Location Intelligence
Infrastructure Asset Management

Confirm®

Maintenance Management

v26.30a.AM

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October 02, 2026

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Maintenance Management

The Maintenance Management folder contains the utilities and screens to perform maintenance actions to Assets. These actions can be adhoc (non Routine), part of Cyclic Regimes or annual Routine Maintenance.

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Job

A Job will define an item of Non-Routine or Cyclic work.

It will:

- define the Site and Plot where the work is to be carried out,
- give related details such a Cost Code and Customer,
- establish a time-scale for the work to be carried out,
- have a life cycle determined in stages or Statuses,
- be made up of one or more SOR items detailing the work.

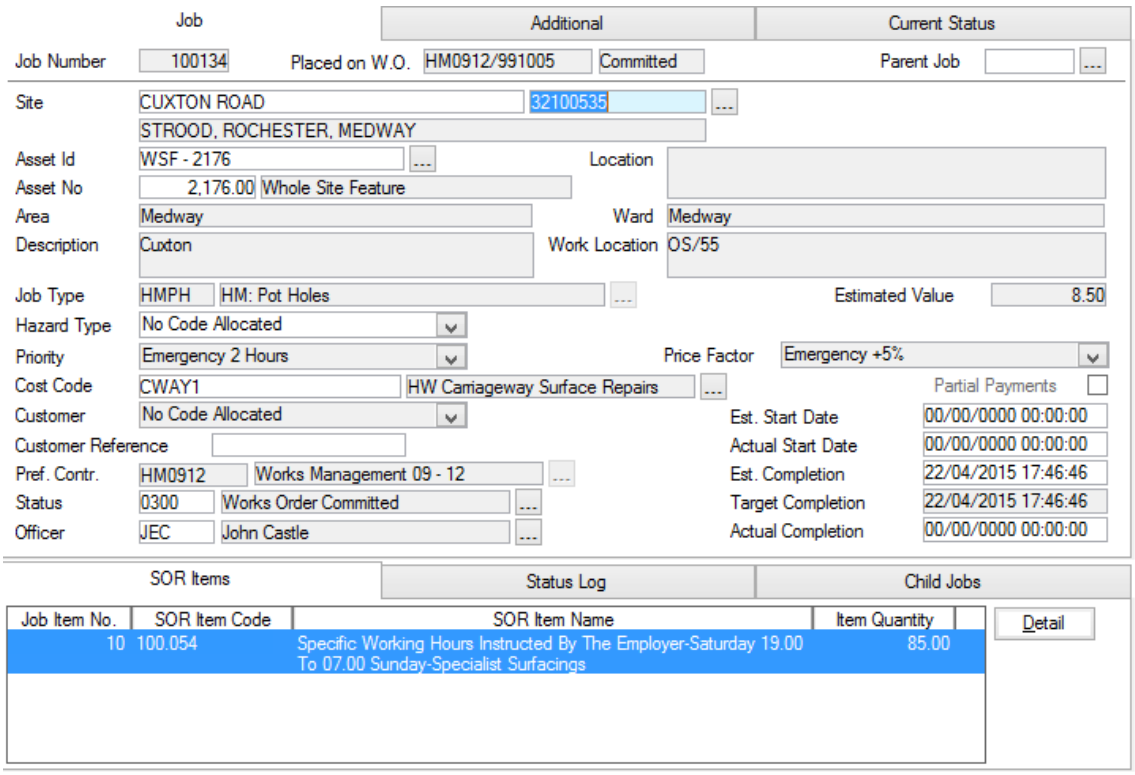
It may also be assigned to a 'Preferred Contract', thus derive an Estimated Value from the Contract prices. However, a Job need not be raised under any particular Contract.

A Job can be reported on, in various ways. Batch tools are available to produce numbers of Jobs at once, to advance the Status of Jobs, and to archive Jobs

In order to commit a Job, it must be put onto a Non Routine Works Order, under a particular Contract.

Job

The Job form carries information on a series of tabs. The Job tab is uppermost when the form is first displayed.



The Job tab carries the specific details for the Job - the Site, Plot Number and details of the work and location for the Job.

Job Number: When creating a new Job, leave this field blank so that Confirm can assign the next available number, from the Work Group Seed numbers when it is saved.

Job Seed numbers are set in the Job Seed Number Lookup.

Asset Maintenance\Maintenance Lookups

To select an existing Job, enter the Job Number then tab out of the field.

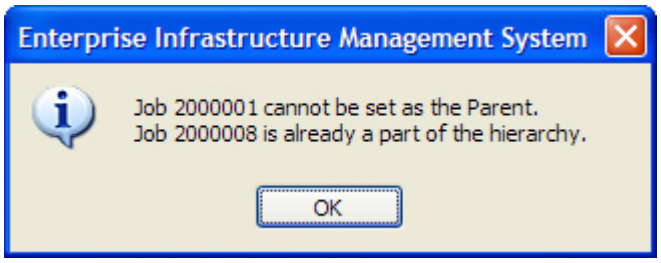
Placed on W.O.: The first part of this field will remain blank until the Job is placed on a Works Order and Committed. Once the Order is Committed the second part of the field will change to 'Committed'.

Parent Job: (0970 - CM Works Precedence)

The Parent Job field allows a hierarchy of Jobs to be created where many individual Jobs may be logged beneath a single over-arching Job.

To assign a Parent (over-arching) Job, simply enter the Parent Job's reference in this field, or use the Pick button to filter Jobs to find the appropriate Parent. A Parent Job may also have a Parent, hence any particular hierarchy of Jobs may be created.

A Parent Job reference will be rejected if the Job Number does not exist or if the Current Job is already a Parent within the requested Parent's hierarchy - in other words you cannot create a circular chain of Parent Jobs. If a circular chain is detected then an error similar to the following will be displayed:



To remove a Job's Parent, clear the Parent Job field and save the record.

The **Child Jobs tab** on page 17 lists any Jobs whose Parent is the currently selected Job.

Site: Type in a Site name or Code, or use the pick button to select a Site from the Site Register.

Site Register

Locality, Town and County will be displayed for the selected Site and cannot be edited.

Feature Id: Optionally enter a Feature Id to pick the Feature for this Job or use the pick button to select a Feature on the entered Site.

Plot Number: Type in a Plot number to select a Feature. If a Feature was selected using the pick button on the Feature Id field, this will already be populated.

Location: The text entered in the Location field of the Feature will be automatically entered here and is not editable.

Area: The Area assigned to the current Feature will be displayed, this cannot be edited.

Ward: The Ward assigned to the current Feature will be displayed, this cannot be edited.

Description: A free text field into which any explanation of the work can be entered. (Optional)

Note: Jobs can be prevented from Committal if the Description is blank by ticking the Job System Setting 'Prevent Committal of Jobs with No Description'

Asset Maintenance\Maintenance Lookups

Work Location: A free text field into which any location details can be entered. (Optional)

Note: Jobs raised on the 'Whole Site Feature Type' can be prevented from Committal if the Work Location is blank by ticking the Job System Setting 'Prevent Committal of Jobs on Whole Site Feature with No Location'

Asset Maintenance\Maintenance Lookups

Job Type: This field will default to the Job Type specified in the Job System Settings when the screen is opened and a new Job is being entered.

Asset Maintenance\Maintenance Lookups

This can be changed if not applicable for the current Job. The pick list references the Job Type lookup.

Asset Maintenance\Maintenance Lookups

This field may have been set to a different default depending on where it was created from e.g. Enquiry Subject Job, Defect Type, Work Type or Maintenance Regime.

Estimated Value: The Estimated Value will derive from the Target Rate entered in the SOR Item library (if one is entered) or if Preferred Contract is entered, from the Contract Rates.

If no Target Rates are present, and no Preferred Contract is entered, the Estimated Value will be blank.

Hazard Type: This field will default to the Hazard Type associated with the Job Type specified in the Job System Settings when the screen is opened and a new Job is being entered.

Changing the Job Type will set the Hazard Type to the appropriate default value.

The Hazard Type can also be changed directly if not applicable for the current Job.

Priority: This field will default from the Priority set in the General System Settings.

System Administration\Security

The default can be changed if a different Priority is required for the Job being entered. Use the drop down list to alter the Priority.

Asset Maintenance\Maintenance Lookups

Price Factor: The default Price Factor may be derived in one of two ways:

Where a Price Factor Matrix is in place, the default will derive from the combination of the Feature Smart Value, and the Job Priority. The Price Factor Matrix is created for the Feature Group.

Asset Register\Feature Lookups

Where no Price Factor Matrix has been set up, the default will be set by the Priority.

Asset Maintenance\Maintenance Lookups

Use the drop down list to alter the Price Factor if necessary.

Asset Maintenance\Maintenance Lookups

Cost Code: Select a Cost Code which will be used as a default for new Job Items. Leave this blank if the Job Item SOR is to be derived from the Feature or overriding Cost Code.

Asset Register\Feature

The Cost Code pick list references the Cost Code Lookup.

Site Register\Site Lookups\Operational Lookups

Partial Payment: Check this to tell Confirm that Partial Payment can be made for this Job.

Setting Partial Payment on the Job will not set the 'Completed' flag (on the Payment Job in the Payment Batch) until the full value of the work has been paid. The Job can therefore be placed on several Payment Batches - each to pay off partial cost of the work.

Note: The 'Complete' flag on the Payment Job can be altered at the payment stage - see "**Payment Processing - Payment Job**"

Customer: This field will default to the Customer for the Feature that has been selected. Use the drop down list to alter this if necessary.

Note: This field is also seen on the Additional tab, and is editable on either tab.

Cust Ref: An optional free text field into which a reference can be entered. This can be used as a grouping mechanism to later report on a series of Jobs which all carry the same reference.

Pref Contr: Optionally enter a Contract which will apply an 'Estimated Value' to the Job, and replace any value applied from the SOR Item Target Rate. When the Job is Committed, the Preferred Contract field will be updated to match the Contract that the Order was Committed for.

Asset Maintenance\SOR Item

Note: This field is also seen on the Additional tab, and is editable on either tab.

Status: When Jobs are progressed, the Status is updated. The first Status a Job acquires defaults from the selected Priority, and is editable. Subsequent Statuses may be set by the system because of certain actions carried out (Committal for instance), by a Batch Status update, or by manually altering the Status for this single Job.

Note: This field is also seen on the Current Status tab, and is editable on either tab.

Officer: Enter an Action Officer who will be responsible for the progress of the Job. The Action Officer linked with the User who is currently logged in will be entered by default. The Officer may be edited.

Note: This field is also seen on the Current Status tab, and is editable on either tab.

Job Dates

Please refer to the Additional tab for details on these dates.

Additional tab

Click on the Additional tab to display the Additional details portion of the form:

Job Number:	Will be copied from the Job tab
Customer:	The default Customer for the Feature will already be entered here. Use the Drop-down list to alter this if necessary. **Note:** This field is also seen on the Job tab, and is editable on either tab.
Pref. Contract:	Entering a Contract Code will apply an Estimated Value to the Job, and supersede a value applied from SOR Item target rate. (Optional) **Note:** This field is also seen on the Job tab, and is editable on either tab.
Contract Area:	This is derived from the Contract Area for the selected Feature. It cannot be altered. **Note:** The Contract Area for the Feature may not be covered by the Contract you have entered as the Preferred Contract. This will not prevent the Job displaying an Estimated Value, but it will prevent the Job from coming onto an Order for this Contact
Traffic Management:	This field will default from the Job Type 'Default Traffic Management' setting but can be changed for this Job. This drop down references the Traffic Management lookup. **Street Works\Street Works Lookups**
Workstream:	The Workstream field allows Jobs to be placed onto a Workstream, which can be used for the grouping of Jobs when scheduling in ConfirmWorkzone.

Job Dates

Entered:	The date on which this Job was raised. Entered automatically as today's date - but can be amended
Est. Start Date:	You may enter an Estimated Start Date here from which the Estimated Completion will be calculated in preference to the Entered Date. Using this field will ensure that the Estimated Completion date accurately reflects the date on which the work was started rather than the date on which the Job was entered into Confirm. **Note:** This field is also seen on the Job tab, and is editable on either tab.
Actual Start Date:	Enter the date to record when the Job actually started. This will be automatically set if a Job Status is selected with the 'In Progress' setting ticked. **Asset Maintenance\Maintenance Lookups**
Est. Completion:	Estimated Completion is automatically calculated in three different ways:

- The default is for Estimated Completion to be calculated on committal of the Job, based on the committal date and the Follow Up set on the Priority. In this case the Est. Completion field remains blank until the Job is committed.
- If the Job System Settings 'Set Est. Completion Date When Job Raised' is flagged, then an Estimated Completion is calculated based on the 'Logged date' and the Follow Up set on the Priority. In this case the Est. Completion field is populated as soon as the Job form is opened.

Maintenance Management\Contract Management Lookups

- If a Start Date is entered for the Job, then regardless of Systems Settings, or Committal date, the Est. Completion will be based on the Start Date and the Follow Up set on the Priority.

An Estimated Completion may also be directly entered, and will remain unaltered when the Job is committed.

Note: This field is also seen on the Job tab, and is editable on either tab.

Target Completion: This date is intended for supplying an indication of when the Contractor should aim to have the Job completed by. This date is disabled once the Job has been Committed and is initially set to be the same as the Est. Completion date. This is also shown on the Job tab.

Actual Completion: Will be entered automatically by the system as the date on which the Job achieves a Status that has the 'Complete' flag set. Statuses are set up in the Status library.

Asset Maintenance\Maintenance Lookups

Note: This field is also seen on the Job tab.

Liability Date: A Liability date will be calculated from the Actual Completion date (when one is entered for this Job), based on the Liability follow up set against the Price Factor for the Contract, if one is set.

Contract Preparation\Contracts - Price Factor tab

Geography

Easting, Northing & Altitude: Optional fields giving a geographical reference for the location of the work. These values will be used to plot the location of the Job on a map when linked with the mapping module.

External System

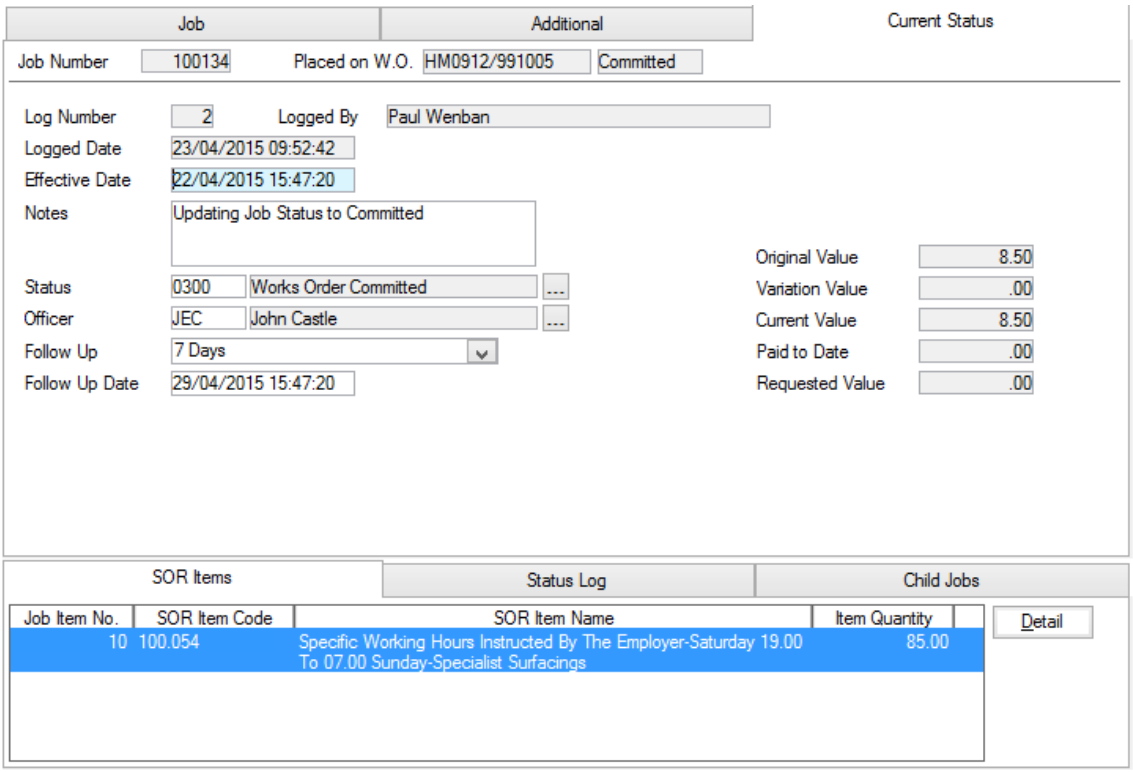
Name, Order Reference & Job Reference: Optional fields giving details of a Jobs Order and Job reference within another external system. The name of that external system is also displayed.

Note: These fields are only displayed if Module 1620 (Contractor Access Agent) is enabled.

Current Status tab

Click on the Current Status tab to display the Current Status portion of the form:

Note: This tab has all the compulsory fields completed from defaults. It is not therefore necessary to access it unless you want to change the defaults.



The Current Status tab gives details of the current stage of the Job. The stages a Job may pass through are defined as Statuses.

Asset Management\Maintenance Lookups

Each Status is assigned a log number, is logged by a user, and assigned to an Action Officer.

Job Number:	Copied from the Job Tab
Log Number:	A consecutive number will be assigned by Confirm to each status given to this Job.
Logged:	The date and time this Status is logged. This is set when the new status is entered and cannot be altered.
Logged by:	The User logging the Status. This is automatically entered from User information and cannot be altered.
Description:	Text notes on the current status or change of status. (Optional)
Status:	The first Status a Job acquires defaults from Priority, and is editable. Subsequent Statuses may be set by the system because of certain actions carried out (committal for instance), by a Batch Status update, or by manually altering the status for this single Job. **Note:** This field is also seen on the Job tab, and is editable on either tab.
Officer:	The Action Officer responsible for the progress of the Job. The Action Officer linked with the User who is currently logged in will be entered by default. The Officer may be edited **Note:** This field is also seen on the Job tab, and is editable on either tab.

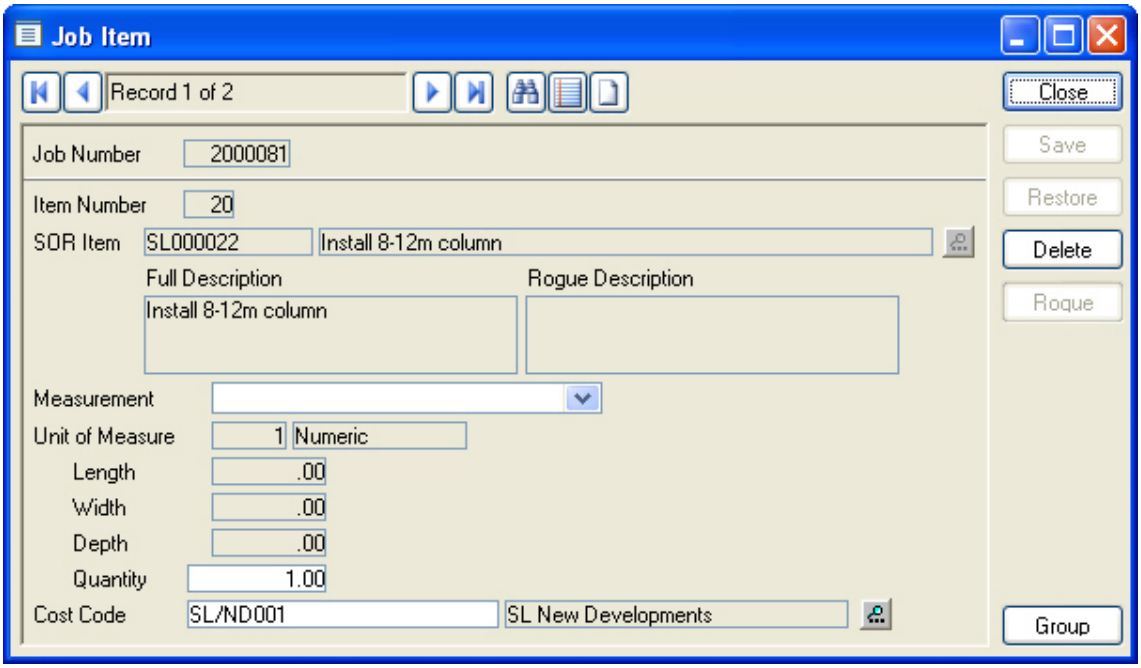
Effective Date:	Today's date is entered by default and can be altered. Effective date provides the basis for the follow up date
Follow Up:	Default, derived from the Follow up set for the Status in the Status library, is already entered. Use the Drop-down list to alter this if necessary.
Follow Up Date:	A date calculated on the Follow Up specified above, and the effective date as set in the Effective date field.
Original Value:	This is the sum of the Original Values found on the Order Item screen for the Order Job.
Variation Value:	This is the sum of the difference between the New Value and the Old Value for all committed Variation Items on the Job.
Current Value:	This is the sum of the Current Values found on the Order Item screen for the Order Job.
Paid to Date:	This is the sum of all committed Payment Items for the Job.
Requested Value:	This is the sum of all uncommitted Payment Request Items for the Job. Any cancelled uncommitted Payment Requests are not included. Cancelled Payment Requests are those which are at a Request Status of 'Closed' but not 'Authorised'.

Note: These values are calculated by Confirm when a Job is selected and are not actual columns in the database. Exporting the data from the Job screen will not export these values.

SOR Item tab

The SOR Item tab displays the Job Item form, which is used to enter the SOR(s) that will make up this Job.

Click on the SOR Items tab, and then on the Detail button to access the Job Item form:



Job Number:	Copied from the Job tab

Item Number:	Items added to a Job are automatically numbered from 10, in increments of 10. These numbers can be overwritten.
SOR Item:	Enter an SOR code or use the pick button. The pick list references the SOR Item library. The SOR Items available for selection are restricted by the Contractor and Price Factor specified on Job. **Asset Maintenance\SOR Item**
Full Description:	The SOR Item full description will be entered here, copied from the SOR Item library.
Rogue Description:	Only available when a 'rogue' SOR Item is entered above. A 'rogue' SOR is one that uses a Unit of Measure that does not have the Rate Uplift flag checked. This is usually an Item worth a Pound (£) referencing Pound (£) as the Unit of Measure. When the appropriate SOR is entered, the Rogue Description box becomes available and a description of the work can (optionally) be entered. See also " **Rogue button** on page 16"
Measurement:	The drop down lists all Measurement Types that are referenced by the same Unit of Measure as the selected SOR. To enter the Feature quantity in the Quantity field: - select the Measurement Type the Feature uses. This will automatically enter the Feature measurement into the Quantity field below. To allow a free entry in the Quantity field: - leave the Measurement field blank **Note:** The Measurement field is only appropriate for Measurement Types used by the Feature. If you select an SOR measured by the Hour, for instance, there is unlikely to be an appropriate Measurement Type recorded against the Feature (one using Hours as the Unit of Measure), and the Quantity field will become unavailable, with Zero quantity entered.
Unit Of Measure:	Displays the 'Price Per' quantity and Unit of Measure as recorded in the SOR Item library **Asset Maintenance\SOR Item**
Length, Width, Depth.	Only available for Units of Measure flagged as being measured in this way in the Unit of Measure lookup. **Asset Register\Feature Lookups** If the fields are available, they must be used to enter the required quantity.
Quantity:	Is unavailable if: • The quantity is made up of Length, Width or Depth. • An entry has been made in the Measurement field above. If the field is available, enter the required quantity referencing the Unit of Measure displayed in the Unit of Measure field above. **Note:** If you find this field unavailable, and wish to make an entry, check that the Measurement field is blank. If it is not, delete out whatever is in there and you will find the Quantity field becomes available.
Cost Code:	Default - from the Job (which in turn, if nothing was entered, will be defaulting from the overriding Cost Code, or the Feature).

You may enter a Cost Code here, which will apply only to this Item, and will take precedence over any other Cost Code entered for the Job or Feature.

The ability to set different Cost Codes on Job Items can be specifically disallowed by setting the Cost Code Protection settings on the Job System Settings screen.

Asset Maintenance\Job System Settings

Rogue button

Only available for 'rogue' SOR Items (see: "Rogue Description" above).

Clicking on the button displays the Rogue Item filter which can be used to help automatically set the Rogue description based on another SOR.

Base On SOR Item:	Enter an SOR on which to base the Rogue Item Desc. The SOR Items available for selection are restricted by the Contractor and Price Factor specified on Job. Selecting an SOR here will enter the SOR's Full Description in the field below. (Optional)
Rogue Item Desc:	Amend the description associated with the SOR entered above, or enter a description if no SOR has been selected. (Optional)
Calculation:	A price calculation may be entered here using standard formula notation. The result is displayed in the Quantity field. (Optional)
Copy Calculation:	Defaults to ticked. When ticked this will enter the calculation details in brackets after the Rogue Description.
Result Description:	Shows the description that will be displayed for the SOR, and the Calculation if the 'Copy Calculation' box is checked.

Note: The Rogue Item field on the Job Item form can be directly completed without reference to this form.

Group button

The Group button allows you to use a Group of SORs without having to add each SOR separately to the Job.

Only the SOR Groups with atleast one SOR Item included in the BOQ of Contractor and Price Factor can be selected. To use a Group, enter (or select from the pick list) the SOR Group code. A quantity may be entered, which will be applied to all the SORs in the Group. Leave the Quantity field blank to return to the Job Item form and add quantities individually to each Item.

SOR Groups are created and stored in the SOR Group Lookup.

Asset Maintenance\SOR Item lookups

Click Ok to add the items in the selected Group to the Job.

Status Log tab

The Status Log tab displays all the Statuses the Job has held, with details of date and Action Officer.

The list may be viewed on the Status tab, with the current Status at the top and the others listed in reverse date order underneath.

The log may be viewed in more detail by clicking on the Detail button.

Each Status is held as a separate record and gives the date, the user who was logged in, any notes made at the time, the Action Officer, the Follow Up, and the date generated from the Follow Up.

Child Jobs tab

(0970 - CM Works Precedence)

The Child Jobs tab lists all the Jobs that are 'children' of the current Job record.

The Child Jobs can be opened by double-clicking on the record or using the Detail button with a Child Job selected.

Using the 'Batch' button will allow you to assign multiple Jobs as children of the currently selected Job record. Clicking the 'Batch' button allows you to filter for existing Jobs, when the filter has been submitted and the preview saved the Parent/Child associations will be applied. The batch process can only be used to add Child Jobs and is not designed to remove associations. The 'Batch' button will not be available if the current Job record is an Archived Job.

Buttons

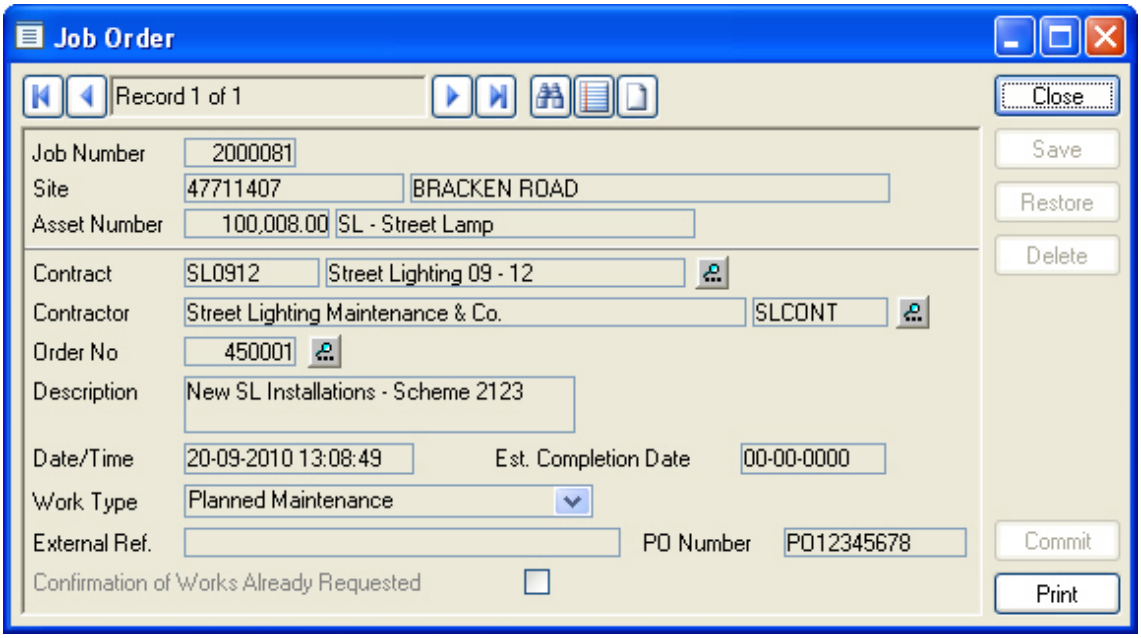
The following buttons are available from the Job screen:

Order button

(Contract Management module)

For Committed Jobs, the Order button displays the Job Order with the details of the Order which contains the Job.

For Uncommitted Jobs, it displays any Orders containing the Job. It also allows the user to place this Job on a new or existing Order, and optionally to Commit the Order.



Job Number, Site and Plot Number are filled in automatically from the Job.

Contract: Enter a code for the Contract under which you want to order this work. It will only be possible to select Contracts which:

- Cover the Contract Area which contain the Site and Feature specified in the Job
- Have the SORs specified on the Job priced on the BOQs for the Contract for the Jobs Price Factor.
- Are current, i.e. the date of the Job falls between the start and finish date of the Contract.

If the Preferred Contract from the Job fulfils these criteria, the Contract will be automatically set to the Preferred Contract.

Contractor:	Enter a Contractor for Non-Term Contracts (this choice is only available if the Non-Term Contracts module is active) For awarded Contracts, the field will automatically enter the Contractor to whom the Contract is awarded and cannot be altered.
Order Number:	To add this Job to an existing (uncommitted) Order: enter the number of the Order or use the pick button (only uncommitted orders will be displayed in the Lookup) To create a new order: Leave the field blank, the system will assign the next available seed number in the Work Group to the order.
Description:	An Order Header description - which therefore must be relevant to all the Jobs on the order and not just this one.
Date/Time:	The current date and time, which can be amended
Set Completion:	Enter an estimated completion for the whole order (not just this Job) (Optional)
Work Type:	Select from the drop-down. The drop down list references the Work Type library. Maintenance Management\Contract Management Lookups
External Ref:	An optional free text field where any relevant reference can be entered. This will appear on the order but otherwise does not provide filtering or reporting fields.
PO Number:	This shows the Purchase Order number for the Order. It is provided for information purposes only and cannot be changed. If the Order has no Purchase Order number this field will not be visible.
Confirmation... :	Check this box to have the words 'Confirmation Only' appear across the top of the Order print-out
Commit button:	Click to commit the Order
Print button:	Click to print the Order

Links button

Provides links to external files. Please see the Systems Fundamentals manual for more information on linking to external data.

Systems Fundamentals\Document Links

Copy button

The Copy button copies the details of an existing Job to a new one. SOR items are copied but the status log is not. Where appropriate, dates are reset. When used on the Order Job screen the copied Job will be placed on the Order automatically.

On the Job screen there are three different Copy options:

- Copy - this creates a new Job with no Parent Job.
- Copy as Child - this creates a new Job with its Parent Job set to the one being copied.
- Copy as Sibling - this creates a new Job with the same Parent Job as the one being copied.

