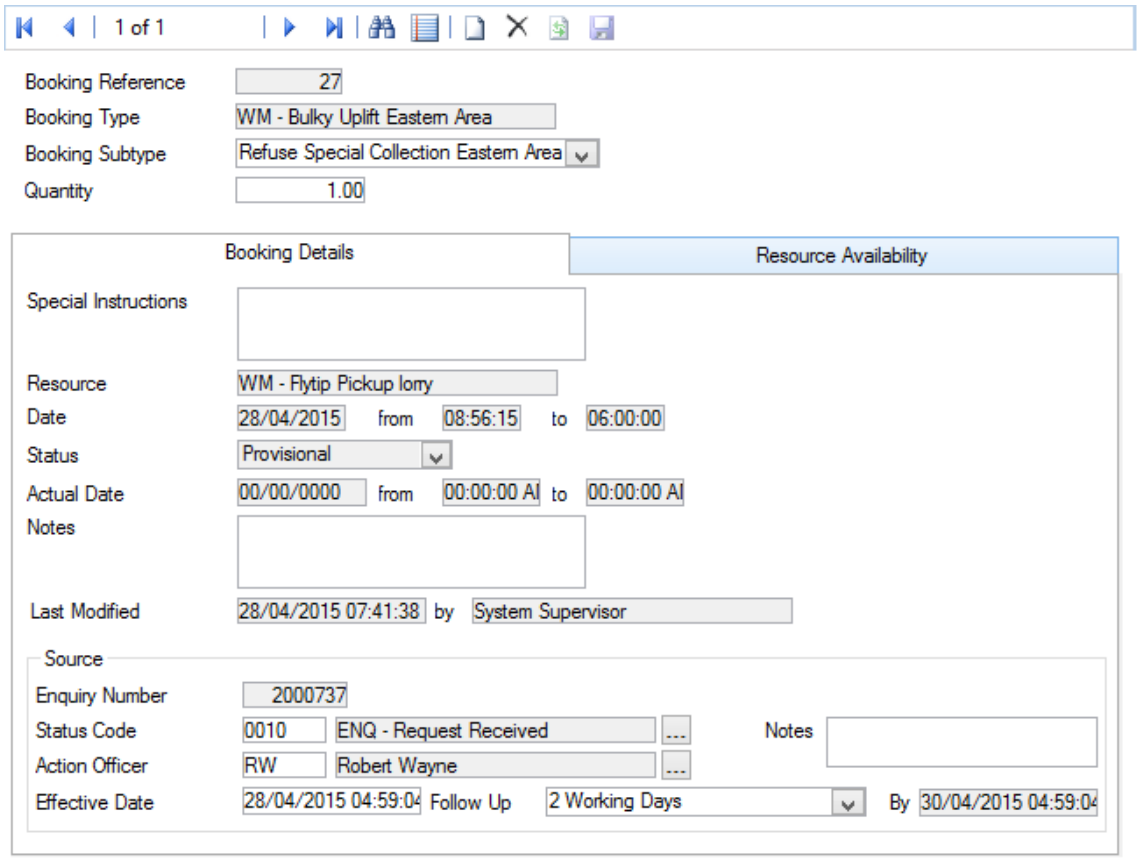
The Bookings form is used to enter new Bookings, and to view and update existing Bookings.

The Bookings form will be displayed when an Enquiry is entered with a Site and Subject which have a Booking Type assigned. When the Bookings form is accessed in this way it may be used to enter new Bookings.

The Bookings form may also be viewed from the menu item in the root of the Customer Services folder. When the Bookings form is accessed in this way it may be used to edit and update existing Bookings.

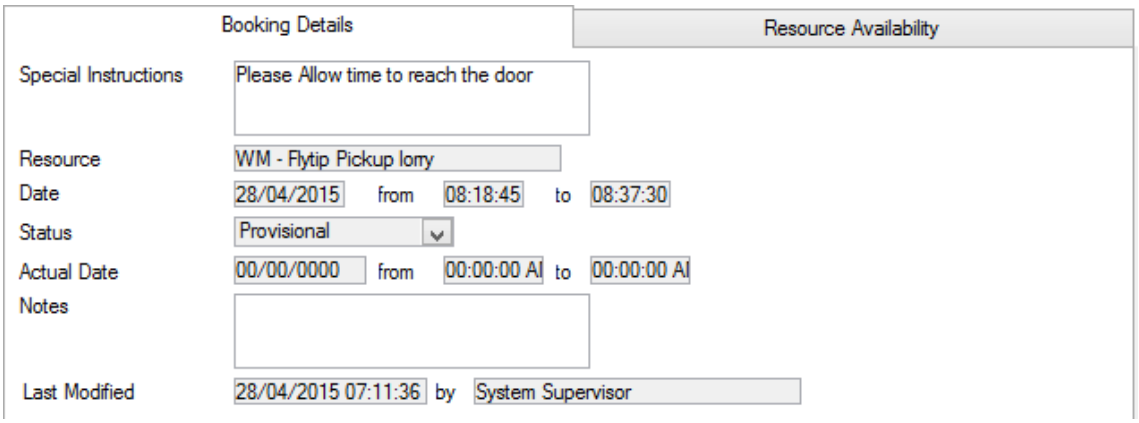
(0850 - Gang Allocation & Scheduling)

The Scheduling screen creates Booking records for each Job that is Scheduled to a Gang. The Booking screen can be opened by double-clicking the Booking Slot, or directly from the menu option.



Booking Reference:	An unique number up to 8 numbers. You may enter a reference, or leave the field blank to have the reference assigned from seed numbers.
Booking Type:	The Booking Type is derived from the Enquiry Subject and may not be edited.
Booking Subtype:	The default Booking Subtype will be entered (as defined in the Booking Type Lookup). You may select another Subtype by selection from the drop down list. The drop down list references the Booking Subtypes for the current Booking Type.
Quantity:	The quantity to be applied in this Booking, of the Unit of Measure assigned to the Booking Type in the Booking Type Lookup.

Booking Details tab



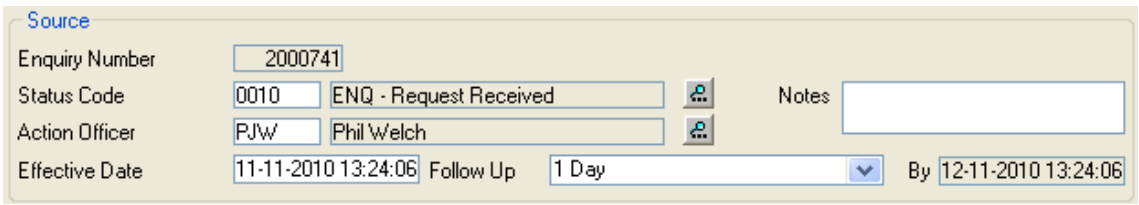
After selecting a slot, the date and time range of the slot will be entered on the Booking Details tab. The booking details are not editable apart from: Special Instructions (which will appear on a Gang ticket - if linked) and Notes, both of which are free text fields.

An Enquiry Booking created from this screen will have a 'Provisional' Status. The User has a period of time, defined in the **Bookings System Settings** on page 110, to change the status from 'Provisional' to 'Confirmed' by saving the Enquiry (see 'Confirming the Booking' below). Once this time has elapsed then the Booking will not be taken into consideration in availability checks and hence the slot may be taken by a different Booking.

For this reason, and because other Bookings may have been made between the Booking screen calculating availability and the User hitting the Save button, the availability of the slot will be checked again on saving.

If the selected slot is now overbooked (due to another Booking being made during the time the User spent viewing slots in the Bookings screen) a warning message is displayed and the save is prevented. The User must choose another slot. If any additional Booking has been made in the slot but capacity still remains, a warning may be displayed (depending on whether the Booking Type is flagged to do this) following the save. No Optimum Capacity warning is issued at this stage.

The Source section of the Booking screen will change depending on what type of Booking is displayed:



Enquiry Number:	The linked Enquiry Number is entered here and cannot be changed.
Status Code & Notes:	The current Status, and Status Notes of the Enquiry is displayed and both may be changed directly on the Booking screen.
Action Officer:	The Action Officer currently assigned to the Enquiry is displayed and may be changed.

Effective Date: The current Effective Date is displayed and can be edited directly on the Booking screen.

Follow Up: The current Follow Up is displayed, but this may be changed from picking a different option in the drop-down. Changing this will automatically set the 'By' value based on the Effective Date.

(0850 - Gang Allocation & Scheduling)



Job Number: The linked Job Number is entered here and cannot be changed.

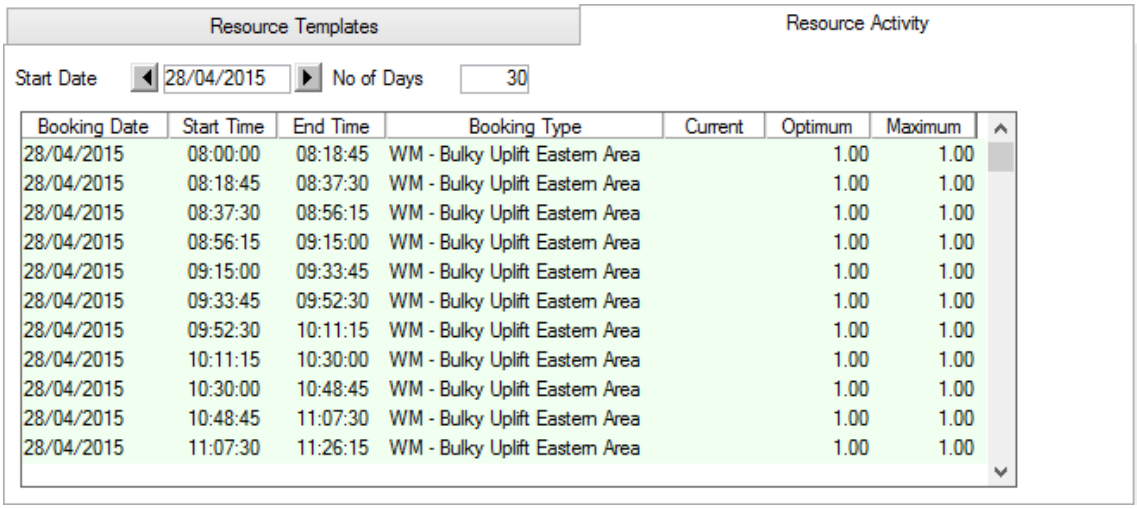
Status Code & Notes: The current Status and Status Notes of the Job is displayed and can be changed directly in the Booking screen.

Note: Changing the Job Status to one which is flagged as 'Complete' will set the Booking Status to 'Complete'.

Gang: The Gang that the Job is currently Scheduled to is displayed and cannot be changed directly from the Booking screen. The Scheduling screen must be used to change the Gang if required.

Effective Date: The current Effective Date of the current Job Status is displayed and cannot be edited from the Booking.

Resource Availability tab



Start Date: The Start Date determines which is the first Booking slot in the list below and will default to the current system date. A new date may be entered.

No of Days: The number of days in advance shown in the list below. This defaults from the **Bookings System Settings** on page 110, but may be altered in this window.

The available Booking slots (as defined in the Bookings Template for this Resource) will be displayed below. Each booking slot row is colour coded to show its status. Colours are set in the **Bookings System Settings** on page 110.

Making an Enquiry Booking

A Booking is made by selecting a Booking slot in the list and double clicking on it.

Previous bookings in the same slot may be viewed by clicking on the 'Detail' button.

When the User selects a slot, a check will be made comparing the entered quantity against the remaining available capacity of the slot. If the Maximum Capacity would be exceeded, the selection is prevented.

Once a slot is selected, the date and time details will be entered on the Booking Details tab.

Confirming the Booking

Once an Enquiry Booking has been saved, the User is returned to the Enquiry screen. When the Enquiry is saved, the overbooking check is carried out again. Once the Enquiry is saved, the Booking is linked to the Enquiry and set to a Status of 'Confirmed'.

(0850 - Gang Allocation & Scheduling)

Bookings created with the **Scheduler** will automatically be set to a Status of 'Confirmed'.

Editing a Booking

Bookings may be edited and updated in the Bookings form when it is accessed from the Bookings menu item.

Booking slots may be altered for Bookings which are at the status 'Provisional' or 'Confirmed'.

Users may recall existing Bookings and alter the status to indicate the progress of the Booking.

Available Statuses are:

'Provisional' When a date/time has been chosen a Booking record will be created at this Status. The User will then have a period of time determined by the **Bookings System Settings** on page 110 to enter the remaining details and change to a 'Confirmed' status, during which time the Booking slot is protected. Once the period of time has elapsed then the date/time becomes available for other Bookings to overwrite.

'Confirmed' A firm Booking has been made. This will be the Status at which a Booking is set once the related Enquiry has been saved

(0850 - Gang Allocation & Scheduling)

All Bookings made for Jobs will automatically be set to this Status.

'Completed' A Booking at 'Confirmed' status can be manually changed by a User to be at the 'Completed' Status. An Actual Start and Finish Time can be specified at this point, and Notes entered.

(0850 - Gang Allocation & Scheduling)

If the Job Status for the Booking(s) is progressed to one that is flagged as 'Complete', the Booking will also be updated. The Start and Finish times will be set to the Start and Actual End dates of the Job.

'Failed' — A Booking at Confirmed status can be manually changed by a User to be at the Failed Status. This Status is used to indicate that the Booking was not carried out successfully. It would be applied after the event. When setting a Booking to Failed, a User may enter Notes against it

'Cancelled' — A Booking has been made and then cancelled. Another Booking can overwrite this slot. The idea behind this Status is so that any cancelled Bookings that are not re-booked can be seen and monitored.

(0850 - Gang Allocation & Scheduling)

If a 'Cancelling' Payment Batch is Committed for a Job which has a Booking, the Booking Status will be set to 'Cancelled'.

Payment Processing\Batch Create Payments

Enquiry Trace Form

An Enquiry Trace form provides the details of each Enquiry, and optionally the Customer(s), for the Action Officer to follow up the Enquiry.

A separate Trace Form will be printed for each Enquiry selected in the filter, giving Site, Service and Subject, Location and Description details. Other details, such as Status and Status history are optional in the print filter.

Enquiry Trace Form Filter options include:

Action Officer:	The current Action Officer is entered by default. That is, the Action Officer linked with the User login for the current User. Another Action Officer can be entered by selection from the pick list.
Reference:	This field references the Enquiry Reference entered in the Enquiry.
Outstanding:	Select from 'Yes', 'No' or 'Both'.
Unprinted only:	Checked by default. Uncheck to include Enquiries for which a Trace Form has already been printed.
Update Printed Flag:	Checked by default. Uncheck to stop the printed flag from being set for the Enquiries that are included in this print. These Enquiries will then be picked up in a future print filter in which 'Unprinted only' is set, since they have not been 'marked' at having been printed.

Display:

Select the display options for the Trace Form print. The first time the user opens this screen, all the options will be selected by default. Once the user clicks 'OK', the state of the Display settings will be saved in the database and retrieved next time the Enquiry Trace Form is run.

Status History:	To display a list of previous Statuses the Enquiry has held.
Status Comments:	To display the Status notes held in the Enquiry against each 'historical' Status.
Show Site Notes:	To display Site Central Notes
Additional Comment Space:	Leaves space headed: 'Revised Status:' after the Enquiry details.
Show Address:	To display the Site Address.
Show Attributes:	(Extended Attributes Module) To show the Enquiry related Attributes and values
Customer Details:	To display details of all the Customers linked with each Enquiry.
Style:	Select from 'Small Font' and 'Large Font'

Note: The 'Trace' buttons on the various Enquiry forms will run an Enquiry Trace Form without first displaying a filter screen. The display options used will be determined from those saved in the database for the current user.

Contractor Notification

A Contractor Notification print will give details of all Enquiries that have had a Contractor Notification noted against them (and have not previously been printed). See **Buttons** on page 15 for information on logging a Contractor Notification against an Enquiry.

The selection of Notifications can be limited in the Contractor Notification Filter:

Filter options include:

Reference:	This field references the Enquiry Reference entered in the Enquiry.
Outstanding:	An outstanding Enquiry is one which carries a Status which is flagged 'Outstanding'
Printed:	A 'Printed' notification is one which has the 'Printed' checkbox checked
Update Printed Flag:	Checked by default. Uncheck to prevent the printed flag from being set for the Notifications that are included in this print. These Notifications will then be picked up in a future print filter in which Printed - 'No' is set, since they have not been 'marked' at having been printed.
Display:	Select the display options for the Trace Form print: Style: select from 'Small Font' and 'Large Font' Show Address: displays the Site Address. **Note:** The display options selected for a print obtained through the filter remain in place for Notifications printed from the 'Action' button, 'Notification' option on the Customer Enquiry from and the Enquiry form. No filter is displayed for Notifications prints direct from a selected Enquiry.

Letter Batch

A Letter batch will collect together all the Letter Types that have been assigned to Customer Enquiries, and have not been batched (and saved) before. See **Customer Enquiry buttons** for information on logging a Letter against an Enquiry.

Saving the Letter batch will launch the mail merge, and produce a letter, of the selected Letter Type(s) for each Customer who has had a new Letter Type assigned to them. See **Setting up Mail Merge for Letters - Step-by-step** on page 101 for information on setting up the mail merge.

Logged from:	Today's date is entered by default. The dates may be amended.
Logged by:	The current User (derived from the User login) is entered by default. This may be amended by selection from the drop down list. The drop down references the Action Officer lookup.
Letter Type:	Select a Letter Type or leave blank to batch all available Letter Types. The pick list references the **Letter Type lookup**.
Correspondence:	Select a Correspondence Type, or leave blank to batch all Correspondence Types. The drop down references the **Correspondence Type lookup**.
Unprinted only:	Checked by default. Uncheck to include Letters that have already been batched.
Set Printed Flag:	Checked by default. Uncheck to prevent the printed flag being set for the Letters that are included in this batch. These Letters will then be picked up in a future Letter Batch in which 'Unprinted only' is set, since they have not been 'marked' at having been printed.
Directory:	Contains the path to the directory that contains the data file(s) entered against the Letter Type(s) in the Letter Type Lookup. The 'Directory' should be set the first time the Letter Batch is run and the value will be saved once the 'OK' button has been clicked. This field will be automatically entered by default on subsequent Letter Batches.
File Type:	Specifies the type of file for the data file entered against the Letter Type(s) in the Letter Type Lookup. In the same way as 'Directory', the 'File Type' is set when the Letter Batch first run, and should be automatically entered by default on subsequent Letter Batches.

Click on OK to run the Letter Batch. A letter Batch preview will be displayed, listing the Correspondence Log numbers and Enquiry numbers of the letters that will be sent.

Your Word Processor will be launched using the Command Line from the Letter Type Lookup, and the information in the data file will be merged into the merge fields of the form letter to produce a letter for each Customer selected by the Letter Batch filter. Letters can then be sent to the printer from the work processor.

Save the Letter Batch to 'Set the Printed flag', that is, to mark the relevant Correspondence log entries as 'Printed'.

Outstanding Enquiries

The Outstanding Enquiries option provides a list of all Outstanding Enquiries. An Outstanding Enquiry is one which carries a Status which is flagged as 'Outstanding'

The same option is selected by clicking on the 'Print' button in the Officer Enquiries form.

Filter options include:

Action Officer:	Will be completed by default from the User Login where the User is linked to an Action Officer in the Action Officer Lookup. The field may be amended or left blank.
Responsible Officer:	The Responsible Officer is also selected from the Action Officer Lookup list, but refers to the Responsible Officer assigned to the Subject (as opposed to the Action Officer, who is assigned to the progression of the Enquiry) in the Enquiry Subject Lookup.
Work Group:	Select from the drop down list to restrict the list to Enquiries assigned to Action Officers in that Work Group. The Work Group drop down list references the Work Group library. **System Administration\Security\Work Groups** Action Officers are assigned to Work Groups in the **Action Officer lookup**.
Enquiry Ref:	This field references the Enquiry Reference entered in the Enquiry.

Click on OK to display a Preview of the list. Click on the Print button in the Preview window to print out the list.

Outstanding Commitments

(Customer Service Commitments module)

The Outstanding Commitments option provides a list of Commitments that have not yet been 'fulfilled' or resolved. These are defined as Commitments that have no date entered in the 'Fulfilled' field of the Commitment form. See **Commits button** on page 79 for information on Commitments.

Filter option include:

Action Officer:	Will be completed by default from the User Login where the User is linked to an Action Officer in the Action Officer Lookup. Customer Services\Enquiry Lookups The field may be amended or left blank.
Responsible Officer:	The Responsible Officer is also selected form the Action Officer Lookup list, but refers to the Responsible Officer assigned to the Subject (as opposed to the Action Officer, who is assigned to the progression of the Enquiry) in the Enquiry Subject Lookup.
Work Group:	Select from the drop down list to restrict the list to Enquiries assigned to Action Officers in that Work Group. The Work Group drop down list references the Work Group library. **System Administration\Security\Work Groups** Action Officers are assigned to Work Groups in the **Action Officer lookup**.

Click on OK to display a Preview of the list. Click on the Print button in the Preview window to print out the list.

Fixed Penalty Notices

The Fixed Penalty Notices module provides the functionality in Confirm for logging an Offence which can then result in a Fixed Penalty Notice (FPN) being issued to the offender(s). An FPN gives the offender the opportunity to discharge their liability to prosecution for an Offence by paying a fine within a certain date. Depending on the type of Offence, the fine may be discounted if paid early.

In Confirm, FPNs are used to penalise statutory undertakers for Street Works offences.

Note: "Street Works Offence and Fixed Penalty Report" and "Street Works Fixed Penalty Financial Summary" options are only available with Street Works.

Find Offence

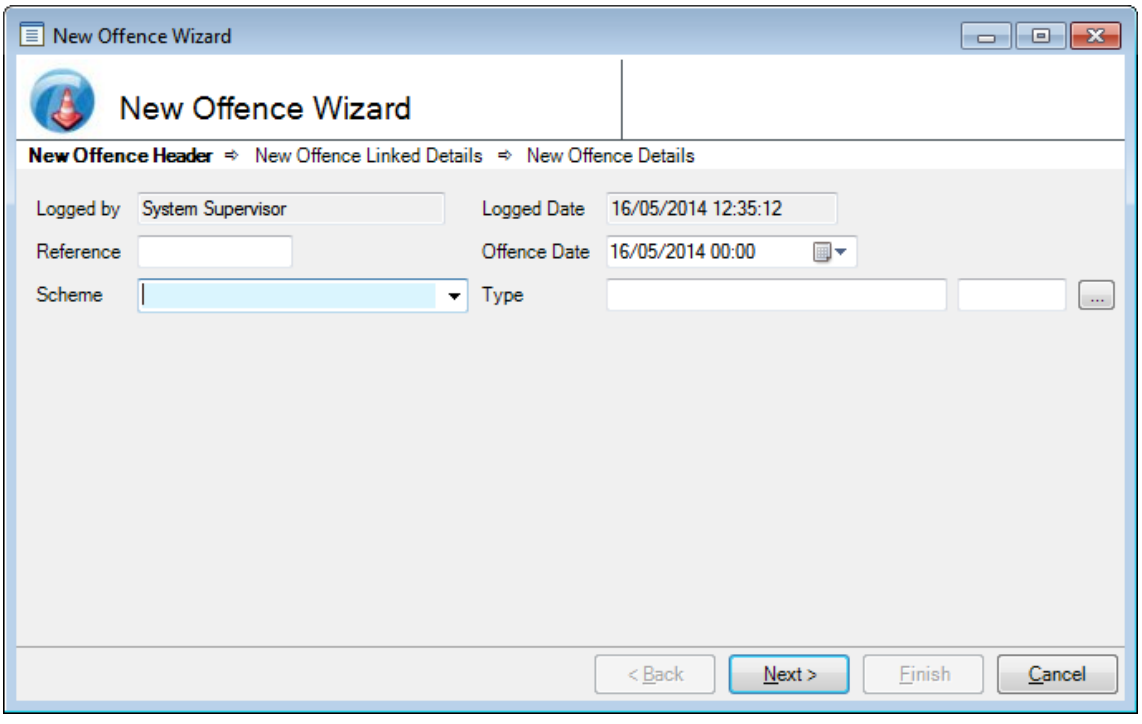
The Find Offence option opens the Offence filter which can be used to find records that have already been created. It can be accessed from the menu or from the Find button on the Offences & Fixed Penalty Notices screen.

New Offence

The New Offence Wizard can be accessed from the 'New' button on the Offence & Fixed Penalty Notices screen, the 'Action' menu on the Street Works Notice screen or from the 'New Offence' option in the Confirm Explorer. This wizard is used to record an Offence that has occurred. At this point the Offence may not result in an FPN.

This Wizard will only be available if the current User has 'Add' privileges to the 'Find Offence' option.

Step 1 - New Offence Header



Logged By & Logged Date:	These fields will be set automatically by Confirm and cannot be edited.

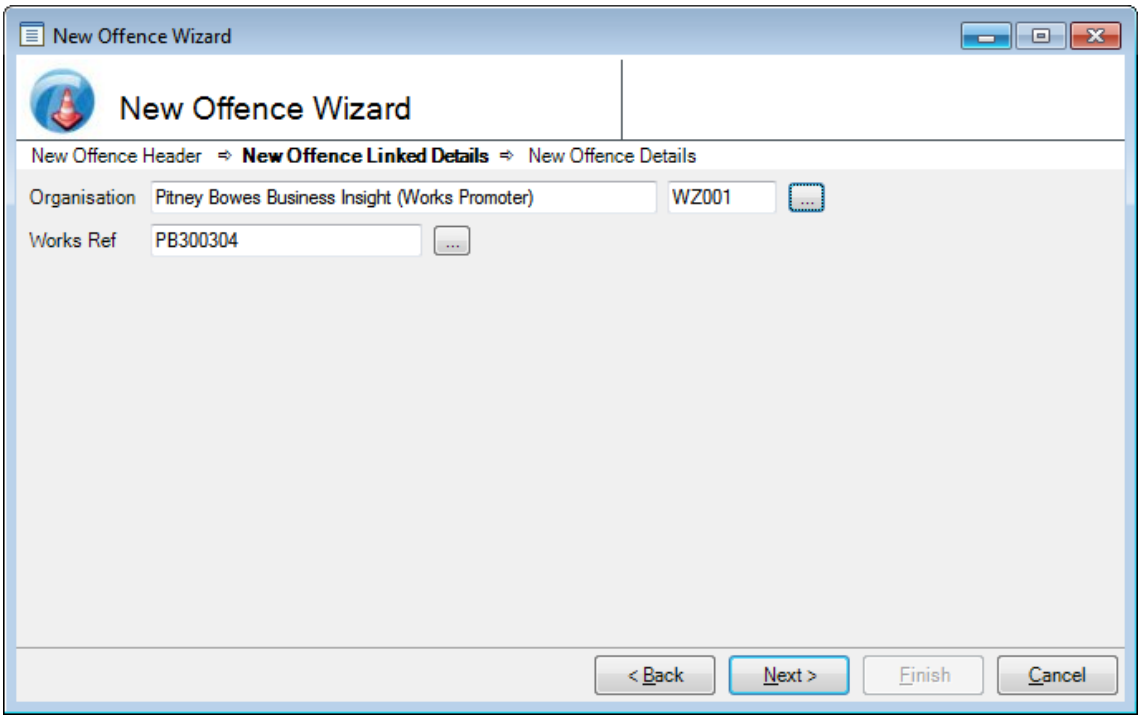
Reference:	Optionally enter an Offence reference number. If left blank, Confirm will generate a number in the format specified in the **Penalty System Settings** on page 72.
Offence Date:	This is a mandatory field. Defaults to the current date but can be edited.
Scheme:	Select the Penalty Scheme under which the offence was committed. The drop down list references the **Penalty Scheme lookup**.
Type:	This is a mandatory field. Select the type of Offence which was committed. The pick list references the **Offence Type lookup** and displays only the Types which are linked to the selected Penalty Scheme.

Step 2 - New Offence Linked Details

This step varies depending on the Penalty scheme chosen in Step 1.

Street Works Penalty Scheme

Records the details required to identify the works that the Offence is regarding.

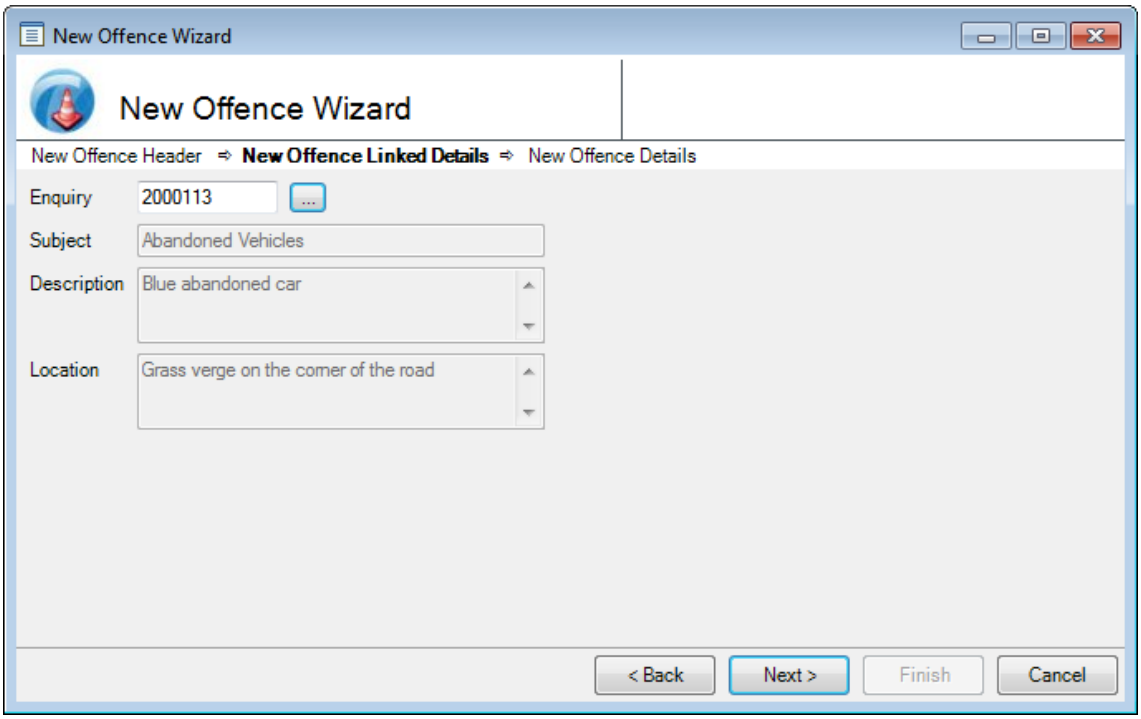


Organisation:	Select the promoter Organisation that has committed the Offence. If a Works Ref is provided instead then the Organisation field will be populated automatically with the From Organisation of the Works. This is a mandatory field if the Offence Type has a Street Works related Penalty Scheme.
Works Ref:	Optionally select the Works Reference to which the Offence is related. The Organisation field will be populated automatically with the From Organisation of the Works. Leaving this field blank is used to indicate that the Promoter is working without a Notice, Fixed Penalty Notices raised against these Offences cannot be transferred via EToN. In order to transfer such Offences via EToN the Offence should be linked to an Unattributable Works instead.

It is not possible to select a Works Reference if the Promoter or Highway Authority Organisations for the Works do not have the 'Notice Initiation' flag ticked on the Organisation screen.

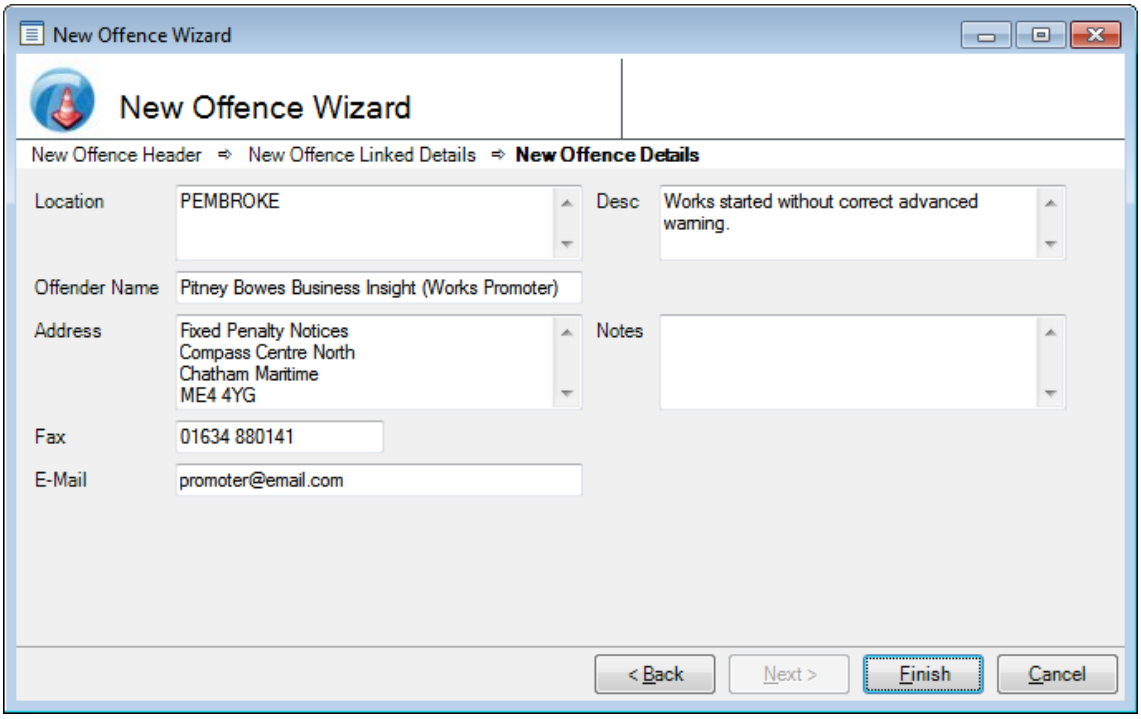
Enquiry Penalty Scheme

Records the details required to identify the Enquiry that the Offence is regarding.



Enquiry:	Enter the Enquiry number this offence relates to.
Subject: Description: Location:	These fields are defaulted from the Enquiry when the Enquiry number has been entered.

Step 3 - New Offence Details



Location: Free text field for describing the location of the Offence.

Street Works: defaulted from the Site and Location details on the chosen notice.

Enquiry defaulted from the Site and Location details of the chosen Enquiry.

Description: Free text field for describing the details of the Offence.

Street Works: left blank by default.

Enquiry: defaulted from the Enquiry description.

Offender Name: * This is a mandatory field. Enter the name of the Offender to which the Offence and possible FPN will be addressed to.

Street Works: defaulted from the Organisation details.

Enquiry: defaulted from the Contact of the Enquiry.

Address: * This is a mandatory field. Enter the address for the Offender.

Street Works: defaulted from the Organisation details.

Enquiry: left blank by default.

Notes: Free text field for entering any further notes for the Offence.

Fax: * Enter the Fax number for the Offender.

Street Works: defaulted from the Organisation details.

Enquiry: defaulted from the Enquiry Fax number.

Email: * Enter the email address for the Offender.

Street Works: defaulted from the Organisation details.

Enquiry: defaulted from the Enquiry Email address.

* - For Offences which have had a Works Reference supplied, these fields will be populated from the From Organisations details. If the Works is an Unattributable Works then this will be populated

from the Promoter Organisations details. If no Works Reference is supplied for a Street Works Offence then this will be populated from the selected Organisations details.

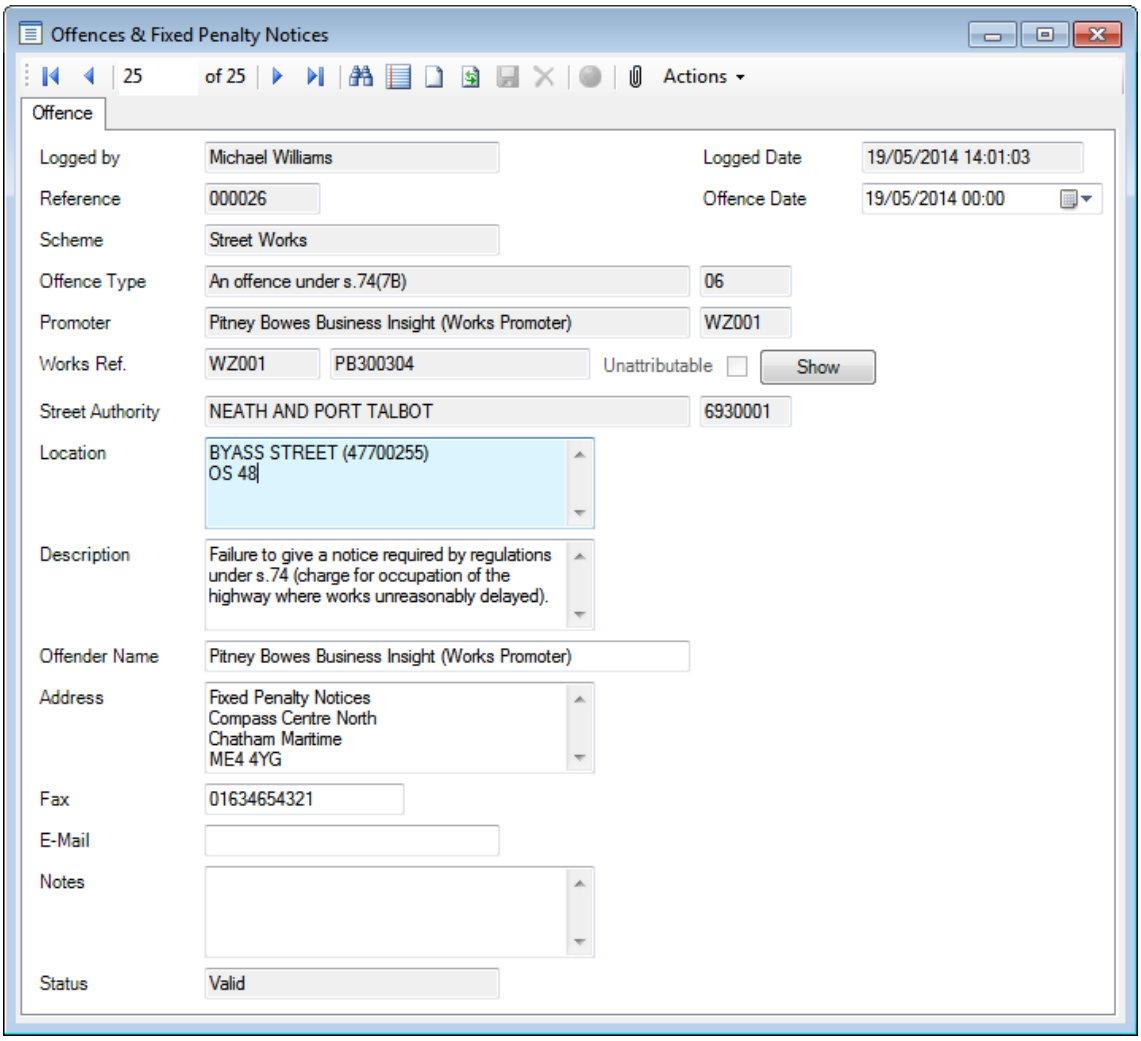
Once the mandatory fields have been populated, the 'Finish' button will be available. Click this to complete the wizard and create an Offence with 'Valid' Status. Click 'Back' to edit any details which have already been entered.

Offence & Fixed Penalty Notices

The Offence & Fixed Penalty Notice screen is opened after the 'Find Offence' menu item has been used, or after the 'Finish' button has been clicked on the 'New Offence Wizard'. It displays Offences and Fixed Penalty records, which have been created.

Offences are progressed and modified using the options available on the 'Actions' button and the current Status is displayed at the bottom of the screen.

Offence tab



Logged By:	Displays the User that logged the Offence record.
Logged Date:	Displays the Date that the Offence was logged.
Reference:	Displays the Reference that was supplied in the New Offence Wizard or the reference that was generated using the format specified in the **Penalty System Settings** on page 72.

Offence Date:	Displays the Date that the Offence was committed.
Scheme:	Displays the Penalty Scheme that this Offence is related to.
Offence Type:	Displays the Offence Type that this Offence is related to.
Enquiry:	Available with an Enquiry Scheme. An Enquiry Reference is displayed (if supplied). The 'Show' button will display the associated Enquiry.
Subject:	Available with an Enquiry Scheme. The Enquiry Subject is displayed.
Promoter:	Available with a Street Works Scheme. The Promoter Organisation is displayed.
Works Ref:	Available with a Street Works Scheme. A Street Works Notice Reference is displayed (if supplied). The 'Show' button will display the associated Works.
Unattributable:	Available with a Street Works Scheme. Tickbox to display whether the Offence is raised against an Unattributable Works or Defective Apparatus. This is inactive and cannot be changed.
Street Auth.	Available with a Street Works Scheme. The Street Authority Organisation is displayed.
Location:	The Location of where the Offence took place is displayed here.
Desc:	The Description of the Offence that took place is displayed here.
Offender Name:	Displays the name of the Offender to whom the Offence and possible FPN is addressed.
Address:	Displays the Address details for the Offender.
Fax:	Displays the Fax number of the Offender.
E-Mail:	Displays the email address of the Offender.
Notes:	Free text field for recording any further information regarding the Offence.
Status:	The current Status of the Offence is displayed here. It can be changed by using the 'Actions' button options.

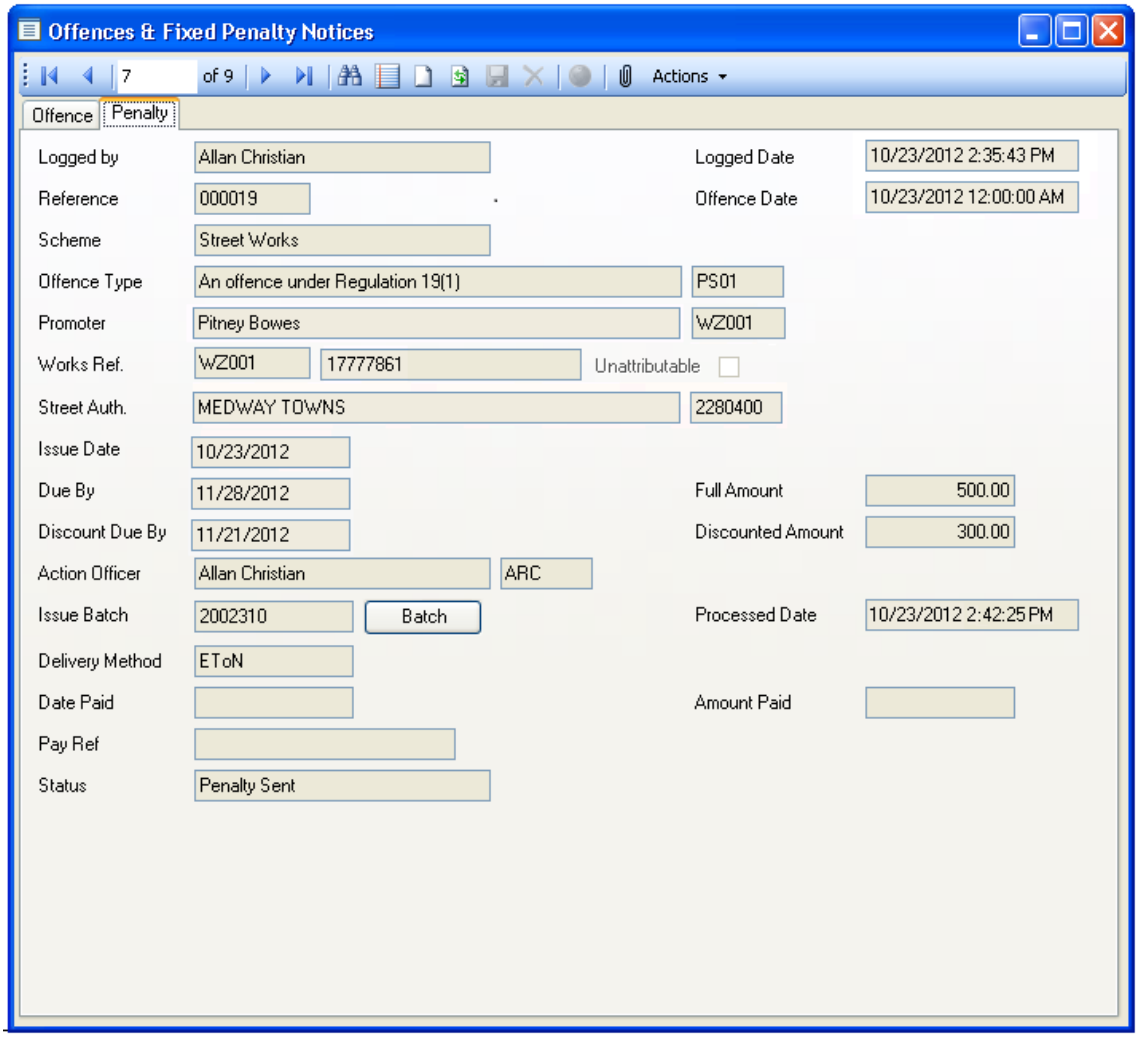
The following fields are editable on Offences that are at a Valid or Candidate Offence Status:

- Offence Date
- Location
- Desc
- Offender Name
- Address
- Fax
- E-Mail

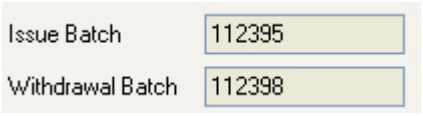
The Notes field is always editable on the Offence.