Note: Price Factors will be set to the Priority default

Other button

The Job form carries an Other button. Click on the 'Other' button to display a drop down menu of linked forms, displaying linked information.

The Menu list will vary depending on which modules are available within your version of Confirm.

Menu Option	Description
Variation	(Contract Management module) Click on Variation in the menu list to displays any Variation(s) raised and committed against the Job. Variations cannot be raised by this route. This option is unavailable on uncommitted Jobs, or Jobs that have no linked Variations. This option is unavailable on the Order Job screen.
Fast Variation	The Fast Variation screen allows Variations to be created, edited and committed for the current Job. See **Fast Variation** on page 22.
Request	(Contract Management module) For Jobs already on a Payment Request: - displays the details of the Payment Request that contains this Job. For Jobs not on a Payment Request: - displays a blank Fast Payment Request Form. (See "Payment Processing - Payment Requests" for details on adding a Job to a Payment Request). This option is unavailable if the Job is not committed. This option is unavailable on the Order Job screen.
Retentions & LDs	(Contract Management - Retentions and Liquidated Damages module) The Retentions & LDs option becomes available when a Job is put onto an Order. It displays the Retention and Liquidated Damages details. See **Retentions and Liquidated Damages** on page 51.
Tender	(Contract Management - Non Term Bidding module) Displays the Fast Tender form with the details of the currently displayed Job entered. This option is unavailable on the Order Job screen.
Allocate	See **Gang Allocation** on page 20
Enquiry	(Customer Services Module)

Menu Option	Description
	Displays the Enquiry from which this Job was raised. This option will be unavailable if the Job was not raised through an Enquiry. This option is unavailable on the Order Job screen.
Defect	(Condition Survey module) This launches the Defect screen that displays the Defect(s) linked to the Job. This option is unavailable on the Order Job screen.
Location	(Linear Assets module) Displays the location from in which you may enter a chainage length for the work, and edit the Works Location details.
Precedence	See **Precedence** on page 21. This option is unavailable on the Order Job screen.
Inventory Updates	(Inventory module) Displays the Feature form with the Feature on which the Job is raised displayed in the form. You may edit the Inventory related to the Feature interactively, so that the Inventory Item Start or End date is linked to the Job Est. Completion (and, when the Job is completed, the Actual Completion date), and is updated in line with changes to the Job completion date. You may: • End date existing Inventory Items • Create new Inventory Items • Edit the Attributes of Inventory Items that are created by this Job **Note:** Inventory Items linked to the current Job are indicated by an asterisk (*) next to them in the view. **Note:** Inventory Updates set up in this way will be deleted if Jobs are Archived or cancelled.
Scheduling	(Gang Allocation and Scheduling module) This launches the Gang Allocation and Scheduling screen with the current Job listed and selected for scheduling. This option is unavailable on the Order Job screen.
Monitoring Items	(Performance Monitoring module) This launches the Monitoring Item screen and displays the Monitoring Item(s) linked to the Job. This option is unavailable on the Order Job screen.
Entity History Report	Displays an Entity History Report for all the Historical Log entries associated with this Job attribute record. See '**Entity History Report**' for more information on Entity History Report.

Gang Allocation

(Works Management module)

Displays the Gang Allocation filter for allocating this Job to a Gang.

Enter the required Gang in the Gang field or select from the pick list. The pick list references the **Works Management\Gang** Lookup.

The Hours Required will derive from SMVs, entered in the **Works Management\Cost Detail** library, for the SORs used in this Job.

The Graph button will display the Gang Allocation graph.

See the Works Management manual for details on setting up and using Gangs.

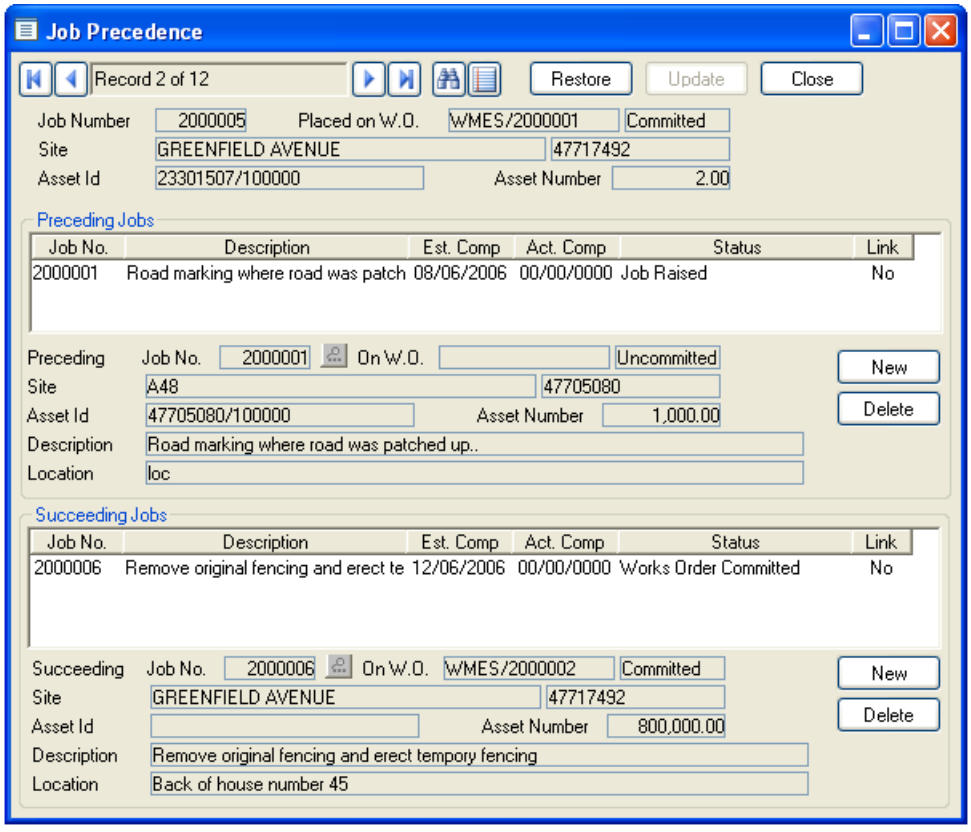
Note: If the Job is not already on a Works Order, one will be created and committed using the Preferred Contract on the Job and the Default Order Header Work Type specified in Contract Management System Settings.

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

Precedence

(Works Precedence module)

This screen allows the order in which Jobs should be carried out to be set. The Job Precedence List shows a list of the Jobs in the order determined by Job Precedence. Setting precedence will also cause a warning to be issued when Jobs with a lower precedence are included on a Works Order before Jobs with higher precedence.



The Job details at the top of the screen reflect the job that is currently displayed in the underlying Job screen and cannot be edited. The direct link to the underlying Job screen means navigating between records on the Job Precedence screen causes the currently displayed Job on the Job screen to also change.

The central portion of the screen shows the Preceding Jobs that should be completed before the current job, and the bottom Succeeding Jobs which should not be started until the current job is complete.

Adding and deleting Jobs

Jobs are added by entering (or selecting from the pick list) a Job number into the Job No field. Click on Update to save the record changes.

Click on New to move down to a new line to enter another Job.

Click on Delete to remove the currently highlighted Job from the list.

Identifying other precedences

The Jobs listed in the Preceding and Succeeding areas show the following Job information: Job No, Description, Estimated and Actual Completion and Current Status. The far right ‘Link’ column shows whether the Job already has a Precedence set, if ‘No’ is shown then that Job is not linked to any other Precedence and if ‘Yes’ then this Job has its own set of Precedences.

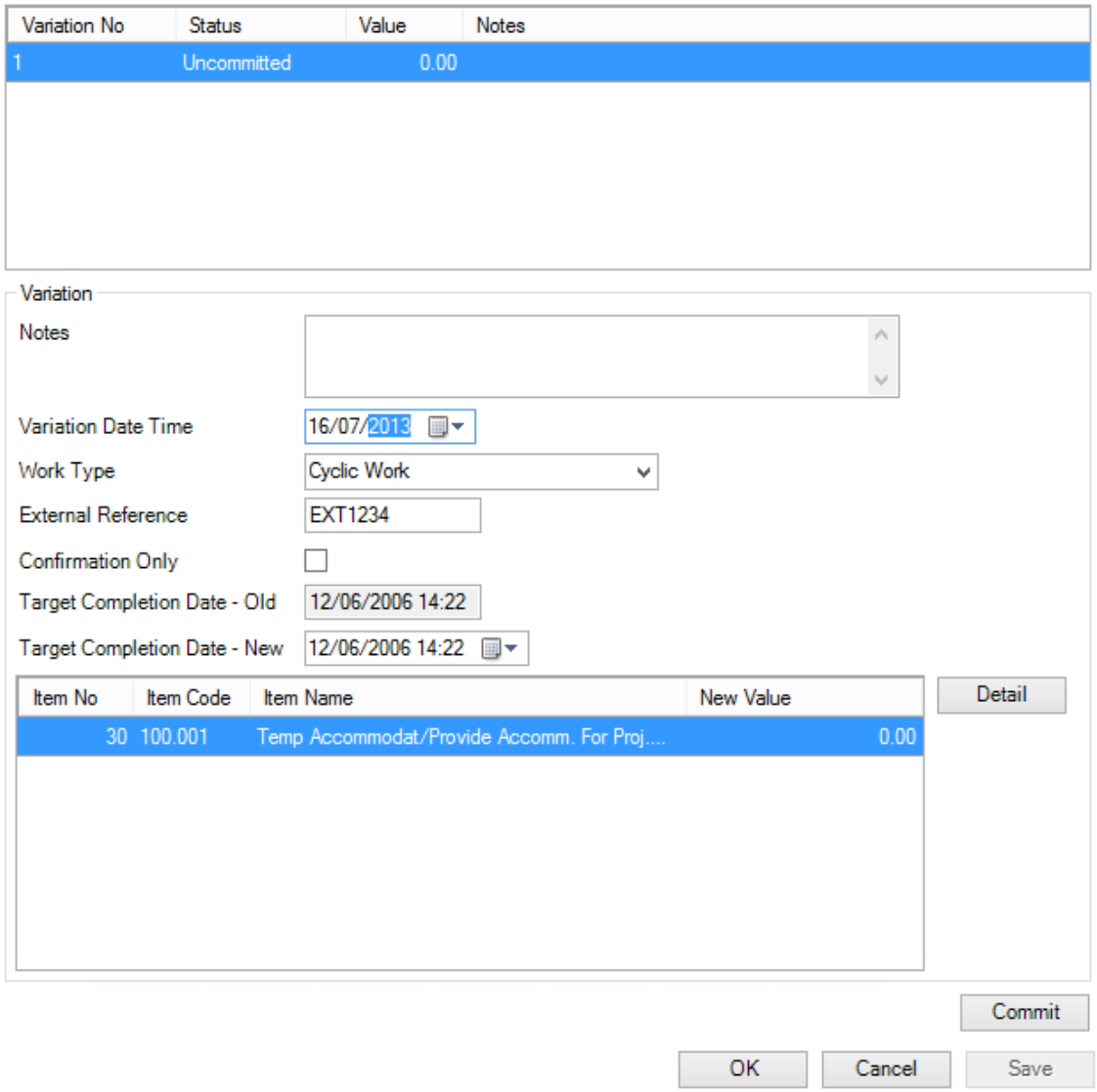
To see the Precedence details for any of the Jobs in the lists double click on that row. This will cause another instance of the Job Precedence screen to be displayed for the selected Job but it will not be possible to add or remove Jobs from here, this can only be done from the screen that was opened directly from the Job.

Fast Variation

Variations are created to alter details of Committed work.

The Fast Variation screen enables the user to:

- View the current Variations associated with a Job.
- Edit a Works Target Completion Date and also vary Order Items.
- Create new Variations with the New button on the toolbar.
- Commit an uncommitted Variation.



Variation List:	Select an existing Variation from the grid to view or edit. Any newly created Variations will be listed here. The Variations will have their Variation Number, Status, Value and Notes shown in the grid. Further details of the highlighted Variation will be displayed beneath the Variation List.
Notes:	An optional, free text field to store notes for the Variation being edited or created.
Variation Date/Time:	The current date and time when the 'New Variation' button is clicked is automatically entered, but can be altered as required.
Work Type:	Select the appropriate Work Type from the drop down list. The drop down list references the Work Type Lookup.
External Reference:	An optional free text field.
Confirmation Only:	Check this to print the words Confirmation Only across the top of the Variation Order print out.
Target Completion Date - Old:	The Old Target Completion Date is taken from the Target Completion Date value on the Job that the Fast Variation screen was launched from. The field can not be edited.

Target Completion Date - New:	The New Target Completion Date can be edited by clicking on the date picker icon and selecting a date or by manually entering a date into the field. Editing of the field is optional. The list at the bottom of the screen shows the Variation Order Items. Existing items can be edited by double-clicking or by selecting and clicking the Detail button. To add a new item click the Detail button and select the New item button on the Variation Item screen.

Click the 'Commit' button to commit the currently highlighted uncommitted Variation. Click the 'Cancel' button to exit, discarding all unsaved changes. Click the 'Save' button to save changes to the currently selected Variation.

Notice button

(Street Works Initiation - 3420)

This button is used with the Initiating Street Works Notices from Jobs functionality. Refer to the **Street Works Initiation from Jobs** help section for more information.

Risks button

Saving a Job directly in Confirm with a Feature or Inventory Item selected carrying an Attribute value flagged for 'Risk Warning' will display the Risk Assessment screen.

The Risk Assessment screen can be opened at any time by selecting the 'Risks' button. Each time the 'Risks' button is selected Confirm will check the Attribute lookups to see if there are any additional assessments to display. This will be done until the Job is 'Archived'. If any 'Risk Warnings' are no longer applicable (removed from the Attribute Values) these will not be removed from the Risk Assessments for this Job.

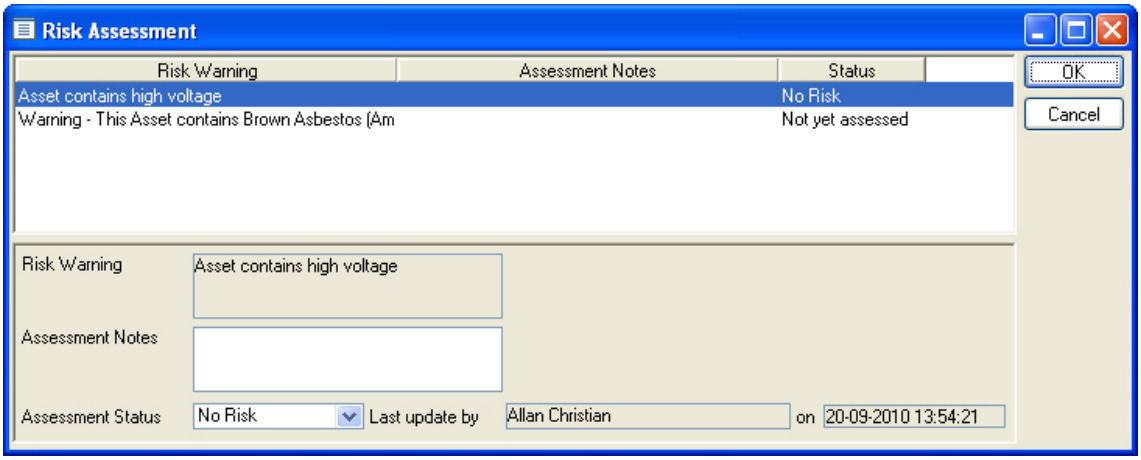
Assessments will only be removed (after warning the User) if the Feature is changed.

Each 'Risk Warning' applicable to the selected Feature or Inventory Item will be listed allowing the User to specify if the warning is applicable for the Job being carried out i.e. The Feature contains a certain Risk but the Job being carried out would not be affecting it.

The presence of Risks will not prevent an Order from being Committed.

Risk Assessments can be printed using the 'Risk Assessments' list option from the Job or Defect screens.

The Risk Assessments screen carries its own User Security option so individual Users can be prevented from Updating assessments.



Risk Warning:	This is populated from the Risk Warning field on the Attribute Value and is not editable. **Asset Register\Feature Lookups\Attribute Type**
Assessment Notes:	Provide Notes to justify/explain the reason for the Assessment Status.
Assessment Status:	Select from: 'Risk' - The Risk Warning is applicable to this Job and the necessary precautions have been taken. 'No Risk' - The Risk Warning does not apply to this Job. 'Not Yet Assessed' - This Risk Warning is outstanding and needs to be assessed - this is the default value.
Last update by... on...:	Displays the name of the User who last updated the Assessment Status or Assessment Notes with the date and time.

Attrib button

(Module 0715 - Job Attributes)

Clicking on the 'Attrib' button displays the Job Attribute screen. Here any Operational Attributes that have been assigned to the selected Job are displayed.

Click Add to display the filter list for selection of the required Attribute. The Attribute will be added to Job Attribute form, with the default value.

Previously added Attributes may be removed (excluding attributes linked with the Job's Hazard Type) by selecting the Attribute and clicking on the 'Remove' button.

Attributes Inherited from Defects

If the Job was raised from a Defect, the will be inherited and placed on the Job.

Updates to the Defect's Attributes will be reflected on the Job's Attributes.

Removing an inherited Defect Attribute from the Job will not remove it from the Defect.

Attributes Inherited from Hazard Awareness

(Module 2310 - Hazard Awareness)

A Job will inherit Attributes from its Hazard Type.

If the Job's Hazard Type is changed, Attributes entered are retained if they are applicable to the new Hazard Type, or if they have been changed from their default value.

Some Attributes may be flagged as 'Must Change Default' on the Operational Attribute Types screen. This has no effect on the creation and editing of Jobs but it is not possible to Commit a Works Order while any of its Jobs have such Attributes still set to the Default Value.

Commit button

The Commit button allows uncommitted Jobs to be committed directly from the Job screen. It will put Job on to an Order and open Works Order Commit - Preview screen.

Access to this button is controlled via a 'Commit Button on Job' Security Option.

Note: For the new Order, the Work Type will be defaulted from 'Default Order Header Work Type" specified on the the Contract Management System Settings screen.

Priced Job Reports

Priced Job List

The Priced Job List shows the selected Jobs as a list, with the Jobs displayed in rows. The Job values based either on the Preferred Contract (where one is entered for the Job), or by the selection of a Contract in the Priced Job Sheet filter.

The Priced Job Sheet filter selection parameters include:

Location - Enter the full Work Location to pick out jobs with matching entries in the Work Location field. Maximum 30 characters.

Notes - Enter the full Work Description to pick out jobs with matching entries in the Work Description field. Maximum 30 characters.

Choosing the Contract:

Making an entry in the Contract field will impose the selected Contract's prices on the SORs included on the Job(s). This allows you to report on the same Job or Jobs, priced under different Contracts.

If no entry is made in the Contract field - the report will use the Preferred Contract prices. The Preferred Contract is an optional field on the Additional tab of the Job form.

If no entry is made in the Contract field in the filter, the list will omit all Jobs that do not have a Preferred Contract specified on the Job form.

Priced Job Sheet

The Priced Job Sheet shows the selected Jobs, one Job per sheet*, giving all the details which were entered on the Job form. The Job values are based either on the Preferred Contract (where one is entered for the Job), or by the selection of a Contract in the Priced Job Sheet filter.

The Priced Job Sheet filter selection parameters include:

Location - Enter the full Work Location to pick out Jobs with matching entries in the Work Location field. Maximum 30 characters.

Notes - Enter the full Work Description to pick out Jobs with matching entries in the Work Description field. Maximum 30 characters.

*You may elect to print Multiple Jobs per Page by checking the check box in the top right hand corner of the filter. If Multiple Jobs per Page is checked, the report will page-break on change of Site, not for each Job.

Choosing the Contract:

Making an entry in the Contract field will impose the selected Contract's prices on the SORs included on the Job(s).

If no entry is made in the Contract field - the report will use the Preferred Contract prices. The Preferred Contract is an optional field on the Additional tab of the Job form.

If no entry is made in the Contract field in the filter, the list will omit all Jobs that do not have a Preferred Contract specified on the Job form.

Evaluate Priced Job

The Evaluate Priced Job list shows all the live Jobs priced under all the available (i.e. awarded) Contracts. A direct comparison can then be made of the cost of the work under one Contract as against the cost of the work under another Contract.

The Evaluate Priced Job filter allows selection by:

1. Job Number - From / To
2. Action Officer
3. Status
4. Jobs Entered since (Date field)

Create Jobs from Defects

(Jobs from Defects module)

This utility is used in conjunction with the Condition Surveying module. It can be used at two different 'Levels':

- **Create one Job per Defect**

  Use this to select a range of Defects and raise one Job for each selected Defect. The details of the Job will be set based on the Defect, and the Job will be linked to the Defect.

  The Action Officer for the Job will be determined by the Enquiry Subject Site rules if a Subject has been linked to the Defect Type. If no rule exists then the currently logged in User will be used. If an Action Officer record is not linked to the currently logged in User then the utility will not run.

  Each Job created will automatically inherit the attributes from the Defect it was created from.

- **Create one Job per Feature**

  Use this to select a range of Features and raise one Job for each selected Feature. A Job will be raised for a Feature even if there are no Defects present.

  Any existing Defect on the Feature that is not currently linked to a Job will be linked to the created Job, as long as the specified SOR Group is assigned to its Defect Type, i.e. as long as the work being done is relevant to resolving that Defect.

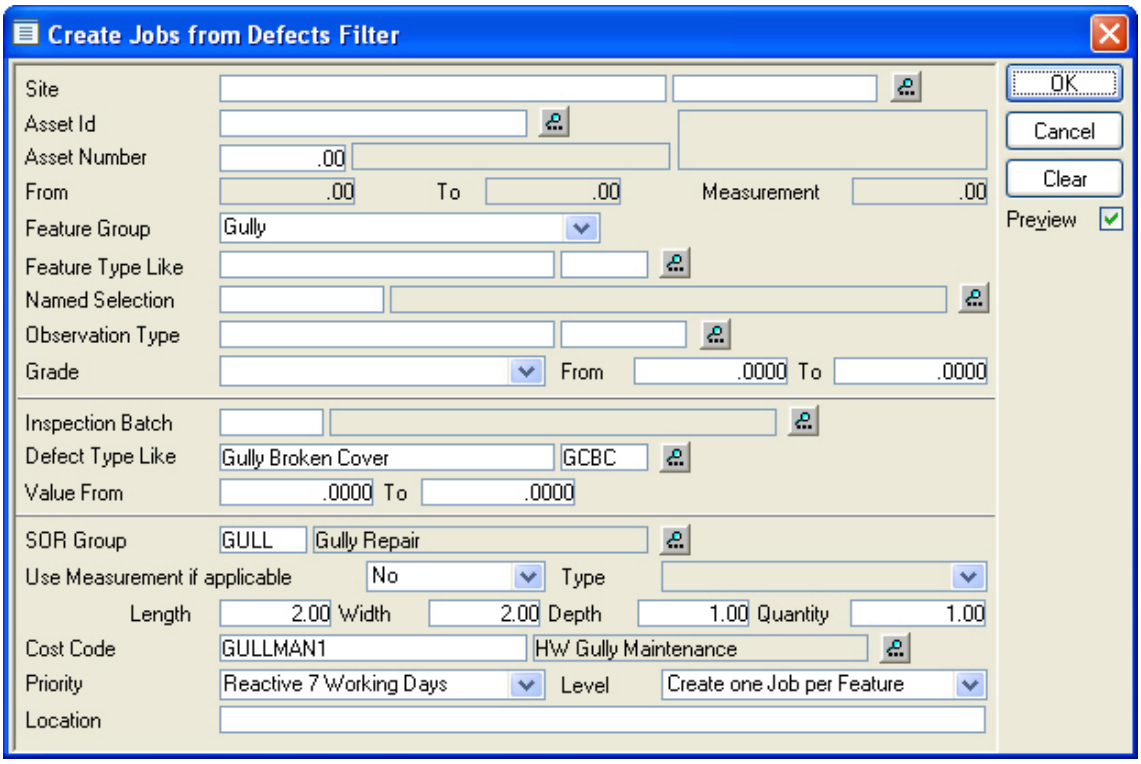
  The currently logged in User must be linked to an Action Officer for this utility to continue as this Officer will be used on each Job created.

  Each Job created will not automatically inherit the attributes from Defects when using the utility at this level.

Note: The Job Items are created using a specified SOR Group.

Asset Maintenance\SOR Item Lookups

The filter is divided into three sections:



The top section allows the selection of Features by any of the parameters, or combination of parameters given. In particular, selection can be made by Observation Type, and Grade allowing Jobs to be raised as a result of a Condition Survey, on Features that do not have a Defect, but nevertheless have a Condition Grade that requires work to be carried out.

The central section allows the selection of Defects. This can be done using any combination of the available fields.

Note: If operating at the 'Create one Job per Feature' level, these criteria are used to select which Features are included, e.g. only Features on the specified Inspection Batch, or only Features with at least one Defect of the specified Defect Type. They will have no effect on which Defects are linked to the created Jobs, e.g. a Job could resolve a Defect of a different Defect Type to that specified, provided the selected SOR Group was assigned to the Defect Type of the Defect.

The top two sections can be used in combination so that if you wanted to raise Jobs, from a particular Inspection Batch, for a particular Feature Type, you would complete the 'Feature Type Like' field in the upper section, and the 'Inspection Batch' field in the central section.

The bottom section defines the Jobs that will be raised:

SOR Group:	Enter an SOR Group code, or select a group from the pick list. The pick list references the SOR Group lookup. **Asset Maintenance\SOR Lookups**
Use Measurement:	Select from the drop down: 'No' - this is the default and is to indicate that you do not wish to refer to the Feature measurement, but will enter measurements appropriate to these Jobs in the Quantity fields below 'Primary' - if this is selected, the Primary measurement for the selected Features (or Features referenced by Defects) will be used as Job Quantities. 'Specified' - if this is selected, the next field: 'Type' will become available, allowing the selection of the Measurement Type to be used from the Features. See Notes below

Quantity:	Enter the required Quantities here, as Length, Width and Depth, or as a Quantity, or as a combination of these. **Note:** Where some SORs in the group will require a measurement as 'Length, Width and Depth, and other SORs in the Group will require an entry for Quantity, All fields should be completed to deal with both. These entries will be applied to the SOR Unit of Measure where: • 'No' has been selected in the 'Use Measurement' field • Measurement type referenced in the 'Use Measurement' field does not use the same Unit as the SOR.

Note: Where 'Primary' or 'Specified' has been selected in the 'Use Measurement' field, the Job will reference the Features for a measurement of the appropriate Type. These measurements can only be used if Type references the same Unit of Measure as the SORs in the SORs Group.

Any SORs that do not reference the same Unit of Measure will use the measurements entered in the Quantity fields.

Cost Code:	Enter a Cost Code if you wish to supersede the Overriding Cost Code or Feature Cost Code. The pick list references the Cost Code Lookup **Site Register\Site Lookups\Operational Lookups**
Priority:	Enter or select the required Priority. The drop down list references the Priority Lookup and will set the Price Factor and starting Status for all the Jobs created in this batch. **Asset Maintenance\Maintenance Lookups**
Level:	Select from 'Create one Job per Defect' and 'Create one Job per Feature' as described above.
Location:	An optional free text field whose contents will be copied to the Location field of each Job.

Job Batch Update

The Job Batch Update utility allows details to be updated on a range of Jobs at once (like Action Officer, Status). The filter can be used to select the Jobs to be updated.

Use the fields above the grey line to specify the Jobs that will be included in the batch update.

The fields below the grey line are for supplying the changes which are to be made:

New Status:	The new Status that the selected Jobs should acquire.
Action Officer:	The new Action Officer to be assigned to Jobs.
Effective:	Today's date is entered by default. This can be changed.
Estimated Start:	Where the Estimated Start date is to be updated, enter the new date. Leave the field blank to update the Job Status without updating the Estimated Start date.
Estimated Completion:	Where the Estimated Completion date is to be updated, enter the new date. Leave the field blank to update the Job Status without updating the Estimated Completion date.

Follow Up:	The Follow Up associated with the new Status. This can be changed by making a new selection from the drop down list. The drop down list references the Follow Up Lookup **Asset Maintenance\Maintenance Lookups**
By:	Calculated by adding the Follow Up to the Effective date.
Log Text:	An optional free text field.

Click OK to display the preview, which will list all the selected Jobs with their old details. The Preview heading will give the new details (Action Officer, Status, etc.) that these Jobs will acquire if the preview is saved.

Save the Preview to update the Jobs. Close the Preview without saving to abort the update.

Note: It is mandatory to provide either ‘New Status’ or ‘Action Officer’ for the utility to proceed with updating jobs.

Note: Job Batch Update will ignore any Jobs that are at a current Job Status which has the 'Status Locked' checkbox checked. This will happen for all Users, including Users that have update access to the Data Security Key set in the Job Status Lookup. This is because the Job Status Notes are mandatory.

Archive Jobs

All Jobs are eventually archived. Once they have been paid, the system will automatically archive them, and they will subsequently not be seen unless specifically filtered for (unless the 'Prevent Non Routine Jobs from Archiving' flag is set on the Contract).

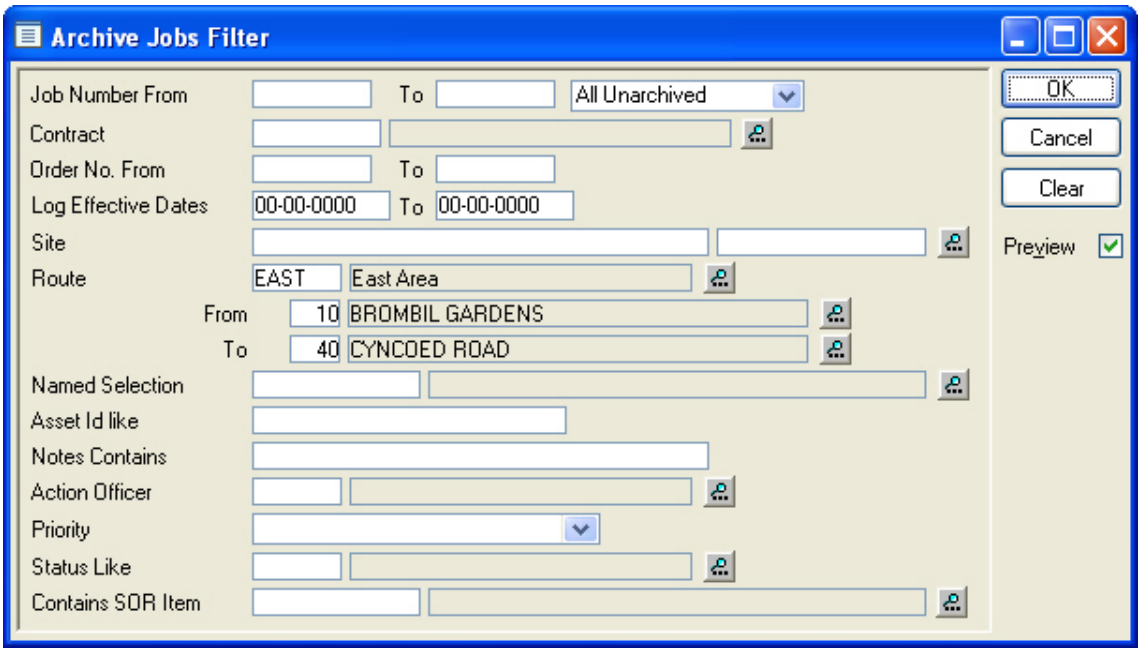
Jobs which are raised and cancelled, either before they are committed, or after they are committed but before they are paid, will not go through the payment procedure and therefore will need to be manually archived using the Archive Jobs utility.