Penalty tab

The Penalty tab appears once an Offence has had a Fixed Penalty Notice generated for it (the 'Create FPN' Action item has been used). This tab displays some of the same information as on the Offence tab, with the following additions:



Issue Date:	Displays the date that the FPN was issued.
Due By:	Displays the date that the FPN is due to be paid by. This is calculated from the settings specified in the **Offence Type lookup**.
Amount:	Displays the Amount that the Offender has to pay to resolve this FPN.
Discount Due By:	Displays the date that a discounted amount can be accepted.
Discounted Amount:	Displays the Discount Amount that the Offender can pay if they pay early.
Action Officer:	Displays the Representations Officer specified on the **Offence Type**. This is the Action Officer who will deal with any formal representations requested by the Offender.
Issue / Withdrawal Batch:	Available for Street Works only. These fields are only visible if the Delivery Method for the FPN was EToN. These fields display the Batch numbers that the FPN was Issued / Withdrawn with.



The 'Batch' buttons will open the **Street Works Batch** screen for the associated Batch numbers that the FPN was Issued / Withdrawn with.

Processed Date:	Processed Date: These fields are only visible if the Delivery Method for the FPN was EToN and the FPN or FPN Withdrawal was transferred successfully. These fields display the date and time when the FPN or FPN Withdrawal was received by the Recipient's Web Service.
Delivery Method:	Displays the method by which this FPN was delivered to the Offender by.
Date Paid:	Displays the date that the FPN was paid.
Pay Ref:	Displays a Payment Reference (if supplied).
Amount Paid:	Displays the amount that the Offender paid to resolve this FPN.

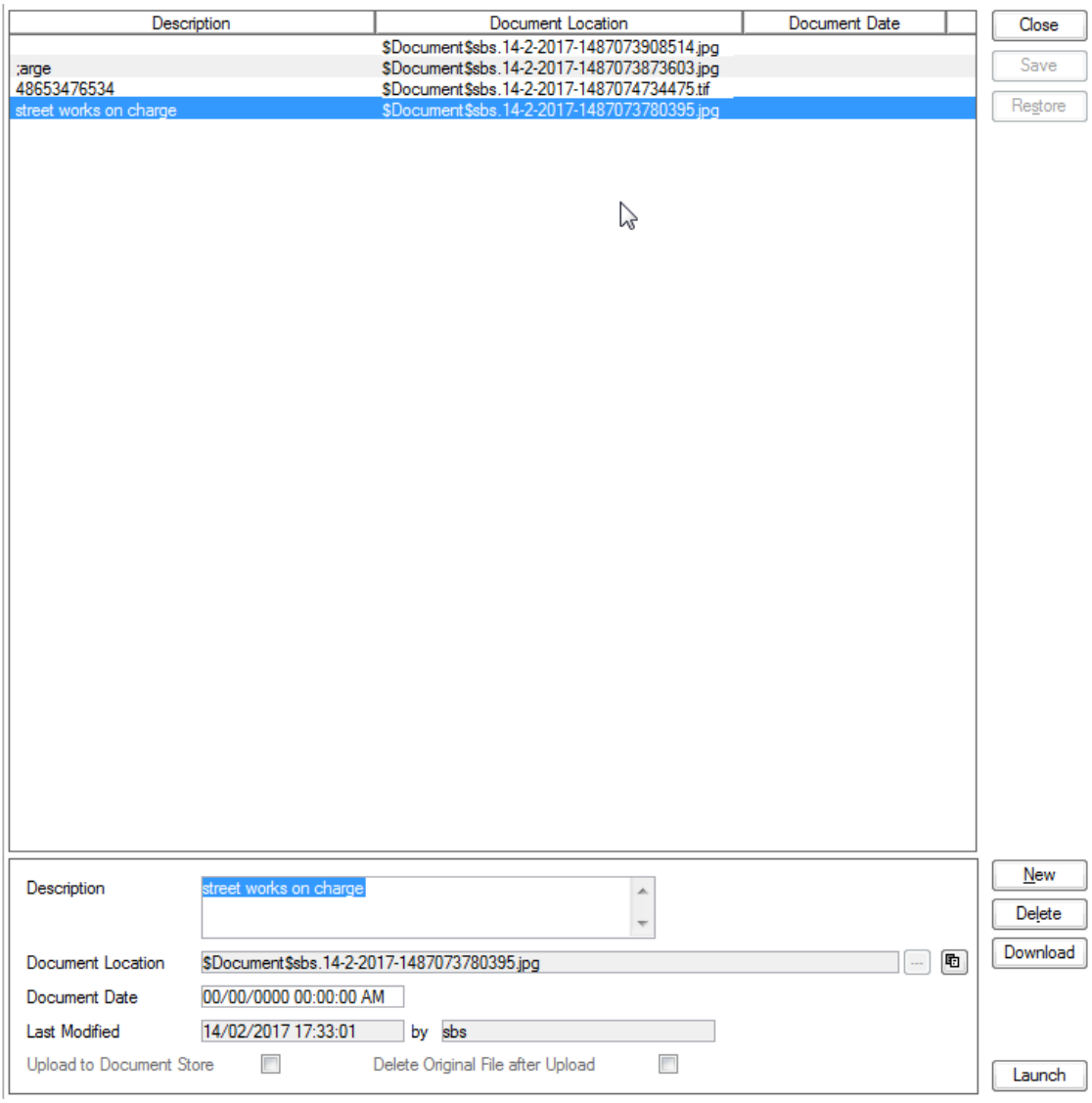
Toolbar Options

The following options are available from the toolbar of the Offence and Fixed Penalties Notice screen.

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.

Street Works Notice Types

Document links can be sent along with an EToN 5 or above Street Works Notice as attachments. Please refer to the Document Exchange section for more information about document linking.

An attachment is sent in the form of a URL to the document. As such, the actual document must exist in a location that is accessible to all recipients of the Notice before the Notice is sent. This is what the Publish button is for. It copies the document to a specified location, ensuring that it is accessible to the recipients of the Notice and can be viewed when the Notice is received.

Documents links are exported to the Notice recipients for the following Notice types:

Promoter Notices	EToN Version	Authority Notices	EToN Version
Forward Planning Information	5 & 6	Unattributable Works	6
New Activity	5 & 6	Defective Apparatus Works	6
Activity Confirmation	5 & 6	Street Work Licences	6
Works Data Alteration	5 & 6	Direction on Timing	6
Registration of Reinstatement	5 & 6	Direction on Placing Apparatus	6
Registration of Non-Notifiable Works	5 & 6	Undue Delay	6
Work Stop	6	Refuse PAA/Permit/Variation	6
Temporary Traffic Signal Application	6	Modification Request	6
Work Comments	6	Revoke Permit (Proposed Works)	6
Completion of Non-Notifiable Works	6	Authority Imposed Variation	6
Fixed Penalties Notices Comments	6	Revoke Permit (In Progress Works)	6
		Fixed Penalties Notices	6
		Fixed Penalties Notices Withdrawal	6
		Fixed Penalties Notices Comments	6
		Inspection	6
		Work Comments	6

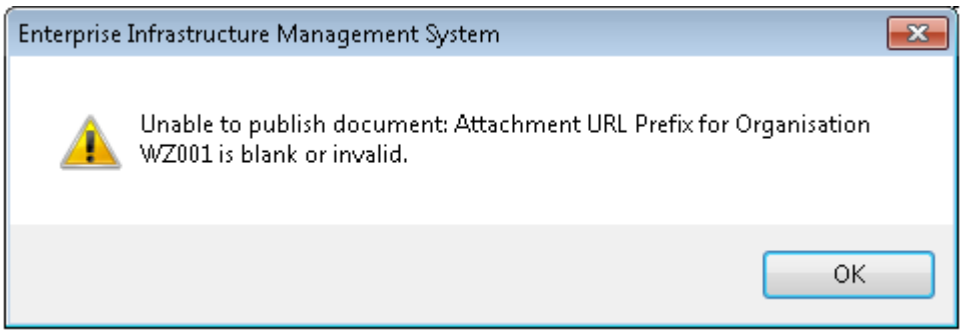
Publish button:

This button will post the selected document to the FTP site specified in the Street Works Initiation System Settings. The button will be inactive under the following conditions:

- If the document has already been transferred to a central document store.
- If the document has already been published.
- If the Organisation is not currently set to use EToN 5 or above.
- The Works is EToN 1 - 4 (Notice attachments are only valid for EToN 5 or above notices.)

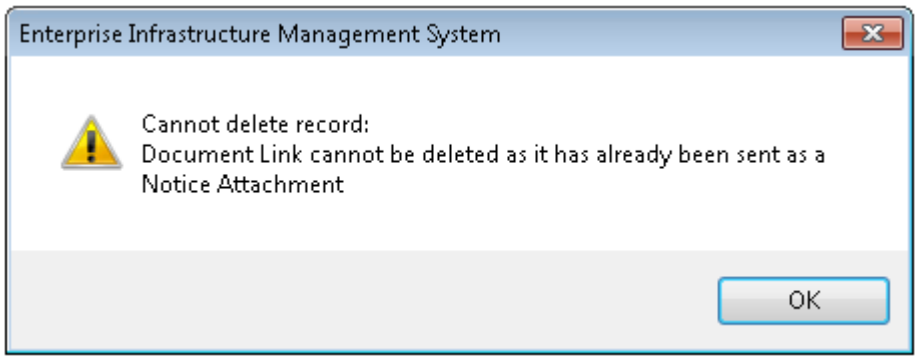
Once a file has been published, the path of the document's location will be replaced with the 'ORG_PREFIX' prefix, allowing it to be viewed from the Organisation's document repository.

If the sending Organisation's 'Attach. URL' field is not correctly configured then clicking the Publish button will generate a message:

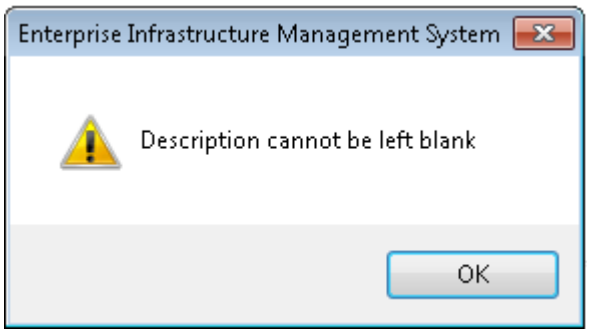


Once the document has been published deleting the document link will also cause the published version to be deleted. However, if the Notice has also been sent then the words 'Attach. Sent' will appear below the Publish button and it will no longer be possible to modify or delete the link.

The following message will be displayed if the User tries to delete an already Published document Link.

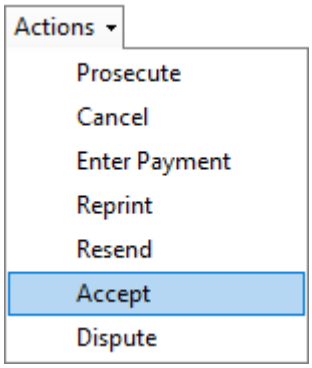


The following message will be displayed if the User tries to publish a Document link with blank Description.



Actions

Depending on the current Status of the Offence/FPN, various Actions can be performed.



The following table details which Actions are available from which Status and what the Status will be once the Action has been completed:

Current Status of the Offence	'Action' button Option													
	Validate	Take No Action	Gave Warning	Prosecute	Cancel	Create Penalty	Accept	Dispute	Enter Payment	No Further Action	Revert To Valid	Revert to Penalty Sent	Reprint	Resend
Valid		Y	Y	Y	Y	Y								
Penalty Sent Queue				Y	Y*					Y			Y	Y
Penalty Sent				Y	Y*		Y	Y	Y	Y			Y	Y
Accepted				Y	Y				Y	Y				
Disputed				Y	Y		Y		Y	Y				
Prosecute											Y***			
No Action Taken											Y			
Warning Given											Y			
Resolved												Y		
No Further Action													Y	
Cancelled											Y***		Y****	Y****
Status after Action completed														
	Valid	No Action Taken	Warning Given	Prosecute	Cancelled	Penalty Sent Queue **	Accepted	Disputed	Resolved	No Further Action	Valid	Penalty Sent	No Change	Penalty Sent Queue / No Change *****

* A Withdrawal Notice will be created automatically if the Offence has an FPN created against it.

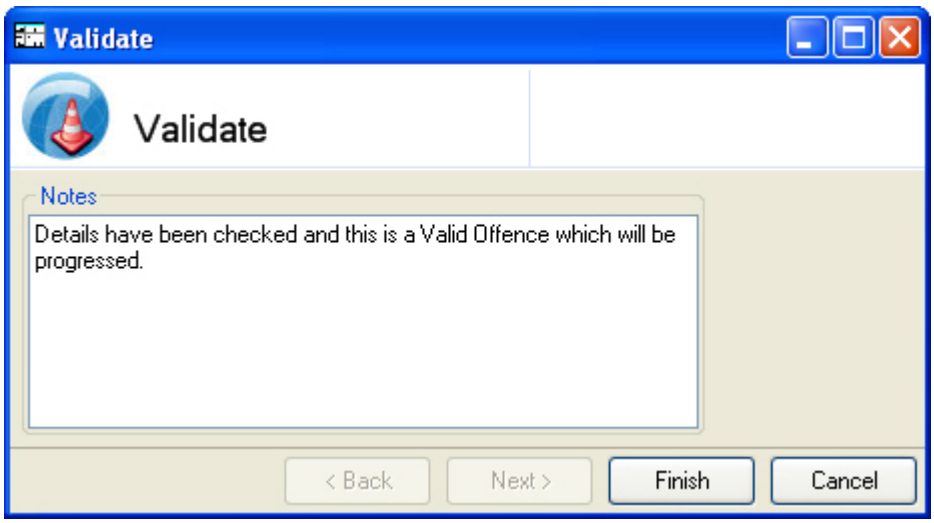
** The Status will be set to 'Penalty Sent'. However, if the Delivery Method of the FPN is EToN or Email then the Status will be set to 'Penalty Sent Queue'. Street Works Transfer will then move the Status onto 'Penalty Sent' after sending.

*** 'Revert To Valid' is only available for Offences which do not have an FPN created against them.

**** 'Reprint' and 'Resend' are only available for Offences which do have an FPN created against them.

***** The Status will be set to 'Penalty Sent Queue'. Street Works Transfer will then move the Status onto 'Penalty Sent' after sending. If the current Status is 'Cancelled' then the Status will not be updated when using the Resend Action.

Validate Offence Wizard

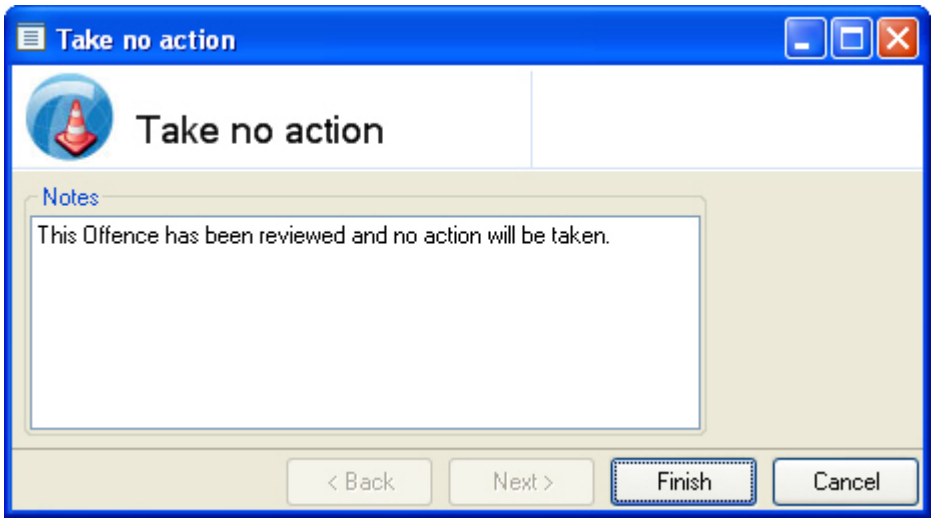


Select this option to Validate the current 'Candidate' Offence. The 'Valid' Status is used to show that this Offence has been reviewed and the details are confirmed as correct.

'Candidate' Offences are created automatically by the EToN Web Service when Notices are imported and there is something about the details supplied which could cause an FPN.

Notes can be edited / supplied for this change of Status.

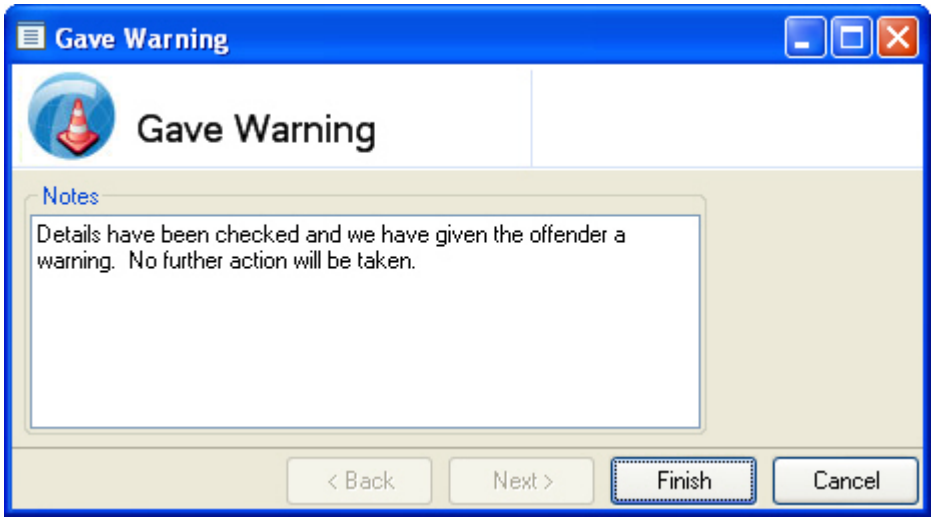
Take No Action Wizard



Select this option to update the Status of the Offence to 'No Action Taken'. This Status is used to show that this Offence has been reviewed and a decision has been made to not take the matter any further.

Notes can be edited / supplied for this change of Status.

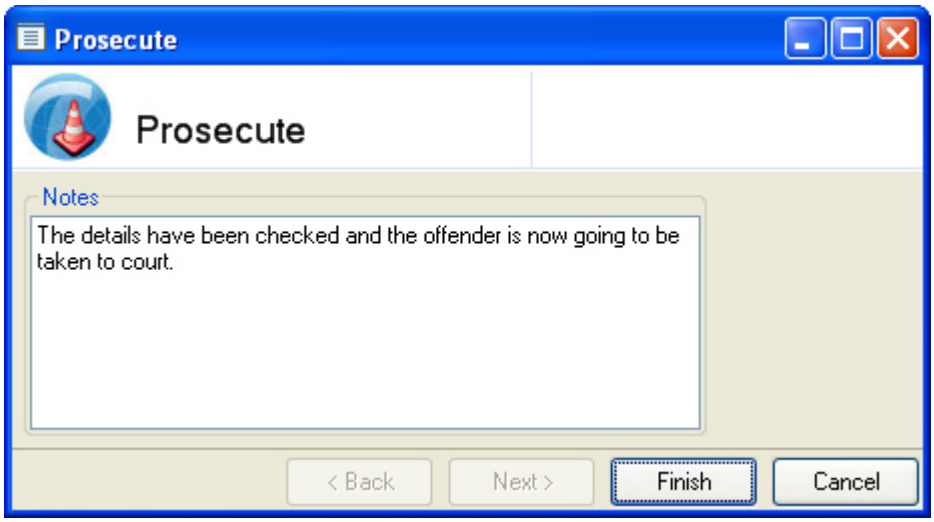
Gave Warning Wizard



Select this option to update the Status of the Offence to 'Gave Warning'. This Status is used to show that Offender has been given a warning about their Offence and this particular Offence will not be taken any further.

Notes can be edited / supplied for this change of Status.

Prosecute Wizard



Select this option to update the Status of the Offence to 'Prosecution'. This Status is used to show that this Offence has not been resolved with an FPN and now the matter will be taken to court.

Notes can be edited / supplied for this change of Status.

Cancel Wizard



Select this option to Cancel the current Offence. The 'Cancelled' Status is used to show that this Offence has been reviewed and a decision has been made to Cancel it e.g. the details were incorrect.

Notes can be edited / supplied for this change of Status.

A Withdrawal Notice will be created when cancelling an Offence that has had a Fixed Penalty Notice created against it. The following warnings may appear if there are any issues with the Offence Type Stylesheet used to create the Withdrawal Notice:

"This Offence cannot be cancelled because the Withdrawal Stylesheet is blank for Offence Type ({0})."

"This Offence cannot be cancelled because the Withdrawal Stylesheet does not exist for Offence Type ({0})."

"The Withdrawal Notice cannot be printed as there is a problem with the Withdrawal Stylesheet - <error>"

New Penalty Wizard

Select this to open the New Penalty Wizard to raise a Fixed Penalty Notice (FPN) for the current Offence.

Issue Date:	Enter the date that the FPN was issued. This will default to today's date, but can be edited.
Delivery Method:	Select the delivery method for this FPN: 'Post' - The FPN is to be printed out and sent via post to the Offender(s). 'Fax' - The FPN is to be printed out and sent via fax to the Offender(s). Note: Confirm will use the stylesheets specified on the Offence Type to generate the printed version of the FPN. 'Email' - The FPN is to be emailed to the Offender(s). 'EToN' - The FPN is to be transmitted to the Offender(s) electronically using the Street Works EToN format (only available when the **Penalty Scheme** 'Related Entity' is 'Street Works' and has a linked Street Works). The FPN will be sent to the FPN Url specified against the Works Promoter **Organisation record**. **Note:** Once the Delivery Method has been saved, it is not possible to edit it. If a mistake is made, the FPN would need to be Cancelled.

Email:	This field is only available if the 'Email' Delivery Method is selected. By default it is populated from the offending Organisation's 'Delivery Email' field on the Fixed Penalty Notice Delivery tab of the Organisation screen.
Officer:	Enter the Action Officer that is responsible for raising this FPN. This will default to the currently logged in Action Officer (if the User is linked to an Action Officer record). The pick list references the **Action Officer lookup**.