Where the 'Prevent Non Routine Jobs from Archiving' is set on the Contract, Job will not automatically archive and therefore will need to be manually archived after the required period of time.

In either case, the following must be true for Jobs before they can be archived:

- Jobs must be at a Status that allows closure, i.e. does not have the 'Outstanding' check box checked. See "Asset Maintenance - Standard Statuses" for an example of a Status which would allow a Job to be archived.
- Uncommitted Jobs which are on Orders must be removed from the Orders before they can be archived
- Committed Jobs must have an outstanding balance of zero. In other words, the full value must have been paid, and any remaining value must be reduced to zero by Variation. The Variation must be committed against the Job before the Job can be archived.
- All Job Costs, on Jobs linked to a Contract with a Payment Percentage Uplift, must have been included on a Payment Request.

For Uncommitted Jobs, if the Job is linked to a Defect that is currently at an 'Action Required' status, then the Defect will be moved onto 'No Action Required' when the Job is Archived.



The drop down selector allows the following selection to be made:

'All Unarchived' - To select from all live Job at an appropriate Job Status.

'Committed Only' - To restrict the selection to Committed Jobs at an appropriate Job Status.

'Uncommitted Only' - To restrict the selection to Uncommitted Jobs at an appropriate Job Status.

The Archive Jobs filter includes the following selection parameters:

Notes Contains:	Text entered here will select Jobs whose Work Description field contains that text as part of the full entry.
Contains SOR Item:	Will select all Jobs which use this SOR Item
Named Selection:	See **Asset Register - Feature Lookups** for a description of Named Selection and how to create a Named Selection

Note: Selection of Jobs can only take place from: Jobs whose Status is not checked as 'Outstanding', Committed Jobs with a zero outstanding balance, or Uncommitted Jobs not on an Order.

Click OK to display the preview, which will list all the selected Jobs for archiving.

Save the Preview to archive the Jobs. Close the Preview without saving to abort the archive.

Inventory updates on Job Archive

Where a Job is linked to Inventory Updates, that is that Inventory was updated through the Job form 'Other' button, the Inventory Updates will be undone where possible and the links will be deleted during Job Archiving.

Where undoing the Inventory Updates would lead to anomalies, a warning will be issued on Archive Preview, and a warning report will detail the issues relating to each Inventory Update link.

Import Jobs

The Import Jobs utility allows text files to be imported into the Job library.

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

Note: See **Import Specification** for detailed information on import utilities used throughout Confirm.

Job Reports

These reports are used to report on Job data:

Customer Tracking Report - Reports on Job by customer as defined by the entries in the Customer Ref field of the Job form (not the Customer as defined by the Customer specified for the Feature and entered by default on the Job form).

Job by Location List - Reports on Jobs by Site and Location as defined by the Feature Id and Location fields of the Feature form.

Site History Report

Job Status Report

This is a general Job report, which includes the option to pick up Jobs by Actual Completion Date, Liability Date and Follow Up date.

Note: The Job Status Report references Jobs that are on an Order (regardless of whether the Order is committed) therefore Jobs that are not on an Order will not be included in the report.

Job Precedence Report

(Works Precedence module)

This report details each Job that has had a Precedence set. The default is for each Job to be displayed with its succeeding Jobs.

To display only preceding Jobs, select Show Predecessor Jobs from the drop down list at the bottom of the filter form.

To display both Preceding and Succeeding Job, check the Include [Predecessor, or Successor] Jobs check box.

Job Duration Report

This report is used to analyse the time taken for Jobs to go between two Job Statuses.

Use the filter to restrict the Jobs that are required for the report. There is an option for page orientation and to exclude negative values.

Site History Report

Repair Performance Report

This report is used to calculate the time taken to repair Features.

Jobs with a Preferred (Term) Contract will be included in the report. Where Defects are linked to a Job, the Defect with the earliest date will be used.

The filter has two options on which to base the calculation of the number of days taken to do the repair:

Start Date: Set the 'Start Date' filter option to one of the following:

'Initiated Date Excl. Enquiries' - The 'Days Taken' is calculated to be the difference in days between Defect Date, if available, Job Start Date, if available, or Job Entry Date, and the Job Actual Completion Date.

'Initiated Date Inc. Enquiries' - The 'Days Taken' is calculated to be the difference in days between Enquiry Logged Date, if available, Defect Date, if available, Job Start Date, if available, or Job Entry Date, and the Job Actual Completion Date.

'Order Commit Date' - The 'Days Taken' is calculated to be the difference in days between the Order Commit Date and the Job Actual Completion Date.

It is possible to restrict the Jobs which are retrieved by this report.

Show Jobs: Select from:

'All' - The report will include all Jobs, not just those linked to Enquiries or Defects.

'Linked to Enquiries (Primary) or Defects' - Select this to restrict the Jobs to those which are the Primary Job for an Enquiry or Defect.

'Linked to Enquiries (Primary)' - Select this to restrict the Jobs to those which are linked to an Enquiry.

'Linked to Defects' - Select this to restrict the Jobs to those which are linked to a Defect.

There are 'Contract' and 'Job' level options which can be set depending on the format required.

Non Routine Works

The Non-Routine Works folder provides the tools for creating Works Orders and placing Jobs on the Works Orders.

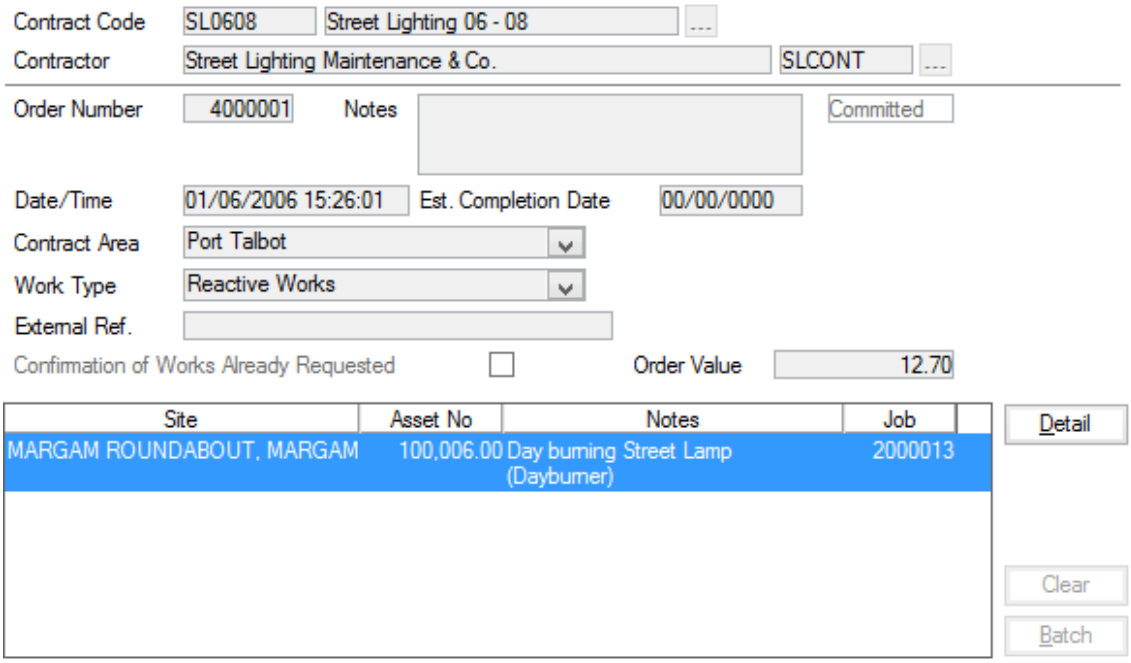
The Order formalises the Job, by providing a Contract, a price, and the means of committing (and therefore eventually paying for) the work.

Works Orders are raised, and then committed. Up until the committal, alterations can be made directly to the Order. After committal the Order can only be altered by the raising and committal of another (Variation) Order.

Order Details

(Contract Management module)

The Order Details displays the Order Header. The Order Header will provide details of the Contract and Contract Area, and Work Type. All the Jobs that are put onto this Order must therefore be in the same Contract and Contract Area, and be ascribed to the same Work Type.



When a Committed Order is being viewed, all the fields will be disabled and may not be edited, unless the 'Allow Work Type Amendments on Committed Header ' option has been set in the **Contract Management System Settings** on page 90, in which case a new Work Type may be selected.

Contract Code: Enter, or select from pick list, the Contract under which this Order will be issued. The Pick list references the Contract Library and displays awarded Contracts, and Non-Term Contracts (Non Term module).

The user may only save Orders for current or future Contracts. If the user tries to save an Order attached to an expired Contract then the following error will be generated:



Contract Preparation\Contract

Contractor: If an awarded, term Contract was selected, the Contractor who 'owns' the Contract will be automatically entered and the field will not be editable.

If a Non-Term Contract (Non-Term module) is selected then the field becomes available for the selection of a Contractor.

The pick list for this field references the Contractor library.

Contract Preparation\Contractors

Order Number: A number will be automatically assigned from the Seed numbers for the User's Work Group and the selected Contract when the Order header is saved. See **System Administration\Work Group** for details on setting seed numbers for Orders.

The number of an existing Order can be entered here to recall that record.

Notes: An optional, free text field

Status field: This field is not editable and will display the current status of the Order.

'Uncommitted' - the Order has not been committed.

'Uncommitted (Pending)' - where the Contract has 'Order Commit Authorisation' checked, the Commit Order utility will set the Order to 'Pending' while awaiting authorisation for full committal. The Order and Jobs with the 'Pending' flag set have restricted editing allowed, on the same basis as for Committed Orders.

'Committed' - the Order is committed, and at least one of the Jobs on the Order remains open.

'Archived' - the Order is committed and all the Jobs on the Order have been paid and closed

Date/Time: The current date and time is automatically entered. The field can be edited.

Set Completion: An estimated completion can be entered here. (Optional)

Contract Area: Select the appropriate Contract Area from the drop down list.

The drop down list references the Contract Area Lookup.

Site Register\Site Lookups\Operational Site Lookups

Work Type: Enter, or select from the drop down list the appropriate Work Type. If a Contract has been specified in against the selected Work Type and one has not already been entered on this screen, it will be entered in the Contract field.

The drop down list references the Work Type Lookup

Maintenance Management\Contract Management Lookups

External Ref:	An optional, free text field
PO Number:	Shows the purchase order number for the Order. It is not available when manually entering Orders, and can only be populated by importing a PO Number with the Financial Interface XML Agent. If the Order has no purchase order number this field will not be visible.
Confirmation ... :	Check this to print the words 'Confirmation Only' across the top of the Works Order print out
Order Value:	Read only field, which will display the total value of the Order when Jobs are added.

Links button

Provides links to external files. Please see the "Systems Fundamentals" manual for more information on linking external data.

Systems Fundamentals\Document Links

Commit button

The Commit button is only available on uncommitted Orders and displays the Order Commit Batch filter, with the details of the current Order entered, for Committal of the Order. See **Commit Orders** on page 46 for more information on committing Orders.

Archive button

Redundant headers can be Archived with the Archive button. After prompting the User for confirmation the Status of the Order Header will be set to 'Archived'.

The button will be disabled if there are Jobs attached (in which case the 'Clear' button can be used) or the Order has already been Archived.

Print button

Displays the Order Print filter, with the details of the current Order entered. See **Print Orders** on page 47 for more information on committing Orders.

Add Job button

The Add Job button displays a screen that allows the user to add Jobs to a Committed Order. The button is only available on Committed Orders if the 'Add Jobs to Committed Orders' check box is ticked on the Job System Settings screen..

Asset Maintenance\Job System Settings

Existing Jobs can be added, or new ones created and then added.

An existing Job can only be added to the Order if:

- It is Uncommitted.
- AND it does not have any SOR Items assigned.
- AND it is not already on an Uncommitted Order.
- AND it does not require a **User Commit Limit** on page 95 to be generated.

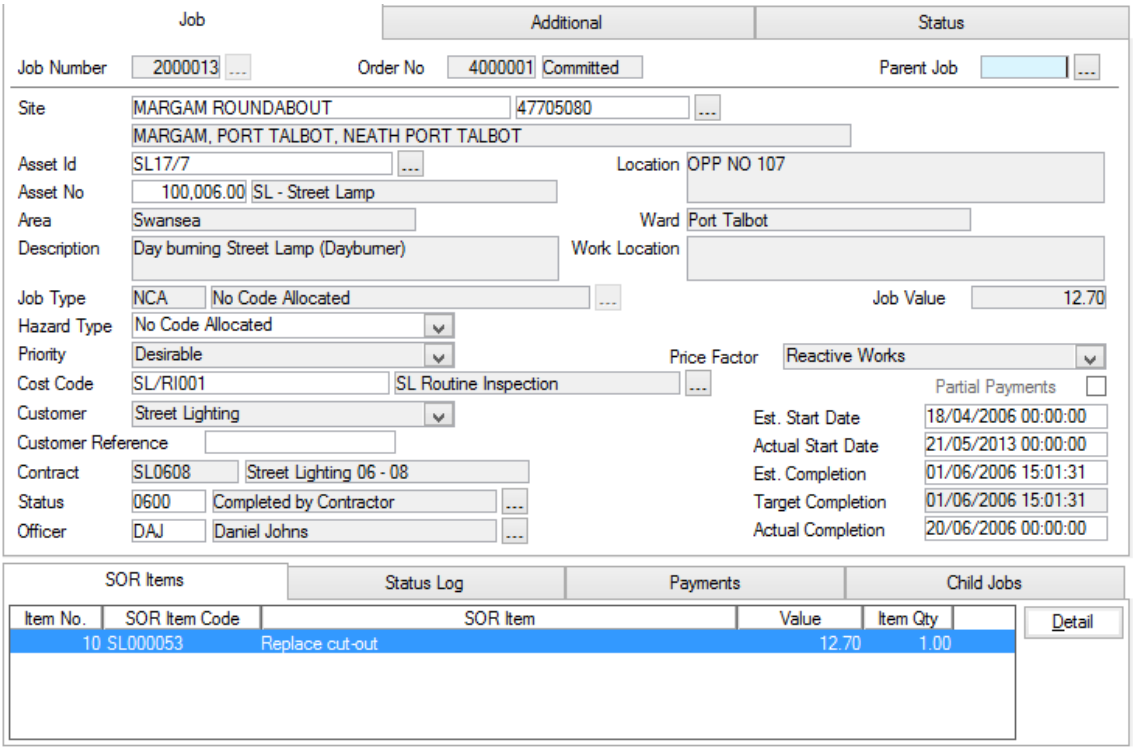
If a new Job is created from the Add Job button then it will be automatically added to the Order, and set to a Committed Job status. SOR Items cannot be created for new Jobs added to Committed

Orders because they are not allowed to have any value. However, SOR Items can be added or varied for these Jobs using Variation Items, Payment Items or Payment Request Items.

Since no SOR items are created for these Jobs, they cannot be processed via the Payment Commit process as it requires Payment Items on all Payment Jobs. Jobs that have a Payment Item added subsequently can be archived automatically by the Payment process, or if they have no value then they can be archived with the **Archive Jobs** on page 30 utility.

Detail button - Order Job

Click on the 'Detail' button to Display the Order Job form:



Jobs can be added to Orders in two ways:

- A pre-existing Job can be added to the Order
- A Job can be directly created in the Order Job form

To add a pre-existing Job or range of Jobs:

Jobs may have been created in the Job form, or created as a result of a batch process such as Create Jobs from Regimes, or Create Jobs from Defects. These Jobs can be added to the Order.

A single Job can be added by entering the Job number in the Job Number field. Use the pick button on the Job Number field to display all available Jobs. The pick list references all Uncommitted and Live Jobs for the selected Contract Area (i.e. the Contract Area entered on the Order Header)

A range of Jobs can be added using the 'Batch' button on the right-hand side of the Order Job form. See **Batch button** on page 42.

Order Jobs can be created from scratch in the same way as Jobs are created in the Job form. See "Job"

An Order Job differs from a **Job** on page 7 in some respects, and has some additional fields and buttons.

Contract: Copied from the Order Header

Order No: Copied from the Order Header

Cost Code: Where a default Cost Code is set against the Work Type, and the Order is for the Contract specified against the Work Type, the default Cost Code will be entered.

The Work Type Cost Code default is set in the Work Type lookup.

Maintenance Management\Contract Management lookups

The Cost Code entered here will be used as a default for new Job Items. Leave this blank if the Job Item Cost Code is to be derived from the Feature or overriding Cost Code.

Job Type: This field will default to the Job Type assigned to the Work Type of the Order Header when a new Order Job is being entered.

The Job Type default is set in the Work Type lookup.

Maintenance Management\Contract Management lookups

This can be changed if not applicable for the current Job. The pick list references the Job Type lookup.

Asset Maintenance\Maintenance Lookups

This field may have been set by a different default depending on where is was created from e.g. Enquiry Subject Job, Defect Type, Job System Settings or Maintenance Regime.

If an existing Job which has the 'NCA' Job Type assigned is added to an Order then the Job will be updated to match the Job Type from the Work Type assigned to the Order.

Job Value: The Contract Rates will be used to work out the cost for the current Job.

Priority: Where a default Priority is set against the Work Type, and the Order is for the Contract specified against the Work Type, the default Priority will be entered instead of the Priority set in the General Systems Settings.

The Work Type Priority default is set in the Work Type lookup.

Maintenance Management\Contract Management lookups

Price Factor: Only Price Factors associated with the Contract selected on the Order Header will be displayed in the drop down list.

Contract Preparation\Contract - Price Factor tab

Additional tab

This tab is very similar to the Additional tab on the Job screen. The following fields are different:

Minimum Value: The minimum Value is entered here - derived from the Minimum Job cost set for the Price Factor under the Contract.

Contract Preparation\Contract - Price Factor tab

Can be edited for this Job.

The Minimum Value will override the Job Value if the Job Value is less than the Minimum Value.

Fee Percent: (Administration Fee Recovery module)

This will be entered automatically when the first SOR is added to the Order Job. Can be edited for this Job.

Minimum Fee: (Administration Fee Recovery module)

This will be entered automatically when the first SOR is added to the Order Job. Can be edited for this Job.

Fee Income Code: (Administration Fee Recovery module)

This will be entered automatically when the first SOR is added to the Order Job. Can be edited for this Job.

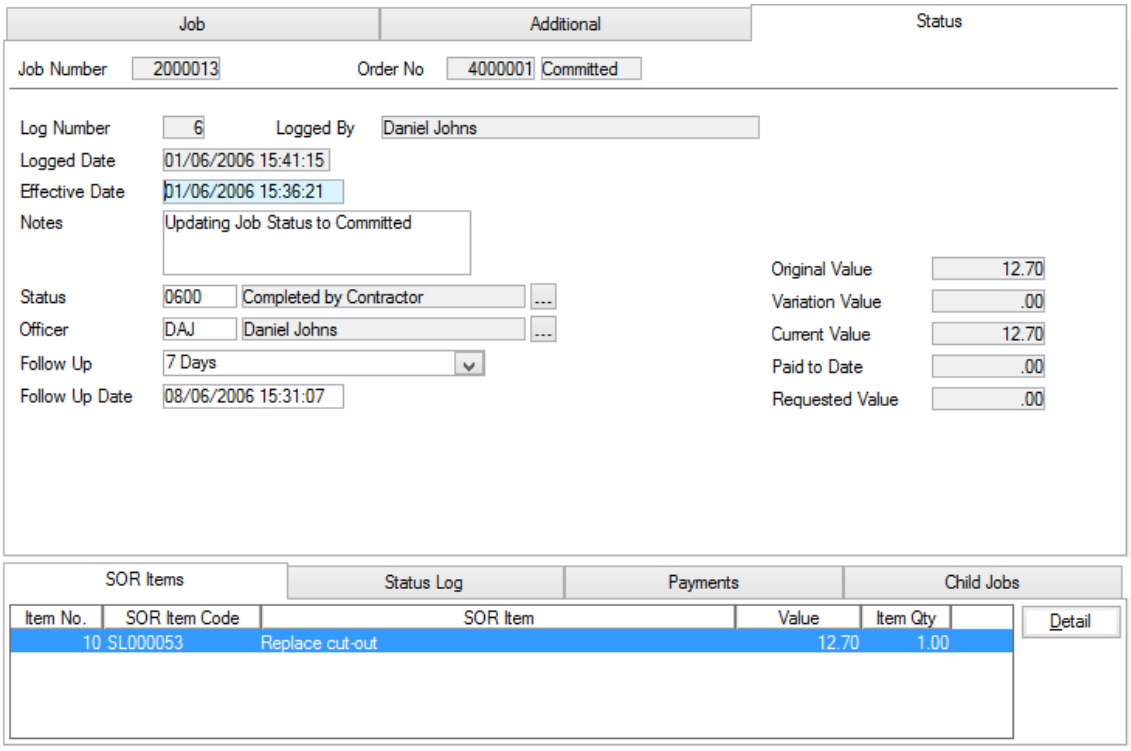
Note: 'Fee Percent', 'Minimum Fee' and 'Income Code' details are derived from the first SOR added to the order - even though subsequent SORs added may carry a different Fee Work Category and therefore may have imposed different values. The Fee Rates are set up in the Administration Fee Recovery folder - see Finance & Budgets for details on how to set up Administration Fee Recovery.

Status tab

The Status tab gives details of the current stage of the Order Job. The Stages an Order Job may pass through are defined as Statuses. Most fields are the same as the Job **Current Status tab** on page 12 tab, with the exception of 'PO Number' which shows the Purchase Order number, if set. If the Order has no PO Number this field will not be visible.

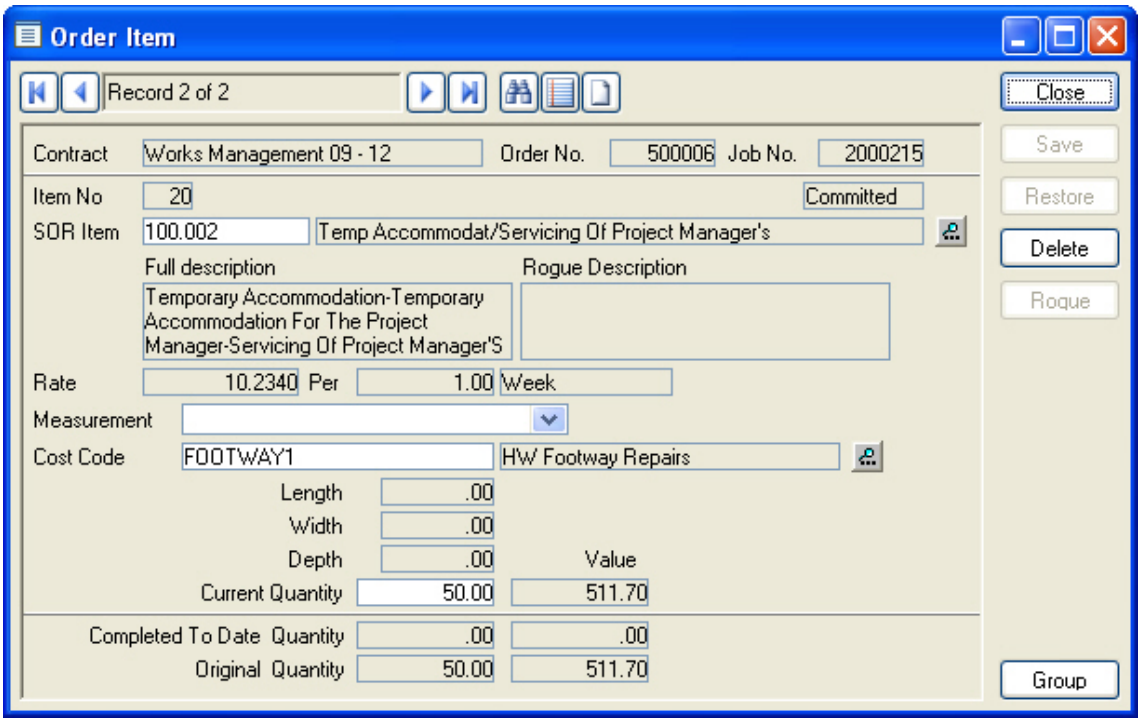
Each Status is assigned a log number, is logged by a user, and assigned to an Action Officer.

Note: This tab has all the compulsory fields completed from defaults. It is not therefore necessary to access it unless you want to change the defaults.



SOR Item tab

The Order Job SOR Item tab has additional detail to the Job Item screen:



SOR Item	The SOR Item pick list will only display SOR Items that are on the Contract for the Contract selected on the Order Header. **Contract Preparation\Contract Rates**
Rate:	The contract rate for the selected SOR Item derived from the Contract selected on the Order header. Contract Preparation\Contract Rates
Value:	Calculated from the Contract Rate for the SOR Item, and the Current Quantity.
Completed to Date:	This field will record the quantities and values that have been paid for.
Original:	Records the original quantity and value, for comparison with the Current Quantity, which may have been changed as a result of a Variation Order.

Rogue button

Please see Job Item form **Rogue button** on page 16 for details.

Group button

Please see Job Item form **Group button** on page 16 for details.

Status Log tab

The Status Log tab displays all the Statuses the Job has held, with details of date and Action Officer.

The list may be viewed on the Status tab, with the current Status at the top and the others listed in reverse date order underneath.

The log may be viewed in more detail by clicking on the Detail button.

Each Status is held as a separate record and gives the date, the user who was logged in, any notes made at the time, the Action Officer, the Follow Up, and the date generated from the Follow Up.

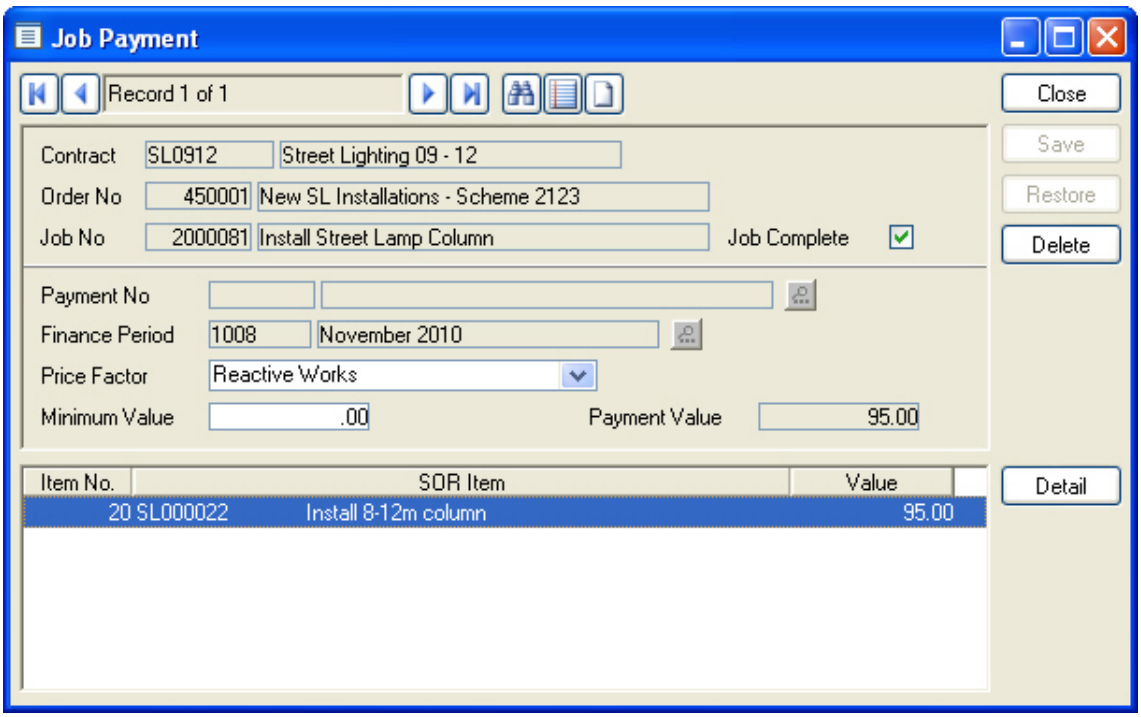
Payment tab

The payment tab will record the Payment Batch number(s) and date(s) on which payment is made.

It can also be used in advance of payment to profile payment. This can be done to determine when the full payment will be made, or, if the Job has been flagged for Partial Payment (on the Additional tab), to set when each 'installment' will be paid.

To profile payments:

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

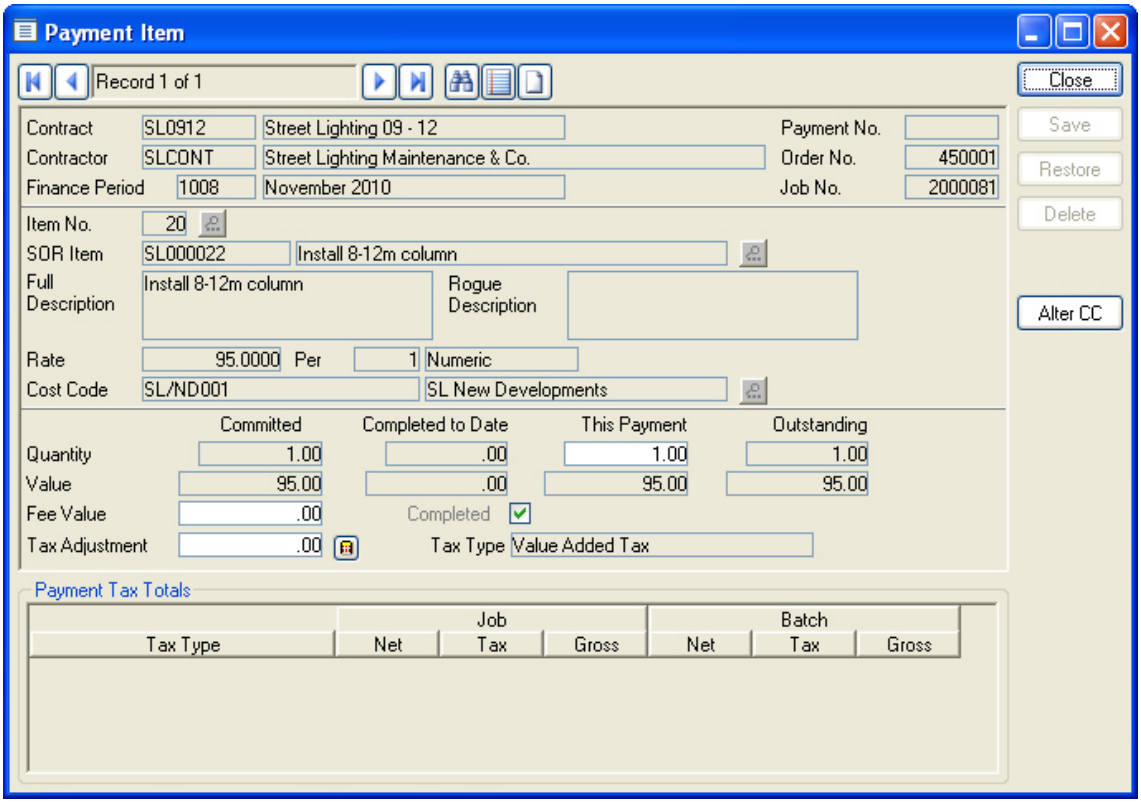


Contract, Order No and Job No are copied from the Order Job.

Payment No:	Leave blank. The Payment number will be automatically entered when payment is made.
Finance Period:	Select the Finance Period in which you want the payment to be made.
Price Factor:	Select the Price Factor you wish to use for this payment (this need not necessarily be the Price Factor for the Job, but be aware that Retentions and Liquidated Damages are based on Price Factor)
Minimum Value:	Defaults to zero. Set the full minimum value that you want to apply for the Job on the last Job Payment (i.e. the Job Payment which will be flagged as 'Job Complete'). If a Minimum Value is set before the 'Job Complete' flag is set, the system will calculate the balance, over what has been profiled, that needs to be added to bring the Job up to the minimum value.
Job Complete:	If this is the last (or only) payment that will be made on this Job, check this box. Checking this box will assume that no more payment is to be made, and archive the Job, regardless of whether the full payment has been made.

Payment Item

Click on the 'Detail' button to set the value of this Payment for each SOR Item on the Job:



Select the appropriate SOR Item by entering the item number in the Item No field, or selecting from the pick list.

The selected SOR Item will be displayed with all the fields completed and unavailable except:

This Payment:	Enter the Quantity to be paid for, the value will be automatically calculated in the Value field below.
Fee Value:	(Administration Fee Recovery Module) A Fee value will be calculated based on the information on the Additional Tab of the Job. This field can be edited.
Completed:	Check this to indicate that final payment has been made on this SOR Item. Leave blank if more payments will follow.

Complete a Payment Item form for each Item that will have a payment made in this Finance Period.

Several Job Payment forms can be completed for this Job, paying off part of the total value of the Job in several Finance Periods.

Buttons

The following buttons are available from the Order Job screen:

Delete button

The delete button will remove this Job from this Order. The Job will still be available in the Job library, and may be added to another Order once it has been deleted from this one.

Batch button

The Batch button displays the Order Job Batch filter, for batching Jobs onto this Order. All fields in the filter are optional, and leaving the filter completely blank will batch all available Jobs onto

the Order (i.e. all Live Jobs in the correct Contract Area). The parameters that can be used in the filter to restrict the Jobs include:

Location Contains:	To find Jobs whose Location notes contain the text entered in this field.
Notes Text contains:	To find Jobs whose Work Description notes contain the text entered in this field.
Restrict Job by Preferred Contract:	To select only Jobs that have the Order Contract entered as the 'Preferred Contract'.
Exclude Successor Jobs:	(Works Precedence module) If this is checked then Jobs that have non-complete preceding Jobs won't be added to the Order.

Click on OK in the filter to make the selection.

Where The Works Precedence module is active, a warning will be given if the batch included Jobs that have non-complete preceding Jobs. The warning does not prevent the inclusion of these Jobs on the Order.

The Jobs will be added to the Order and may be viewed by scrolling.

Other button

The 'Other' button menu contains the following option in addition to those available from the **Other button** on page 19:

Retentions & LDs:

Displays the Retentions form, giving retention details for this Job. Default Retentions, and Liquidated Damages may be altered for this Job. See **Retentions and Liquidated Damages** on page 51.

Inventory Updates:

Selecting this option allows the User to see the Inventory that will be modified by this Order Job.

Links button

Provides links to external files. Please see the Systems Fundamentals manual for more information on linking to external data.

Systems Fundamentals\Document Links

Copy button

The Copy button copies the details of an existing Job to a new one. SOR items are copied but the status log is not. Where appropriate, dates are reset. When used on the Order Job screen the copied Job will be placed on the Order automatically.

On the Job screen there are three different Copy options:

- Copy - this creates a new Job with no Parent Job.
- Copy as Child - this creates a new Job with its Parent Job set to the one being copied.
- Copy as Sibling - this creates a new Job with the same Parent Job as the one being copied.

Note: Price Factors will be set to the Priority default

Risks button

Please see the Job **Risks button** on page 24 section for details.

Clear button

The Clear button may be used to remove all the Jobs from an Uncommitted Order Header. Click on the 'Clear' button to display the Clear Order Batch filter:

You may optionally enter a Job Status, Effective Date and Log Notes in order to update the Status of all the Jobs being removed from the Order.

Leave the filter blank to allow the Jobs to retain their current status.

Click on OK to remove the Jobs from the Order Header

Batch button

The Job Create Batch filter allows Jobs to be created based on a Data Source and SOR Groups.

Where the 'Inventory' module is present, the utility will also carry out Inventory updates simultaneously with the Jobs if an appropriate Data Source is selected, and maintain Start or End dates for Inventory Items in line with the Estimated Completion date (and, when the Job is complete, the Actual Completed date) for the Job. The Data Source should be at Inventory Item level; it may contain a mixture of:

- End dates to existing Inventory Items, and
- New Inventory Items, with their Attribute values in columns

The utility also includes Job details in order to:

- Create a Job for each distinct Feature whose Inventory is being changed (multiple Jobs where different Job Sequence Numbers are supplied)
- Create a Job Inventory Item Update record for each row
- Link each Job created to the Order

Batch Creation Data Source

The Data Source must contain some or all of the columns listed below in order to be used by the utility. As a minimum, just Site Code and Plot Number must be present. The Columns are identified by means of a case insensitive match between the Labels defined in the Data Source and the values in the table below.

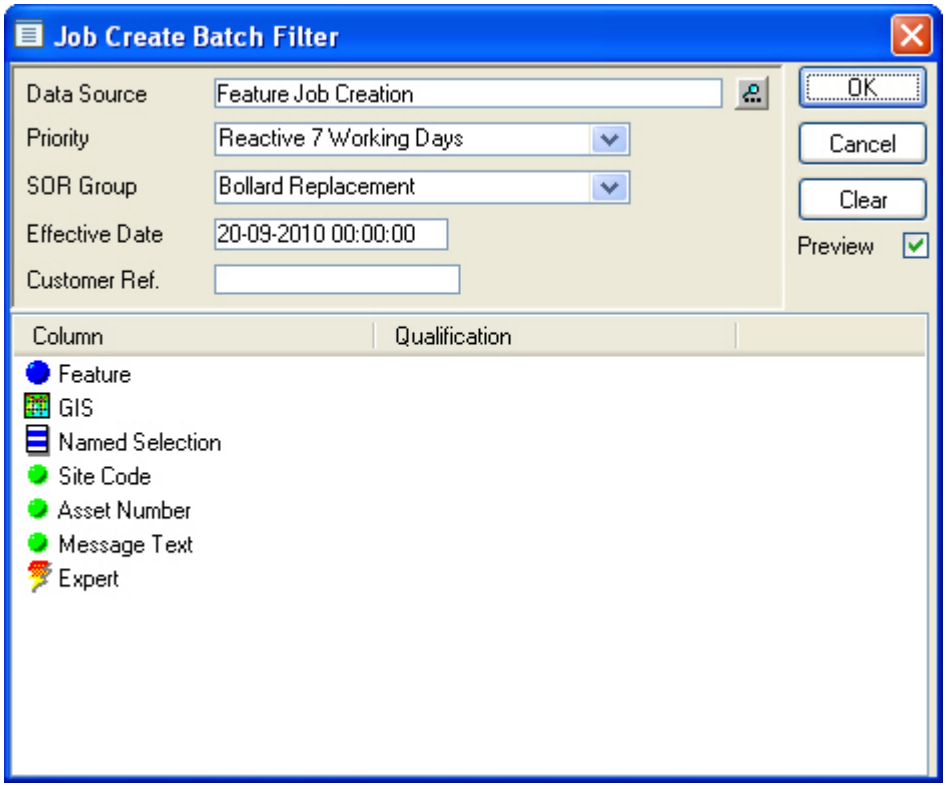
Column Name	Description
Site Code	Mandatory, used to identify the Feature against which the Job will be raised
Plot Number	Mandatory, used with Site Code to identify the Feature
Job Notes	
Job Location	
Cost Code	
Job Sequence Number	
Update Type Flag	"A" to Add a new Inventory Item, "R" to Remove (i.e. to End Date) and existing Inventory Item. Any other value, or absence of this column, means no Inventory update occurs

Column Name	Description
Inventory Item Id	The unique identifier of an Item to be Removed, or in the case of Adding a new Item, the identifier of the Item to be copied to create the new Item
Inventory Link Feature	The Feature to which a new Item being Added links
Feature Type	The Feature Type of the new Item (if the item is a copy of an existing one, the Feature Type must be of the same Feature Group as the existing one)
Attrib CODE	The value of the Attribute with the specified Code for the new item, for example a column called "Attrib SEQ" might be used to supply a Sequence Number Attribute. The column might contain numeric, date time or text data depending on the Attribute Type, and will be validated accordingly. Any Attributes not supplied will be populated with the values of the Item from which this one is being copied, or if no Item is being copied, will be left blank

Note: The Utility does not currently allow the specification of Start and End Distance, or XSP values, for Inventory Items.

Job Create Batch Filter

Click on the 'Batch' button on the Order Header to display the Job Create Batch Filter



Data Source: Select an appropriate data source. The pick list references the Data Source lookup.

Reporting\Reporting Lookups

Priority:	Select the Priory to be applied to the Jobs that will be created. The drop down list references the Priority Lookup.
	Asset Maintenance\Maintenance Lookups
SOR Group:	Select the SOR Group, which will be used to create Job Items.
	Asset Maintenance\SOR Item Lookups
Effective Date:	Enter the effective data which will be used in each Job
Customer Ref:	You may optionally provide a Customer Ref, which will populate the Customer Ref field for each of the Jobs created.

Click on OK in the preview screen to create the Jobs and add them to the current Order Header.

Commit Orders

Orders must be committed in order to allow:

- Work Summaries to be printed
- Gang Allocation to take place (Works Management module)
- Work Tickets to be printed (Works Management module)
- Budgets to be amended to show the Order Value as 'Committed'
- Current Commitments reports to be run.
- Payments to be made.

Commit button will display the Works Order Commit - preview which will give the Order Number(s), Job Number(s) and values. The last column of the preview will report on whether the Jobs or Order can be committed. If the Order cannot be commit a short line of text will describe the problem. A problem with any single item on the Order will prevent the whole order from committing.

To re-select the Orders Re-filter to open the Order Commit Batch filter:

Contract:	A Contract, or range of Contracts must be entered.
Order Number:	An Order number or range of Order Numbers can be entered here.
Order Date:	A date or range of dates can be entered here.
Display Cost Code Summary:	Check this to display a break down of the Order Value, by Cost Code, on the Order print

If the selected Contract has the 'Order Commit Authorisation' flag checked then the Orders must receive authorisation before they can be fully committed and will enter a Pending status in the meantime. Please refer to **Order committal authorisation** on page 46 for more detail.

If no problems are reported, or to commit orders without problems, click on the 'Save' button.

Order committal authorisation

(Financial XML Agent module)

Confirm can be configured to request authorisation from an external financial system before allowing Routine and Non-routine Works to be committed. This authorisation process can be selected individually for each Contract. The facility is enabled when the Financial XML Agent module is present and the 'Authorisation Required' option is selected on the Contract lookup in Contract Preparation. The Financial XML Agent must also be configured correctly so that it can contact the external financial system.

When the user attempts to commit Orders and the assigned Contract has 'Authorisation Required' selected, the Commit Order utility will set the Order Status to 'Uncommitted - Pending' while awaiting authorisation for full committal.

For Non-Routine Works, the following apply to Orders and Jobs in the 'Uncommitted - Pending' status:

- Restricted editing is allowed, on the same basis as for Committed Orders.
- The works order number is added to the job.
- The cost code commitment values are not updated with the Order cost code values (the Order remains 'uncommitted').
- The Job status for Jobs on the 'Pending' Order is set to the Order Pending system setting.

For Routine Works, the following applies when a Order or Job is 'Uncommitted - Pending':

- The cost code commitment values are not updated with the Order cost code values (the Order remains 'uncommitted').

Payment Processing\Financial Interface XML Settings

Contract Preparation\Contracts Interface

Obtaining Authorisation

Orders and Jobs will remain in the 'Uncommitted - Pending' state until authorisation is obtained.

Authorisation is sought though an automated export of 'Uncommitted - Pending' Orders to an external financial system and an import of authorisation from this external system.

Orders which have been set to 'Uncommitted - Pending' since the last Financial XML Interface run are extracted via the Financial XML Interface, and exported. The external system should send back a response either providing a Purchase Order Number, and thereby authorising the exported Order, rejecting the Order, or leaving it unchanged as 'Uncommitted - Pending'.

- If the Order is authorised, the Status of the Order is set to 'Committed', the Purchase Order Number is stored against the Order Header and the cost code commitment values are updated with the Order cost code values. The order status will then become 'Committed'. A Purchase Order Number assigned through authorisation cannot be edited.
- If no Purchase Order Number is supplied for an exported Order then the Order is deemed rejected, the Order returns to the 'Uncommitted' status.
- If no response is received for a particular exported Order then that Order will remain in the 'Uncommitted - Pending' status.

A Job Status Log record is created as follows:

- When the Order is authorised, the status used is the Order Committed system setting.
- When the Order is rejected, the status used is the Order Authorisation Failed system setting.

Print Orders

Orders can be printed whether they are committed or uncommitted. The Order print will show whether the Order is committed or not.

Print Order displays the Order Print Filter:

Contract:	A Contract must be entered.
Order Number:	An Order number or range of Order Numbers can be entered here.
Route:	If a (Site) Route is entered, the Works Order print will list the Jobs in Route order. Jobs on Sites that are not in the Route will appear at the end of the order print in alphabetical order.

Status:	Select from drop down list - Committed Only, Uncommitted Only, Archived, or Live. **Note:** This selection will only be effective where a range of Orders has been selected. Where a single order is to be printed, the system will ignore any selections in this field and print the Order.
Commit Date From / To:	Use these fields to restrict the Orders printed to a specific or range of Commitment dates.
Unprinted Orders only:	Uncheck this to print all the selected Orders, regardless of whether they have the 'Printed' flag set. **Note:** This selection will only be effective where a range of Orders has been selected. Where a single order is to be printed, the system will ignore any selections in this field and print the Order.
Update 'Printed' flag	Confirm will register the fact that an order has been printed - Job Statuses can be updated on this basis if a link is made in the Contract Management System Settings. Uncheck this box if you do not wish Confirm to update anything on account of this print.
Order Copy:	Select the range of Order Copies from the pick lists. The pick list references the Order Copy library.
Report Type:	Select Detailed, or Summary. A Detailed Order prints all the Job information that was entered in the Job form. A Summary copy prints only the Site, Area, Classification, Plot Number and Feature Type or Feature ID for each Job

Click on Ok to display the Preview. Click on the Print Button in the Preview to send the Order to the printer.

Print Work Summary

A Work Summary details the Jobs, Site by Site, in a table format. The details shown are limited to: Site, Area, Plot Number, Location, SOR Item and Quantity

Print Work Summary filter criteria include:

Status: a pre-set drop down list from which All, Committed, Uncommitted, or Archived can be selected.

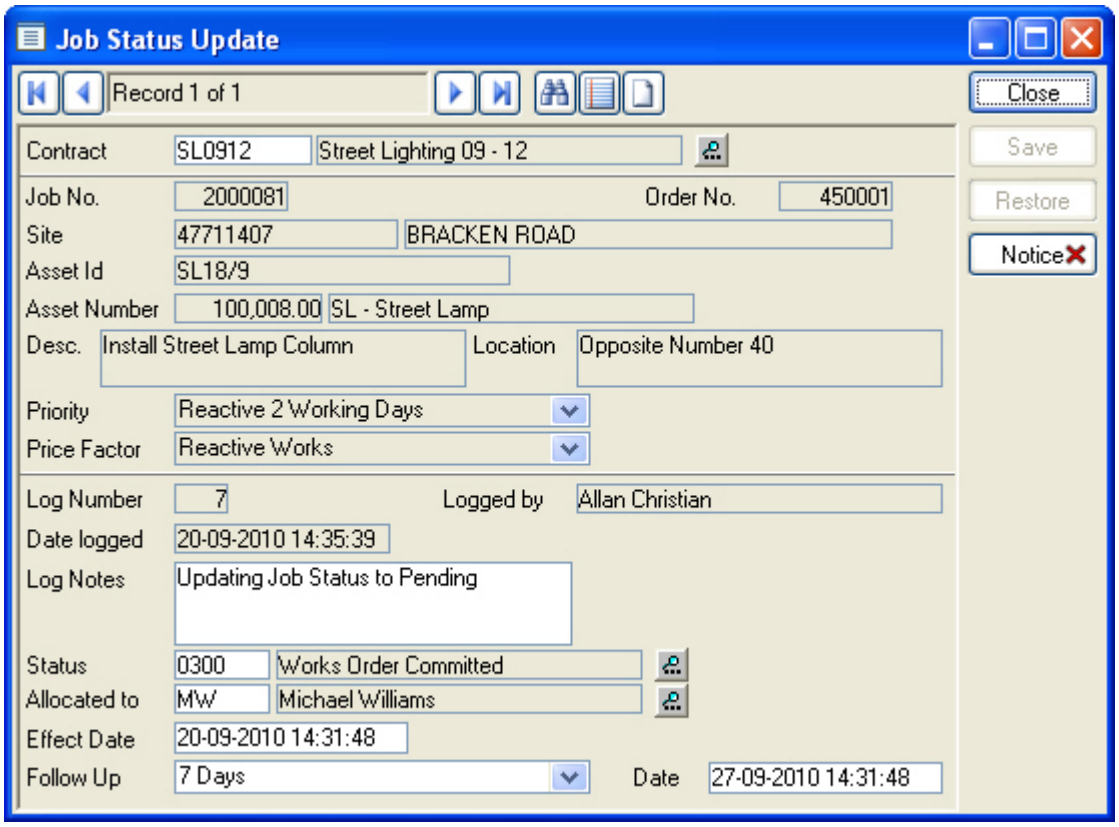
Show Long Description: check this box to show the SOR Item long description on the Work Summary

Show Values: check this box to include the Job Values.

Click on Ok to display the Preview. Click on the Print Button in the Preview to send the Work Summary to the printer.

Job Status Update

The Job Status update filter allows a range of Jobs to be selected which can then be scrolled through, to update the Status of each Job.



Enter the Job number in the Job No field.

Click on the Find button, and use the Job Status Update filter to select the required Jobs. The selection will be made from Jobs that are on Orders (both Committed and Uncommitted Orders). Click Ok to place the Jobs into the Job Status Update form where they can be scrolled. Each Job will display the current Status.

Log Number:	Assigned by the system
Logged by:	The current User is entered and cannot be amended.
Date Logged:	Today's date - cannot be amended.
Log Notes:	Defaults to last entered notes. Amend or delete.
Status:	Enter a new status, or select from the pick list. The Pick list references the Status Lookup **Asset Maintenance\Maintenance Lookups**
Allocated To:	Will default to the Action Officer linked with the current User when a new Status is selected. Amend if necessary. The pick list references the Action Officer Lookup **Asset Maintenance\Maintenance Lookups**
Effective Date:	Today's date will be entered by default. Can be amended
Follow Up:	The Follow Up linked with the selected Status will be entered by default.
Date:	A Follow up date calculated from the Effective Date and the Follow Up. Can be amended.

Save the record to update the Status of this Job.

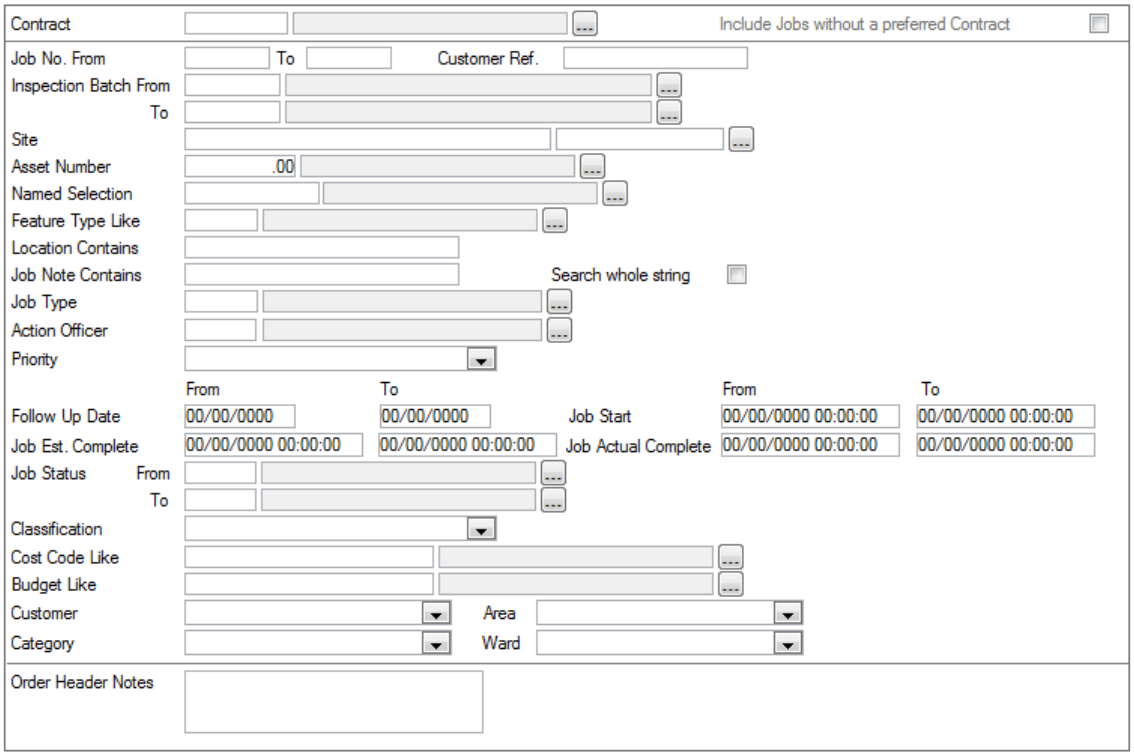
Batch Jobs onto Orders

The Batch Jobs onto Orders utility will find Jobs that are not already on an Order, and will put them onto Orders according to a set of rules, and the filter parameters selected in the Order Batch filter.

The rules governing the batching of Jobs are:

- The grouping of Jobs onto Orders will primarily be determined by Contract, Contract Area and Price Factor.
- Jobs batched as a result of this utility will be grouped by Site or Feature according to the Contract setting.
- Only Jobs with the same start and completion dates will be included on the same Order.
- Non Term Contracts cannot be selected with this utility.

Click on the Batch Jobs onto Orders menu item to display the Order batch Filter:



The top section defines the Contract under which the Orders will be raised, and will recall all Jobs that have the Contract set as the Preferred Contract.

Note: The preferred Contract is set in the Preferred Contract field on the **Additional tab** on page 11 of the Job.

Include Jobs without a Preferred Contract - set this to batch Jobs that have no entry in the Preferred Contract field. Only Jobs that are raised on Features in a Contract Area covered by the selected Contract will be batched

The central part of the form, between the two grey lines, contains the filter options for selecting Jobs. These include:

Inspection Batch From / To:	Select from the Pick list. The pick list references the Inspection Batch library. **Condition Survey\Inspection Batch**

Retentions and Liquidated Damages

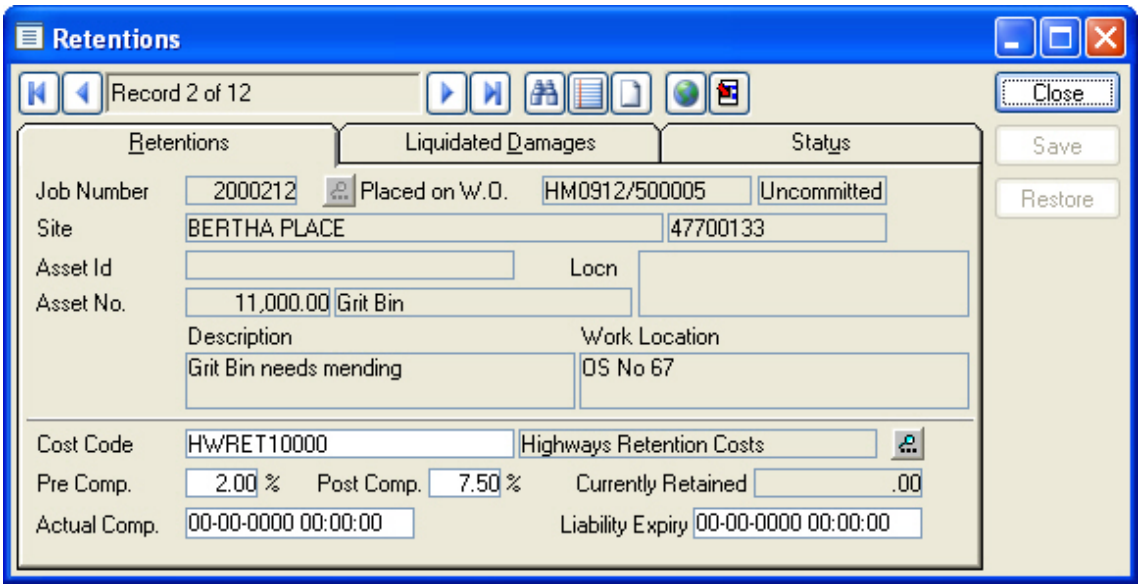
(Module 0930 - CM Retention and Liquidated Damages)

Displays Retention and Liquidated Damages information for Jobs on Orders.

These details are derived from the Price Factor on the Contract, if it has parameters set for Retentions and/or Liquidated Damages. See **Contract Preparation**for details on how Retentions and Liquidated Damages are set up for a Contract.

To view Retentions and Liquidated Damages information for Jobs: enter the Job number in the Job Number field to recall that Job, or use the Find button on the form to recall a range of Jobs into the form.

Retentions



The Retention allows a percentage of the cost of the work to be withheld from the payment until a pre-set period of time has elapsed after the completion of the work

A Retention will be calculated when a Price Factor is used which has had Retention information entered against it in the Contract.

The top part of the form, above the grey line, copies information from the Job.

The lower part of the form, under the grey line, displays the following:

Cost Code: The Retention Cost Code as defined for the Price Factor under the Contract.

Contract Preparation\Contract - Price Factor tab

This may be altered by selecting a new Cost Code from the pick list.

The Pick list references the Cost Code lookup.

Site Register\Site Lookups\Operational Lookups

Pre Comp: The Pre Completion percentage that will be retained from any payments made before the Job is complete.

This is entered automatically from the Pre Completion percentage set for the Price Factor under the Contract.

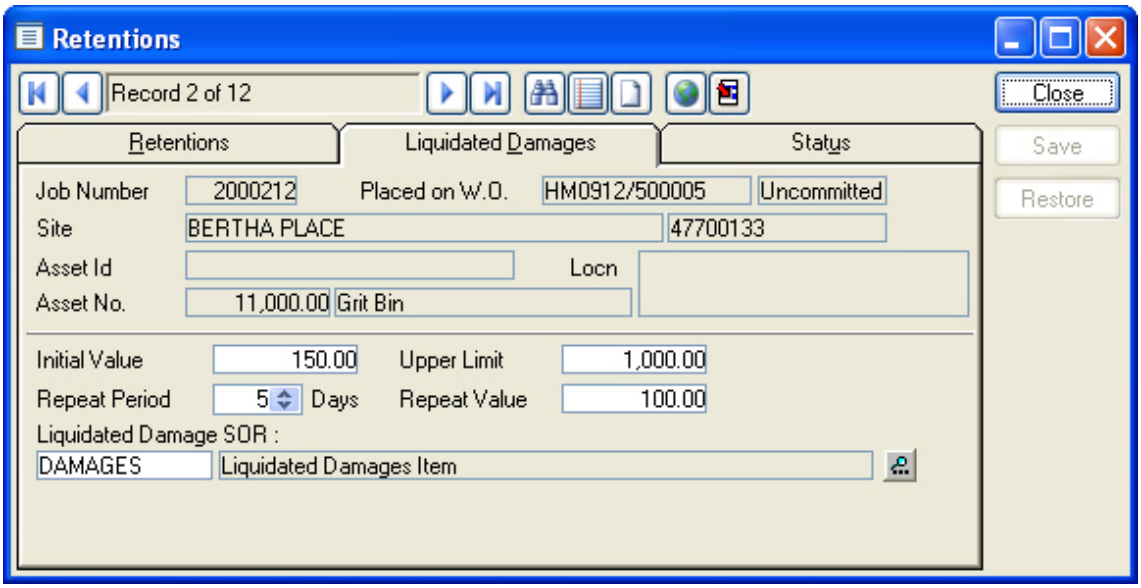
Contract Preparation\Contract - Price Factor tab

	This may be altered by entering a new figure.
Post Comp:	The Post Completion percentage that will be retained from payment made after the Job has been completed. This is entered automatically from the Post Completion percentage set for the Price Factor under the Contract. Contract Preparation\Contract - Price Factor tab This may be altered by entering a new figure.
Currently Retained:	A record will be kept of the amount of money being retained against the Job, when payment is made. This field is not editable.
Actual Completion:	Will be entered automatically by the system as the date on which the Job achieves a Status that has the Complete flag set.
Liability Expiry:	Will be calculated from the Actual Completion date for this Job and the Liability Follow Up set for the Price Factor under the Contract. Contract Preparation\Contract - Price Factor tab This may be edited by entering a new date.

Liquidated Damages

Liquidated Damages allows a penalty to be imposed for late completion of a Job. The terms of this penalty are set up for Price Factors in the Contract. See "Contract Preparation - Contract" for details on setting up the parameters for Liquidated damages.

The Liquidated Damages is intended solely as an override for the Contract defaults. If the form is left blank the Job will use the details set for the Price Factor on the Contract.



The top part of the form, above the grey line, will have been copied from the Job.

The lower portion of the form, under the grey line will be blank, and should be left blank unless you wish to override the Contract defaults set for the Price Factor.

The form is laid out in the same way as the Contract Price Factor details for Liquidated Damages, and the fields have the same function. See "**Contract Preparation\Contract - Price Factor Tab**" for details on how to complete these fields.