Click 'Finish' to raise the FPN. Depending on the Delivery Method selected, the FPN will either be displayed in a Print Preview screen, or will be transmitted to the Offender(s) electronically.

If the Delivery Method is 'Email' then the following rules will apply:

- Confirm will attempt to send the Penalty email once. If the email is sent successfully the Penalty is given the 'Penalty Sent' status.
- If any Penalty email cannot be sent then Confirm will raise an 'alarm' email which will be sent that to the configured notification address.
- If a Penalty cannot be sent then the Offence will be reset to the 'Valid' status and the Penalty would need to be generated again by using the 'New Penalty' Action. The previous Penalty details will be retained and the Offence and Penalty tabs will be available. This ensures the Penalty dates are reset accordingly and provides the ability to correct the email address if it was previously entered incorrectly or delivery set to an alternative means.
- If a Penalty Withdrawal fails to send then the Offence will be reset to the 'Penalty Sent' status and would need to be cancelled again.
- Any sent Penalties and Withdrawals can be re-sent manually by using the 'Re-Print' action and attaching the file to a separate email.

Possible Warnings

The following warnings may appear depending on the Delivery Method selected:

Delivery Method	Warning
All	It is not possible to create a penalty with this issue date. The time allowed for creating a penalty for the offence has elapsed.
	Action Officer is a required field.
	Issue Date is a required field.
	Delivery Method is a required field.
EToN	The Description is a required field.
	The Location is a required field.
	The Description of the Offence cannot be more than 500 characters for Fixed Penalty Notices to be sent via EToN.
	The Location of the Offence cannot be more than 200 characters for Fixed Penalty Notices to be sent via EToN.
	FPN Delivery URL for Organisation is blank or invalid.
Email	FPN Delivery Email address is blank or invalid.
Fax	FPN Delivery Fax Number is blank or invalid.

The following warnings may appear if there are any issues with the Offence Type Stylesheets used when creating the FPN:

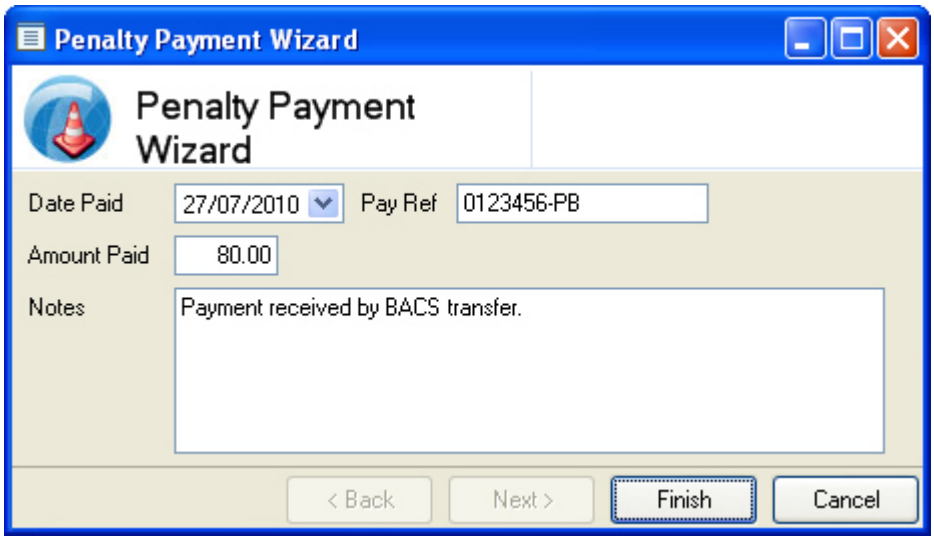
"A Fixed Penalty Notice cannot be created because the Issue Stylesheet is blank for Offence Type ({0})."

"A Fixed Penalty Notice cannot be created because the Issue Stylesheet does not exist for Offence Type ({0})."

"The Fixed Penalty Notice cannot be printed as there is a problem with the Issue Stylesheet - <error>."

Enter Payment Wizard

Select this Action item to enter the Payment details for an FPN directly in Confirm.



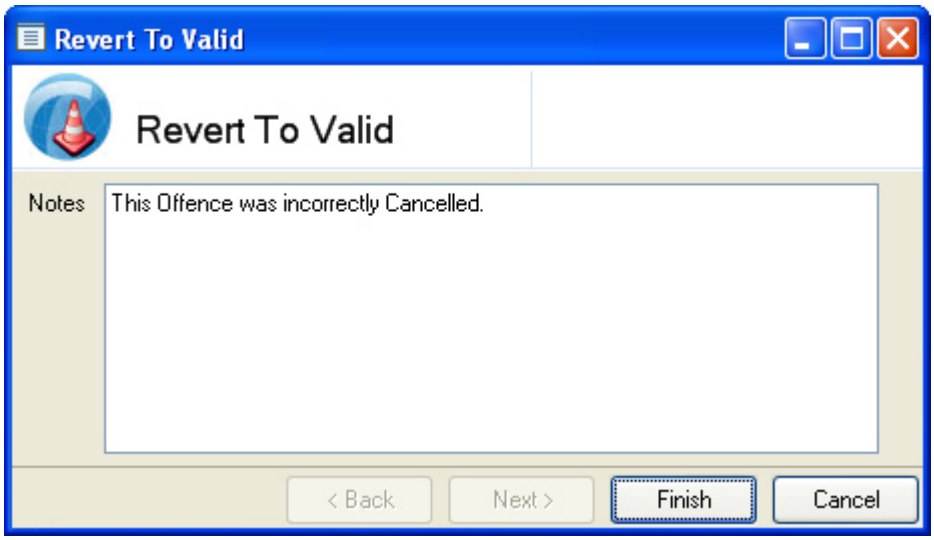
Date Paid:	This is a mandatory field. Enter the date that the Payment was made.
Amount Paid:	This is a mandatory field. Enter the amount paid for this FPN. This defaults to the amount due for the current day.
Pay Ref:	Optionally enter a Payment Reference for this transaction.

Click 'Finish' to complete the wizard. Confirm will check the details entered and either save the details to the database or present a message detailing why it could not be saved e.g. the discount amount has been supplied but the discount period has elapsed.

A late Payment can only be entered by Users who have access to the 'Can Accept Late Payments' option in the **User Security screen**.

If the FPN Payment Web Service is being used to enter Payment details the same rules will be enforced regarding the values which can be accepted.

Revert to Valid / Revert To Penalty Sent Wizard



This Action allows for certain Fixed Penalty Actions to be undone.

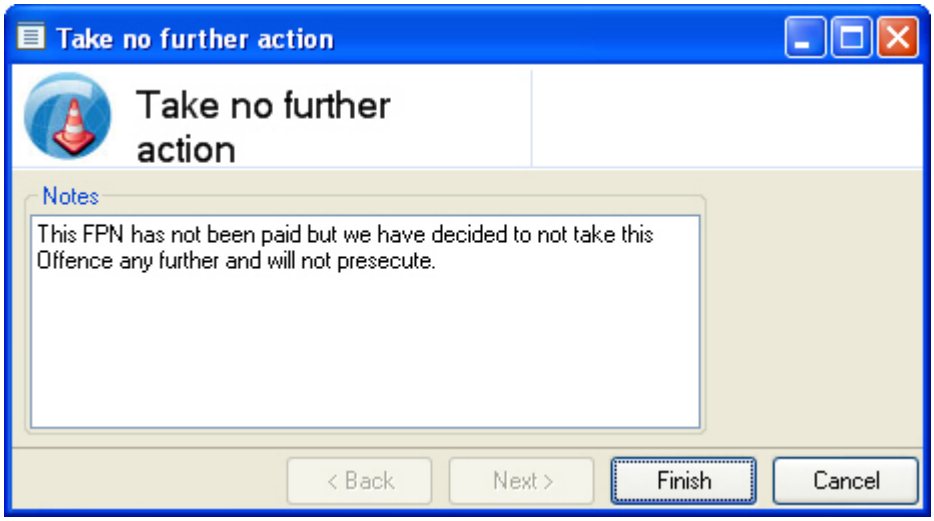
For Offences without Penalties, this action will return an Offence to the 'Valid' state - effectively cancelling any of the following actions:

- Take no Action
- Gave Warning
- Prosecute
- Cancel

For Offences with Penalties, where a payment action has been selected in error, this action will return an Offence to the 'Penalty Sent' state.

Notes can be edited / supplied for this change of Status.

Take No Further Action Wizard



Select this option to update the Status of the Offence to 'No Further Action'. This Status is used to show that this Offence/FPN has been progressed but no further action will be taken.

Notes can be edited / supplied for this change of Status.

Reprint

Select this option to 'Reprint' a Fixed Penalty Notice or Withdrawal Notice which has already been processed.

The Status will not be updated. Note: In order for this to occur, the **Offence Type** of the current Offence must have a Stylesheet specified.

Resend

Select this option to 'Resend' an FPN or FPN Withdrawal which has already been processed.

The Resend Action is only available if an FPN has been created for the Offence and the FPN Delivery Method is EToN. Also the Authority Organisation must have the 'Notice Initiation' flag ticked.

The Status will be set to 'Penalty Sent Queue', unless the current Status is 'Cancelled' in which case the Status will not be updated. The Status will move from 'Penalty Sent Queue' onto 'Penalty Sent' after sending.

Note: In order for this to occur, the Offence Type of the current Offence must have a Stylesheet specified.

Offence and Fixed Penalty Notice Report

This report displays Offence and Fixed Penalty details. For Offences that have no associated Fixed Penalty, the Penalty details will be blank. The report is available from the Confirm Explorer and from the list button on the Offences and Fixed Penalty Notice screen.

There are three report levels available on the filter:

'Detail' - This option provides details of each Offence that has been logged. The user can double-click on Offence records (when the report has been run at the 'Detail' level) to open the 'Offences and Fixed Penalty Notice' screen.

'Internal Summary' - This option lists the number of Offences and Fixed Penalties for each Penalty Scheme, broken down by Offence Type.

For Offences that have not resulted in a Fixed Penalty, the number of Offences at each of the following status values is shown:

- Pending (Candidate, Valid)
- No Action Taken
- Cancelled
- Warning Given
- Prosecution

For those Offences where a Fixed Penalty has been issued, the number of Fixed Penalties at each of the following status values is shown:

- Outstanding (Created, Queued, Sent) broken down into Discount and Full periods, and Late
- No Further Action
- Cancelled
- Paid (Resolved) broken down into Discount and Full periods, and Late
- Prosecution

'External Summary' This is similar to the Internal Summary, but is intended to be shown externally, and so only shows Offences with an actual outcome. This means the counts for Offences Pending, No Action Taken and Cancelled are not displayed. For Offences where a Fixed Penalty has been issued, the information supplied is the same as the Internal Summary.

Fixed Penalty Financial Summary

This report displays Fixed Penalty summary counts and payment totals. The report is available from the Confirm Explorer. The user must have appropriate Fixed Penalty Notices User security settings to access this report.

The report will show the number of Fixed Penalties at each of the following status values:

- Outstanding (Created, Queued, Sent) broken down into Discount and Full periods, and Late
- No Further Action
- Cancelled
- Paid (Resolved) broken down into Discount and Full periods, and Late
- Prosecution

Payment amounts are shown for Paid Fixed Penalties, showing the total payments that have been made for each category, and also for Outstanding Fixed Penalties, showing the payments that would be made if all Fixed Penalties were to be paid on the current date.

Fixed Penalty Lookups

This folder contains the lookups required to configure the Offences and Fixed Penalty Notices functionality.

Penalty Scheme

This screen is used to manage details of any Penalty Schemes that are being operated in Confirm.

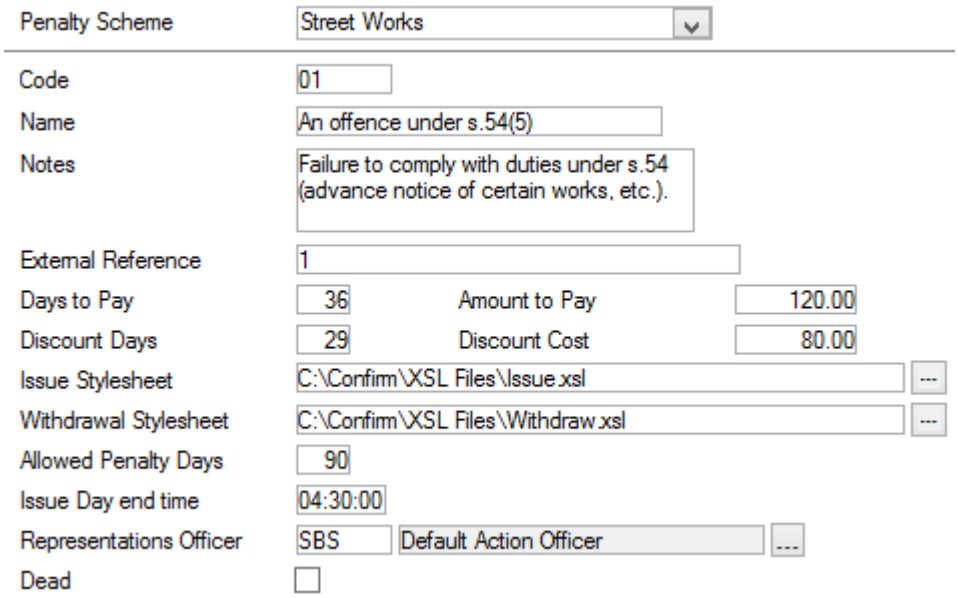
Code:	Enter a Code for this Penalty Scheme.
Name:	Enter a Name for this Penalty Scheme.
Related Entity:	The Related Entity setting tells Confirm which wizard screen layout and rules to use when an Offence is created. Select from the following options: 'Enquiry' - The wizard will display fields allowing the selection of an Enquiry. 'Street Works' - The wizard will display fields for specifying the Organisation and Works Reference that the Offence is related to. The FPN Delivery Method 'EToN' will be available when creating a Penalty. 'None' - The FPN will not be linked to a Confirm entity.
Dead:	Tick this to prevent new records from being created using this Penalty Scheme. Confirm will ask if all the linked Offence Types are also to be flagged as 'Dead' when the Scheme is saved.

All details can be modified for existing Schemes but these changes will have no affect on any existing Offences, only newly created records.

All live Offence Types that have been linked to the current Penalty Scheme will be displayed at the bottom of the screen.

Offence Type

Penalty Schemes contain Offence Types to detail the actual Offence that has occurred, the requirements for the Offender to resolve the matter and the setup within Confirm.



Penalty Scheme:	Select the Penalty Scheme that the Offence Type will be related to.
Code:	Supply a code that matches the Offence Code provided by the relevant act (if one exists).
Name:	Enter a Name for this Offence Type, ideally supply the name given in the relevant act.
Notes:	Free text to supply any further detail on this Offence Type.
External Reference:	Supply the code for this Offence Type that will be exported against this type of Offences.
Days to Pay:	Supply the number of days that the Offender has to pay the FPN.
Amount to Pay:	Supply the amount that the Offender has to pay for this type of FPN.
Discount Days:	Some Offence Types allow for a 'Discount' period where the Offender can pay a lesser amount if they pay early. If this is the case for the current Offence Type, supply the number of days for which the discount is valid.
Discount Cost:	Supply the amount that an Offender is required to pay if they pay their FPN early within the number of days specified above.
Issue/Withdrawl Stylesheet:	The Issue and Withdrawal stylesheets are templates that will be used to format completed FPNs that are sent to the Offenders. **Note:** If stylesheets are not specified then printing and emailing will not work.
Allowed Penalty Days:	Specify the number of days that an authority has to issue a Penalty for this Offence Type. This value is usually determined by the Penalty Scheme.
Issue Day end time:	Optionally supply an end time, which will be used as the cut-off time for setting the Issued Date to the current day. If an FPN is being issued past this time then the Issue Date will be set to the next working day. **Note:** If this is not provided then the Confirm working day end time is used for this purpose. Please see the System Administration\Security manual for details.
Representations Officer:	The Representations Officer is the Action Officer who will deal with any formal representations requested by the Offender.

Dead:	It is not possible to Delete Offence Types which have been used to create Offence records. To prevent any further records being created with this Offence Type, tick the Dead flag.

Changes can be made to the Offence Type fields but these changes will not affect any existing Offence records, only newly created records.

The following table details the Offence Types for Street Works which can result in an FPN:

OFFENCE CODES AND DESCRIPTION		
Code	**Offence**	**Brief Description**
01	An offence under s.54(5).	Failure to comply with duties under s.54 (advance notice of certain works, etc.).
02	An offence under s.55(5).	Beginning to execute works in contravention of s.55 (notice of starting date).
03	An offence under s.55(9).	Failure to give notice in accordance with s.55(8) (notice to be given on s.55 notice ceasing to have effect).
04	An offence under s. 57(4).	Failure to give notice in accordance with s.57 (notice of emergency works).
05	An offence under s.70(6) consisting of a failure to comply with subsection (3) or (4A).	Failure to comply with requirements to give notice of completion of reinstatement.
06	An offence created by regulations made under s.74(7B).	Failure to give a notice required by regulations under s.74 (charge for occupation of the highway where works unreasonably delayed).
07	An offence created by regulations made under section 74A(11)	Failure to give a notice required by regulations under s.74A (charge determined by reference to duration of works).
PS01	An offence under Regulation 19(1)	Undertaking specified works on a specified street without a permit where an applicable Permit Scheme requires one.
PS02	An offence under Regulation 20(1)	Breaching a permit condition.

Offence and Fixed Penalty Notice Alert Type

(FPN Alerts - Module 2710)

Alerts can be configured to send messages for Offences and Fixed Penalty Notices when specified criteria is met.

See **Alerts\Offence and Fixed Penalty Alert Type** for more information.

Penalty System Settings

Number of further days to accept late Payments by post	Specify a tolerance number of days in which Payments for FPNs delivered by Post will be accepted. This is to allow for any delay in postal services. The Payment web service will also check this setting when validating the Payment. If attempts are made to enter Payment details outside of the allowed tolerance an error will be presented unless the User has security to accept late Pay-

	ments. A User Security setting is available. Only the view option will have any effect.
Number of digits for generated Offence Reference	Specify the number of digits (max 6) which will be used when Confirm generates an Offence reference. **Note:** This will not be used if the Offence reference is being entered manually.

FPN Email

The following settings are used to define the structure and content of FPN Emails generated by the Street Works Transfer Agent.

From Address:	The From email address used when emails are sent to the recipient.
Subject Line:	FPN email subject line. Text in this field will be appended with Offence Reference Number of the Offence when the email is sent.
Message Body Issue:	Text that will appear in the body of the FPN email.
Message Body Withdrawal:	Text that will appear in the body of the FPN Withdrawal email.

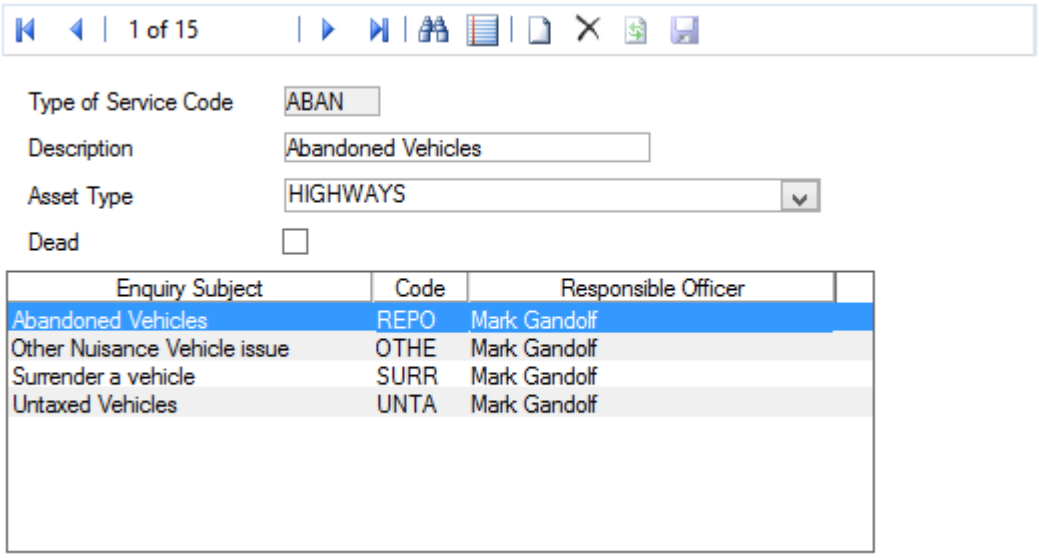
Enquiry Lookups

The Enquiry Lookups provide the libraries, utilities and settings necessary for completing the Enquiry details of the Customer Enquiry form and the Enquiry form.

Many of the Lookups are linked through the Type of Service, and Subject lookups to provide a system of default entries for the Customer Enquiry form and the Enquiry form.

Type of Service

The Type of Service Lookup groups Enquiry Subjects together in broad definition of Services provided by the Authority.



Type of Service Code:	Up to four alphanumeric characters
Description:	Up to thirty characters
Asset Type:	Select from the drop down. The drop down list displays the Data Sets for this database. Where this is a single asset database, only one option will be available. In a multi-asset, segmented, database, all the data sets will be listed and you should select the dataset that contains the data relevant to this Service.
Dead:	Type of Service records can be flagged as 'Dead' manually or automatically when there are no live Enquiry Subjects attached to them. When ticked manually Confirm will ask the User if all of the linked Subjects should be also flagged as 'Dead'. If the 'Dead' flag is removed Confirm will also ask the User if they want to remove the flag from the linked Subjects. **Note:** New Type of Service records will automatically be set as 'Dead' but this will automatically be removed when a subject is added to it with the 'Detail' button.

Click on the 'Detail' button to display the Enquiry Subject form.