Status

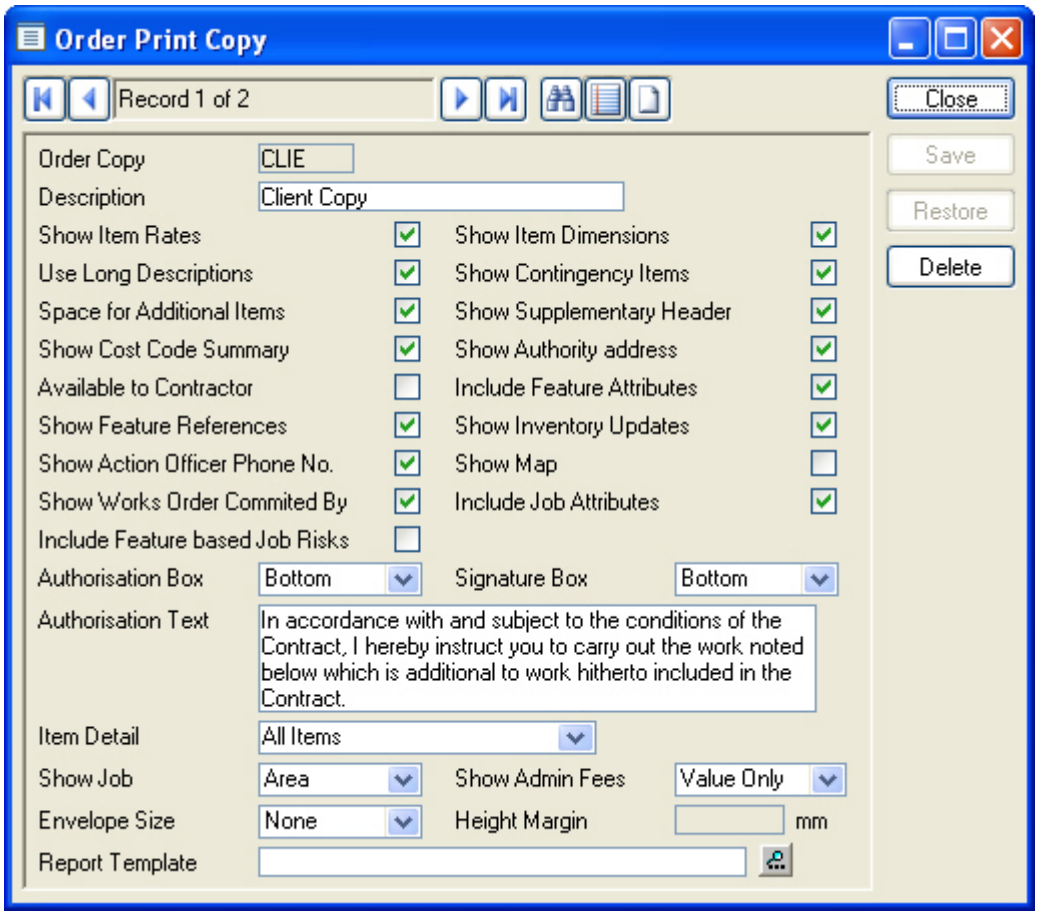
The Status tab carried details of the current Status for the Job. The Job status can be changed her by selecting a new Status in the Status field.

Order Print Copy

The Order Print Copy defines the way the Order Print out will look for:

- Non-Routine Works Orders
- Variation Orders

Several different Order Copies can be set up.



Order Copy:	A code - up to four alphanumeric characters
Description:	Up to 30 characters

The check boxes will define what appears on the Order print out. Check the boxes to display the item.

Show Item Rates:	Displays a column headed 'Unit Rate' showing the Contract rate for the SOR Item.
Show Item dimensions:	Displays Quantities as Length, Width and Depth, where they have been entered on the Job in that way.
Use Long Descriptions:	Displays the SOR Item Full Description as entered in the SOR Item library

Asset Maintenance\SOR Item

Show Contingency Items: Displays SOR Items included on the Job, which are flagged as 'Contingency' in the SOR Item library. If this check box is not selected, Contingency Items are not displayed on the Order print, and their value is not displayed or included in the Order total.

Asset Maintenance\SOR Item

Space for Additional Items: Provides a page-wide box, headed 'Additional Items' after the SOR Items for each Job.

Show Supplementary Header: Displays a second header with Contractor address and officer details, and Order Header details. The Contractor address derives from the Contractor library.

Contract Preparation\Contractor

Show Cost Code Summary: Summarises the Order Value, at the end of the Order print out, by Cost Code

Show Authority Address: Displays the Authority Address as entered in the General Systems Settings.

Leave the option unchecked, to display the logo instead of the Address, (if a path to a bitmap file is entered in the General Systems Settings).

System Administration\Security\General System Settings

Available to Contractor: Allows the Contractor, using Contractor Access, to use this Print Copy.

Include Feature Attributes: Will include Measurements, Text Attributes, Smart Attributes, and Date Types for the Features in the Works Order print.

Note: Attributes will only be displayed where the Feature Group Attributes have been flagged 'Show on Order'. See **Asset Register\Feature Lookups\Feature Groups** for details on adding Attributes to Groups and the 'Show on Order' check box.

Show Feature References: (Inventory module)

Where Inventory Item is being updated as a result of a Batch Job Creation, or manual editing of the Feature through the Order Job 'Other' button, the print will show Attributes of Features referencing this one and of the Inventory Items making up the references.

Note: Attributes will only be displayed where the Inventory Feature Group Attributes is flagged 'Show on Order'. See **Asset Register\Feature Lookups\Feature Groups** for details creating Inventory Items and adding Attributes to Inventory Feature Groups.

Show Inventory Updates: (Inventory module)

Where Inventory Item is being updated as a result of a Batch Job Creation, or manual editing of the Feature through the Order Job 'Other' button, the print will show the state of the Feature before and after the Job, i.e. all Items of Inventory Types that have been affected, rather than just the updated items.

Note: Inventory Items and Attributes will only be displayed where the Inventory Feature Group Attributes is flagged 'Show on Order'. See **Asset Register\Feature Lookups\Feature Groups** for details creating Inventory Items and adding Attributes to Inventory Feature Groups.

Show Action Officer Phone No:	Check this to show the Action Officer phone number (from the Action Officer lookup) on the Works Order print.
Show Map:	Check this to include a map on the Order Print. Defaults for map selection and appearance are set in Order Print Map System Settings. There is also an example of how to configure the settings. Maintenance Management\Contract Management Lookups\Order Print Map System Settings
Show work Committed by:	Check this to display the User who Committed the Works Order and when it was Committed. If set, the data shown for the Order is the Committed date, rather than the Order date. Who Committed the Order is displayed below this date. If an Action Officer is linked to the User that Committed the Order, then the name of the Action Officer is displayed, otherwise the first name and the last name of the User is displayed.
Include Job Attributes:	(Job Attribute module - 0715) Check this to include Job Attributes for the Jobs in the Works Order print.
Include Feature based Job Risks:	(Risk Management module - 2300) Check this to show the Feature based Job Risks on the Works Order print.
Authorisation box:	The Authorisation box consists of a signature box labelled 'Authorisation Date', with the Authorisation text as defined for this print copy. Select from: 'Top' - To display the Authorisation box at the top of the print-out 'Bottom' - To display the Authorisation box at the bottom of the printout. 'None' - To print without an Authorisation box.
Signature Box:	The signature box has two lines for 'Completion Date' and 'Acceptance Date'. Select from: 'Top' - To display the signature box at the top of the print-out 'Bottom' - To display the signature box at the bottom of the printout. 'None' - To print without a signature box.
Authorisation Text:	Enter the Text that is to appear with the Authorisation box.
Item Detail:	Select from: 'All Items' - To display all items in the Job and total them all. 'Percentage Items Separate' - To list and total Job Items separately from Percentage Items in the Job.
Show Job:	Select from the drop down list: 'Area' - Will print the Site Area for each Job. 'Address' - Will print the Site address, as it appears in the Address field of the Site form. If no address is entered for the Site, the field will default back to Area for that Job.

Show Administrative fees:	(Administration Fee Recovery module) Select from the drop down list: 'Value' - Only the value of the work is shown, headed 'Job Value' 'Value and Fees' - Job Value includes fees, and will be shown on the Order as: 'Job Value (incl fees)' 'Fees only' - Only the Fees will be shown, in a column headed 'Fee Value'
Envelope Size:	Select an envelope size which will set the Height Margin. **Note:** This does not affect printer settings - Confirm will still use the default Windows default printer settings.
Height Margin:	Enter the distance from the top of the envelope that the address field should be printed on the Order Print. This will default from the Envelope Size selection but can be overwritten, in which case the Envelope Size will change to 'Custom'.
Report Template:	(Data Miner module) You may specify a Report Template to use for the Order Print, which will substitute the User-defined Report for the normal system one. The printed flag will be set, and all other system functions that rely on an Order Print will carry on as usual. When printing Orders using Report Templates, only one Order Print Copy may be used. The specified Report Template must use a Data Source that has a link to the Order Header table. Additionally, if the Report's Data Source also has a link to the Order Print Copy table, the pick box selections can be applied to Order Print Copies using that Report Template. In other words, a single Report Template may be applied in several different Order Print Copies and may be additionally configured by selections made in the Order Print Copy window.

Works Order Reports

Work Order reports will give information on Jobs that have been placed on Orders:

Works Order Variation Value on page 56: to compare the original value of work with the Varied value of the work

Works Order Performance Report on page 57: to compare the Estimated Completion with the Actual completion and list Jobs as being 'Late' or 'Early'.

Work Order Status Report on page 57: to report on Jobs on Orders by Job Status.

Works Order Variation Value

The Works Order Variation Value report will draw on information from committed Jobs and committed Variation Orders, to provide a comparison of the original value of the work, and the varied value of the work.

Filter parameters include:

Committed by: select a user to filter for all Works Orders committed by the User.

Regime Like: for Routine Works Orders only

Report level: select from the drop down list, the level of detail for the report.

Works Order Performance Report

The Works Order Performance report will draw on information from Jobs on committed Work Orders to compare the Estimated Completion with the Actual Completion. The report then lists the Jobs as being Late or Early by a number of days.

Filter parameters include:

Committed by: select a user to filter for all Works Orders committed by the User.

Committed: From-To

Est Completion: From-To

Act Completion: From-To

Report Level: select from Contract or Job

Detail: select from Early, Late or All

Work Order Status Report

The Works Order Status Report will draw on information from Jobs on committed Work Orders to report on the current Job Status each Job carries, the Follow Up, and the 'New Date' - i.e. the date by which the Job should be actioned with a new Status.

Routine Works

The Routine Works folder contains all the forms, utilities and reports necessary to raise and commit Routine Work, print Orders and Work Summaries, and analyse the Routine Work.

Routine Work can be calculated by the system from the routine work that has been programmed into the system by Maintenance Regimes allocated to Features.

Routine Work can be browsed through the Order Header, and a Works Order can be printed.

Calculate Routine Works

The Calculate Routine Works utility will calculate a Works Order based on the Routine Works programmed into Confirm. Works Orders are Contract Area specific, and a separate Works Order will be raised for each Contract Area in the specified Contract.

The work calculation will be based on the Features in the appropriate Contract Areas, their measurements, and the SOR Items and occasions given in the Maintenance Regimes allocated to them.

The SOR Items are priced by reference to the Routine Price Factor of the appropriate Contract. The Routine Price Factor is set in the General Systems Settings.

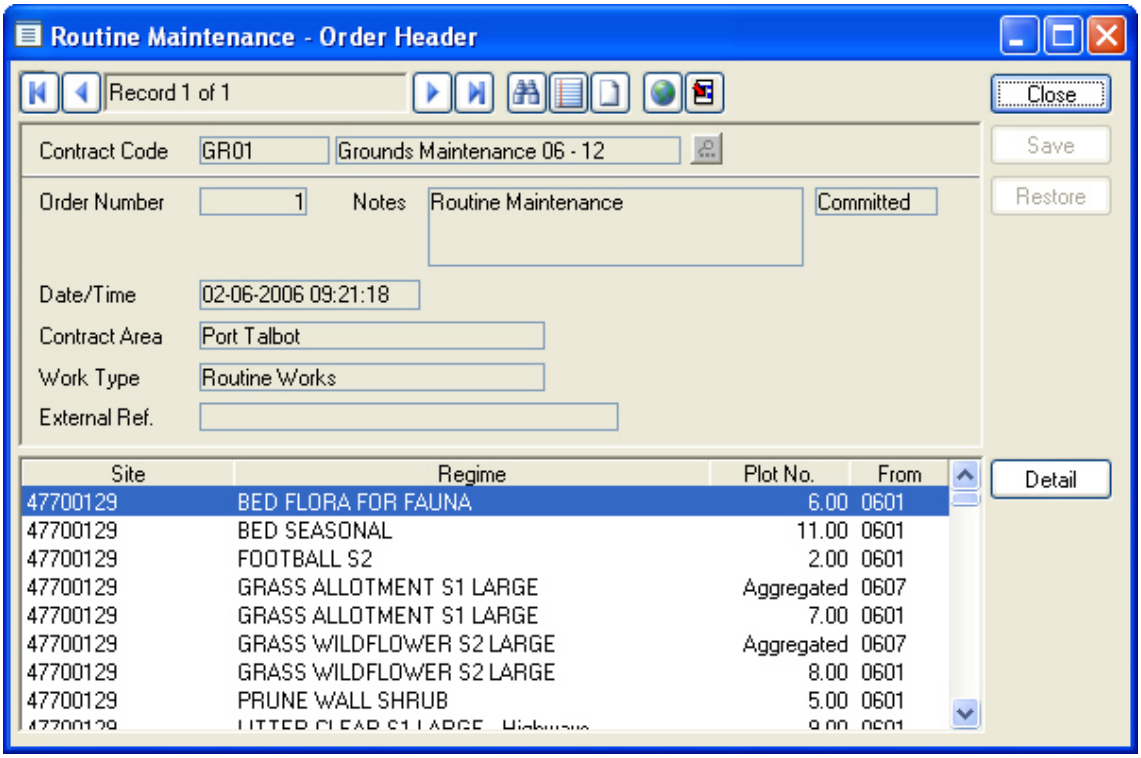
System Administration\Security

Contract:	Enter, or select from the pick list. The pick list references awarded Contracts.
Regime:	Enter a Maintenance Regime to restrict the works calculation to Features carrying that Regime. Leave blank to raise details for all appropriate Features. **Note:** Where Regimes are limited by Contract, only those Regimes specified for the selected Contract will be used in calculation of Routine Works.
Site:	Enter a Site to restrict the works calculation to a Site. Leave blank to raise details for all appropriate Sites.
Finance Period From/To:	Enter a range of Finance Periods. Work will be raised for all Periods in the range, by reference to the Work Periods that are linked with these Finance Periods in the Finance Period library. Finance and Budgets\Finance Period **Note:** Routine Work should not be calculated for a period beyond the date when a rate uplift is due. The works, once committed, are fixed to the prices in place on the day of committal, and Variations will use the Order prices (and not Contract rates).
Work Type:	Enter or select from the drop down list. The drop down list references the Work Type library. Maintenance Management\Contract Management Lookups
External Reference:	An optional, free text field - up to 20 alphanumerical characters.
Replace Any Existing Orders:	Checked by default. The Works Orders raised as a result of this calculation will replace any uncommitted Works Orders already raised for the same Contract. Committed Works Orders will be unaffected.

Click on OK to preview a list of Sites that will have work raised in the Works Order. Save the Preview to create the details.

Browse Routine Works

Browse Routine Works displays the Routine Maintenance - Order Header.



The Order Header is never used to raise Routine Work, and nothing in it can be edited directly. It is used only to view work raised through the 'Calculate Routine Works' utility.

There will be a separate header for each Contract and Contract Area, and for each range of Finance Periods selected in the 'Calculate Routine Works' filter.

Use the Find button to select an Order or range of Orders, or enter the Contract and Order number into the form and press the Tab key.

The Order Header displays the Contract, the Order Number (which will have been assigned from the Work Group seed numbers when the details were calculated and saved), the date and time the Order was raised, the Contract Area, and Work Type. The Order Header will also show whether the Works Order has been committed or not.

The lower pane lists Sites, Regimes and Plot No (or Aggregate*) for the work that has been raised. The far-right column displays the first Finance Period for which work has been raised in this Works Order.

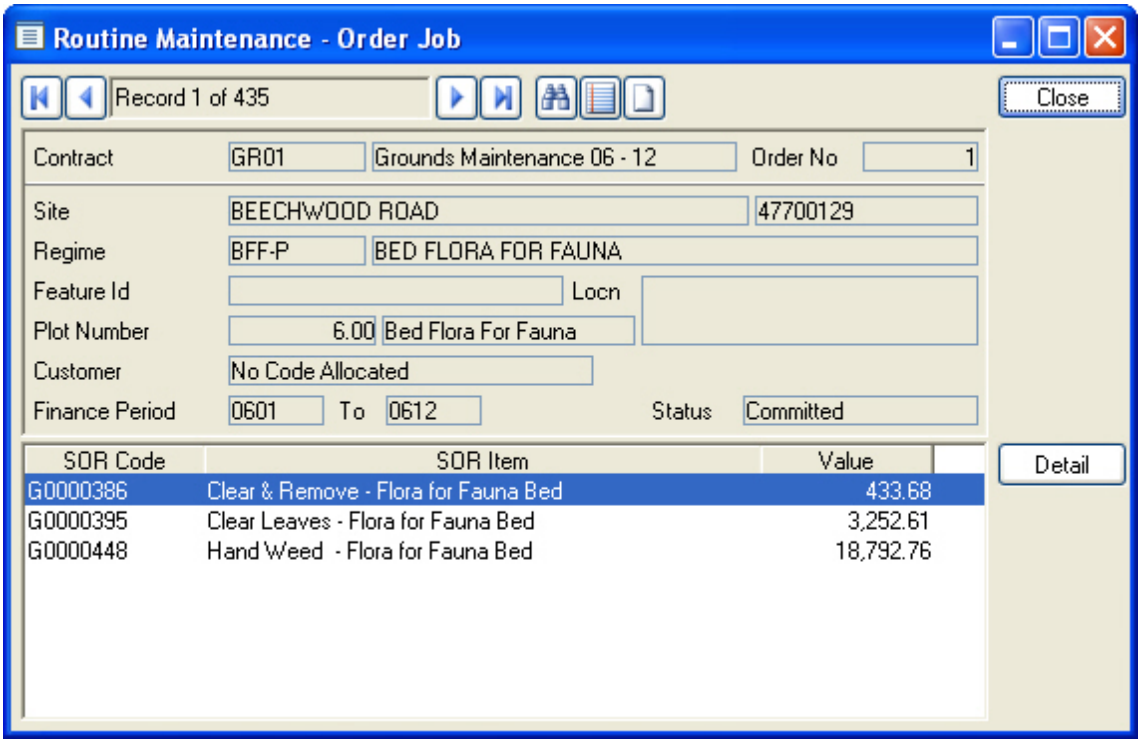
To view an item of Work in more detail, select it from the list in the lower pane, and click on the 'Detail' button.

*Note: Where the Maintenance Regime has the 'Aggregate' check box checked, all the work under that Regime in the same Site, with the same Customer and Cost Code, will be totalled, rather than displayed as a series of plot numbers. See **Asset Maintenance\Maintenance Regimes** for information on aggregating Regimes.

Routine Maintenance - Order Job

Each Regime from which work has been ordered for this Site will be displayed as a Routine Maintenance Order Job in the Routine Maintenance Order Header. Where the Regime is Aggregated there will be one Order Job for all the work under that Regime on the Site. Where there is no Aggregation, a separate Order Job will have been created for each Feature that carries the Regime.

To view the Routine Maintenance - Order Jobs, click on the 'Detail' button in the Order Header.

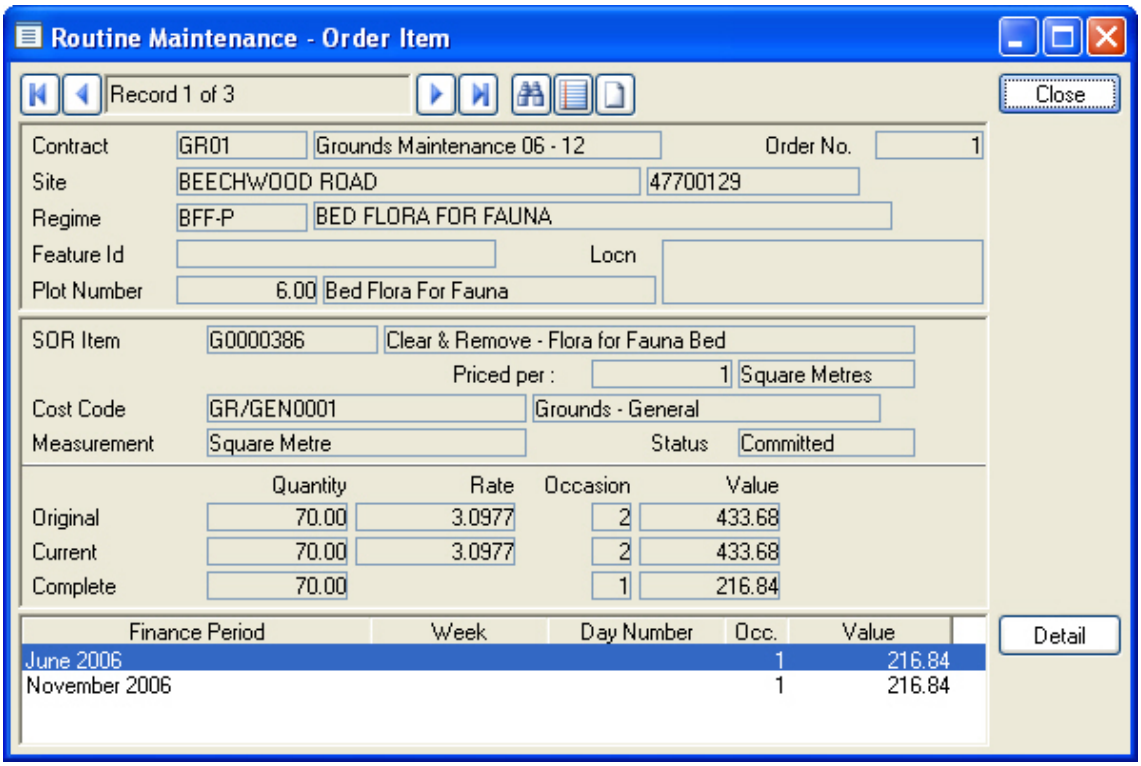


The Routine Maintenance - Order Job displays the details of the Site, Regime, and Plot Number (or Aggregate where the Regime is Aggregated). The Customer is displayed and the full range of Finance Periods for which the Work has been raised.

The lower pane displays the SOR Items associated with the Regime, and the Value of the work for each SOR Item.

Routine Maintenance - Order Item

Each SOR Item for this Routine Maintenance - Order Job can be viewed in more detail by clicking on the 'Detail' button in the Routine Maintenance - Order Job form.



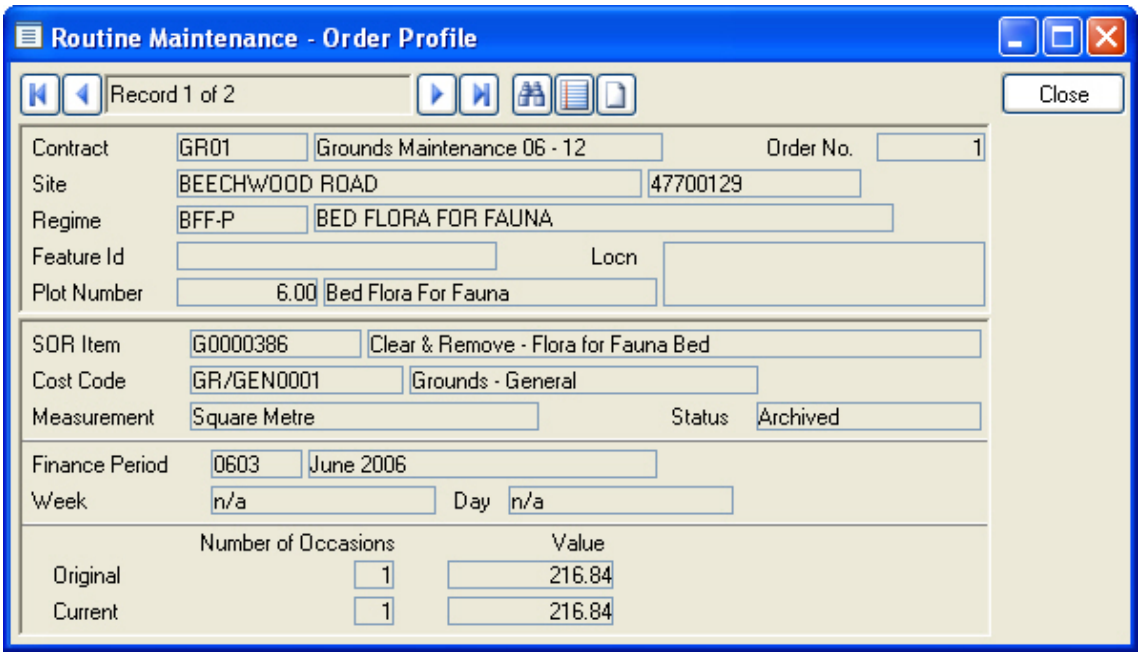
The Routine Maintenance - Order Item form carries forward the information from the Routine Maintenance - Order Job, and additionally displays the details of the selected SOR Item.

Original:	The Quantity, Rate, number of Occasions, and Value, which were originally ordered when the Order was first committed.
Current:	The Current Quantity, Rate, number of Occasions, and Value. These may have been changed from the Original quantities by the committal of a Variation Order.
Complete:	The 'Complete' field keeps a running record of the Quantities and Occasion which have been paid for, that is, which are include on a committed Payment Batch.

The lower pane lists the occasions of work ordered, giving a Value for each.

Routine Maintenance - Order Profile

Each Occasion of work can be viewed in more detail by clicking on the 'Detail' button in the Routine Maintenance - Order Item form.



The Routine Maintenance - Order Profile form carries across the information from the Routine Maintenance - Order Job, and from the Routine Maintenance - Order Item form. There is a separate Routine Maintenance - Order Profile form for each Finance Period, Week, and Day for which work using this SOR Item has been ordered. This will be based on the Maintenance Regime. In other words: if the Regime from which this work has been derived specifies work at Period level only, then only Periods will be displayed in the Routine Maintenance - Order Profile.

The Number of Occasions, and Value are displayed, for the Period, Week or Day to which this Routine Maintenance - Order Profile refers. This information is given for the Original Order, and for the Current Order, reflecting any Variations that have been committed against this Works Order.

Commit Routine Works

Orders must be committed in order to allow:

- Work Summaries to be printed
- Gang Allocation to take place (Works Management module)
- Work Tickets to be printed (Works Management module)
- Budgets to be amended to show the Order Value as 'Committed'
- Current Commitments reports to be run
- Payments to be made

'Commit Routine Works' displays the Routine Maintenance | Works Order Commit Filter.

Contract:	A Contract, or range of Contracts must be entered.
Order Number:	An Order number or range of Order Numbers can be entered here.
Order Date:	A date or range of dates can be entered here.

Click OK to display the Preview. The preview will display the Works Order(s) to be committed, with details of the work which is to be included. The last column of the preview will report on whether the Works Order(s) can be committed. Click on the 'Save' button to carry out the committal.

Order committal authorisation

(Financial XML Agent module)

Confirm can be configured to request authorisation from an external financial system before allowing Routine and Non-routine Works to be committed. This authorisation process can be selected individually for each Contract. The facility is enabled when the Financial XML Agent module is present and the 'Authorisation Required' option is selected on the Contract lookup in Contract Preparation. The Financial XML Agent must also be configured correctly so that it can contact the external financial system.

When the user attempts to commit Orders and the assigned Contract has 'Authorisation Required' selected, the Commit Order utility will set the Order Status to 'Uncommitted - Pending' while awaiting authorisation for full committal.

For Non-Routine Works, the following apply to Orders and Jobs in the 'Uncommitted - Pending' status:

- Restricted editing is allowed, on the same basis as for Committed Orders.
- The works order number is added to the job.
- The cost code commitment values are not updated with the Order cost code values (the Order remains 'uncommitted').
- The Job status for Jobs on the 'Pending' Order is set to the Order Pending system setting.

For Routine Works, the following applies when a Order or Job is 'Uncommitted - Pending':

- The cost code commitment values are not updated with the Order cost code values (the Order remains 'uncommitted').

Payment Processing\Financial Interface XML Settings

Contract Preparation\Contracts Interface

Obtaining Authorisation

Orders and Jobs will remain in the 'Uncommitted - Pending' state until authorisation is obtained.

Authorisation is sought though an automated export of 'Uncommitted - Pending' Orders to an external financial system and an import of authorisation from this external system.

Orders which have been set to 'Uncommitted - Pending' since the last Financial XML Interface run are extracted via the Financial XML Interface, and exported. The external system should send back a response either providing a Purchase Order Number, and thereby authorising the exported Order, rejecting the Order, or leaving it unchanged as 'Uncommitted - Pending'.

- If the Order is authorised, the Status of the Order is set to 'Committed', the Purchase Order Number is stored against the Order Header and the cost code commitment values are updated with the Order cost code values. The order status will then become 'Committed'. A Purchase Order Number assigned through authorisation cannot be edited.
- If no Purchase Order Number is supplied for an exported Order then the Order is deemed rejected, the Order returns to the 'Uncommitted' status.
- If no response is received for a particular exported Order then that Order will remain in the 'Uncommitted - Pending' status.

A Job Status Log record is created as follows:

- When the Order is authorised, the status used is the Order Committed system setting.
- When the Order is rejected, the status used is the Order Authorisation Failed system setting.

Print Routine Works

Works Orders can be printed whether they are committed or uncommitted. The Works Order print will show whether the Works Order is committed or not.

Print Routine Works displays the Routine Maintenance | Work Order Print Filter.

Contract:	A Contract must be entered.
Order Number:	An Order number or range of Order Numbers can be entered here.
Route:	If a (Site) Route is entered, the Works Order print will list the work in Route order. Work on Sites that are not in the Route will appear at the end of the Works Order print in alphabetical order of Site.
Committed Orders Only:	This is shaded by default. This is to indicate that both Committed and Uncommitted Orders will be printed. Clear the box to print only Uncommitted Works Orders. Click the box to display a tick which will print only Committed Works Orders. **Note:** This selection will only be effective where a range of Works Orders has been selected. Where a single Works Order is to be printed, the system will ignore any selections in this field and print the selected Works Order.
Unprinted Orders only:	Uncheck this to print all the selected Orders, regardless of whether they have the "Printed" flag set, that is, they have been printed before. **Note:** This selection will only be effective where a range of Works Orders has been selected. Where a single Works Order is to be printed, the system will ignore any selections in this field and print the selected Works Order.
Show Rates:	Checked by default. Uncheck to print the Works Order without the rates for the work.
Short Description only:	Checked by default. Uncheck to show the Long Descriptions for SOR Items in place of the short description.
Show Cost Code:	Checked by default, to show the Cost Code against every Feature/Regime included on the Order. Uncheck the box the print the Works Order without Cost Codes.

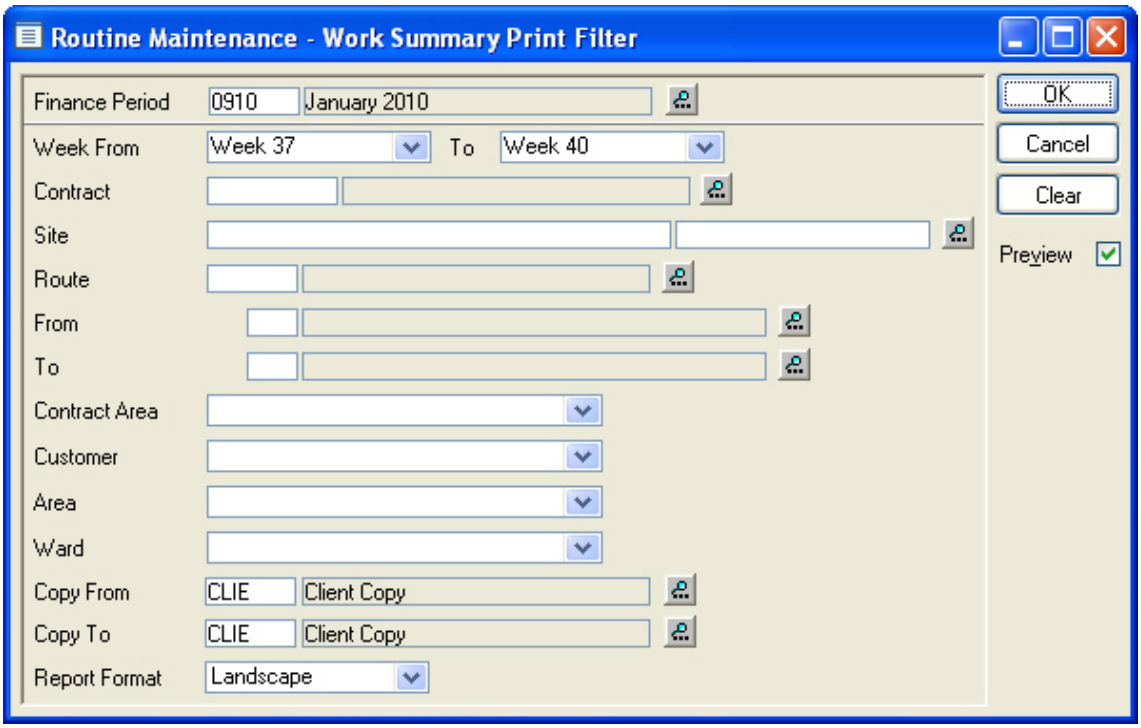
Click OK to display the Preview. Click on the Print Button in the Preview to send the Works Order to the printer.

Print Routine Work Summary

The Print Routine Work Summary will display the ordered work as a grid giving the details of the Site and Plot (or aggregation of plots where a Regime has been aggregated) and the occasions displayed in the relevant Period or Week column.

Routine Work Summaries can only be printed for work that is on a committed Works Order.

At least one Work Summary Copy must be in place before a Works Summary can be printed.



Finance Period: A Finance Period must be entered, or selected from the pick list. The pick list references the Finance Period library.

Finance and Budgets\Finance Period

Week From/To: These fields will default to the Weeks defined for the Finance Period specified above*. A shorter range of weeks (or a single week) may be entered, provided that the weeks specified fall within the given Finance Period.

*Note: The relationship of Weeks to Period is set in the Week Lookup.

Asset Maintenance\Maintenance Lookups

The Periods are Linked to Finance Periods in the Finance Period library.

Finance and Budgets

All other fields in the filter are optional. These include:

Route: If a (Site) Route is entered, the Works Summary print will be restricted to the Sites contained on the specified Route. These Sites will appear alphabetically - not in Route order.

Copy From/To: Specify the Print Copy, or range of Print Copies to be printed. The Pick lists reference the Work Summary Copy Lookups.

Maintenance Management\Contract Management Lookups

If these fields are left blank, every Work Summary copy type will be printed.

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

Routine Maintenance Reports

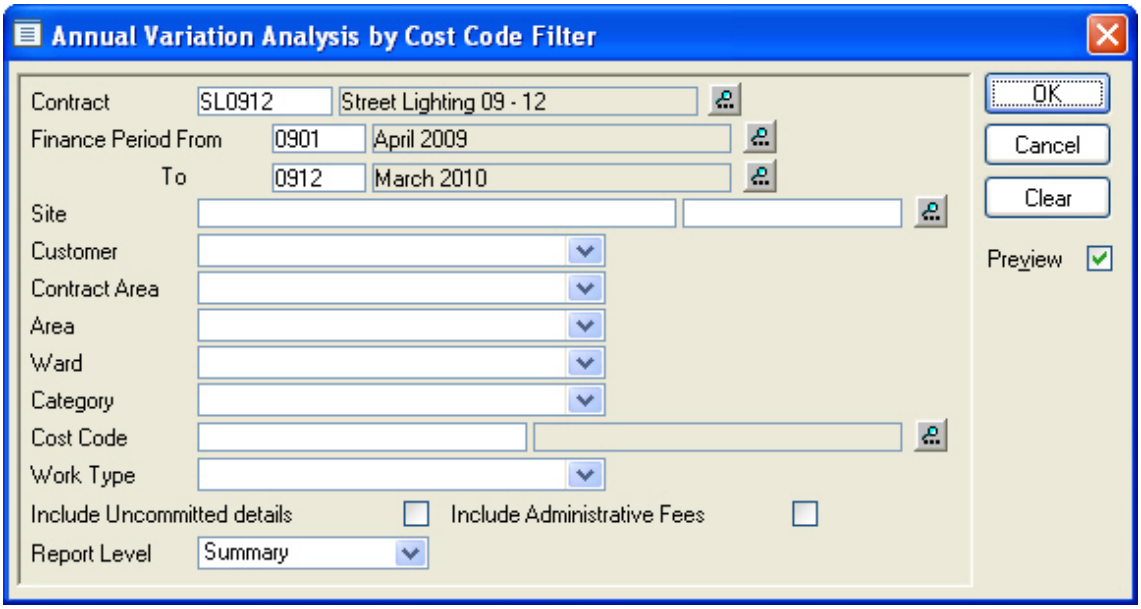
The Routine Maintenance Reports give details of Routine Works Orders, and Routine Variation Orders, committed in the system.

These can be seen as Summary reports giving a total for the whole amount committed on Works Orders in a Contract, the total committed on Routine Variations for that Contract, and the final amount now committed in that Contract, after adjusting for the Variations. The Report Level can be set to provide a more detailed report.

Both Annual and Period reports are available. The Annual Reports will simply give the totals for the range of Periods selected. The Period Reports will give information on each of the Periods in the selected range.

Annual and Period reports can be run by Contract Area, by Cost Code, by Customer and by Site.

The filter for all these reports is similar:



Filter options include:

Finance Period From/To:	These fields must be completed. The pick lists reference the Finance Period library. Finance and Budgets
Report Level:	Select from the drop down list: 'Summary' - Summary totals given only 'Type of Work' - The information is summarised by Type of Work - that is the Work Type that was assigned to each Works Order header, or Variation Order header. 'Detailed' - Individual Works Order totals will be given.

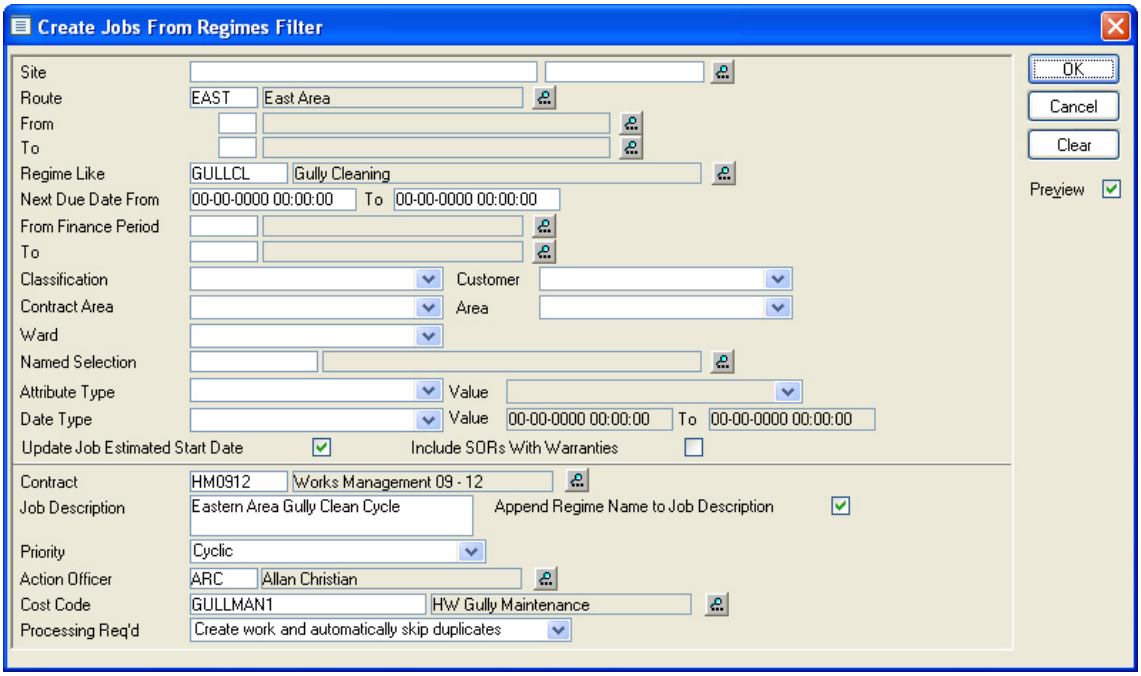
Cyclic Works

Cyclic work depends on Cyclic Maintenance Regimes as the basis for raising Jobs.

The Jobs, once raised, continue through the Non Routine process of work in exactly the same way as any other Job.

Create Jobs from Regimes

The Create Jobs from Regimes utility will create Jobs based on the selection of Regimes and Features.



The Create Jobs from Regimes filter is divided into two sections by a grey line.

Above the grey line the fields are for selecting the Features that will have a Job raised, and the Regime that is to be used as a basis for the Jobs.

The filter criteria include:

Regime:	The pick list will display Cyclic regimes only - i.e. Regimes which are flagged as 'Cyclic' in the Maintenance Regimes library. **Asset Maintenance\Maintenance Regimes** Selection of a Regime will restrict the Feature selection to Features that have this Regime allocated in the 'Current Cycle'.
Date next Due:	This will reference the 'Date Next Due' fieldof the Allocated Regime form for each Feature that has this Regime allocated. See " **Asset Register\Feature - Other button**" for information on the Allocated Regime form. If a date has been entered, it can be used to recall all Features on which this work has become due.
Finance Period:	Leave this blank unless you have specified particular Occasions on the Regime.

Update Job Estimated Start Date:	Check this to populate the Estimated Start Date field to the first day of the selected Finance Period, on the Jobs created. If the flag is not set, the Estimated Start Date will not be set on the created Jobs.
Include SORs with Warranties	(Warranty Dates module) The selected Regime(s) may contain SOR Items which are flagged as Warranty Items, and for which a current Warranty exists. In this case the Create Jobs from Regimes utility will exclude all SOR Items currently under Warranty unless the 'Include Warranty Item' checkbox is checked. **Note:** This may be checked by default in the Job Systems Settings Items are excluded (not Regimes) - in other words, if a Regime contains both excluded Warranty Items and Items which are not Warranty items, or Warranty Items not being triggered by their Date Type, then these items will be included and a Job created for those Items only. Where all available Items on the Regime are excluded then no Job is created.

The area of the form below the grey line is for specifying the Job details. All fields except 'Processing Req'd' will be greyed out by default. Select either 'Create Work and automatically skip duplicates', or 'Create work without checking for duplicates' to release the other fields in this section

Contract:	(Optional) Enter, or select from the pick list, a Contract. The pick list references awarded, and Non-term Contracts in the Contract library. Contract Preparation\Contract A Contract entered in this field will be entered as the 'Preferred Contract' on the Job Additional tab.
Job Description:	An optional text field. Text in this field will be copied to the Work Description field of each Job that is created.
Append Regime name:	Check this to append the Regime Name to the Job Description.
Priority:	Enter, or select from the drop down list. The drop down list references the Priority Lookup **Asset Maintenance\Maintenance Lookups**
Action Officer:	The Action Officer linked to the current User will be entered by default. This can be amended. The pick list references the Action officer Lookup **Asset Maintenance\Maintenance Lookups**
Processing Req'd	Select from: 'Preview work and display duplicates'* - All other fields in this section will be greyed out when this option is selected. This option will display a preview report, detailing the Jobs that would be produced, and reporting on whether duplicates* exist. 'Create work and automatically skip duplicates'* - This will create a Job for each Feature selected by the entries in the top part of the form, other than those for which duplicate* Jobs are found. 'Create work without checking for duplicates'* - This will create a Job for each Feature selected by the entries in the top part of the form, without checking for duplication*.

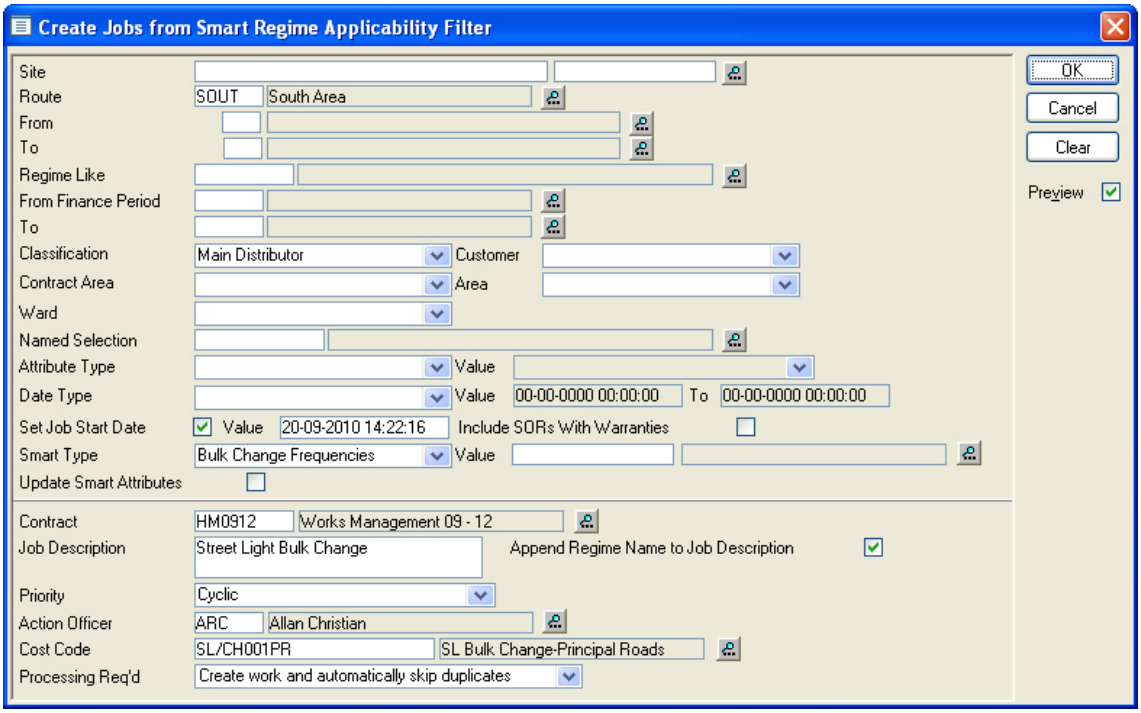
*Duplicate - another live Job in the system for the same Site and Plot, with the same SOR Items.

Click OK to display the preview report. Save the preview to create the proposed Jobs. When the preview is displayed, each Job will be assigned a number that will be displayed in the right hand column of the report.

Jobs, once created, can be batched on to Orders, be reported on, and eventually paid in the same way as for a Job produced in any other way.

Create Jobs from Smart Regime Applicability

The Create Jobs from Smart Regime Applicability utility will create Jobs based on the Feature Smart Value and the selection criteria applied in the filter. Regimes are associated with Smart Attribute Values in the Smart Attribute lookup.



The Create Jobs from Smart Regime Applicability filter is divided into two sections by a grey line.

Above the grey line the fields are for selecting the Features that will have a Job raised, and the Regime that is to be used as a basis for the Jobs.

The filter criteria include:

Regime:	The pick list will display Cyclic regimes only i.e. Regimes which are flagged as Cyclic in the Maintenance Regimes library. Selection of a Regime will restrict the Feature selection to Features that acquire this Regime through their Feature Smart Attribute Value, where the Regime is in the Current Cycle.
Date next Due:	This will reference the Date Next Due field of the Allocated Regime form for each Feature that acquires this Regime through their Feature Smart Attribute Value. See Asset Register\Feature Other button for information on the Allocated Regime form. If a date has been entered, it can be used to recall all Features on which this work has become due.

Finance Period:	Leave this blank unless you have specified particular Occasions on the Regime.
Set Job Start Date:	Check this to make the date field available for the entry of a Start Date. This date will be applied as the Start Date for each Job created in this batch. You may check the checkbox and leave the date field blank in order to apply the Start Date as the first day of the selected Finance Period. If you do not check this option, no Start Date will be set for the Job.
Include SORs with Warranties:	(Warranty Dates module) The selected Regime(s) may contain SOR Items which are flagged as Warranty Items, and for which a current Warranty exists. In this case the Create Jobs from Regimes utility will exclude all SOR Items currently under Warranty unless the 'Include Warranty Item' checkbox is checked. **Note:** This may be checked by default in the Job Systems Settings Items are excluded (not Regimes) in other words, if a Regime contains both excluded Warranty Items and Items which are not Warranty items, or Warranty Items not being triggered by their Date Type, then these items will be included and a Job created for those Items only. Where all available Items on the Regime are excluded then no Job is created.
Smart Type:	You may select a Smart Type in order to restrict the selection of Features to those with the selected Smart Attribute Applied.
Smart Value:	This field is available if you have selected a Smart Type and you may restrict the selection of Features to those with the selected Feature Smart Attribute Value applied.
Update Smart Attributes:	This check box will be available if you have selected a Smart Attribute Type. Check this option to update Feature Smart Attribute Values (from their dependent Feature Attribute Values) before making a selection of Features for Jobs.

The area of the form below the grey line is for specifying the Job details. All fields except Processing Reqd' will be greyed out by default. Select either Create Work and automatically skip duplicates, or Create work without checking for duplicates to release the other fields in this section.

Contract:	(Optional) Enter, or select from the pick list, a Contract. The pick list references awarded, and Non-term Contracts in the Contract library. A Contract entered in this field will be entered as the Preferred Contract on the Job Additional tab.
Job Desciption:	An optional text field. Text in this field will be copied to the Work Description field of each Job that is created.
Append Regime name:	Check this to append the Regime Name to the Job Description.
Priority:	Enter, or select from the drop down list. The drop down list references the Priority Lookup.
Action Officer:	The Action Officer linked to the current User will be entered by default. This can be amended. The pick list references the Action officer Lookup.
Processing Reqd:	Select from: 'Preview work and display duplicates'*: all other fields in this section will be greyed out when this option is selected. This option will display a preview report, detailing the Jobs that would be produced, and reporting on whether duplicates* exist.

'Create work and automatically skip duplicates'*: this will create a Job for each Feature selected by the entries in the top part of the form, other than those for which duplicate* Jobs are found.

'Create work without checking for duplicates'*: this will create a Job for each Feature selected by the entries in the top part of the form, without checking for duplication*.

*Duplicate another live Job in the system for the same Site and Plot, with the same SOR Items.

Click OK to display the preview report. Save the preview to create the proposed Jobs. When the preview is displayed, each Job will be assigned a number that will be displayed in the right hand column of the report.

Jobs, once created, can be batched on to Orders, be reported on, and eventually paid in the same way as for a Job produced in any other way.

Regime Cycle Batch

A Maintenance Regime which is flagged as 'Cyclic' carries information about how many cycles will be carried out, and which Cycle is currently being carried out. When a Regime is selected in the Create Jobs from Regimes filter, it will include with it any Feature to which this Regime, in this Cycle has been allocated. Another set of Features may have been allocated the Regime in another Cycle. The information about which Cycle (and therefore which Features) is currently involved is given by the entry in the 'Current Cycle' field of the Maintenance Regime.

Asset Maintenance\Maintenance Regime

When a cycle for a Regime has been finished, the Regime 'Current Cycle' field should be updated to the next cycle of work that will be undertaken. This can be done directly in the Maintenance Regime form, or it can be done by a batch process using Regime Cycle Batch.

Increment Cycle:	Check this to increment the 'Current Cycle' on the selected Regimes by 1.
Set Cycle:	Enter a number to be entered into the 'Current Cycle' field of the selected Regimes. Overrides the 'Increment Cycle' field.
Regime Like:	Enter the Regime, or code segment and wildcards, to select the Regimes to be updated. Leave blank to update all the Cyclic Regimes.

Click OK to display the preview report. Save the preview to update the Regimes. Variation Details displays the Variation form.

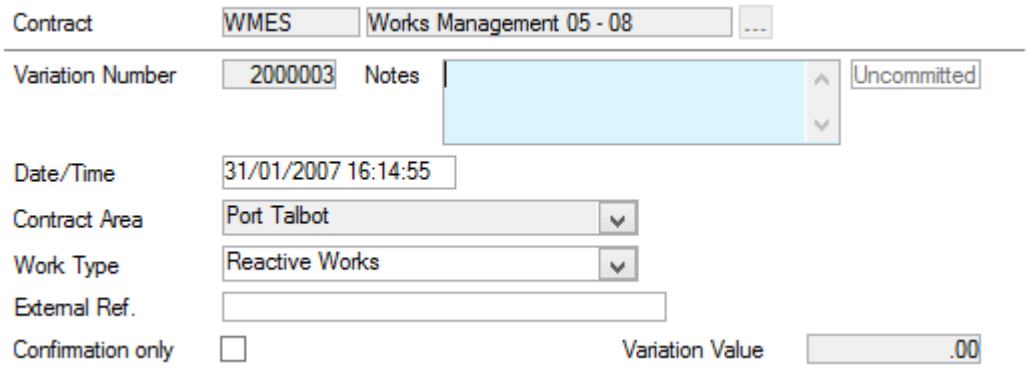
Variation Orders

A Variation Order is raised and committed to make changes to committed Works Orders.

Each Variation Order will have a numbered Variation Header, which is numbered within the Contract from the Work Group Seed numbers.

Variation Details

Variations are created to vary details of Committed work. This work can be either Routine or Non-Routine.



Contract Code: Enter, or select from pick list, the Contract under which this Variation will be issued. The Pick list references the Contract Library and displays awarded Contracts, and Non-Term Contracts (Non Term module).

Contract Preparation\Contract

Variation Number: A number will be automatically assigned from the Seed numbers for the User's Work Group and the selected Contract when the Variation Header is saved. See "**System Administration\Work Group**" for details on setting seed numbers for Variations.

The number of an existing Variation can be entered here to recall that record.

Notes: An optional, free text field

Date/Time: The current date and time is automatically entered. The field can be edited.

Contract Area: Select the appropriate Contract Area from the drop down list.

The drop down list references the Contract Area Lookup.

Site Register\Site Lookups\Operational Site Lookups

Work Type: Enter, or select from the drop down list the appropriate Work Type.

The drop down list references the Work Type Lookup.

Maintenance Management\Contract Management Lookups

External Ref: An optional, free text field.

Confirmation only:	Check this to print the words 'Confirmation Only' across the top of the Variation Order print out.
Variation Value:	Non-editable field that will display the total value of the Variation when Variation Jobs are added.

Commit button

Click on the 'Commit' button on the Variation Header. The Variation Commit Batch filter will be displayed, with the relevant fields already completed for this Variation. Click OK to view the Preview. Save the Preview to carry out the Committal.

See **Commit Variations** on page 81 for details on Committing Variation Orders

Archive button

Redundant headers can be Archived with the 'Archive' button. After prompting the User for confirmation the Status of the Variation Header will be set to 'Archived'.

The button will be disabled if there are Jobs attached (in which case the 'Clear' button can be used) or the Variation has already been Archived.

Print button

Click on the 'Print' button on the Variation Header. The Variation Print Filter will be displayed, with the relevant fields already completed for this Variation. Click Ok to view the Print Preview. Click on the Print button in the Preview to send the Order to the Printer.

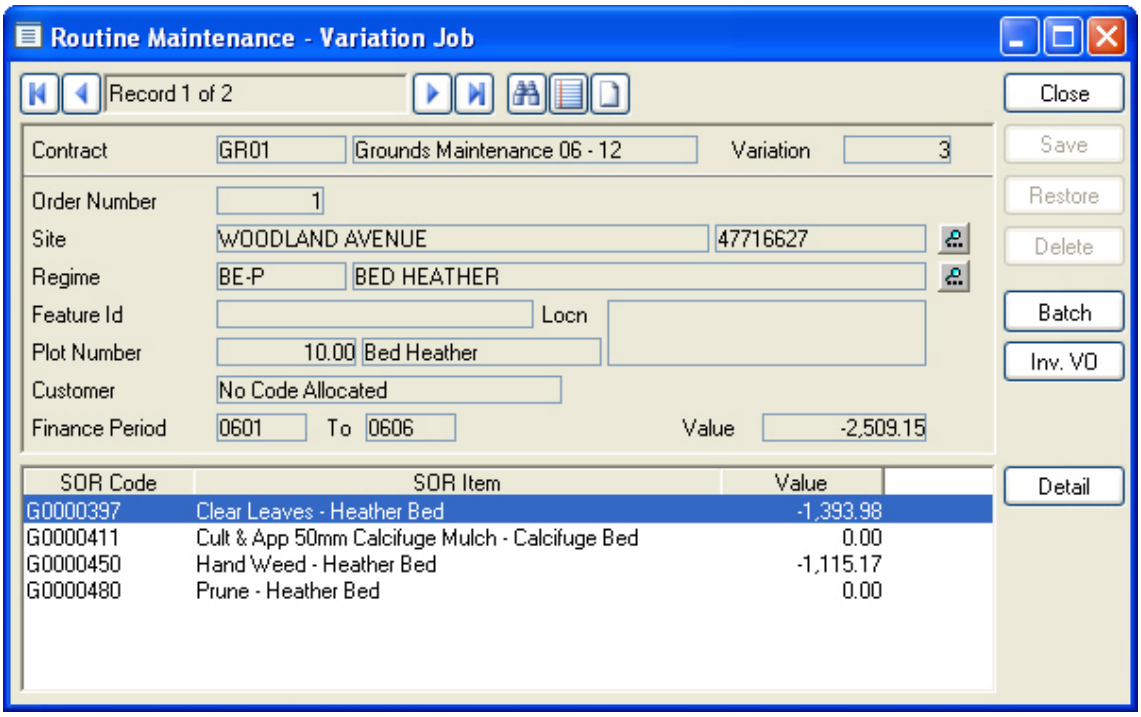
See "**Print Variations** on page 81" for details on printing Variation Orders.

Variation Header - Routine button

Click on the 'Routine' button to display the Routine Maintenance - Variation Job form

Variation Job

This form can be used to view Variations created by the Batch utility, and the Inventory Variation utility.



Both the 'Batch' and Inventory Variation utilities create Routine Maintenance - Variation Jobs. A Variation Job is created for each Regime, Customer and Plot (or aggregation of plots) in which a change will be made.

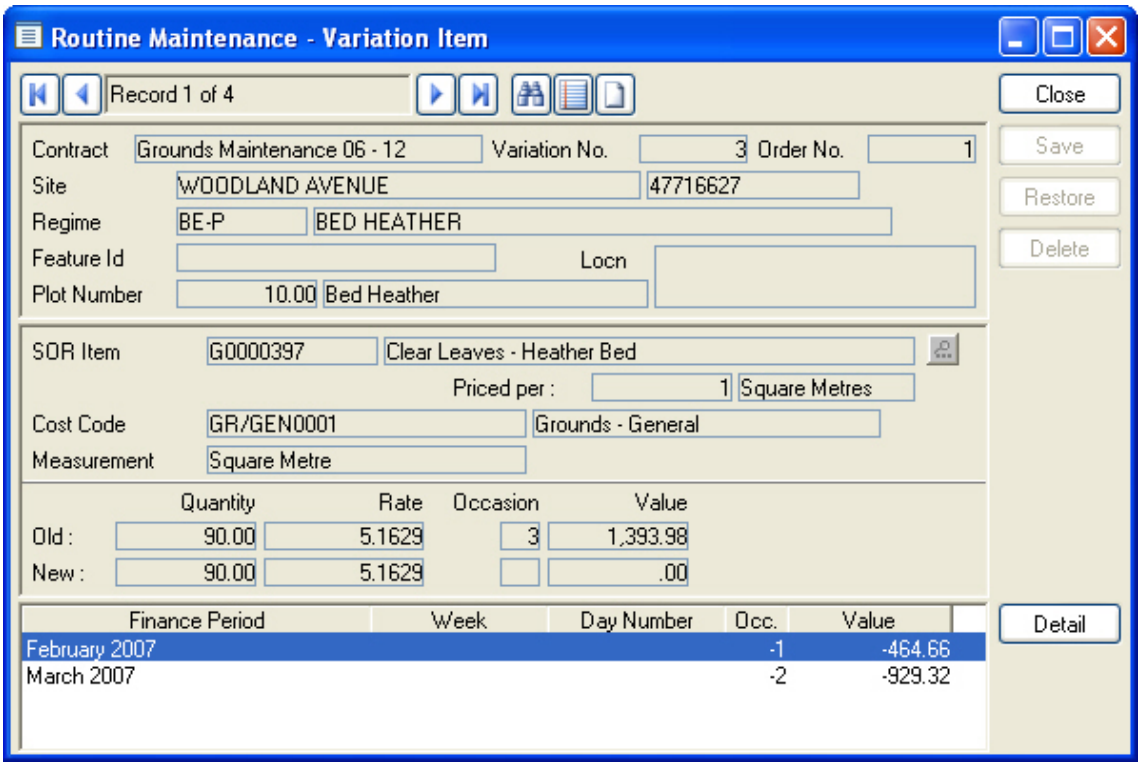
The Routine Maintenance - Variation Job form displays the details of the Site, Regime and Plot Number (or aggregation where the Regime is aggregated), derived from the original Works Order, of each Variation Job. The number of the Works Order that contains the original work, and the Finance Period(s) for which the Works Order runs, are also displayed.

On an uncommitted Variation Order, Variation Jobs can be deleted for the Variation Order by clicking the 'Delete' button.

The lower pane displays the SOR Items that have been amended, and the Value of the change.

Variation Item

Each SOR Item for this Variation Job can be viewed in more detail by clicking on the 'Detail' button in the Variation Job form.



The Variation Item form carries forward the information from the Variation Job, and additionally displays the details of the selected SOR Item, as derived from the original Works Order.

The Quantity, Rate, number of Occasions, and Value are displayed, for the life span of this Order:

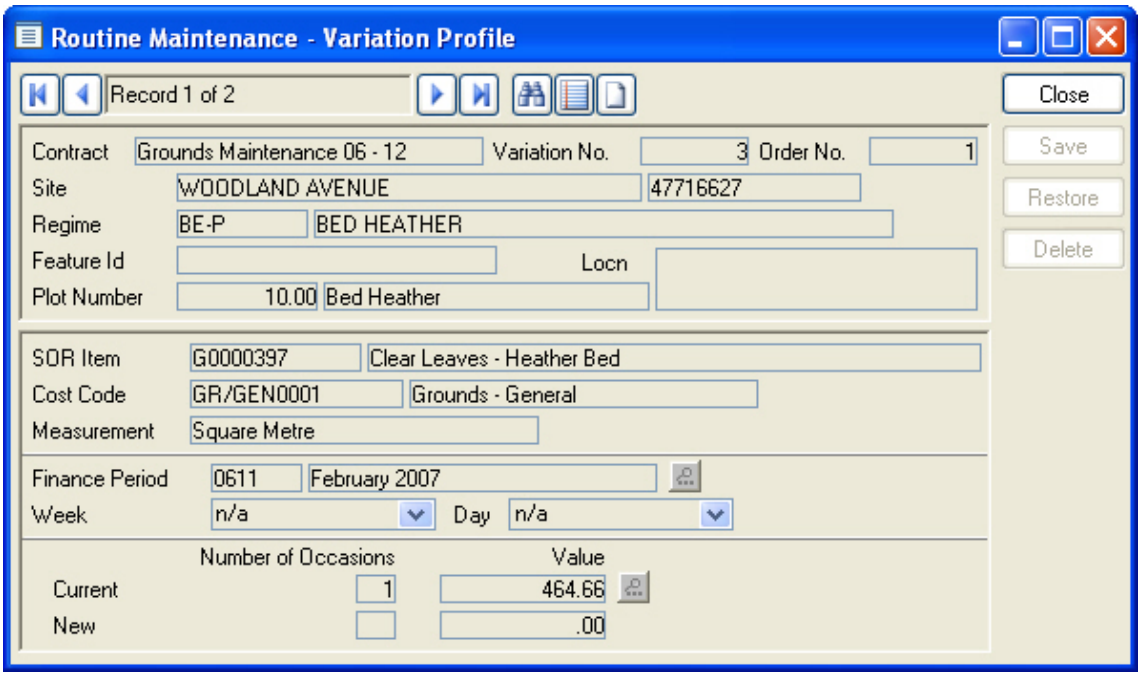
Old:	The Quantities, Occasions and Values prior to this Variation.
New:	The Quantity, Occasions and Values, reflecting the changes imposed by this Variation.