Enquiry Subject

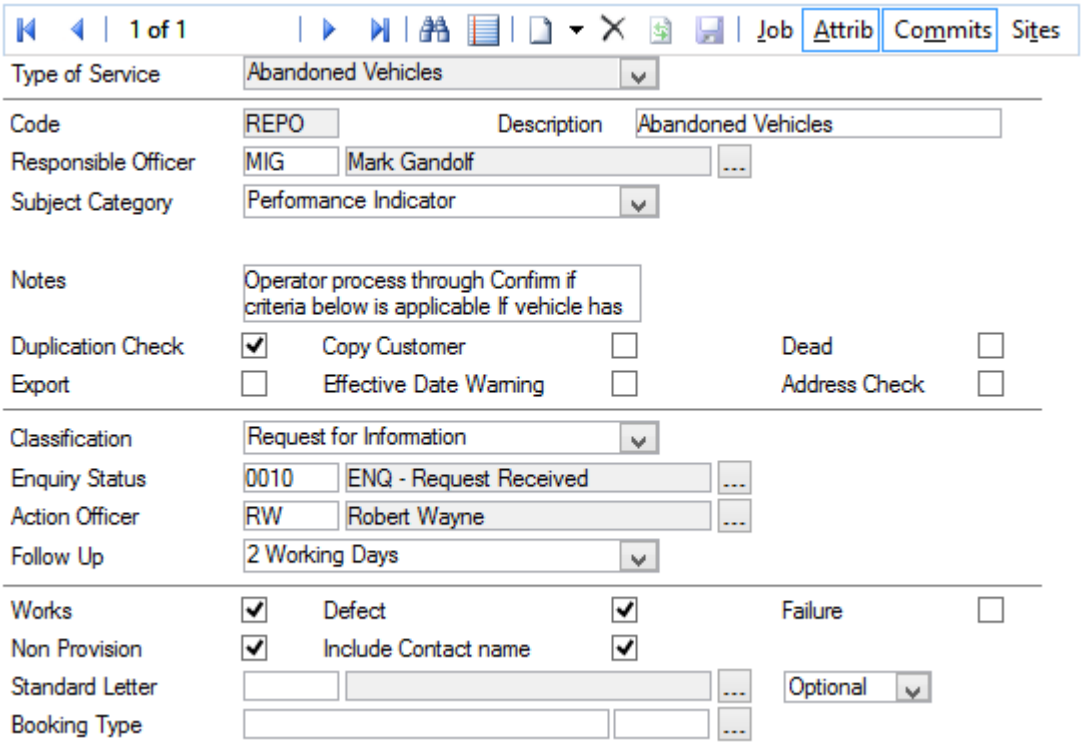
The Enquiry Subject form is displayed by clicking on this option in the Explorer, or by selecting a Type of Service in the Type of Service form and clicking on the Detail button.

To add an Enquiry Subject you will need to have completed the following Lookups:

- **Type of Service** on page 74
- **Action Officer lookup**
- **Enquiry Status** on page 86
- **Follow up library** and
- **Enquiry Classification** on page 88
- **Subject Category** on page 88

If you wish to add a default Letter Type and a default Commitment to the Subject you will also need to complete:

- **Letter Type** on page 101 and **Correspondence Type** on page 101 (Customer Lookups)
- **Commitments** on page 103 (Customer Lookups)



Type Of Service:	Will be entered from the Type of Service form if the Enquiry Subject form has been accessed from the Type of Service form. If the field is blank, select from the drop down list. The drop down list references the Type of Service Lookup.
Code:	Up to four alphanumeric characters.
Description:	Up to thirty characters.
Responsible Officer:	The Officer with responsibility for this Subject (but not necessarily for the Enquiry). The pick list references the Action Officer Lookup.

Subject Category: Select from the drop down list the Category for Enquiries with this Subject. The drop down list references the Subject Category Lookup.

Data Key: Set a Data Security Key in order to limit the availability of this record to Users with rights to this Data Security Key through their Data Security Group.

Users will only be able to view / update Enquiries if they have been granted access to the Data Key associated with the Action Officer and Subject of the Enquiry.

This will apply to Fast Entry Enquiry, Fast Entry Issues, and Officer Enquiries screens

Select from the drop down list. The drop down list references the Data Security Key library.

Note: This option is only visible if the current user has "Assign Data Key Manually" enabled in**User Security**.

System Administration\Security

Notes: The notes will be completed from the notes entered in the Subject Category Lookup for the Category selected above. These may be deleted, and/or other notes entered for this Subject.

The Subject Notes will be displayed in the Enquiry Additional Information form from the 'Info' button of the Customer Enquiry form.

Duplication Check: Check this box to have an automatic Duplication check carried out on the Enquiry as soon as a Site, Service and Subject are entered.

Copy Customer: Check this box to have the Customer's address entered into the Location field of the Enquiry, and the Customer's name copied into the Contact field of the Enquiry.

Dead: When the 'Dead' flag is changed on a Subject, the flag on all of the other Subjects associated with the Type of Service will be checked and if all of them are 'Dead' then the Service will also be set as 'Dead'.

Export: (CS - CRM Agent)

Check this box in order to export Enquiries with this Subject.

Effective Date Warning: Check this to issue a reminder warning when an Enquiry in this Subject is saved without manually editing the Effective date.

Address Check: Check this to ensure that the Location field of the Enquiry is not left blank, and, ideally, is populated by reference to the Property Gazetteer (Address library)

If the user makes no entry in the Location field, they will be given an error message on saving, and prevented from saving the record.

If the user has made a direct entry into the field, they will be given a warning that the Enquiry Location has not been derived from the property gazetteer on saving the record, and the 'Save' will continue.

Classification: Select from the drop down list the default Classification for Enquiries with this Subject. The drop down list references the Enquiry Classification Lookup.

Enquiry Status: Select from the pick list, the default starting Status for Enquiries with this Subject.

Action Officer:	Select from the pick list the default Action Officer for Enquiries raised with this Subject. Action Officers are responsible for progressing the Enquiry.
Follow Up:	Select form the drop down list the default Follow Up for Enquiries with this Subject. The Follow Up is defining the maximum time that must elapse before the next status is achieved for the Enquiry.
Default Duration:	Default duration of the task as used by ConfirmWorkzone, for an Enquiry with this Subject.
Works:	(Asset Maintenance module) Check this box to 'allow' the Works option in the 'Action' button menu. The Works option will allow a Job, and possibly an Order to be raised from the Enquiry. Un-checking this checkbox will disable the 'Job' button, and will blank out any current details.
Defect:	(Condition Survey module) Check this box to 'allow' the Defect option in the 'Action' button menu. The Defect option will allow a Defect to be raised from the Enquiry.
Failure:	(Performance Monitoring module) Check this box to 'allow' the Failure option in the 'Action' button menu. The Failure option will allow a Failure to be raised from the Enquiry.
Non Provision:	Check this box to 'allow' the Notification option in the 'Action' button menu. The Notification option will allow a Contractor Notification to be raised from the Enquiry.
Include Contact Name:	Check this box to copy the Contact's name into the Location field of a Job that is raised from an Enquiry with this Subject.
Standard Letter:	Select a Letter Type to be sent when this Subject is selected for an Enquiry, or leave blank of you do not wish to set a default Letter Type. The drop down list references the Letter Type Lookup of the Customer Lookups. In the adjacent field, select 'Optional' or 'Mandatory': Optional: will not add a letter to the Correspondence log, but will offer the option to print a letter of this Type for the selected Customer Enquiry, when the 'Print' button is used in the Customer Enquiry form. Mandatory: if this option is selected, the Letter will be added automatically to the Correspondence log for any Enquiry which has this Subject entered. The letter is then available to print - directly from the Customer Enquiry, or in a batch when the Letter Batch is run. In either case, a check will be made to see whether a letter of this Type has already been sent to this Customer on another Enquiry. If another letter is found, the new letter will be added to the Log, but flagged as 'printed' and will point to the Enquiry on which the original letter was sent. **Note:** In order to add the letter to the Correspondence log of an Enquiry with this Subject, the Letter Type should be flagged as 'Standard Response' in the Letter Type Lookup.
Booking Type:	This Booking Type will be used where a Booking is to be made from an Enquiry. The pick list references the **Booking Type lookup**.

Job button

(Customer Services Job Creation module)

The Enquiry Subject Job screen allows the User to configure the behaviour relating to automatic creation of Jobs for Enquiries for a particular Subject.

It is possible to enter details into the Enquiry Subject Job form even if the Option field is set to None. The populated fields will then default the Job Creation Filter when raising a Job manually from an Enquiry.

Note: In order to avoid disrupting the work flow, Confirm will not check whether the associated Contract has expired when creating automatic Jobs or Work Orders from Enquiries.

Note: The Job Button is only enabled on the Enquiry Subject if the Type of Service for the Subject is in the Asset Type the User is logged in to.

Option:	Option: Select from: 'None' If this option is selected then no Jobs or Works Orders will be automatically created. 'Create Job and Finish' If this option is selected then a Job will be created if a Feature has been supplied. The Job form will not open automatically after creating the Job. 'Create Works Order' If this option is selected and a Job is successfully created, then a Works Order will be created so long as the Price Factor is set against the Priority and is valid for the Contract. If creating the Works Order fails, a pop up dialog window will appear, but the Job will still be created. 'Commit Created Works Order' If this option is selected and a Job and Works Order is successfully created, then the Works Order will be Committed so long as the SOR Item Cost Codes do not block commit (as set in the Contract Management System Settings). **Note:** When using Customer Services in the Confirm web interface the 'Option' value is used to determine which action to take when linking a Feature to an Enquiry. 'Option' is not used when creating a Job manually via 'Action > Create Job'.
Priority:	Defaults to the General System Settings Priority field when the Option field is set to something other that 'None'. Priority is mandatory when the Option field is set to 'Create Job and Finish', 'Create Works Order' or 'Commit Created Works Order'. Job fields such as Status and Price Factor are set depending on the Priority. The Priority specified here also acts as a default when Jobs are manually created from Enquiries via the 'Action' button on Enquiry screens.
SOR Group:	Select from the SOR Group Lookup. The Dimensions and Quantity used to create Job Items from the SOR Group will be 1.00. At least one SOR Item in the specified SOR Group must be valid for the Contract specified in order for Create Works Order and Commit Created Works Order options to work.
Cost Code:	Select from the Cost Code Lookup. This Cost Code will default the Cost Code on the created Job Items. If no Cost Code is specified, it will be set to the appropriate Overriding Cost Code or in the event of this being blank then the Features Cost Code will be used.

Contract:	Select from the Contract Lookup. The Contract will be selected from the Enquiry Subject Site record, unless none exist or one exists with no Contract specified, in which case the Contract specified on the Enquiry Subject Job will be used. If none is specified, the Job will have no Preferred Contract. Where the Option field is Create Works Order or Commit Created Works Order the Contract will be the same as the Preferred Contract on the Job.
Work Type:	Select from the Work Type Lookup. The Work Type must be specified for the Create Works Order and Commit Created Works Order options to work.
Job Type:	Select a default Job Type which will be used for any Job created from an Enquiry of this Subject. This lookup references the Job Type lookup.

Attrib button

CS - Extended Attributes module

Click on the Attrib button to display the Subject Attribute Type.

Use the Subject Attribute Type form to select the Attributes that will be associated with a **Enquiry Subject**, and will be seen when the Attribs button is used on the Enquiry (or Fast Entry Enquiry) screen when that Subject has been selected.

Deleting an Attribute Type for an Enquiry Subject where there are existing Enquiries with a value set for the Attribute will display a warning to the user. The user then has the choice to either delete the Attributes from all the Enquiries, or to leave those with values set and delete only the Attributes still set to the default value.

The Attribute pick list references the **Operational Attribute Type lookup**.

Commits button

(CS - Commitment Tracking module)

The 'Commits' button displays the Enquiry Subject Commitment form.

The top part of the form will copy the Type of Service and the Subject from the Enquiry Subject form.

Use the lower portion of the form to define the Commitment that will be assigned to the Enquiry when this Subject is selected:

Commitment	Select a Commitment from the drop down list. The drop down list references the Commitment lookup in the Customer Lookups.
Commitment Type	Is automatically completed from the Commitment Lookup. This cannot be amended in this form.
Follow Up	A default is entered from the Commitment Lookup. This may be overridden by selecting a different Follow Up from the drop down list. The drop down list references the Follow Up Lookup.
Stage	This allows Commitments to be classified as Milestone (a customer facing, charter type Commitment) or Internal (an internal goal). The classification is purely for reporting purposes and has no impact on the behaviour of the Commitments.
Activation Status	(Only available for Enquiry Commitments). Select the Status that will activate the Commitment. When an Enquiry is logged, only those commitments that do not have a status will be initially

created. On each status change (including initial status), the status-linked commitments will be reviewed to see if any new ones need to be added.

Sites button

The 'Sites' button displays the **Subject Site screen**.

Operational Attribute Types

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

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

- Enquiry Attributes (Module 1460). Default Attributes for an Enquiry are specified on the Enquiry Subject.
- Defect Attributes (Module 0510). Default Attributes for a Defect are specified on the Defect Type.
- Job Attributes (Module 0715). Default Attributes for a Job may be specified on the Hazard Type if Module 2310 is present.

Code:	Supply a code of up to four characters.
Name:	Supply a name for this Attribute which will be displayed to the user.
Description:	An optional, free text field. This value is used in ConfirmConnect® to give further information about the Attribute Type in order to aid the setting of the Value.
Parameter Type:	Select from:
Text:	Select this to provide a free text field for the entry of values. Selecting 'Text', provides the 'Must change Default' check box. Check this to force an entry to be made against this Attribute type. For a Text entry you must also specify default text (what will be entered against the Attribute until specific text is entered).
Date:	Select this to provide a date field for the entry of values. Selecting 'Date', provides the following checkboxes: 'Must change Default' - check this to force an entry to be made against this Attribute type. 'Default to System Date' - check this to enter the current date when this attribute is set.
Number:	Select this to provide a number field for the entry of values. Selecting 'Number', provides the following checkbox: 'Must change Default' - check this to force an entry to be made against this Attribute type. And Default Value - enter the value to be entered by default when using this Attribute. Min and Max fields - you may limit the values that can be entered by entering minimum and maximum values.

Pick: Select this to set up a Pick list from which the user must select a value. Selecting 'Pick' provides the following checkbox:

'Must change Default' - check this to force an entry to be made against this Attribute type.

You must also provide a default value for the pick list.

To enter values for the Pick list, click on the Detail button and use the Enquiry Attribute Value form to enter a code and a description for each of the values to be included in the pick list.

'**Priority multiplier on ConfirmConnect®**' in Attribute Value form is a numeric multiplier value which is used to calculate the defect priority in ConfirmConnect®.

Valid Range for priority multiplier: 0.01 till 9999999.99 (both values inclusive).

If this value isn't populated than the corresponding attribute won't be considered for **Defect Priority Calculation**.

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

Category: Select the Category under which the Attribute Type will be shown in ConfirmConnect.

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

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

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

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

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

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

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

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

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

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

- Off - Not Mandatory. Job may progress.
- On Start - Start button is disabled.

- On Start and Resume - Start and Resume buttons are disabled.
- On Pause and Complete - Pause and Complete buttons are disabled.
- On Complete - Complete button is disabled.

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

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

Show Inline on ConfirmConnect®:	(Optional) Only valid on Pick Operational Attribute Types containing three or fewer values. When checked the Attribute Type values display on ConfirmConnect® as an inline selection instead of a Pick List.
Default Value:	This value will be used as the default value when a record is created. For a pick Attribute this defaults to 'NK' and 'Not Known' but the Code and Description may be changed.

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

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

Operational Attribute Category

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

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

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

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

Enquiry Subject Site

The Enquiry Subject Site lookup allows the allocation of an Action Officer to be further refined to take into account the Site as well as the Subject that is selected for the Enquiry.

This will override the Action Officer for the Subject (entered in the Enquiry Subject lookup).

The Enquiry Subject Site need not be populated if the Action Officers will not be different for the same Subject on different Sites.

Type Of Service:	Entered by default if the Enquiry Subject Site form was accessed from the 'Sites' button on the Enquiry Subject lookup form. Select from the drop down list. The drop down list references the **Type of Service lookup**.
Enquiry Subject:	Entered by default if the Enquiry Subject Site form was accessed from the 'Sites' button on the Enquiry Subject lookup form. Select from the pick list. The pick list references the **Enquiry Subject lookup** and will be restricted to Subject in the Type of Service entered in the field above.
Site:	Select from the pick list. The pick list references the Site library.
Officer:	Select the Action Officer who will deal with Enquiries raised in this Subject on this Site. The pick list references the Action Officer lookup.
Booking Type:	(Bookings module) Select the Booking Type appropriate to this Site in the Subject. The pick list references the Booking Type Lookup.
Contract:	Select the Contract appropriate to this Site in the Subject. The pick list references the Contract Lookup.

Action Officer

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

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

Code:	Up to four alphanumeric characters
Inactive:	Tick this to prevent new records from being assigned to the current Action Officer. Confirm will not allow an Action Officer to be 'Inactive' if it is used on the Enquiry Subject or Enquiry Subject Site records. If an Action Officer needs to be active again, untick this setting. If the linked User is also 'Inactive' Confirm will request that the User is activated first before the Action Officer can be.
Name:	Up to 30 characters

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

Device Settings

Default Priority:	(Optional - ConfirmConnect® - Condition Survey) Enter the Priority that will be assigned to Jobs raised through the 'Fast Defect' functionality in Condition Survey on the device.
Device Data Key:	(Confirm Connector) Optionally specify a Data Key to restrict which Users will have this lookup available on the device. Please see **the Confirm Connect manual** for further details. **Note:** This lookup will still be transferred, it will simply be hidden from the User when logged into the device.
Device Job Officer:	(Jobs in the Field module) Check this to set the current Action Officer as an Officer which will have 'Job' tasks sent to the device when they transfer their tasks.

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

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

Street Works Settings

Route: (Optional - Street Works module)

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

Site Register\Site Lookups\Operational Lookups

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

No of Inspections: (Optional - Street Works module)

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

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

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

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

Organisation: (Optional - Street Works module)

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

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

Labour Type: (Optional - Works Management module)

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

Works Management\Works Costing\Works Costing Lookups

Cost per hour:	(Optional - Works Management module) This will override the Cost per hour specified in the linked Labour Type. Cost per hour on Action Officer is multiplied with Cost per hour multiplier on the Labour Type Lookup to determine the Action Officer's labour rate.

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

Action Officer - Specialist

(Asset Register - Asset Specialists module)

(Not used by Confirm Mobile or ConfirmConnect®)

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

To set up Specialist Action Officers:

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

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

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

Asset Register\Feature Lookups

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

Enquiry Status

The Enquiry Statuses defines the stages the Enquiry may pass through. Statuses may flagged as 'Outstanding' to indicate that the Enquiry has not yet been resolved. Statuses that are not flagged as 'Outstanding' will close the Enquiry when the Enquiry is assigned such a Status.

Additionally, a Status may fulfil a Commitment, if it is entered as the resolving Status against a particular Commitment in the Commitment Lookup.

Enquiry Statuses may be linked with Job Statuses in such a way as to progress the Enquiry as the Job progresses. So, for instance, when the Job reaches a Status of 'Completed' this may advance the linked Enquiry to 'Enquiry Resolved' and close the Enquiry.

Code:	Up to four alphanumeric characters
Description:	Up to 30 characters
Default Follow Up:	Set the Follow Up that will be assigned by default when an Enquiry reaches this Status. This references the **Follow Up library**.
Device Data Key:	(Confirm Connector)

	Optionally specify a Data Key to restrict which Users will have this lookup available on the device. **Note:** This lookup will still be transferred, it will simply be hidden from the User when logged into the device.
Outstanding:	Check this to indicate the Enquiries carrying this Status are unresolved.
Send to Device:	Check this to export Enquiries at this Status to ConfirmConnect® when a transfer is performed.
Reset Printed Flag ... :	Check this to indicate that when an Enquiry reaches this status, it is to be picked up by default when printing Trace forms.
Can be scheduled:	Check this to allow Enquiries, at this status, to be schedulable via Confirm-Workzone.
Scheduled Work In Progress:	Indicates that work is taking place. This status is reflected in ConfirmWorkzone and prevents reassignment, rescheduling and unassignment until the status is updated.

Enquiry Statuses - effects

At its simplest, only a Status to record the logging of the Enquiry, which is flagged as 'Outstanding', and one to record the resolution of the Enquiry, which is not flagged as 'Outstanding', are required.

Other factors that may require additional statuses are:

- Action Officers are assigned to Enquiries when an Enquiry Status is changed. You may therefore need Enquiry statuses to indicate that the Enquiry has moved into another Officers area of responsibility
- Enquiry Statuses may be linked to Job Statuses so that when a particular Job Status is reached, it assigns the selected Enquiry Status to the Enquiry to which it is linked. When this happens, the Job Number will be included in the Enquiry Status Log Notes. See **Asset Maintenance\Maintenance Lookups\Status** for information of setting up Job Statuses and linking them to Enquiry Statuses.
- An Enquiry Status will resolve an Enquiry Commitment (and may resolve a Customer Commitment).
- Alerts may be triggered by a Follow Up Date, or by an Officer re-assignment. Follow Up Dates are set by Enquiry Statuses, and Status changes may involve a change of Action Officer

Follow Up

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

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

Follow Up Code:	Up to 4 alphanumeric characters.
Name:	Up to 30 characters.
Number of Months:	Up to 4 numbers. Supply the number of calendar months to calculate the date. This will take into account where the literal date would be incorrect i.e. a one month follow up from 30th January would become 28th February and not 30th February.

Note: If the Follow Up is in use by a Condition Survey Inspection Type then it will not be possible to alter the months, days or hours fields.

Condition Survey\Condition Survey Lookups

Number of Days:	Up to 4 numbers. Number of days will be counted sequentially, including weekends and Non Working Days, unless 'Working Days' is checked
Number of Hours:	Up to 2 numbers, to 2 decimal places. Minutes are represented as decimal fractions of an hour. So 30 minutes should be entered as 0.50. Hours will be counted sequentially through 24 hours per day, unless the start and end times for the working day have been set in the General System Settings.
Working Days:	Check this to show that the 'Number of Days' excludes weekends and dates entered in the Non Working Days lookup. This field is disabled if a 'Number of Months' is supplied.

Non Working Days

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

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

Enquiry Classification

Enquiries are Classified according to the type of Enquiry - a complaint, or a service request for instance.

Enquiry Classifications are applied to the Enquiry by default through the Subject. The Classification can be changed for any individual Enquiry.

The following reports show results by Classification: Resolution Analysis Report, Problem Breakdown Report, Work Group Breakdown Report, Category Breakdown Report, and the Period Summary Report.

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

Subject Category

The Subject Category categorises Enquiry Subjects, grouping them together for filtering and reporting purposes.

Subject Categories are applied to Enquiries through the Subject.

Code:	Up to four alphanumeric characters
Description:	Up to thirty characters.
Notes:	An optional free text field. Any notes entered here will default onto the Subject to which this Category is applied.

Contacts

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

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

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

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

Address:	The Address field references the Property detail of the Site library, if the CS - Address/Property link module is active. **Site Register\Site - Other button**
Contact Reference:	An optional free text field.
Customer Type:	Select from the drop down. The drop down list references the Customer Type Lookup in the Customer lookups. **Customer Services\Customer Lookups** The Customer Type associated with this Contact will be entered by default into the Customer Enquiry form if this Contact is selected as the Customer.