On an uncommitted Variation Order, the Variation Item can be deleted from the Variation Job by clicking the 'Delete' button.

The lower pane lists the occasions of work varied, giving a Value for each.

Variation Profile

Each Occasion of the work that has been varied can be viewed in more detail by clicking on the 'Detail' button in the Routine Maintenance - Variation Item form.



The Routine Maintenance - Variation Profile form carries across the information from the Routine Maintenance - Variation Item form. There is a separate Routine Maintenance - Variation Profile form for each Finance Period, Week, and Day for which work using this SOR Item has been varied.

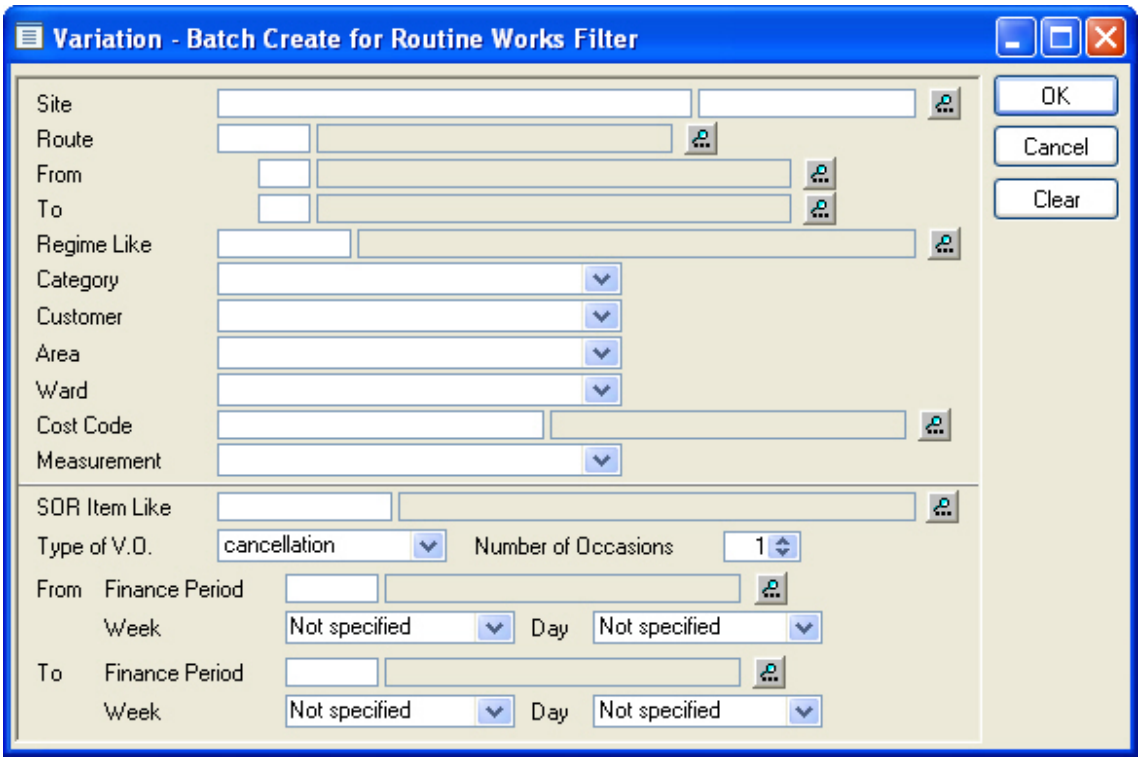
The Number of Occasions, and Value are displayed, for the Period, Week or Day to which this Routine Maintenance - Variation Profile refers:

Current:	The number of Occasions currently ordered.
New:	The occasions and values, which will be applied when this Variation is committed. On an uncommitted Variation Order, the 'New' field of the Variation Profile is editable; therefore changes can be made to the number of occasion specified.

A Routine Maintenance - Variation Profile can be deleted, for this Variation Item, by clicking the 'Delete' button.

Batch button

To carry out a Batch variation, click on the 'Batch' button in the Routine Maintenance - Variation Job form. The Variation - Batch Create for Routine Works Filter is displayed:



The filter is used to define the location, the work, and the occasions for which the Variation is to be carried out.

The fields above the grey line define the Sites, Features and Regimes on which the work is to be varied.

The fields below the grey line define the type of Variation and set the Occasions. These fields include:

Type of V.O:	Select from the drop down list: Cancellation: to cancel the work specified in the filter. If cancellation is selected, the Finance Period fields will be giving a range through which the work is to be cancelled. Reschedule: to move occasions of work from one period to another. If reschedule is selected, the 'From Finance Period' fields will indicate which Period (Week and Day) currently contains the work, and the 'To Finance Period' fields will be specifying the Period (Week and Day) to which the work is to be rescheduled. Additional: to add an occasion of work. If Additional is selected, the 'From Finance Period' fields will grey out leaving the 'To Finance Period' fields for the entry of the occasion(s) of the additional work.
Number of Occasions:	To specify the number of occasions, in each of the Periods specified in the Finance Period fields, which are to be cancelled, rescheduled, or added.
From Finance Period..:	The function of this field will alter with the Type of V.O. selection made above, and the field will not be available at all if the Type of VO 'Additional' has been selected. If only the Finance Period is entered (and Week and Day are left 'Not Specified'), then the selection of work for the Variation will be made from work that was originally specified (in the Maintenance Regime) at Period level.

Week can be selected without completing Finance Period (in which case the appropriate Finance Period will be automatically entered). If a Finance Period is entered first, then the selection of a Week will be limited to the Weeks associated with the entered Finance Period.

If Finance Period and Week are entered, then the selection of work for the Variation will be made from work that was originally specified (in the Maintenance Regime) at Week level.

A Day can be selected after a Week has been specified. If a Day is entered, then the selection of work for the Variation will be made from work that was originally specified (in the Maintenance Regime) at daily level, on that day of the week.

To Finance Period..: This field will:

- Complete the range for a Cancellation of work. The level applied here (in terms of Periods, Week and Days) must reflect the level applied in the 'From' fields. So if 'From' was specified as a Period only, the 'To' can only be specified as a Period.
- Indicate where work is to be rescheduled to for a Reschedule of work. Work can be moved from Period level and rescheduled to a Week or a Day.
- Indicate the Period to which work is to be added for Additional work. Work may be added at any level of Period, Week or Day.

Click on OK to run the utility. All the necessary Routine Maintenance - Variation Jobs will be created, and may be viewed in the Routine Maintenance - Variation Job form.

The 'Batch' may be run as many times as necessary to select, and vary all the required work. Each time the 'Batch' is run, it will add the new Routine Maintenance - Variation Jobs to those already created.

InvVO button

The Inventory Variation utility will identify changes in the Inventory (changes to Sites, Features or Regimes), which have taken place since the Routine Maintenance Works Order was committed, and create Routine Maintenance - Variation Jobs to reflect those changes.

To run the Inventory Variation utility click on the 'Inv VO' button in the Routine Maintenance - Variation Job form. The Inventory Variation Order Filter is displayed:

Finance Period: Enter the Finance Period from which the changes in the Inventory should be effective in the Works Order. The pick list references the Finance Period library.

Finance and Budgets

Week: Do not alter the default for 'Not Specified'.

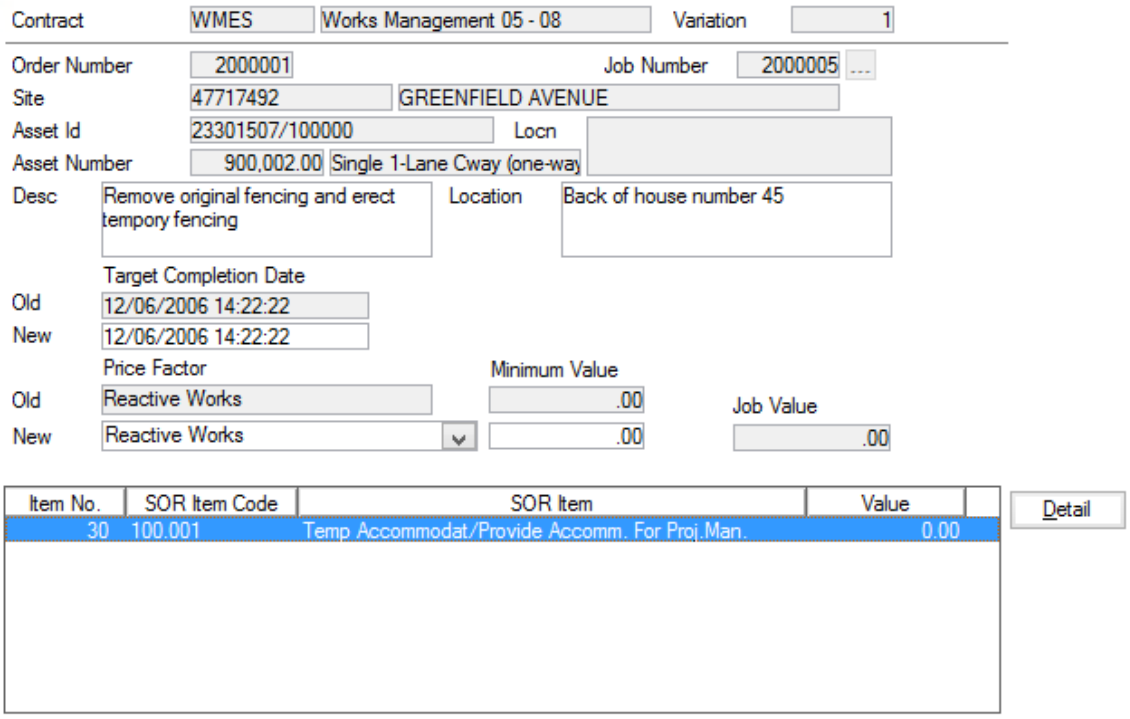
The section under the grey line is to define the parts of the Inventory in which the changes have taken place. The utility will then restrict the comparison to these parts of the Inventory. Leave this section of the filter blank to have the comparison made over the whole Inventory (but be aware that this may take some time if your Inventory is large).

Click OK to run the utility. A Preview report will be displayed, listing the changes that have been found when the Inventory is compared with the Works Order in the Periods specified. The report will give a short line of text, for each difference found, indicating the nature of the change. Click on 'Save' to create the Routine Maintenance - Variation Jobs necessary to amend the Work Order.

Note: Finance Periods are identified using dates saved on the Routine Works Order. If the Finance Period dates have been amended since the Works Order was Saved the utility will be unable to identify the Finance Periods used on the Order and the Save button will be disabled.

Job button

Click on the 'Job' button to display the Variation job form:



Contract and Variation number are copied form the Variation header

Job Number:	Enter, or select from the pick list, the Job number of the Job to Varied. The pick list references live, committed Jobs.

When a Job number is selected, the Job details will be entered into the form. Only the Price Factor field can be amended:

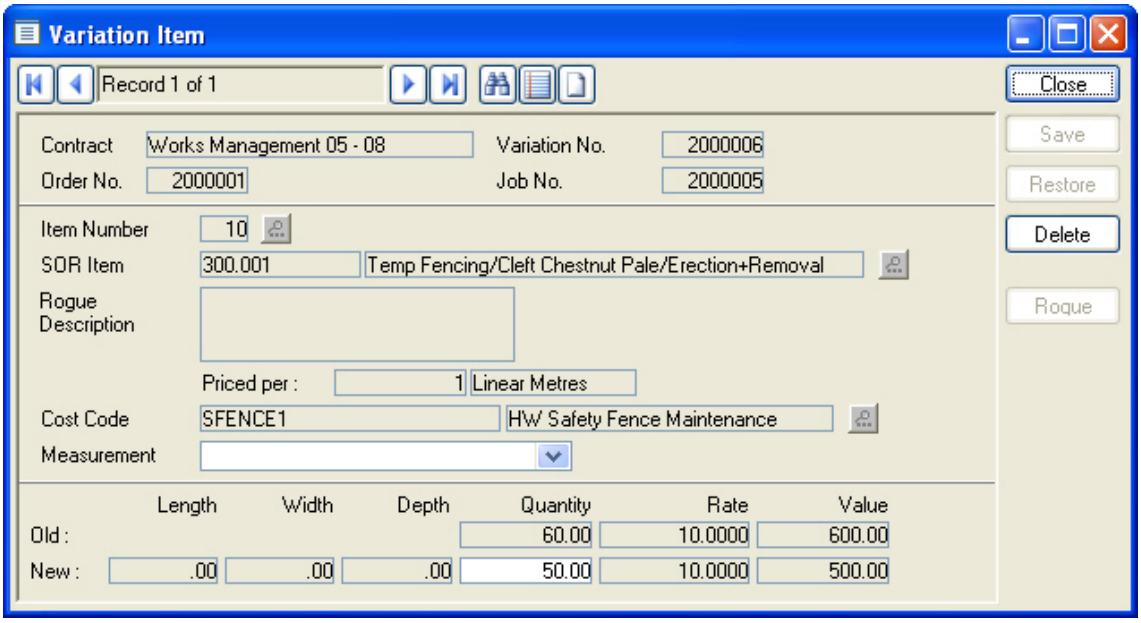
Price Factor - New:	Enter, or select from the drop down list, the new Price Factor. The drop down list references the Price Factors for this Contract **Contract Preparation\Contract - Price Factor tab**
Minimum Value:	The Minimum Value for the Job can be altered by entering a new amount. **Note:** The Minimum Value will be fixed by the original Price Factor and will not change if a new Price Factor (with a different Minimum Value) is selected.
Job Value:	The overall value of the changes made on this Variation Job.

(Administration Fee Recovery module)

Note: Fee Rates are not displayed, but are generated for additions in value. The Fee Percentage rate for the Variation will be drawn from the Job that is being varied, and not from the current Fee Rates stored in the Fee Rate library.

Variation Item

To change SOR Item details, click on the 'Detail button to display the Variation Item form:



To add Items:

The form will be Blank when it is first displayed, with the next available item number entered in the Item Number field. You may use this form to add new Items to the Job.

If the Cost Code Protection settings have been set on the Job System Settings screen, then Cost Code will be set from the Job's Cost Code and it cannot be modified here.

Asset Maintenance\Job System Settings

To amend existing Items:

Enter into the Item Number field the number of the item to amend, or use the pick button on this field to select it. The pick list will display all the items currently on the Job.

When an existing Item is entered, the Item details are brought in and greyed out. Only measurement can be amended:

Measurement:	Select a measurement Type from the drop down list to enter the Feature Measurement. The drop down list will display Measurement Types that reference the same Unit of Measure as the SOR Item. If you wish to enter your own Quantity into the 'Quantity field below, leave this field blank.
Quantity - New	If the original quantities were entered as Length, Width and Depth, then these will be shown in the 'Old' row and the fields in the 'New' row will be available. If the original quantity was entered as a total Quantity, then this is shown in the 'Old' row, and the Quantity field will be available in the 'New' row. Enter a new Quantity. This can be Zero if you want to cancel this SOR Item altogether.

Note: SOR Items cannot be deleted from a committed Job, since a record must be kept of their having been on the original Order. You can however reduce the quantity of the SOR Item to zero.

Commit Variations

Variation Orders must be committed for the changes to be made in the original Works Order. Once a Variation is committed, any new Works Order Prints, Work Summary Print and Gang Ticket Prints will reflect the changes made by the Variation. The Payment also, when it is made, will take account of the Variation. Commit Variations allows a range of Variations to be committed

Contract:	A Contract, or range of Contracts must be entered.
Variation Number:	A Variation number or range of Variation Numbers can be entered here.
Variation Date:	A date or range of dates can be entered here.

Click on OK to display the Preview. The preview will display the Variations by Work Order number and Site. The last column of the preview will report on whether the Variations can be committed. If the Variation cannot be committed a short line of text will describe the problem. A problem with any single item on the Variation will prevent the whole Variation Order from committing.

If no problems are reported, or to commit Variation without problems, click on the 'Save' button.

Print Variations

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

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

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

Variation on Price

Variation Orders will not normally take account of changes in Rates that have taken place since the original Works Order was committed. Varied works will use the rates current when the original order was committed.

If there is a requirement to update Jobs on Committed Orders, and\or Jobs on committed Payment Batches, to reflect new rates, then the Variation on Price utility can be used to do this.

This utility will select committed Non-Routine Orders whose Contract or Site BOQ rate has changed (after a Rate Uplift for instance), and either update the SOR Item rates, or make up the difference in old and new values using an adjustment SOR Item.

The Value of the committed Variation will then be included on the next Payment Batch that is created (if a Payment Batch is not already requested in the Variation on Price filter).

Pre-requisites for Variation on Price

In order to carry out a Variation on Price the following must be in place:

- There must be suitable, 'currency' (pound or dollar) SORIitem, present in the Contract Rates for the Contracts in which Variation on Price is to be carried out. This may be the standard currency Item, or it may be a specially created 'Variation on Price' Item (priced 'per [currency unit]', and given a rate of '1'). **Asset Maintenance\SOR item**
- A new Job Status must be created which has the outstanding, commit, complete and payment check boxes checked. **Asset Register\Maintenance Lookups**
- The Contract Management System Setting must have the Variation on Price SOR Item set, and the Price Variation Status set.

To carry out a Variation on Price

All Filter fields (other the 'Processing Required') are optional and include:

Include Payments:	Check this to include archived Jobs, that is those Jobs on committed payment batches
Finance Period From:	This field is only available is 'Include Payments' is selected. It will limit the selection of Archived Jobs to those in Payment batches in and after the selected Finance Period.

The area under the grey line is to define the actions required when the filter is run

Processing Required:	Select from: Create uncommitted Variations: - to create a Variation Header containing all the selected Jobs amended to update the Price. Commit Variations: - to create the Variation as above, and commit it. Create uncommitted Payment Batches: - to create and commit the Variation(s), and create Payment Batches for all the Jobs involved in the Variation. Commit Payment Batches: - To create and commit the Variations, and create and commit the required Payment Batches.
Finance Period	This field will only be available if 'Create uncommitted Payment Batches', or 'Commit Payment Batches' is selected. Enter the Finance Period to be assigned to the Payment Batch(es) that will be created.

Click on OK to run the utility. A preview will be displayed listing all the Jobs that will be varied, and giving the value of the Variation. Save the Preview to carry out the Variation.

Note: Where Create Payment Batches, or Commit Payment batches has not been selected, the Jobs on the Variation will need to be manually paid. To do this:

Committed (but not archived) Jobs will be paid in usual way, either by a Request for Payment, or by setting the Status to one that allows payment. The Jobs can be put onto a Payment Batch as soon as they are authorised and the amended value will be paid.

Archived Jobs - these will have the 'Variation on Price' Status set. This Status allows payment, therefore these Jobs can be included on a payment batch without any further processing.

Contract Management Lookups

Contract Management Lookups contains libraries and System Settings for the Contract Management module and the Contractor Invoice module.

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.

Work Type

The Work Type lookup provides a series of labels for applying to Order Headers. These labels then provide a reporting tool so that Works Orders of a particular Work Type can be picked out for a report. Additionally, where the Administration Fee Recovery module is present, the Work Type plays a part in determining the Fee Percent and the Minimum Fee for the work on an Order.

Code:	Up to four alphanumeric characters
Name:	Up to thirty characters

The next four fields, Contract, Cost Code, Priority and Job Type, are settings that may be used to define defaults to be used for new Orders and Order Jobs created for this Work Type.

Contract:	(Optional) The default Contract used in the Order Header and Job Order screens when a new Works Order is created with this Work Type.
Cost Code:	(Optional) The Cost Code to be used when manually creating a new Job on a Works Order with this Work Type. In addition, when an existing Job is manually linked to an Order with this Work Type, this Cost Code will be applied if the Job does not itself have a Cost Code.

Priority:	(Optional) The Priority to be used when manually creating a new Job on a Works Order with this Work Type.
Job Type:	(Optional) The Job Type to be used when manually creating a new Job on a Works Order with this Work Type.

(Performance Monitoring module)

Automatically create ... :	Check this to automatically create a monitoring batch for Jobs in an Order in this Work Type when a request for payment is made.
Successful Inspection ... :	Check this to prevent payment on a Job that has not archived a status indicating that it has been successfully monitored. Monitoring statuses are defined in the Monitoring System Settings. **Performance Monitoring\Monitoring Lookups**
Apply Zero Tolerance ... :	Check this to override Payment Requests Contract Tolerances for Jobs on Works Orders with this Work Type set, and apply a zero tolerance at the Payment Request stage. **Note:** This does not affect checks on Payment Batch commitment (the 'Jobs on Payment Authorisation' tolerances on the Contract).

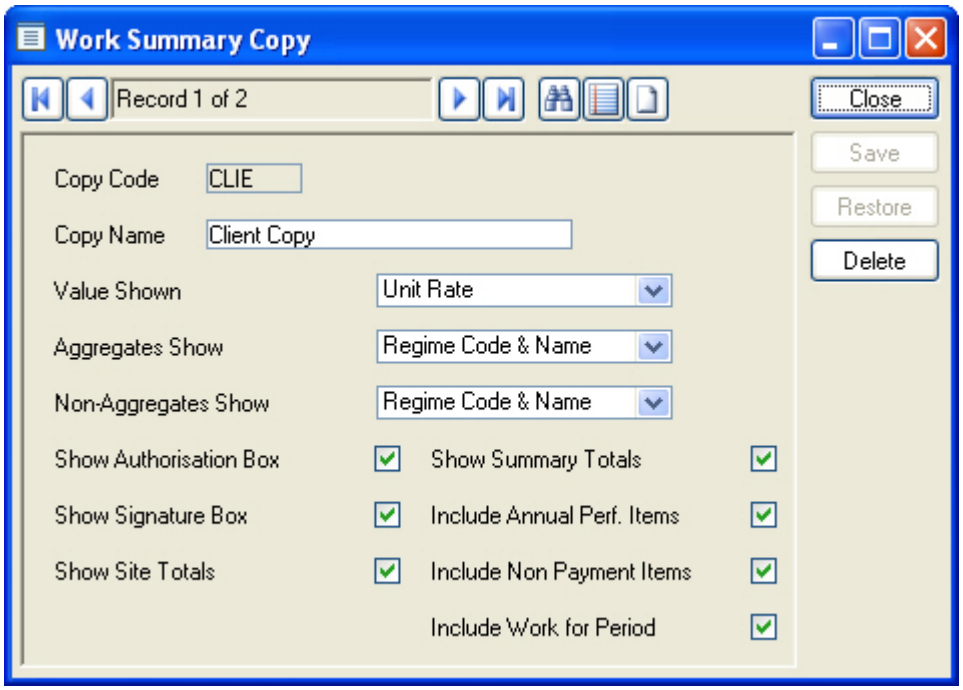
(Administration Fee Recovery module)

Fee Work Type:	Enter, or select from the drop down list. The drop down list references the Fee Work Type Lookup Finance and Budgets\Administration Fee Recovery **Note:** It is this Fee Work Type when applied to an Order through the Work Type, together with the Fee Work Category, which is applied through the SOR Schedule, that gives an Order Job a Fee Percent and a Minimum Fee

Work Summary Copy

The Work Summary print copy defines the way the Routine Work Summary Print out will look.

Several different Work Summary Copies can be set up.



Copy Code:	Up to four alphanumeric characters
Copy Name:	Up to 30 characters
Value Shown:	Select from the drop down list: Unit Rate: to display the SOR Item Rate. Rate per Occasion: to display the Rate for each occasion Total Value: to display the total value for each SOR Item (total number of occasions). None: to omit rates altogether.
Aggregates Show:	Select from the drop down list the way in which the Regimes are to be displayed, where the Regime is Aggregated.
Non-Aggregates Show:	Select from the drop down list the way in which the Regimes are to be displayed, where the Regime is not Aggregated.

The check boxes will define what appears on the Works Order print out. Check the boxes to display the item.

Show Authorisation Box	Displays a line at the bottom of the last page of each Work Summary print, with space for entries against: Authorisation Date, Signed, and Name.
Show Signature Box:	Displays a signature box at the bottom of the last page of each Work Summary print. Two lines are displayed for 'Completion Date' and 'Acceptance Date'.
Show Site Totals:	Displays the total of the Value (as shown by reference to the Value Shown field) for each Site.
Show Summary Totals:	Displays the total of the Value (as shown by reference to the Value Shown field) for the whole Summary print.
Include Annual Perf Items:	Displays SOR Items, included on the Works Order, which are flagged as 'Annual Performance' in the SOR Item library.

	Since these Items are intended to profile payments and not instruct occasions of work, the 'Occasions' will be displayed on the Work Summary as a percentage of the total yearly value of the work that will be paid on that occasion. Thus 25% displayed in the Occasions column of the Work Summary print is to indicate that this is an Annual Performance item, and that a quarter of the total due for the year, will be paid on this occasion.
Include Non Payment Items:	Displays SOR Items included on the Works Order, which are flagged as 'Non Payment' in the SOR Item library.
Include Work for Period:	Check this to display work programmed at Period level as well as that programmed at Week and Day level.

Job System Settings

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

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

Modify Features on Committed Jobs:

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

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

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

Estimated Start Date Editable on Committed Jobs:

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

Note: The Start Date on Archived Jobs remains uneditable.

Cost Code protected on Job and Order Items:

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

Maintenance Management\Job

Cost Code protected on Committed Jobs and Order Jobs:

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

Maintenance Management\Job

Add Jobs to Committed Orders:

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

Maintenance Management\Add Job Button

Job Status Validation Stylesheet:

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

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

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

Maintenance Management\Contract Management System Settings

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

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

Job Status Validation Data Source:

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

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

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

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

Block Jobs with no Description on...:

There are two configuration options here.

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

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

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

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

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

Maintenance Management\Contract Management Lookup

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

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

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

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

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

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

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

Maintenance Management\Contract Management Lookup

Export Job Geometry to Contractor... :

(Contractor Access XML Agent)

Check this to export geometry for jobs.

Prevent Commit of Jobs with No Start... :

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

Include Warranty Items:

(Warranty Dates module)

Check this to check the 'Include Warranty Items' box on the Create Jobs from Regimes filter by default.

Warranty Expiry Date Tolerance:

(Warranty Dates module)

This will indicate a period of days before the expiry of a warranty during which it will be possible to raise a job (on the basis that the warranty will have expired by the time the Job is done).

Device Job future Start Date Tolerance:

(ConfirmConnect® Jobs (7030) module required)

Supply a number of days which will be used by Confirm to restrict the Jobs being sent to the mobile device based on the Job Estimated Start date. If a Job does not have a Start date then it will be transferred to the device.

Setting of 1 means Jobs for Today. Setting of 0 means no restriction will be applied to the Start Date.

Download Feature Conditions and Attributes with Job:

(ConfirmConnect® Asset (7020 for attributes) and/or Condition (7010) Survey modules are required)

Check this to allow the updating of Feature Conditions and Attributes from a Job Task.

Default Job Type: Supply a Job Type which will be used as a default when Jobs are created. This setting does not apply when Jobs are raised from Defects, Enquiries, Regimes or on Orders as each of these processes have their own default.

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

Blocker Job Type: Prevents the Committal of Jobs carrying this Job Type.

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

Repeating Routine Jobs Future Period: Supply a Follow Up which will be used to prevent Repeating Jobs from being created too far into the future.

Only Allocated Regimes where the next Job due date is within the specified Future Period will get Repeating Jobs created when the Agent runs.

Allocated Regimes that are not currently within this Future Period will get picked up as soon as it does fall within the period.

Note: Changing the **Due Date Rule** on a **Regime** whilst within the period where the last Job was completed and this Future period, the next Job will still be created using the previous rule.

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

Contract Management System Settings

The Contract Management System Settings define defaults for Maintenance. Job Statuses are linked to the system procedures that they represent.

Minimum Value SOR Item: Enter the SOR Item to be used in an Order Job to make up the difference between a Job Value and the Minimum Value set for that Job.

The Item entered here should be one that is priced per Pound.

The Pick list references the SOR Item library

Asset Maintenance\SOR Item

This field can be left blank where a Minimum Value is not used.

Variation On Price SOR:	Enter the SOR Item to be used to add value by the Variation on Price utility when implementing new prices on Orders Committed and paid.
Job Status Entries	These fields reference the Status library. **Asset Maintenance\Maintenance Lookups**
Works Order Pending:	Where an Order Committal requires external authorisation through an interface with a financial system, the Jobs on an Order awaiting authorisation will take on the Job Status selected here.
Works Order Rejected:	Where an Order Committal requires external authorisation through an interface with a financial system, and that authorisation is refused, the Job will take on the Job Status selected here.
Works Order Committed:	Enter here the Status that defines the Job as having been put on an Order and committed. The link in the System Setting will cause the Job to automatically move to the entered Status when it is Committed.
Works Order Printed:	Enter here the Status that should be applied to an Order Job when the Order is printed (unless the Update Printed Flag check box is not checked in the Order print filter). **Note:** The Status will only be applied to Jobs on Committed Orders, the first time it is printed
Variation Committed:	Enter here the Status that defines the Job as having been varied. The link in the System Setting will cause the Job to automatically move to the entered Status when a Variation is Committed against it.
Payment Authorised:	Enter here a Status that will allow the Job to be paid. The link in the System Setting will cause the Job to automatically move to the entered Status when it is Authorised on a Payment Request.
Payment Committed:	Enter here the Status that defines the Job as having had a Partial Payment made against it. The link in the System Setting will cause the Job to automatically move to the entered Status when it is flagged as Partial Payment (on the additional tab of the Job form), is on a Committed Payment Batch, and is not Completed i.e. has not yet had the full value of the Job paid.
Complete and Not Closed:	Enter the Status that indicates that the Job is complete, but has not Archived because the Contract under which it was raised is flagged to 'Prevent Non-Routine Works Archiving'. The 'Prevent Non-Routine Works Archiving' flag is set on the Payment tab of the Contract form. **Contract Preparation\Contract**
Closed:	Enter here the Status that defines the Job as having been completed and paid in full. The link in the System Setting will cause the Job to automatically move to the entered Status when it is on a Committed Payment Batch, and is Completed i.e. has had the full payment made.

See **Payment Processing Payment Batch**for information on what constitutes a Partial Payment and what a full Payment on a Job.

Post Comp Liability:	Enter the Status at which a paid Job will be held pending the completion of the liability period and the payment of the retained amount. The link in the System Settings will cause Jobs with Retention Items to automatically move to the entered Status when the final payment (of all but the Retention) is made. Holding Jobs at this Status allows the user to report on

Status and Liability Date to find Jobs that should be included on Payment Batches for final payment of the Retention.