Enquiry Alert Type

(CS - Alerts & Notifications module)

The Enquiry Alerts system will send an Alert to the selected person, notifying of the selected event, and giving the message outlined in the Lookup.

See **Alerts/Enquiry Alert Type** for more information.

External System

(Customer Services Publication Agent, Corporate Issue Agent, CRM Agent & Confirm Connector, Contractor Access XML Agent)

The External System is used to identify Enquiries that may have been generated, or are maintained, by external CRM systems.

An External System can also be associated to Confirm Jobs to identify the corresponding Job and Order record within the external system.

System Name:	The user facing name for the external system.

System Number:	This is assigned by Confirm and cannot be modified. It is this value that is used to identify the external system in any Imported or Exported records.
Import File Path:	Corporate Issue Agent only - Enter a file path where the agent will poll for new imports.
Export File Path:	Corporate Issue Agent only - Enter a file path where the agent will export Status Updates to.

Note: If any Enquiries exist in Confirm with a matching External System Number then that External System record cannot be deleted.

Customer Services Agent System Settings

This screen provides settings for the Alerts and Notifications Agent. Some settings are also used by ConfirmConnect and by the CRM Connector.

The top half of the screen is used to configure default values used for creating new Customer Enquiries, where not all information has been provided in the request.

Only 'Customer Name' is a free text field and doesn't reference a lookup. When transferring Enquiry Customers from ConfirmConnect®, if the Customer Surname is empty then it defaults to the value in this field.

'Work Type' is optional. A Work Type is only required where sufficient information is being imported into Confirm to raise a Works Order. That is:

- If a Plot number and Defect Type is supplied, a Defect is raised;
- If a Plot number and SOR Group are supplied, a Job is raised.
- If the Action Officer is linked to a Contractor, who has a Contract covering the identified Asset's Contract Area, a Works Order is raised and committed for the Job.

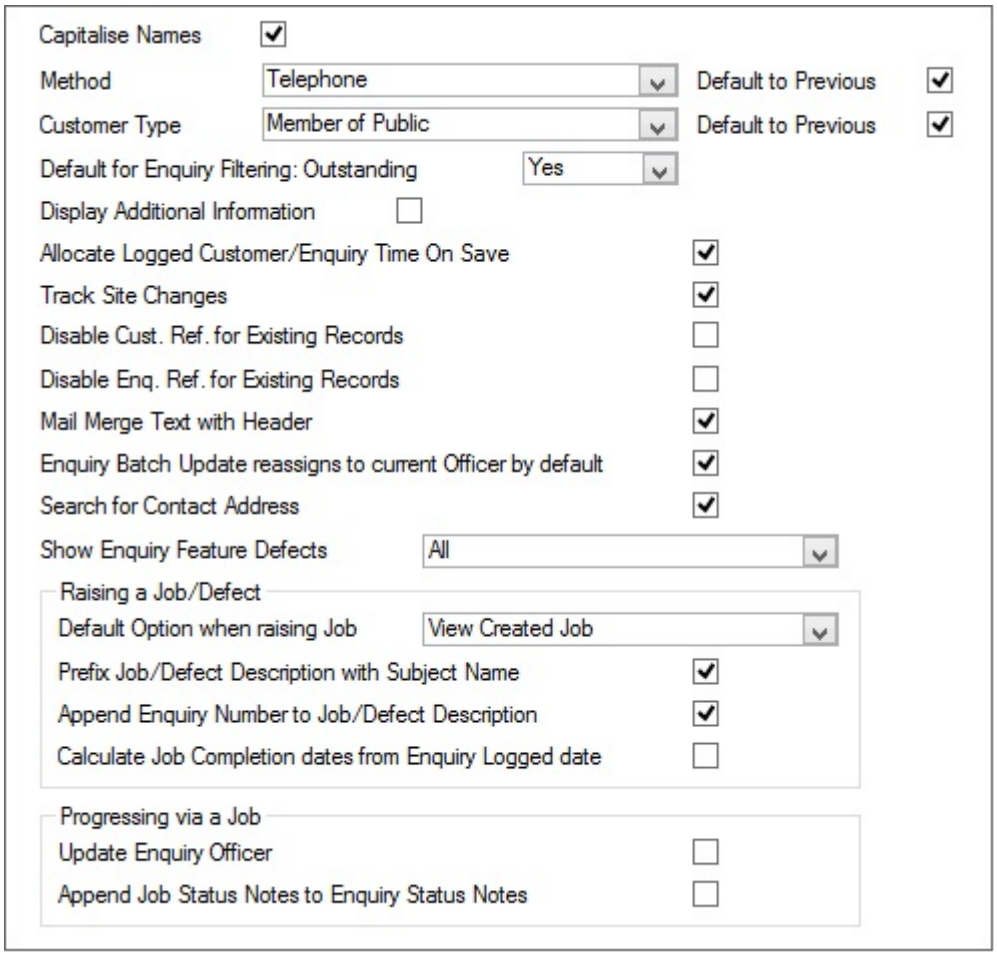
The other settings on the screen are described below.

Create Standard Letter ...	Tick this to create a Correspondence Log for any 'Standard Letters' which have been configured against the Enquiry Subject for imported Enquiries.
SMS Email Expression	(Alerts and Notifications Agent) Supply an expression which will be used to send Enquiry Alert emails to an SMS Server. The SMS Server will then generate an SMS (text) message which will be sent to an Enquiry Customers Mobile Telephone. The email sent to the SMS Server will be truncated according to the setting below. Once this setting has been saved, the 'SMS' option will become available in the 'Automated Contact' field on the Customer Enquiry screen. **Note:** This relies on an SMS Server being available and configured to send messages - this is not provided in Confirm.
SMS Email Character Limit	(Alerts and Notifications Agent) Messages sent to an SMS Server will be truncated to 160 characters by default. The limit can be altered using this setting, with a value of 0 meaning no truncation happens. **Note:** Please check with your service provider for the acceptable SMS character limit. SMS text over 160 characters may be charged for multiple SMS.

Derive Site from Enquiry…	(CRM Connector) Tick this to derive the Site from Enquiry coordinates if Site Code is not supplied for Enquiries imported via CRM Connector. This does not use any map data but is a simple method based purely on the coordinates shown on the Site screen. Each Site is considered to be a straight line from Extent One to Extent Two and the system calculates how far away from this line the Enquiry is. The Site where the Enquiry is closest to this line is chosen, provided the distance is less than the Tolerance (see below). **Note:** When no suitable Site is found to which the Enquiry is close enough, or if no coordinates are supplied for the imported Enquiry, it will be assigned to the default Site specified on this screen.
Tolerance for Deriving Site	(CRM Connector) This is the furthest distance an Enquiry can be from the line of a Site for that Site to be considered in deriving a Site from coordinates, as described above. If a large proportion of Enquiries are being assigned to the default Site, the Tolerance value may be too small. Increasing the Tolerance too much may result in Enquiries being assigned to the wrong Site. A very large Tolerance may impact on performance of the Connector.

Customer Services System Settings

The Customer Services System Settings provides defaults for the Customer Services functionality.



Capitalise Names:	Check to automatically capitalise the first letter of any entries in the Title, Forename, Surname and Contact fields of the Fast Entry Enquiries screen, and the Contact field on the Fast Entry Issues screen.
Method:	Select a default entry for the Method field of the Fast Entry Enquiries screen. The drop down list references the Enquiry Method lookup.
Default to Previous:	Check this to default the Method from the last Enquiry entered
Customer Type:	Select a default entry for the Customer Type field of the Fast Entry Enquiries screen. The drop down list references the Customer Type lookup.
Default to Previous:	Check this to default the Customer from the last Enquiry entered.
Default for Enquiry Filtering:	You may select the default entry for the Outstanding field in the Enquiry Filtering screens. Select from: 'Yes' - To default the filter to searching from only outstanding Enquiries 'No' - To default the filter to searching from only Enquiries which are not Outstanding 'Both' - To default the filter to searching from all Enquiries Users may make another selection in the filter.
Display Additional Information:	If this is checked, then the Enquiry Additional Information screen will be automatically displayed as soon as both the Site, and the Subject are entered in a new Enquiry.

Allocate logged Customer/Enquiry time :	The logged times for the Customer/Enquiry are entered into the date/time field at the time when a new, blank Fast Entry screen is accessed. Check this to allocate the date/time on Save of the record (instead of on opening the new record).
Track Site Changes:	Check this to record the previous Site name in the Status log when the Enquiry Site is changed and the Enquiry is saved.
Disable CustRef for Existing records:	If this is checked then the CustRef field of an Enquiry Customer record may not be edited once it is entered and saved.
Disable EnqRef for Existing records:	If this is checked the EnqRef field of an Enquiry record may not be edited once it is entered and saved.
Mail Merge Text with Header:	Check this to include the headers with the data in the same file when carrying out a mail merge. This will be necessary for those using a word processor for mail merge that demands that the data and headers be in the same file (such as Word XP).
Enquiry Batch ... reassigns... :	Check this to have the New Officer field of the Enquiry Batch Update filter populated by default by reference to the currently logged in user. Uncheck the box to leave the New Officer field blank.
Show Enquiry Feature Defects:	This setting controls the behaviour of the Defect screen when opened from the Enquiry screen for an Enquiry linked to a Feature but not yet to a Defect. Select from: 'All' - This will show all Defects logged for the Feature associated with the Enquiry. 'Not Whole Site Feature Type' - This will result in an empty Defect form being presented when the Defect menu option is used and the Feature associated with the Enquiry is of the Whole Site Feature Type (as set in the Feature System Settings). No existing Defects will be retrieved. 'None' - This will result in an empty Defect form always being presented when the Defect menu option is used. No existing Defects will be retrieved. **Note:** All Enquiries that are not linked to a Feature present an empty Defect form when the Defect menu option is used.
Default Option when raising Job:	Select the Default Option that will be used on the Job Creation Filter when raising a Job from an Enquiry.
Prefix Job/Defect description... :	Check this to prefix the Job and Defect descriptions with the Enquiry Subject Name.
Append Enquiry Number... :	Check this to have the Enquiry Number appended to the Description of Jobs and Defects when raised from an Enquiry.
Search for Contact Address:	Unchecked by default. When checked, the tabbing order on the Fast Entry Enquiries screen is changed. Tabbing out of the Method field will move the focus straight to the Address field, which in turn launches the Address search filter. The Address search filter will have extra Contact fields (Title, Forename and Surname) available at the bottom. If the User enters a Post Code then the system will search for a Contact first, and then if none found, it will search for

an Address. If the User clicks on the Post Code pick button then this will use the standard Address search.

If a Customer Enquiry is updated, so that a change is made to the Customers details (excluding the Phone Numbers, Fax Number, Email Address and Customer Type fields) then the User will be prompted with a warning if the Customer is linked to a Contact. The warning message will prompt the user to verify if this is still the same Contact. If the User selects 'No' then the link from this Customer to the original Contact will be removed.

Hide Documents on Jobs (Confirm-Connect and Web interface):	Check this to prevent Jobs in ConfirmConnect and the Confirm web interface from displaying the Documents of linked Enquiries.

Progressing via a Job:

Update Enquiry Officer :	Where an Enquiry Status is automatically updated as a result a Job Status update on a linked Job, you may elect whether to update the Enquiry Action Officer to the same one set on the Job. Check the box to update the Enquiry Action Officer to match the one now set on the Job. Uncheck the box to leave the Action Officer on the Enquiry unchanged.
Append Job Status Notes... :	Check this to have the Job Status Log notes included in the Enquiry Status Log Notes when the Enquiry is progressed by a Job.

Raising a Job/Defect:

Calculate Job Completion dates from Enquiry Logged date :	When a Job is raised from an Enquiry, the Estimated and Target Completion Dates are calculated based on the Job Entered date. If this setting is ticked, they will instead be based on the Enquiry Logged date. **Note:** This setting will have no effect if the system is not configured to calculate Job Completion dates when Jobs are raised. This is determined by a setting on the **Job System Setting** screen.

Customer Services Seed Numbers

Each Enquiry, and each Customer, is automatically numbered within the system. These numbers are taken from the Customer Services Seed numbers set for each Work Group working in Customer Services.

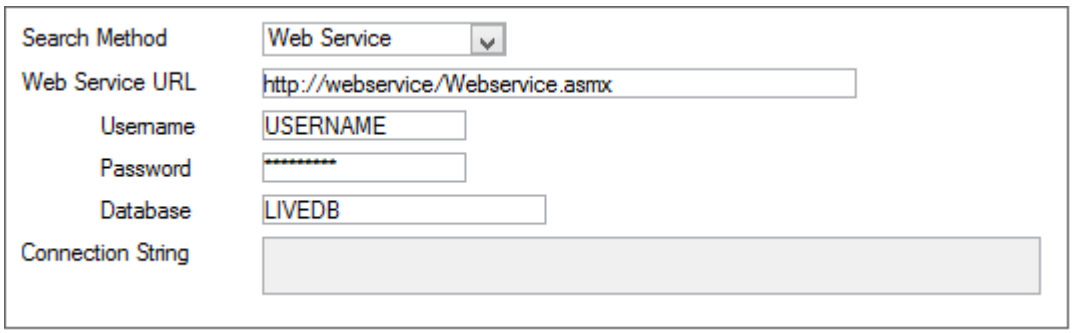
Work Group Code:	Enter the code for an existing Work Group, or use the 'Find' button. **System Administration\Security\Work Groups**
Name:	Entered from the Work Group library when a Code is entered.
Customer - This Range: Enquiry - This Range:	Current: - this will be zero when the seed numbers are first assigned. Change this to the first available number if the first range of numbers has been assigned to another Work Group.

	Maximum: set the final number in the range of numbers being assigned to this Work Group.
Customer - Next Range:	A second range of non-contiguous numbers may be assigned to this Work Group, at this stage or at a later date.
Enquiry - Next Range:	

Contact Lookup Adaptor System Settings

(Contact Lookup Adaptor module)

The Contact Lookup Adaptor System Settings is used to configure connection details to an external Contact/Customer database.



Search Method:	Select from: None Set by default. If None is selected then Confirm will not attempt to retrieve Contact data from an external source. Web Service If Web Service is selected then Web Service URL, Username, Password and Database fields are enabled. The Settings can only be saved when the supplied details are valid. ODBC SQL Server, ODBC Oracle, ODBC Other Selecting a ODBC Type will enable the Connection String field and the SQL Button.
Web Service URL:	Active when the Search Method is set to Web Service. It should contain the complete URL to the external Web Service supplying the Contact data.
Username:	Active when the Search Method is set to Web Service. It should contain the Username that is used to connect to the Web Service.
Password:	Active when the Search Method is set to Web Service. It should contain the Password for the above Username.
Database:	Active when the Search Method is set to Web Service. It should contain the Database that the Web Service should connect to.
Connection String:	Only active when the Search Method is set to one of the ODBC Types. The Connection String field is pre-populated with the relevant connection parameters, and then it is possible for the User to complete the connection details for the external database. The Connection String field can only be saved with a valid SQL Select Statement.

SQL button

The 'SQL' button is only active when the Search Method is set to one of the ODBC Types. Clicking the 'SQL' button opens a screen for writing an SQL Select Statement. The SQL form can only be saved with a valid SQL Select Statement.

The SQL Select Statement must adhere to the following interface, as it is the order of the selected columns that Confirm uses to determine each of the search parameters and returned values. Therefore Confirm will check the correct number of columns and data types are supplied.

SELECT Order	Description	Confirm Name	Char Length
1	Customer Identifier	Contact Reference	20
2	Surname	Contact Surname	50
3	Forename	Contact Forename	40
4	Title	Contact Title	8
5	Customer Type	Customer Type	4
6	Street Name	Street Name	100
7	House Name/Number	Address	60
8	Flat/Sub Building Name	Flat/Sub-Bldg	60
9	Locality	Locality	35
10	Town	Town	35
11	County	County	35
12	Post Code	Post Code	10
13	UPRN	Address Reference	20
14	Telephone Number	Telephone Number	20
15	Alternative Telephone Number	Alternative Tel.	20
16	Fax Number	Fax Number	20
17	Email Address	Email Address	100

CRM Agent System Settings

(CRM Agent module)

The CRM Agent exports newly created Enquiries and Enquiry updates to a Web Service. If new Customer information is added to an Enquiry then this will also be exported with the Enquiry. Enquiries created or updated via the CRM Connector will not be exported by the CRM Agent unless an External Issue Number has been specified, in which case any Enquiry details entered via the CRM Connector with a matching External System number will not be exported; all others will.

Username / Password / Database:	These values are included in the Authentication section of each XML output generated by the Agent. This provides schema consistency between the CRM Agent and CRM Connector. These values are optional and can be omitted if not required by the target Web Service.
External Issue System:	This optional setting identifies the external system that the Agent is sending updated Enquiry information to. Any Enquiries created or updated via the Confirm Connector from the same external system specified here are not

exported by the Agent, as it is deemed unnecessary having arrived from that same system. Any Enquiry updates received from a different external system are exported by the Agent.

Maximum Number of Exports: This is the maximum number of exports the Agent will attempt to send on each run. When this limit is reached any Enquiries not yet exported will be sent on the next run of the Agent. This prevents the Agent from attempting to send a large number of Enquires that may have built up if the Agent has not been run for some time.

Send one Enquiry Customer at a Time: If checked, this will send separate enquiry request for each customer, to target CRM system.

Dump Data: When ticked, Request and Response XML files will be created for each Enquiry being exported. This is unticked by default.

Output Folder: The Requests and Response files are created in sub-folders by year, month and day, e.g. …\2013\01\21\...Request.xml

The meaning of suffixes are:

- Request – Original request file generated from Confirm.
- CrmReq – Request file generated from Confirm with request transformation applied to it, but before sending to target CRM.
- CrmResp – response file received from target CRM system.
- TransResp – response file received from CRM system with response transformation applied to it.

There can be multiple Transformed files created as per number of specified Transformations.

This can create a large number of files, so it is advised to only use this when troubleshooting problems.

Sequence No: The order in which XSL transformations will be applied for interaction with destination CRMs Web Service. This is Read Only.

Description: An optional free text field.

URL: The destination Web Service URL. This field should contain the complete URL to the external Web Service that the Customer Enquiry data is exported to.

Note: The Settings should be saved after validating the Web Service using Test Settings button. This will prevent Agent from failing due to wrong URL or credentials.

Request Stylesheet: Enter or find the location of the Style sheet (.XSL) that will be used to transform the Confirm CRM Agent output into corresponding Web service's required format. This can be left blank if no transformation is required.

Response Stylesheet: Enter or find the location of the Style sheet (.XSL) that will be used to transform the Web Service response into the required Confirm format.

HTTP Headers: Allow users to set standard or custom http headers to an outgoing CRM request from Confirm. Default value is 'Content-Type:application/soap+xml'

Note: If the SOAP version supported for the target CRM endpoints are older than 1.2, then set the Content-Type header as 'Content-Type:text/xml'. Also include a SOAPAction header with the value of the SOAP action to which requests need to be sent.

Note: A set of template XML stylesheets is available to be used with Lagan CRM. The style sheets can be used to interface Confirm directly with Lagan CRM for request and response. The template stylesheets are available at \\resources\Stylesheet folder of release package.

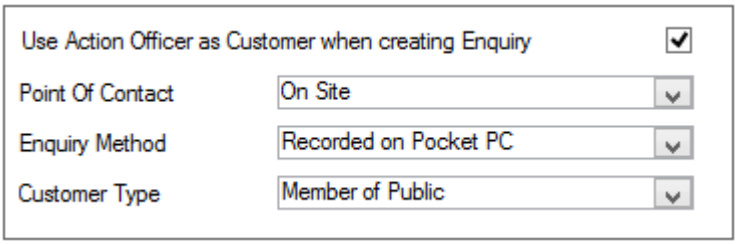
CRM Agent System Settings buttons

The following buttons are available to edit XSL Transformation.

Add:	Use this to add an XSL transformation and destination URL or update existing.
Delete:	Use this to Delete an XSL transformation and destination URL.
Test Settings:	Use this to validate the destination Web Service URL with authentication credentials username/password provided on screen.

Customer Services Device System Settings

The Customer Services Device System Settings screen sets defaults for the Customer for new Enquiries being transferred from mobile devices.



Use Action Officer as Customer … :	Tick this to create a Customer for each new Enquiry that is transferred from the mobile device. This Customer will use the Action Officer's name as the Customer name, and populate the other mandatory Customer fields as set in the following fields. If the new Enquiry has a Customer and this setting is ticked, the Action Officer will not be used as a new Customer. Note: If this is not set or no Customer has been created then the Enquiries raised cannot be viewed in the Fast Entry Enquiry screen (as this requires a Customer). The Fast Entry Issues screen, or Officer Enquiry screen must be used to view the Enquiry.

The following fields are mandatory if the 'Use Action Officer as Customer when creating Enquiry' is ticked. If left unticked, these fields are used as defaults for new Customers being created.

Point of Contact:	Pick from the drop down list a default Point of Contact (P.O.C) that will be used for the Customer when an Enquiry is created from the mobile device. The drop down list references the **Point of Contact Lookup**.
Enquiry Method:	Pick from the drop down list a default Method that will be used when an Enquiry is created from the mobile device. This must be set if a new Customer is created against an Enquiry as it is not available on the device and an error will be generated if this setting has not been set. The drop down list references the **Enquiry Method lookup**.

Customer Type: Pick from the drop down list a default Customer Type that will be used when an Enquiry is created from the mobile device.

The drop down list references the **Customer Type lookup**.

Customer Lookups

The Customer Lookups provide the libraries necessary for completing the Customer details of the Customer Enquiry Form.

They also provide the Letter Types and the settings necessary for the automatic letter merging utility (CS - Letters module), and the Commitments lookup for setting up the Commitment for both Customer and Enquiry (CS - Customer Tracking module).

Point of Contact

The Point of Contact library provides a list of places where the Enquiry might be received.

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

Enquiry Method

The Enquiry Method library contains a list of possible methods of contact.

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

Customer Type

The Customer Type library defines the types of Customer.

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

Councillors

The Councillor library provides a list of Councillors, associated with their Wards. If Sites are also correctly assigned to Wards, the Enquiry can display the Councillors with an interest as soon as a Site is entered in the Enquiry.

Ward:	Select from the drop down list. The drop down list references the Ward Lookup.
Code:	Up to four alphanumeric characters. The code must be unique within the Ward
Councillor:	Up to fifty characters.
Address:	An optional free text field.
Telephone Number:	Optional free text fields.
Fax Number:	An optional free text field.
Email Address:	An optional free text field.
Political Tendency:	Select from the drop down list. The drop down list references the Political Tendency library.

Political Tendency

The Political Tendency library provides a list for the completion of the Councillor Lookup.

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

Letter Type

The Letter Type library stores all the letters that might be sent as part of a mail merge, together with details of the transfer file and merge document.

Code:	Up to four alphanumeric characters.
Description:	Up to thirty characters.
File Name:	Enter the name of the text file that will store the merge data.
Correspondence:	Select a Correspondence Type from the drop down. The drop down references the Correspondence Type lookup.
Command Line:	The path and location of the form letter.
Standard Response:	Check this box if this letter type is to be assigned to a Customer Commitment.

Correspondence Type

Correspondence Type groups together Letter Types to provide a means of selecting for Letter Batches.

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

Setting up Mail Merge for Letters - Step-by-step

These instructions are not specific to any particular word processor, and you will need to refer to the instructions for setting up a mail merge documents for your particular product.

In particular you should note whether the word processor allows you to set the header file (the file giving the field names) separately from the data file (the file containing the actual details that have been entered in the fields for all the Enquiries being merged).

Where your word processor will use a separate header file, you should select the 'MailMerg.TXT' file (usually found in Program Files\Confirm\Client), when asked to find the header file.

Where your word processor expects to find the headers in the data file you should go to **Customer Services System Settings** on page 91, and check the 'Mail Merge text with Header' option before beginning to set-up for mail merge.

Customer Lookups

Create a **Correspondence Type** with a Code and a Name.

Create a **Letter Type** with a Code and a Name. Enter a File Name, which will be applied to the file that will be created as a data source*. Leave the 'Command Line' field blank.

***Note:**Data Source - Used to store information from Confirm, which will subsequently be used in WP document.

Create a blank document in your word processor by opening a document and saving with the name of the Letter Type. Having saved, close the word processor.

Update Letter Type - Locate the previously created Letter Type and complete the 'Command Line' field with the Path-name of the target document (created in the step above), inclusive of file name.

Launching the word processor

Update Correspondence Log - Log a new Enquiry, or find an existing Enquiry in Confirm and then select 'Letters' from the 'Detail' button menu. Select the appropriate Letter Type and save. (Don't print at this stage). Close the Correspondence Log screen.

Select **Letter Batch** - this provides the option to batch print letters.

- In the filter, select the previously created Letter Type and Correspondence Type.
- In the 'Directory' field, enter a directory path to the folder in which the Data Source file should be stored. The Data Source file is the text file that is named in the 'File Name' field of the Letter Type lookup.
- In the 'File Type' field, select the TAB delimited text file type from the drop down list.

Note: the Directory and File type details will be retained and used as the path and File Type for all letters

- Select OK and the letter batch screen will appear. If the Confirm set-up has been performed correctly, this will open the blank document previously created and saved in the word processor.
- You will now need to follow the procedure for creating a mail merge document in your word processor. Each field, and related fields, in the Customer Enquiry should be available as a merge field.
- When you have completed the merge document, save and close the word processor.
- Update Confirm - Save Letter Batch to log that letters have been printed and close Letter Batch screen.

These steps must be followed for each new Letter Type that is set up. Once set for a Letter Type, then all the relevant files, paths and directories are set and the merge will be carried out automatically finishing with all the letters merged and ready to print.

Automating Letters

Letters may be sent automatically when linked to a Subject:

1. Create the appropriate Letter Type (flagged as 'Standard Response') and set up the mail merge as above.
2. In the **Enquiry Subject lookup**, enter the required Letter Type in the Letter Type field, and select 'Mandatory' from the following drop down list.
3. When the Enquiry is raised with this Subject, the specified letter will be automatically added to the Correspondence log for that Enquiry.
4. When the next Letter Batch is raised, the letter will be included and automatically sent. The letter may also be resolving a Customer Commitment (CS - Commitment Tracking).

***Merge Fields**

The merge fields will be linked to the fields in the Customer Enquiry form, and those associated with it.

(CS - Extended Attribute module)

Where Enquiry Attribute Types have been assigned to Subjects, these may be included in the message text. The Attributes are listed as Attribute1, Attribute2, ... , Attribute10. These correspond to the Service/Subject attributes by mapping the Subject Attribute with the lowest display order number to Attribute1 and then the Subject Attribute with the next lowest display order number to Attribute2 and so on.

Commitments

(CS - Commitment Tracking module)

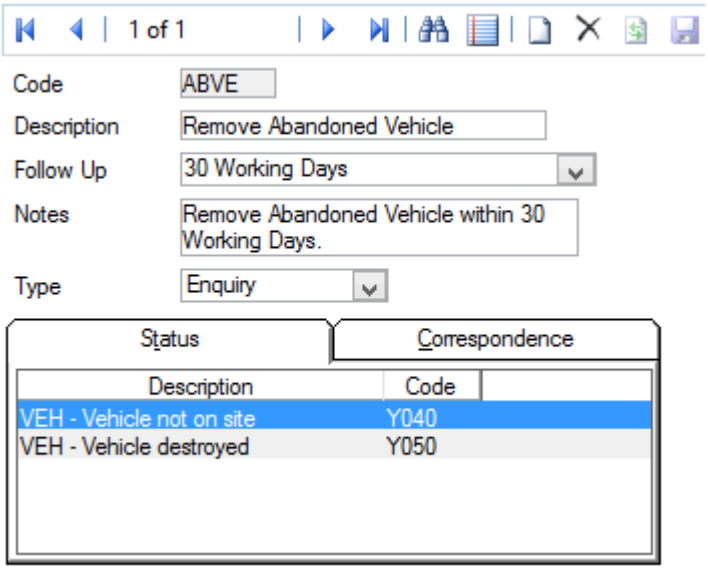
The Commitment Tracking module provides the means of setting Commitments against Customer Enquiries, and checking that the Commitment is met within the specified time.

Commitments can be Customer Commitments, or Enquiry Commitments.

Customer Commitments can be fulfilled when:

- A letter of the specified Correspondence Type is added to the Correspondence Log for the Enquiry and is flagged as 'Printed'.
- The specified Status is assigned to the Enquiry.

Enquiry Commitments can only be fulfilled when the specified Status is achieved.



Code: Up to four alphanumeric characters.

Description: Up to thirty characters.

Follow Up: Select from the drop down, the period of time within which the Commitment must be fulfilled. The drop down list references the Follow Up lookup.

Note: This Follow Up can be overridden based on an Enquiry's Subject via the **Commits button** on page 79 on the **Enquiry Subject** on page 75 lookup

Notes:	An optional free text field
Type:	Select from 'Customer' and 'Enquiry'. Customer Commitments will relate to the Customer and may be fulfilled by a Letter, or by a Status update. Enquiry Commitments will relate to the Enquiry and may be fulfilled by a Status update.
Status Tab:	Select the Status tab and click on the 'Detail' button to display the Resolving Status form. Enter the Status that will fulfil this Commitment.
Correspondence tab:	Customer Commitments only Select the Correspondence tab and click on the 'Detail' button to display the Resolving Correspondence form. Enter the Correspondence Type that will fulfil this Commitment.

Commitments - step-by-step

A Commitment will be defined in the Commitment lookup, with the status or Correspondence Type (Customer commitments only) that will fulfil the Commitment. Commitments are attached to Enquiry Subjects so that any Enquiry with that Subject will acquire the Commitment. When the specified Status is reached, or a letter in the specified Correspondence Type is sent, the Commitment will be fulfilled and the date of the fulfilment entered against the Commitment. The Outstanding Commitment Report will provide details of Commitments not yet fulfilled.

1. Create Commitments in the Commitment lookup, and assign follow up period and Resolving Status or Resolving Correspondence.
2. Use the Enquiry Subject lookup ('Commits' button) to specify Commitments for Subjects. An Enquiry Subject may carry more than one Commitment.
3. When the Enquiry is raised with this Subject, the specified Commitment(s) will be automatically added to the Enquiry.
4. When the specified action is carried out (a letter is sent, or a Status is achieved), the Commitment record will have the date entered and will be marked as 'Fulfilled'.

Bookings Lookups

The Bookings Lookups provide the libraries and tools for configuring the Bookings module. These include:

Appointments will be booked for a particular Booking Type. The Booking Type would be the type of resource or service required e.g. Bulky Uplift, Tennis Court etc.

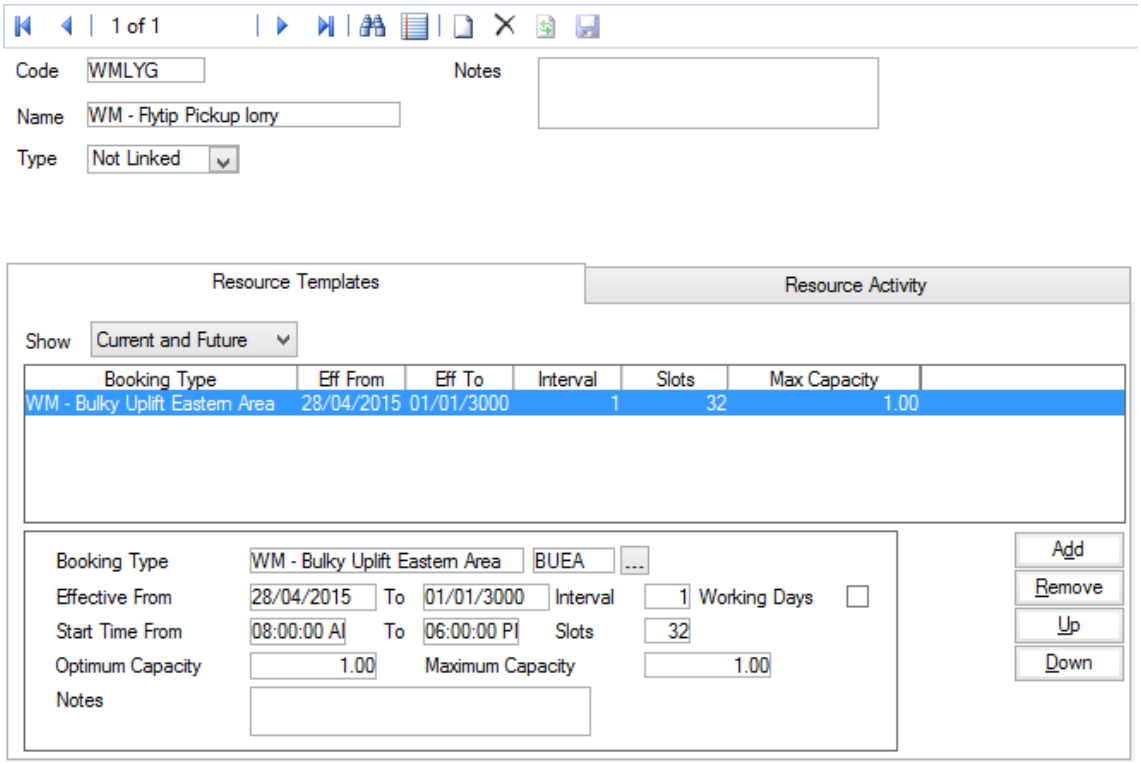
Booking Types may be assigned subtypes, which can be selected in the Booking when that Booking Type has been selected. This allows Bookings to be sub divided for reporting purposes.

The resources available to perform Booking Type requirements will be considered Booking Resources e.g. Park Tennis Court 1, Lorry 1 etc.

For each available Booking Resource a regular schedule made up of Booking Templates can be defined.

Booking Resources

Booking Resources define a Resource, and Booking templates for its availability. A template specifies the availability of the resource at an interval of a specified number of days (one day for daily, seven days for weekly, etc.). A Resource may have several Templates specified to cover the full availability.



Code:	Up to 10 characters
Name:	Up to 50 characters
Notes:	A free text field to supply further information on the Booking Resource.
Type:	Select the physical or logical resource(s) that will fulfil Bookings. Select from: 'Action Officer' - To display the Action officer field for selection of an Action officer.

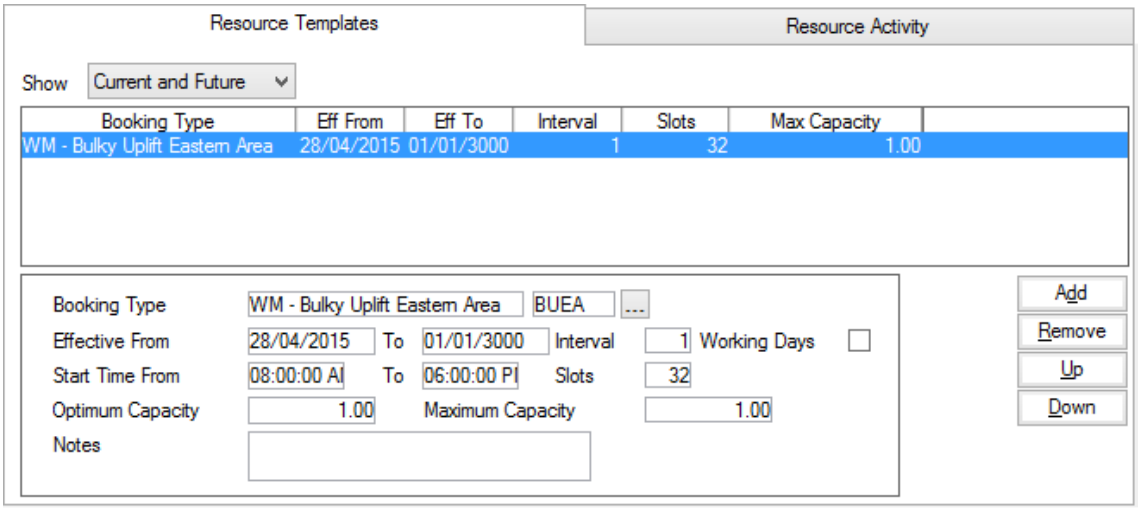
'Feature' - To display the Site / Feature fields for selection of a Feature.

'Gang' - To display the Gang field for selection of a Gang.

Note: Confirm will prevent a Gang being allocated to more than one Booking Resource.

'Not Linked' - To indicate that the Booking Template is not linked to a physical or logical resource.

Resource Template tab



Booking Type: The Booking template is related to a Booking Type by selection from the pick list.

Effective From / To: A time period is then defined over which Bookings may be taken. The time period may be split into a number of slots, which determine the granularity of the time given to the customer.

A Booking Template is considered active for a Resource on the Effective From Date, and every subsequent day that is a whole number of Intervals after the Effective From Date, up until (and including) the Expiry Date.

A Booking Template may be specified as active on Working Days Only, in which case it is not considered active on any non-working days resulting from the above calculation.

Start Time From / To: The time range for available slot in each of the days specified above.

Slots: The number of available slots within the time range specified above. For instance, a time slot from 11:00 to 16:00 divided into 5 slots gives hourly slots for Booking.

Capacity: Optimum and Maximum capacity per Booking slot determines how much 'quantity' of the Booking Unit of Measure can be accommodated. Where the optimum capacity has been exceeded, the slot will be coloured according to the **Bookings System Settings** on page 110 for 'Optimum Capacity Exceeded'. Confirm will ensure the maximum is not exceeded.

(0850 - Gang Allocation & Scheduling)

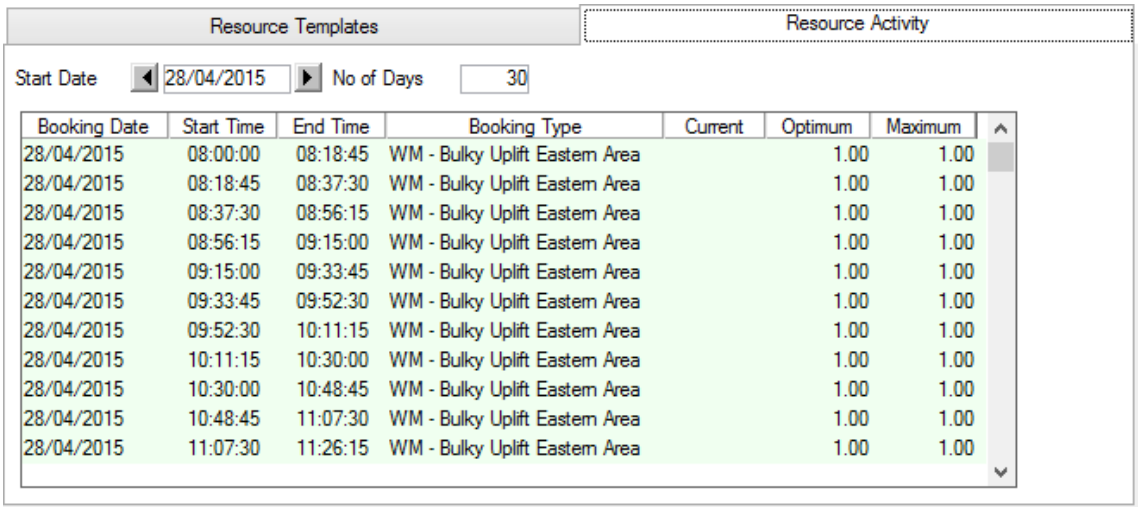
When setting up Gangs for Scheduling, the Maximum Capacity needs to reflect the number of hours work that the current Booking Resource can do in each slot e.g. A Gang has 4 people who can do 1/2 an hour work per slot - the Maximum Capacity field should be set to 2.

A number of Resource Templates may be added to the Booking template to account for all combinations of dates and times, however, times may not overlap.

Note: The Resource Template details are protected once work has been allocated to it.

Resource Activity tab

The Resource Activity tab will display the booking availability configuration based on the information entered on the Resource Template tab.



Booking Date	Start Time	End Time	Booking Type	Current	Optimum	Maximum
28/04/2015	08:00:00	08:18:45	WM - Bulky Uplift Eastern Area		1.00	1.00
28/04/2015	08:18:45	08:37:30	WM - Bulky Uplift Eastern Area		1.00	1.00
28/04/2015	08:37:30	08:56:15	WM - Bulky Uplift Eastern Area		1.00	1.00
28/04/2015	08:56:15	09:15:00	WM - Bulky Uplift Eastern Area		1.00	1.00
28/04/2015	09:15:00	09:33:45	WM - Bulky Uplift Eastern Area		1.00	1.00
28/04/2015	09:33:45	09:52:30	WM - Bulky Uplift Eastern Area		1.00	1.00
28/04/2015	09:52:30	10:11:15	WM - Bulky Uplift Eastern Area		1.00	1.00
28/04/2015	10:11:15	10:30:00	WM - Bulky Uplift Eastern Area		1.00	1.00
28/04/2015	10:30:00	10:48:45	WM - Bulky Uplift Eastern Area		1.00	1.00
28/04/2015	10:48:45	11:07:30	WM - Bulky Uplift Eastern Area		1.00	1.00
28/04/2015	11:07:30	11:26:15	WM - Bulky Uplift Eastern Area		1.00	1.00

Existing Bookings are displayed. The presence of existing Bookings (at any Status) against the Booking Template will prevent the deletion of the Booking Template, and also will result in the following fields being protected:

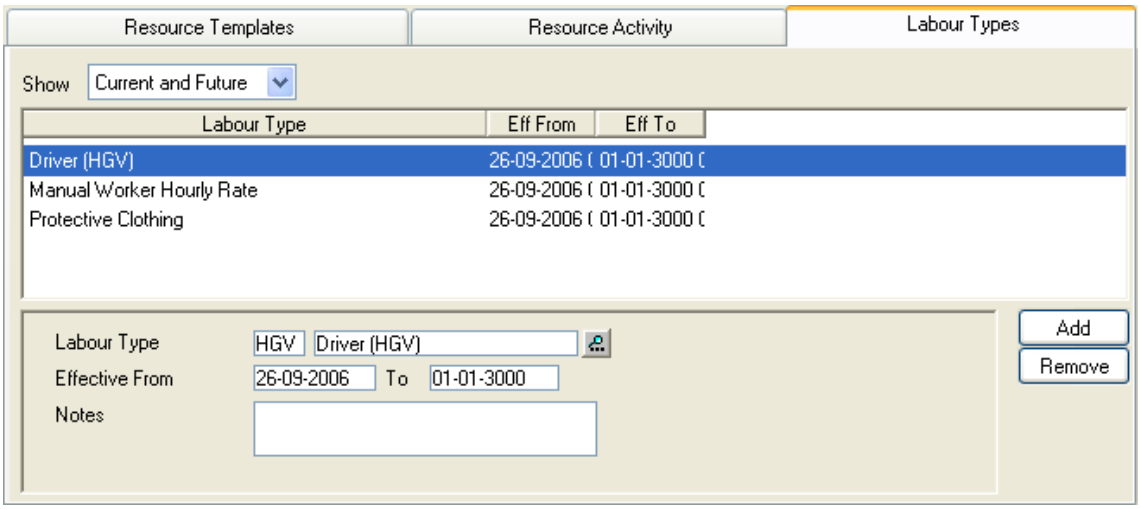
- Booking Type
- Effective Date
- Expiry Date
- Interval
- Start Time
- End Time
- Maximum Capacity
- Only Working Days

Labour Types tab

(0850 - Gang Allocation & Scheduling)

The Labour Types tab will be displayed when 'Gang' is selected in the 'Type' field. It will display the Labour Types (skills) that the Booking Resource has. e.g. an SOR Item may require an operative with an HGV vehicle licence. This type of operative can be added to the Labour Types tab. Labour Types can be optionally added to the SOR Item in the Cost Details screen.

Works Management\Works Costing\Cost Details



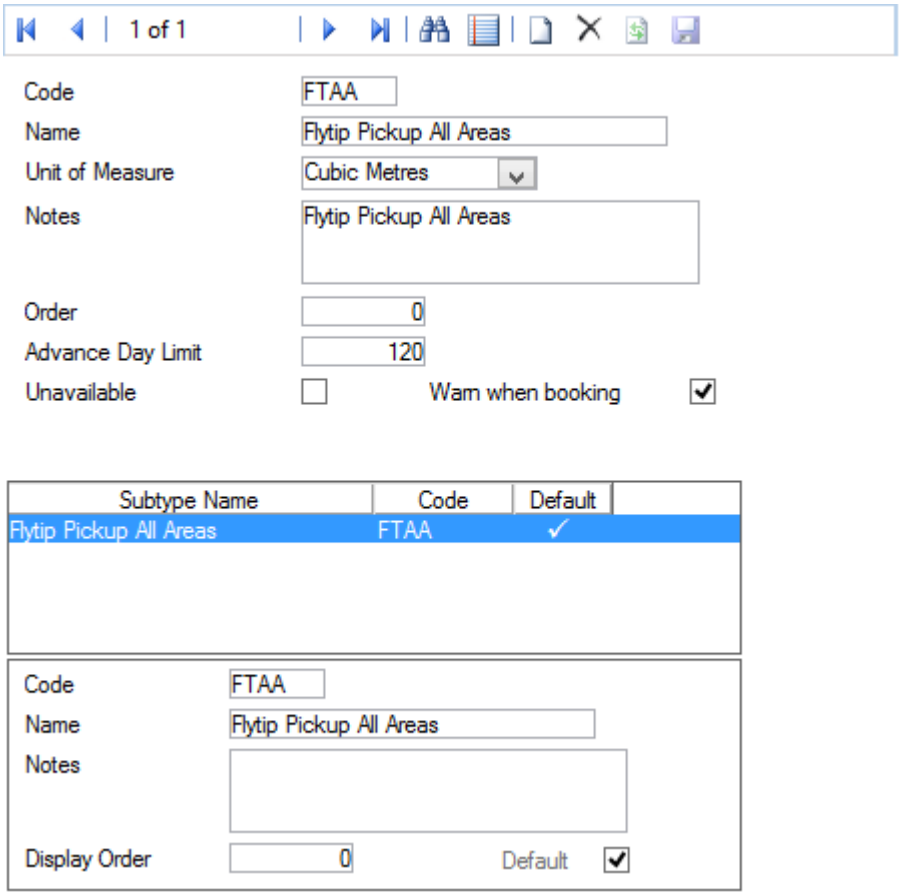
Labour Type:	Select the Labour Type which will be assigned to this Gang Booking Resource. The pick list references the Labour Type lookup. **Works Management\Works Costing\Works Costing Lookups**
Effective From / To:	Select the Dates that the Labour Type is valid for. This may be the time period that a Licence is valid, or when items need to be replaced. A Gang Booking slot will be restricted in the Scheduler if the Labour Types are not valid. The same Labour Type can be added to a Booking Resource, however they cannot overlap by date.
Notes:	Free text field for further describing the Labour Type.

Additional Labour Types can be added to a Booking Resource with the 'Add' button. They can be removed with the 'Remove' button.

Note: Changing Booking Resource Labour Types can cause existing Bookings to become invalid - a warning will be displayed when clicking 'Save' if this is the case.

Booking Types

Booking Types relate to the type of service that a customer requests for a Booking. Possible Booking Types could include 'Bulky Uplift', 'Gardening Service', 'Tennis Court' etc.



Code:	An unique code up to 6 characters
Name:	Up to 50 characters
Unit of Measure:	Booking Type has a Unit of Measure specified against it, defining the meaning of the quantity that needs to be entered against a Booking (e.g. cubic metres for a Bulky Collection). Select from the drop down list. The drop down list references the Unit of Measure lookup.
Notes:	Optional free text field
Order:	You may define a display order for this Booking Type
Advance Day Limit:	Specify the maximum number of days in advance appointments of this Booking Type can be entered.
Unavailable:	Check this box to indicate that no appointments can be created for these Booking Types. The unavailable Booking Types will only be used to configure templates for periods when the Resource will be unavailable (e.g. a Tennis Court closed for repair). **Note:** A Warning will be given if the value of this flag is changed for an existing Booking Type
Warn When Booking:	Check this to give the User a warning message if another Booking has been created in the same slot during the time between the User picking the slot and saving the Booking. When the Booking becomes 'Confirmed' the check, and hence potentially the warning, is repeated. This will allow the User making the Booking to make an informed decision whether to reschedule.

Bookings Data Key:	This will be used to define which Bookings a User can view, create and update. It will not restrict access to Booking Types themselves, or to the Booking Types to which a User has access when Booking Templates and Enquiry Subject Sites are being configured. Select from the drop down list. The drop down list references the Data Security Keys Lookup. **System Administration\Security**

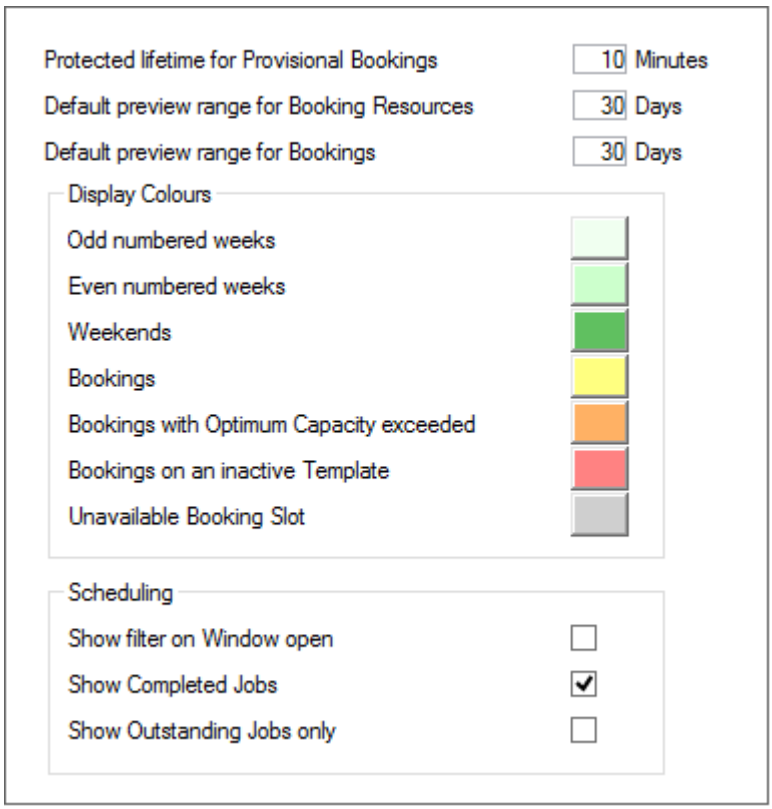
Subtype

The Booking Subtype entity is used to define different categories of appointments within one Booking Type. These subtypes will be available for picking when making a Booking in this Type. This is purely for reporting purposes, the Subtype will have no effect on the availability status of the Booking slots.

Code:	An unique code up to 6 characters
Name:	Up to 50 characters
Notes:	Optional free text field
Order:	You may define a display order for this Booking Type
Default:	One Subtype is checked as the Default to be applied in bookings (which may be changed by selection from other subtypes associated with the Booking Type).

Bookings System Settings

The Bookings System Settings define the defaults for Bookings.



Protected Lifetime for Provisional Bookings:	Enter here the time interval during which a Booking slot will be protected after selection but before 'Confirming' the Booking. Once this time has elapsed then the Booking will not be taken into consideration in availability checks and hence the slot may be taken by a different booking.
Default Preview Range for Booking Resources:	Enter here the default number of days in advance to be displayed in the Resource Activity tab of the Booking Resource screen.
Default Preview Range for Bookings:	Enter here the default number of days in advance to be displayed in the Resource Availability tab of the Booking screen. (0850 - Gang Allocation & Scheduling) This setting will also be used to display the number of days in advance for the Booking Slots on the Scheduling screen.
Display Colours:	You may change the colours assigned to Booking slots in the Resource Activity tab of the Booking Resource screen and the Resource Availability tab of the Booking screen. To change a colour click on the colour box and choose a new colour from the palette.

Scheduling

(0850 - Gang Allocation & Scheduling)

Show filter on Window open:	(Default value is checked) If this option is checked a filter screen will be displayed allowing you to filter which Jobs will be shown in the 'Scheduling' screen. If this option is unchecked the filter screen will not be displayed.
Show Completed Jobs:	(Default value is checked)

	If this option is checked then Jobs at a 'Completed' Job Status will be retrieved for Job Scheduling. If the option is unchecked then Jobs at a 'Completed' status will not be retrieved.
Show Outstanding Jobs only:	(Default value is unchecked) If this option is checked then only Jobs at an 'Outstanding' Job Status will be retrieved for Job Scheduling. If the option is unchecked then Jobs with an 'Outstanding' Job Status will not be retrieved for Job Scheduling.

Customer Services Reports

The Customer Services reports are provided in three broad categories:

Analysis reports, which provide details of the resolution, or progression of Enquiries.

Breakdown Reports on page 114, which look at all Enquiries and provide simple numerical information of the types of Enquiries received.

Period Summary Report on page 114 which provides a 'balance sheet' of enquiries received and Enquiries Resolved in the specified Period.

Resolution Analysis

Provides a simple count of Enquiries resolved (that is, Enquiries which carry a Status which is not 'Outstanding') between the selected dates. The analysis is broken down by Service and Subject, for each of the selected Classifications.

Enquiry Status Analysis

Provides the number of Enquiries at each of the 'live' Statuses (that is, those that are 'Outstanding'), together with an analysis of the whether these are 'Early' or 'Late'. This is based on the Follow-up period that is applied to the Enquiry with the Status.

'Early' Enquiries have progressed to the next Status before the 'Follow up by' date.

'Late' Enquiries have progressed after the 'Follow up by' date, or have not progressed at all (in which case the number of days shown is the number of days since that status was applied).

Note: Only Enquiries that have two or more entries in the Status Log can be included in this report. This report generates values based on how often a particular Status has been used in an Enquiry so it is possible to have a Total higher than the actual number of Enquiries assigned to a specific Action Officer. E.g. if there are 2 Enquiries assigned to a particular Action Officer, the report may not display 2 records. One Enquiry may have gone through 5 Statuses and the other may have gone through 2 Statuses so the report total would then say 7.

Enquiry Attribute Report

(CS - Extended Attributes module)

Use the Attribute field, under the grey line at the bottom of the form, to define the Attribute Type on which to report.

Use the remainder of the form (above the grey line) to limit the report by any of the parameters shown.

The Number, Text, Date and Pick field refer to the user-defined attributes, and making a selection in any of these fields will release the adjacent field for the entry of a value.

See '**Attrib button** on page 79' for information on how Attributes are set against Enquiries.

Commitment Analysis

(CS - Commitment Tracking module)

Provides the number of Enquiries in each Commitment, together with an analysis of the whether these are 'Early' or 'Late'. This is based on the Follow-up period that is applied to the Commitment in the Commitment Lookup.

'Early' Commitments have a 'Resolved' date entered that is earlier than the Target date.

'Late' Enquiries have a 'Resolved' date that is later than the 'Target' date, or have not yet been resolved.

Note: The number of days shown in the report is calendar days (i.e. weekends and non-working days are not excluded), regardless of whether the Follow Up applied in the Commitment was for Working Days or not.

Breakdown Reports

Breakdown reports provide numbers by Service and Subject (Problem Breakdown Report), by Category, Service and Subject (Category Breakdown Report) or by Work Group, Service and Subject (Work Group Breakdown Report). In each case the numbers are given in each Classification, and in total.

The 'Classification From' and 'To' fields must be completed. Select from the drop down list. The drop down list references the **Classification Lookup**.

The Lower portion of the filter form (apart from the Report Level field) will be inactive if 'Enquiries' is selected in the 'Count' field. With 'Enquiries' selected, the numbers in the report will refer to Enquiries

If 'Comments' is selected then the fields that reference the Customer details become available and can be used to refine the filter. With 'Comments' selected, the numbers in the report will refer to Customers.

Note: Since a Customer may raise several Enquiries, and an Enquiry may be raised by several Customers, the 'Count' field selection may affect the results of the report.

Period Summary Report

The period Summary Report will provide figures in each period for the number of Enquiries raised in each period. These are shown as:

1. Outstanding Enquiries brought forward from the last period
2. Numbers of enquiries raised in the period for each Classification.
3. Total number of Enquiries resolved in the period
4. A balance of Outstanding Enquiries to be carried forward to next period.

Bookings Resource Ticket

The Bookings Resource Ticket produces a list of Bookings and available Resource slots.

Enquiry Trace forms for associated Enquiries can be optionally printed.

Customer Services Utilities

The Customer Services Utilities allow batch functions to be carried out.

Import Contacts

The Import Contacts utility allows file to be imported into the Contact library.

To import the file, select the file from the "Contact Import File" pick list, or enter the full path and file name. Select 'Tab Separated' or Comma Separated' from the "Import File Type" drop down list.

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

Subject Site Batch

The Subject Site Batch utility allows the batch allocation of an Action Officer, and (where the Bookings Module is present) a Booking Type, to Sites and Subjects. This will override the Action Officer, and the Booking Type, set for the Subject (entered in the Enquiry Subject lookup), based on the Site selected in the Enquiry.

Operation:	Select from:
	'Create and Update' - Creates new Subject Site records as well as updating existing ones
	'Update' - Only updates existing Subject Site records
	'Remove' - Removes existing Subject Site records

Use the upper part of the form to determine whether the allocation is for an Action officer, or a Booking Type (or both) by checking, or unchecking the boxes. Only checked fields are available for selection of an Action Officer, and / or a Booking Type.

Use the filter options in the lower part of the form to define the Type of Service, Enquiry Subject and range of Sites for which this Officer has responsibility, or which will carry the Booking Type.

Click OK to run the batch. A Preview will be displayed listing the Subject/Sites that will be assigned to this Officer. Save the Preview to assign the Subject/Sites.

The batch may be run several times for the same Officer or Booking Type until all the appropriate Subject/Sites have been allocated.

Enquiry Batch Update

The Enquiry Batch Update provides a utility for updating the Status of a selection of Enquiries or reassigning a selection of Enquiries without altering their Status.

The top part of the form provides filter options for the selection of the Enquiries that are to be updated.

The lower part of the form, under the grey line, sets the new Enquiry Status for these Enquiries or reassigns the enquiries to a new Action Officer. You may leave the New Officer field blank in order to update the Status without reassigning the Enquiry to a new Action Officer. A default may be set for this field in the **Customer Services System Settings** on page 91. You may leave the

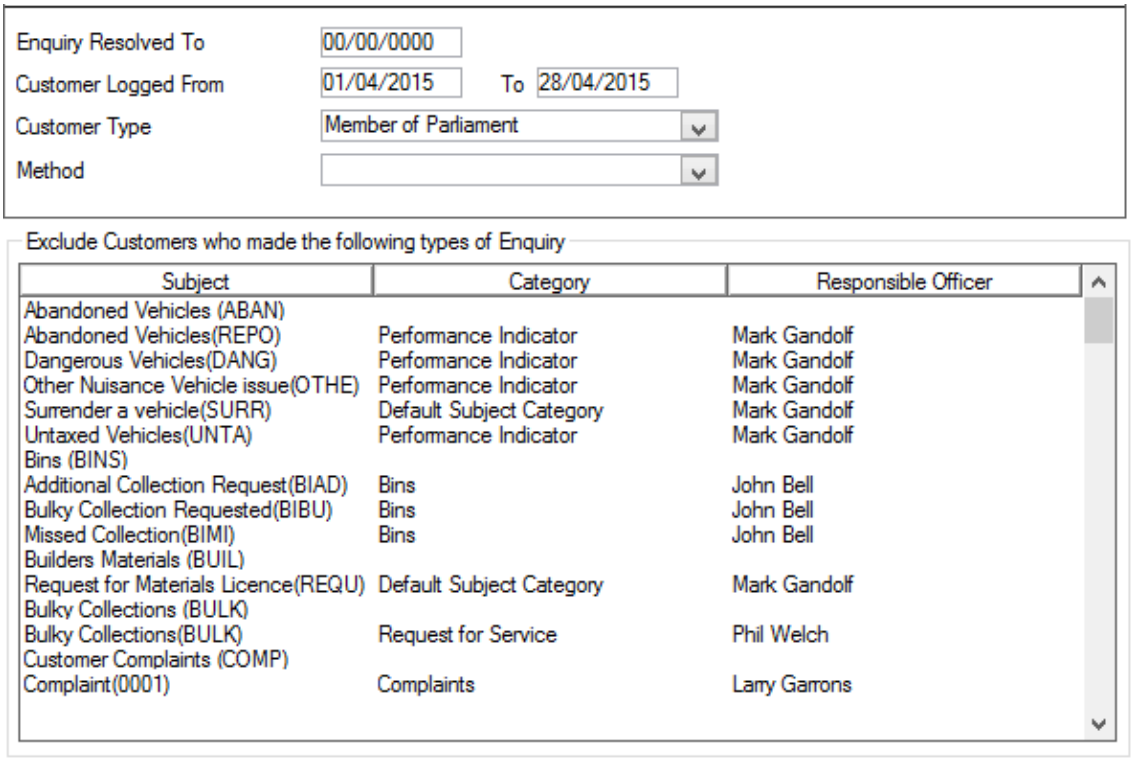
Enquiry Status field blank in order to reassign the Enquiry to a new Action Officer without altering its status. But either a New Enquiry Status or a New Action Officer is required.

Click on OK to display a Preview of the Enquiries which will be updated, with their current Status. Save the Preview to update the Status of all the listed Enquiries.

Clear Customer Details

The Clear Customer Details utility will clear the Customer Title, Forename, Address, Telephone Number, Alternate Telephone Number, Fax Number and Email Address from all selected records. It will replace Surname of the Customer with the date Customer Details were cleared and the user who cleared them.

Note: This utility works only for resolved enquiries.



Use the following fields to define the Enquiries that will have Customer details removed:

Enquiry resolved to:	A date must be entered in this field. This will reference the effective date of the resolving Status.
Customer logged from / to	An optional field in which you may additionally restrict the Customer based on the date on which the Customer was logged (so that an Enquiry with several Customers may retain the later Customers while the earlier ones are removed). If the field is left blank all Customers associated with selected Enquiries will be removed.
Customer Type:	You may select a Customer Type. The drop down list references the Customer Type Lookup
Method:	You may select a Method. The drop down list references the Method Lookup.

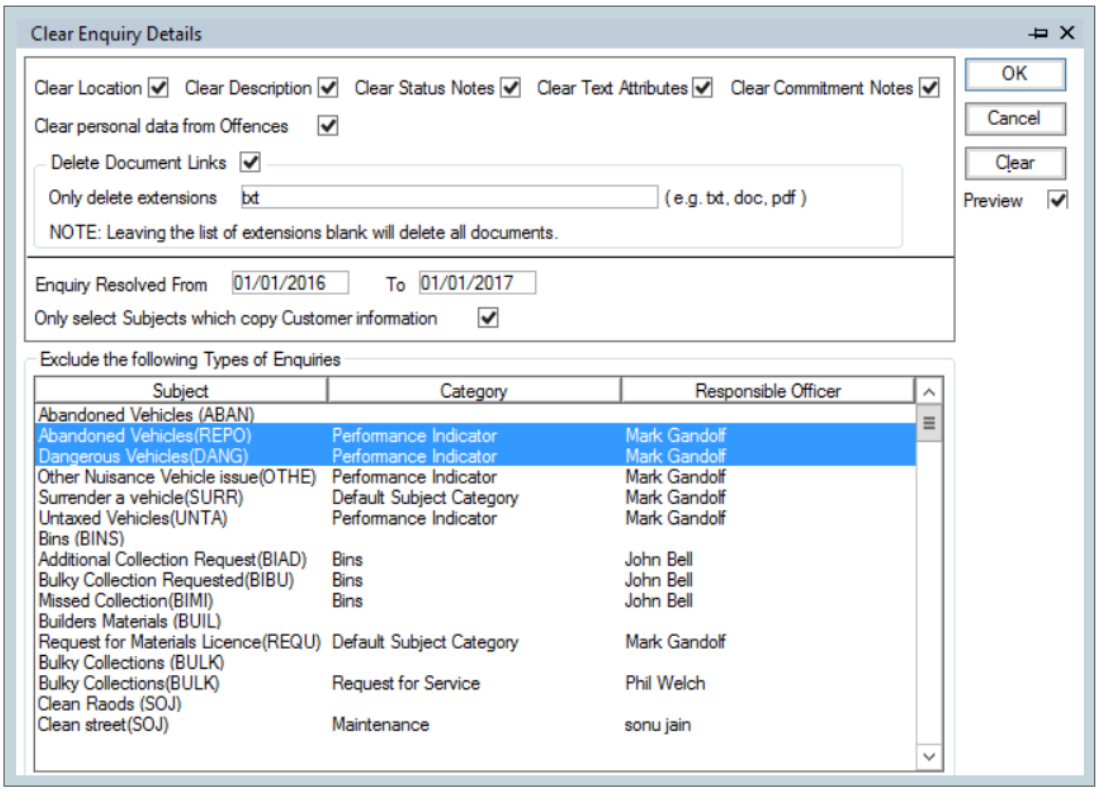
Exclude Customers who	You may select a Service and Subject by clicking on it in the list. Clicking on another Service/Subject will add it to the selection. Click on a selected Service/Subject to deselect it. All selected rows will be highlighted, indicating that all Enquiries referencing these Service/Subjects will retain their Customer details when the batch is run and saved.

Click on OK to run the utility. Click on 'Save' in the preview window to make the changes to the selected Customers on the selected Enquiries.

Clear Enquiry Details

The Clear Enquiry Details utility will allow to clear the Enquiry Location, Description, Text Attributes, linked Documents, Status Notes, Commitment Notes and personal details of linked offences from all selected records and replace Contact with the date Enquiry details were cleared and the user who cleared them. It will additionally remove the Telephone Number, Alternate Telephone Number, Fax Number and Email Address from all selected records.

Note: This utility works only for resolved enquiries.



Use the following fields to define the Enquiry details that will be removed:

Clear Location:	Check to clear Location.
Clear Description:	Check to clear Description.
Clear Status Notes:	Check to clear Status Notes.
Clear Commitment Notes:	Check to clear Enquiry Commitment Notes.

Clear Text Attribute:	Check to clear text from Text Operational Attributes.
Clear personal data from Offences:	Check to clear personal information of linked offence with Enquiry.
Delete Document Links:	Check to delete Document Links and the actual associated documents. Documents will only be deleted if the Document Store is set to 'Folder'.
Only delete extensions:	If this is blank then all links and documents are deleted. If extensions are specified then only documents (and links) with those extensions are deleted, other document links and their documents would be retained.

Use the following fields to define the Enquiries whose details will be removed:

Enquiry Resolved from:	Optional date to select the Enquiries from that date.
Enquiry resolved to:	A date must be entered in this field. This will reference the effective date of the resolving Status.
Only select Subjects which	Checked by default. Leave the box checked to select only those Enquiries that copied the Location and Contact information from the Customer details. If the box is unchecked, Contact details will be removed from all selected Enquiries
Exclude the Enquiries:	You may select a Service and Subject by clicking on it in the list. Clicking on another Service/Subject will add it to the selection. Click on a selected Service/Subject to deselect it. All selected rows will be highlighted, indicating that all Enquiries referencing these Service/Subjects will retain their Location and Contact details when the batch is run and saved.

Click on OK to run the utility. Click on 'Save' in the preview window to make the changes to the Contact entries on the selected Enquiries.