Variation on Price: Enter here the Status that should be assigned to Archived Jobs that have been included in a Variation on Price. The Status will be assigned to the Job when the Variation is committed.

See **Variation on Price** on page 82 for more information.

Allocated to Gang: Enter the status that a Job will be moved to when it is Allocated to a Gang.

If Allocating with the Scheduling screen the Estimated Start and End Date will be set according to the Booking.

Cancelled: Enter the Status that should be assigned to Jobs that have been subject to a Cancelling Payment. See Processing\Batch Create Payments for information on Cancelling Payments.

Note: Leave this Status blank to disable the Job Cancellation functionality.

If any of the fields listed above are left blank then this will prevent the Status update. You may prefer to leave the Works Order Printed field blank, if printing a Works Order might cause the Job to go back to Order Printed from for example Payment Authorised.

Rejected: This status is assigned to a Job if it fails certain Validation procedures during Job creation, including:

- Any errors which are returned by the Export to Contractor Validation Stylesheet.
- Jobs which do not have a Description and the Block Jobs with no Description... setting is set
- Jobs which are of the Whole Site Feature Type, have no Location set and the Block Jobs on Whole Site Features with no Location... setting is set.

These validation checks are configured from the Job System Settings screen. Once set up, the Rejected Status cannot be cleared if any of the above validation checks are enabled.

Asset Maintenance\Job System Settings

A Rejected Job Status must be created from the Job Status screen and should, at the very least, have the 'Outstanding' flag set.

Asset Maintenance\Job Status

This Rejected Status must be configured for the specific Validations to work.

Allow multiple Job Priorities... : Checked by default. Uncheck to restrict Orders to Jobs with the same Priority.

Restrict Batching of Jobs by... : Check this to automatically restrict Jobs being batched onto an Order to those where the Preferred Contract matches the Order Header Contract.

Increment Order Print when Order... : (Contractor Access File Transfer module)

Set this to have the system count an Order export as a print (therefore displaying subsequent prints as re-prints)

Restrict the Selection of Budget... : If this is checked, users will not be able to view Budget Codes in the lookup list when using the pick button in any Cost Code field. They will not therefore be able to select Budget Codes.

The restriction will also apply to Cost Codes sent to a mobile device.

	Note: A Budget Code is defined as a Cost Code appearing in the Budget Code field of the Cost Code form for another Cost Code. Finance and Budgets\Cost Code
Reset Ledger Batch No. If Rejected:	Check this to reset the Ledger Batch No on the Order Header if a Rejection is imported with the Financial XML Agent.
Allow Duplicate SOR Items:	Checked by default, when unchecked the same SOR Item cannot be used more than once on a Job, Variation or Payment Request. Orders and Variations will be prevented from committal if any of the Jobs contain duplicate SOR Items. Payment Requests will fail 'Checking' if duplicates are found. If duplicate SOR Items on Defects are imported from a mobile device, Jobs are created but not Committed. **Note:** This setting does not affect Payment Batches.
Automatically Batch Jobs onto... :	Check this to automate the batching of Jobs onto Order when they are uploaded from a device. See **Batch Jobs onto Orders** on page 50 for details on the rules governing the way in which Jobs are batched onto Orders. See also 'Default Order Header Work Type' below
Allow Work Type Amendment... :	Check this to allow the Work Type field on the Order Header to be amended even though the Order has been committed. See **Order Details** on page 34 for information on completing a Works Order.
Create VOs for Interim... :	Checking this will ensure that Interim Payments are balanced in the Budget reports (i.e. that minus figures don't appear in the Committed columns) by raising a Variation to match the Committal with amount paid. This will only be relevant where Partial Payments are made on Jobs, and Interim Partial Payments (not the final payment) may exceed the amount initially Committed.
Committing 'Confirmation Only'... :	Checking this will ensure that a Variation Order marked as 'Confirmation Only' will update the Job's status to the 'Variation Applied' status when the Variation is committed.If unchecked then only Variation Orders not marked as 'Confirmation Only' will affect the Job's status.
Restrict Contracts by Work Group Contract Areas	Checking this will ensure that when a User attempts to find a Contract (in the Contract screen or using the pick button), only Contracts covering at least one of the Contract Areas available to the User's Work Group are available.
Prevent Job Commit on Allocation	Checking this will disable the Allocate option on the Other button on the Job and Order Job screens for Uncommitted Jobs.
Default Order Header Work Type:	Set a default Work Type to be used when batching Jobs onto Works Orders. This default is also used when allocating a Job to a Gang (via the Allocate button on the Job screen) if the Job is not currently on a Works Order.
Overspend Warning... :	Select from the drop down list: 'Budget Code' - A warning will be displayed on Committal of Works orders, or Variations Orders, if the Committal would overspend the Budget. It will not prevent the Committal.

'Cost Code' - A warning will be displayed on Committal of Works orders, or Variations Orders, if the Committal would overspend the Cost Code. It will not prevent the Committal.

'None' - No warning will be given.

See **Finance and Budgets Cost Code**for information on Budgets and Cost Codes.

Allow Multiple Cost... :

Select from:

'Jobs and Orders' - to allow Cost Codes to be mixed within Jobs (on individual SORs), and within Orders (on individual Jobs).

'Orders Only' - Jobs must have all the SORs charged to the same Cost Code, but Orders may contain Jobs charged to different Cost Codes.

'None' - Orders must contain only Jobs charged to the same Cost Code.

Cost Code to Block Commits:

A Job that carries the Cost Code entered here will prevent an Order from Committing. Enter, or select from the pick list. The pick list references the Cost Code Lookup

Site Register\Site Lookups\Operational Lookups

Works Order Discrepancy Data Source

This Data Source allows additional validation to be configured to prevent Works Orders from being committed, or to allow them to be committed but with a Warning.

The Data Source is applied in the following scenarios:

- When committing a Works Order interactively via the Job/Order screens in Confirm
- When Works Orders are batch committed
- When Works Orders are committed through Confirm Web, e.g. via Enquiry creation

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

Band Orders on Entry:

SOR items can be interactively 'Banded' on entry to Orders, Variations and Payments.

Select from these options:

'None' - No interactive Banding will occur. Items will be changed to the correct Band when Orders and Payments are Committed.

'Ordered Quantities' - Items will be interactively Banded on entry. If an Interim Payment is made for a portion of the quantity Ordered, the Payments Rate will be either the Ordered Rate or the Completed Rate, depending on which of the Quantities (Ordered Quantity or Completed Quantity) is the greatest.

Working Example:

SOR Item Bands and Rates:

SOR Item	Band	Rate
PARENT1	0 - 100	3
CHILD1	100 - 200	2
CHILD2	200 - 999	1

Ordered:

SOR Item	Qty	Rate	Value
CHILD1	150	2	300.00

The User will pick PARENT SOR Item, but due to the Qty of 150 the CHILD1 SOR Item is automatically selected.

Interim Request:

SOR Item	Qty	Rate	Value
CHILD1	50	2	100.00

CHILD1 SOR Item is still automatically selected for the Interim Payment because the Ordered Quantity is greater than the Completed Quantity.

Final Payment:

SOR Item	Qty	Rate	Value
CHILD2	250	1	250.00

CHILD2 SOR Item is automatically selected for the Final Payment because Completed Quantity is greater than the Ordered Quantity.

'Completed Quantities' - Items will be interactively Banded on entry. If an Interim Payment is made for a portion of the quantity Ordered, the Payments Rate will be calculated by adding up all the Completed Quantities (from all the Interim Payments) and using the Rate associated with that Band.

Working Example:

Ordered:

SOR Item	Qty	Rate	Value
CHILD1	150	2	300.00

The User will pick PARENT SOR Item, but due to the Qty of 150 the CHILD1 SOR Item is automatically selected.

Interim Request 1:

SOR Item	Qty	Rate	Value
PARENT	50	3	150.00

PARENT SOR Item is used for the Interim Payment because the Completed Quantity of 50 lands in the PARENT Band.

Final Payment:

SOR Item	Qty	Rate	Value
CHILD1	60	2	70.00

CHILD1 SOR Item is automatically selected for the second Interim Payment because the total of the Completed Quantities of 50+60=110 lands in the CHILD1 Band.

The Value of the Payment is not 60 * 2 = 120.00. Instead it is the total of the Completed Quantities multiplied by the current Rate, minus the amounts previously paid.

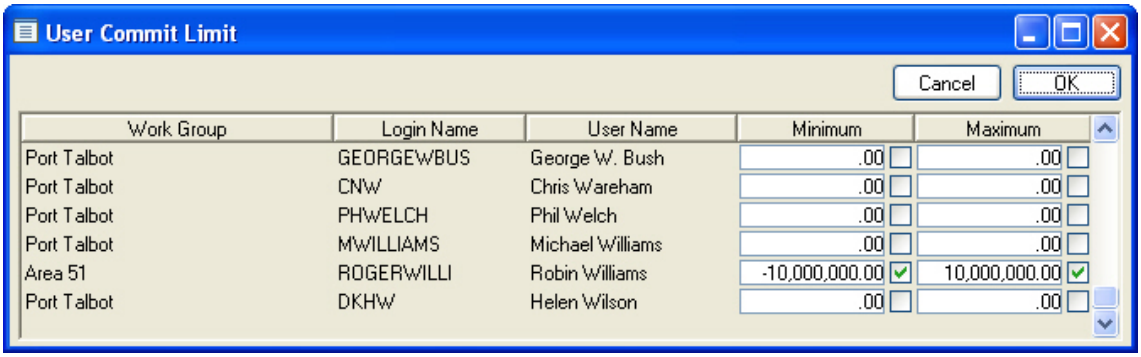
Note: Once set, this setting should not be changed unless all Jobs and Payments for Contracts using SOR Banding are Archived.

An Order is only permitted on one outstanding Variation, Payment Request or Payment Batch e.g. when attempting to include an Order on a Payment Request, a check is made against Uncommitted Variations, Uncommitted Payment Requests and Uncommitted Payment Batches to ensure that the Order is not present on any of them.

The whole Order must be Closed in one Payment.

User Commit Limit

The User Commit limit allows Minimum and Maximum values to be set for each User.



Minimum: The minimum amount (in currency) this User may commit for a single 'Job', or Variation Job. The presence of an under-limit 'Job' on an Order will prevent the committal of the whole Order.

Maximum: The maximum amount (in currency) this User may commit for a single 'Job', or Variation Job. The presence of an over-limit 'Job' on an Order will prevent the committal of the whole Order.

Enter the required amounts, and make sure the check boxes are checked to implement the limits. To allow unlimited committal, both check boxes should be unticked.

Tax Type

The Tax Type Lookup contains a list of the Tax Types you want to apply on Payment Certificates under each Contract. See **Contract Preparation - Contract**for information on linking Tax Types to Contracts.

Where a Tax Type is linked with a Contract, an addition at the stated percentage rate will be made to Payment Certificates under that Contract.

Code: Up to four alphanumeric characters

Name: Up to thirty characters

Add rows to the Tax Type which defines the percentage rates, and the dates during which that rate is applicable. Several date ranges and rates can be applied.

Tax Status

(Contractor Invoices module)

The Tax Status defines whether Tax will be chargeable or not for Tax Categories.

Code: Up to four alphanumeric characters

Name: Up to thirty characters

Tax Applicable: Check this to calculate tax on SOR Items in the Payment Categories that take on this Tax Status.

Leave unchecked to omit SOR Items in Payment Categories that take on this Tax Status from the tax calculation.

Payment Category

(Contractor Invoices module)

Payment Categories are linked to SOR Items. SOR Items can then be grouped by Payment Category to provide a summary for each Payment Category on the Summary Payment Certificate.

See **Asset maintenance SOR Item** for information on linking Payment Categories to SOR Items.

See **Payment Processing Summary Payment Certificate** for information on the format of the Summary Payment Certificate.

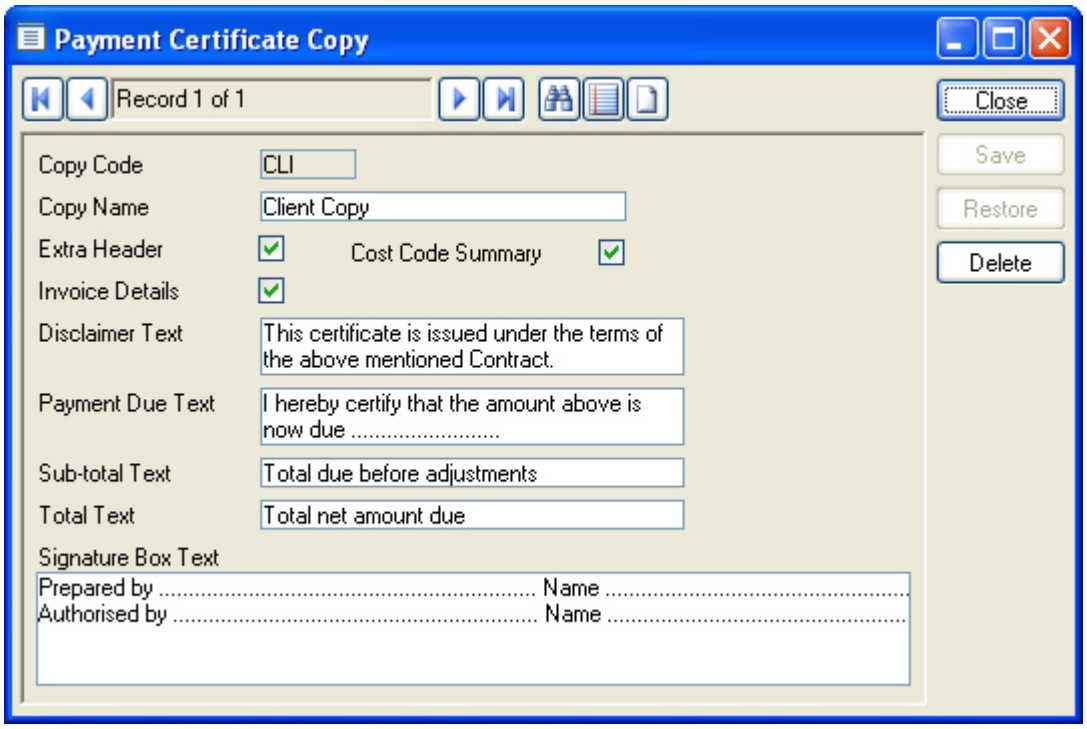
To complete the Payment Category form:

Code:	Up to four alphanumeric characters
Name:	Up to thirty characters
Tax Type:	To assign the rate of tax (as defined in the Tax Type lookup) for this Payment Category. Select from the drop down list. The drop down list references the **Tax Type** on page 96 Lookup.
Can Add to ..:	Non-Routine Work only - check this to allow SORs in this Category to be added to Jobs on a Payment Batch, which are also on a Payment Request.

Payment Certificate Copy

(Contractor Invoices module)

The Payment Certificate Copy defines the layout of the Summary Payment Certificate. Several copies may be set up.



Copy Code:	Up to four alphanumeric characters
Copy Name:	Up to thirty characters

Extra Header:	Check this to display a second header showing: The Contractor name and address (as entered in the Contractor library) **Contract Preparation\Contractor** The Site and Work description. Where several Sites and Jobs are involved, theses fields will be described as 'Various'
Cost Code Summary:	Check this to display a break down of the value of the Summary Payment Certificate by Cost Code.
Invoice Details:	Check this to display: Invoice Number, Invoice Date and Date Received - as displayed on the Payment Batch Header **Payment Processing\Payment Batch** A summary of the Original Value of the Order, total Variations, and Current Value.
Text:	Text can be entered into each of the text boxes, which will appear, on the Summary Payment Certificate. Leave the text box blank to omit that section from the Certificate.

Invoice Payment Systems Settings

(Contractor Invoices module)

The Payment Systems setting set defaults for:

Payment Category:	Provides a default Payment Category for new SOR Items. Select from the drop down list. The drop list references the Payment Category Lookup.
Tax Status:	Provides default Tax Status for new Payment Categories. Select from the drop down list. The drop list references the Tax Status Lookup
Tax Type:	Provides a default Tax Type for new Contracts. Select from the drop down list. The drop list references the Tax Type Lookup. **Note:** The default Tax Type must be zero-rated and cover at least as long a date range as the Contract.
Tax Adjustment Limit:	Enter here the total Tax Adjustment which may be added to a Tax Type in a Request Job.

Order Print Map System Settings

(Works Order Map Print module)

The Order Print Map System Settings define the size of map images in pixels and the way in which URL addresses are constructed in order to retrieve map images from a web server.

Map Width / Height:	Set the size (in pixels) for the map on the Order Print.
Copyright Text:	Enter the copyright text that will appear next to the map on the Order.

Map Settings:

Confirm can download maps from internal or external web servers and will identify the supported image formats of GIF or BMP.

URL addresses are constructed dynamically by substituting $ASSETID$, $GROUP$, $XCOORD$, $YCOORD$ with relevant attribute values which are stored against a Job or Feature to which that Job is linked as following:

- $AssetID$ is substituted by the Central Asset Id of the Feature.

- $GROUP$ is substituted by the Feature Group code of the Feature

- $XCOORD$, $YCOORD$ are substituted by Easting and Northing coordinates of the Job or if these are not defined by Easting and Northing Centroid coordinates of the Feature.

It is also possible to obtain map images indirectly as following:

- Send a URL query to obtain an html page which includes a link to the required map image
- Search within a received html document for another URL address pointing directly to a file, which stores required map image. Search will be performed by finding 'Map URL Search' string pre-defined in the Order Print Map System Settings, which would indicate the beginning of a required URL link.
- New query will be constructed by joining predefined 'Map URL Prefix' with the found string and send to the web server to obtain the required map image

An example Map URL Line might look like this:

```
http://<myserver>/planaccess/getmapimage.asp?zoom=500&easting=$XCO-
ORD$&Northing=$YCOORD$&mapwidth=500&mapheight=400&arrowpointer=true
```

Where <myserver> would be substituted with the user's own particular map serving site.

If PlanAccess is being used as the map server then the URL Search and Prefix fields must be left blank and the Copyright text is not necessary as PlanAccess does this automatically. PlanAccess allows other parameters in the URL Link field. These are described in section 4.10 of the PlanAccess developer's manual.

Note: If no map appears when the Order is printed; keep the Order Print screen open and look in the local "temp" directory (e.g. "C:\Documents and Settings\MyUserName\Local Settings\Temp"). There will be a log file which can be viewed to find out why it has not appeared (e.g. sbs12.log) - sort by date to locate it. Common reasons for this could be that there are missing X and Y coordinates for the Feature or Job, or the internet Proxy Settings are incorrect - indicated by a "Get Internet File from URL Error:502" message.

Street Works Initiation from Jobs

The Street Works Initiation from Jobs functionality provides the ability to automatically create Street Works Notices when specific updates are made to Jobs either interactively via the Confirm Client or externally e.g. ConfirmConnect® / Contractor Access XML Agent.

The following sections will show how to setup Street Works Initiation from Jobs.

They will also clarify the Notice types that can be created and the triggers that automatically create that Notice.

Configuration

Module Requirements

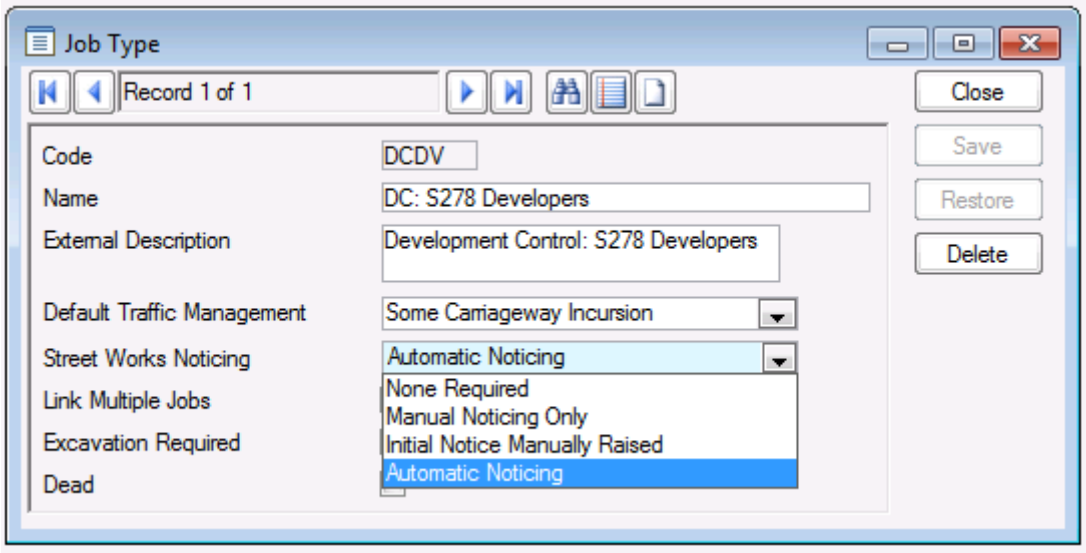
The following modules are required.

- *3400 - Street Works Register*
- *3420 - Street Works Initiation*
- *1215 - Job Creation*

Note: When the *3420 - Street Works Initiation* module is activated the *Notice* button becomes available on the *Job* and *Order Job* screens.

Job Type Lookup

Notice creation from Jobs is governed by the *Street Works Noticing* field in the **Job Type** lookup.



The field is a drop down menu with the following options:

- **None Required:** No notices can be created either manually or automatically for Jobs with this set on their Job Type. The *Notice* button is unavailable on the *Job* and *Order Job* screens.

- **Manual Noticing:** Only manual Notices can be created for Jobs with this set on their Job Type. The *Notice* button will be enabled on the *Job* and *Order Job* screens so the user can select *Create Notice* to manually create a Notice via the Street Works Notice wizard.
- **Initial Notice Manually Raised:** Jobs with this set on their Job Type must create the first Initial Notice manually via the *Noticebutton> Create Notice* option. Subsequent Notices will be generated automatically when the required triggers are present.
- **Automatic Noticing:** All Notices will be created automatically for Jobs with this set on their Job Type when the required triggers are present. In addition manual Notices can also be created via the *Noticebutton> Create Notice* option.

Note: In case Street Works Notice is selected as either 'Automatic Noticing' or 'Initial Notice Manually Raised',Street Works Duration field gets enabled. Set the value in this field for defaulting the duration of the Automatic Notice Permit being created while scheduling the Job from ConfirmWorkzone.

Action Officer Lookup

For a Notice to be created against a Job it must be assigned to an Action Officer that has an Organisation configured in the **Action Officer** lookup.

The *Organisation* field on the lookup is used for this purpose. In addition the assigned Organisation must be a marked as a *Notice Initiator* in the **Organisation** lookup under the *Additional* tab.

Street Works Settings

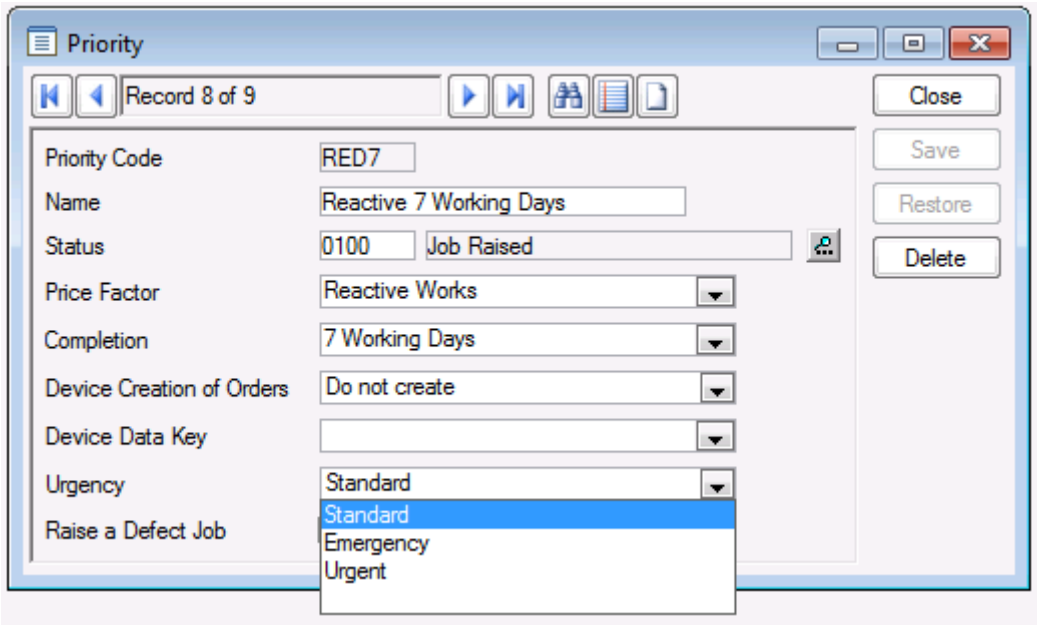
The following Street Works settings screens need to be properly configured to automatically generate Notices from Jobs:

- **Street Works Notice Default System Settings** screen.
- **Organisation** lookup.
- **Street Works System Settings** screen.

Please refer to the relevant documentation in regards to the setup of these screens.

Priority Lookup

The **Priority** lookup (via the *Urgency* field) is used to set the *Street Work Type* on any Notices that are automatically created from Jobs.



The following options are available from the *Urgency* field:

- **Standard:** Set this option to a create Notices with a Street Work Type of *Standard, Minor* or *Major* when a Job is set to this priority. The specific Street Work Type used will be determined by the duration of the Works and the notification period supplied.
- **Emergency:** Set this option to create Notices with a Street Work Type of *Emergency* when a Job is set to this priority.
- **Urgent:** Set this option to create Notices with a Street Work Type of *Urgent* when a Job is set to this priority.

Job Status Lookup

The Job Status is one of the triggers that regulate when automatic noticing takes place.

In the **Job Status** lookup the two trigger options that need to be set are:

- **In Progress check box:** When a Job's first reaches a status that has this option ticked this indicates to Confirm that an *Immediate* Street Works Notice should be created (if all triggers are set).
- **Initiate Street Works check box:** When a Job's at a status that has this option ticked this indicates to Confirm that either a *Minor, Standard* or *Major* Street Works Notice should be created (if all triggers are set).

Note: A Job Status should not have both these options ticked as this will result in notices not being created as they are used for separate functionality.

Street Works Initiation from Jobs Override Setting

In Confirm under *System Administration* > *Security* > *User Security* > *Street Works* there is a *Validation Override* option. This option is used to govern whether notices will be created if all conditions are not met or whether to display an error instead.

With the override switched on the user will be presented with warnings as opposed to errors if there are details missing that are required to accurately create the notice. As they are warnings the Notice will still be created.

If the override is switched off any errors encountered will prevent a Notice being completed.

Creating Automatic Notices

This section outlines the triggers or information that need to be present on a Job in order for it to create automatic Notices.

Each Notice type has different triggers and only one Notice will be created automatically at a time.

If the automatic noticing being created is for a Permit Authority, then the Permit equivalent Notices will be created instead.

There are some general Job conditions that need to be met regardless of which Notice is to be automatically created which are covered in the following section.

General Trigger Conditions

- The *Street Works Noticing* field of the Job's Job Type must be set to *Automatic Noticing* or *Initial Notice Manually Raised*. If the latter option is selected the Initial Notice for planned works must have been created before any subsequent automatic noticing takes place.
- The Job's Priority *Urgency* flag must be set to either *Standard, Urgent* or *Emergency*.
- The Action Officer assigned to the Job must be assigned to an Organisation that is a *Notice Initiator*.
- The Street assigned to the Job that the Notice is being created for should have a *Highway Authority* Street Interest set.
- Ideally coordinates should be set on the Job. These are not mandatory but if they are not present a warning will appear. The Notice will be created but it will not be sent.

  Note: If geometry (Lines and Polygons) have been defined on the linked Defect, using Confirm-Connect, then these geometry details will be used instead of just the Job coordinates. If more than one Job is linked to a Street Work, and these Jobs have geometry data, then the 'Convex Hull' of the combined geometries will be used.

Immediate Works Initial Notice

The following conditions on the Job will trigger the creation of this Notice. This Notice also serves as a notice of starting as the works is immediate and not planned.

- The *Actual Start Date* must be set. This is set automatically when the Job is changed to a status that has the *In Progress* check box ticked.

  Note: The Actual Start Date will *not* be overwritten if it has been set already on the Job.

- The Job's *Estimated End Date* must be set.
- The Urgency on the Job's Priority must be set to Urgent or Emergency.

Planned Works Initial Notice

The type of Initial Notice created for a Planned Works is governed by the duration of the works as follows:

- 1-3 Days will create a Minor Notice
- 4-10 Days will create a Standard Notice
- 11+ Days will create a Major Notice

Note: For TTRO Applications, add text {ttro} or [TTRO] or (TtRo) in Work Location textbox. This will create PAA application for Automatic Noticing from Job or ConfirmWorkzone.

The following conditions on the Job will trigger the creation of this Notice.

- The Job's *Estimated Start Date* must be set. A date should be entered that that supplies enough of a notification period otherwise a early start agreement will be required and an 'i' icon indicator will be displayed next to the field to warn the user.
- The Job is set to a Job Status that has the *Initiate Street Works* check box ticked.
- The Job's *Estimated End Date* must be set.

After all Job conditions have been supplied the Notice will be created.

Planned Works Actual Start Notice

Once a Planned Works has had an Initial Notice created an Actual Start Notice can be automatically generated.

The following conditions on the Job will trigger the creation of this Notice.

- An Initial Notice has been successfully created against the Job.
- The Job's *Actual Start Date* must be set. This can be done manually on the *Job* or *Order Job* screens or by changing the Job's status to one with the *In Progress* option enabled.

After all Job conditions have been supplied the Notice will be created.

Error Correction Notice

When one or more of the following conditions are changed on the Job an Error Correction Notice will be triggered.

- The Traffic Management field is changed.
- The Location field is changed.
- The Description field is changed.
- The Job Coordinates are changed.
- The Street (site) on the Job is changed.

Note: The notice will be created but will not send automatically as these types of Notices require agreements. Agreements have to be entered manually on the Street Works Notice.

Revised Duration / Confirmation Notice

Revised Duration/Confirmation Notices are triggered differently depending on whether an Actual Start Date Notice has been created or not against the Job. These triggers are explained independently below.

Confirmation: Works Has Not Started

When one or more of the following conditions are changed on the Job a Confirmation Notice will be triggered.

- The Job's *Estimated Start Date* has changed.
- The Job's *Estimated Completion Date* has changed.

Revised Duration: Works Has Already Started

When both of these conditions are changed on the Job a Revised Duration Notice will be triggered.

- The Job's *Estimated Completion Date* has changed.

- The *Notes* field on the Job's *Current Status* tab have been updated. This is usually to explain why the duration has changed.

Works Stop Notice

Once a Works has been started a Works Stop Notice can be automatically generated.

The following condition on the Job will trigger the creation of this Notice.

- The Job's *Actual Completion Date* must be set. This can be done manually on the *Job* or *Order Job* screens or by changing the Job's status to one with the *Complete* option checked on the Job Status Lookup.

After all Job conditions have been supplied the Notice will be created.

Cancellation Notice

Cancellation Notices can only be generated for Works that have *not* been started.

The following condition on the Job will trigger the creation of this Notice.

- The Job is set to a cancellation Job Status. A cancellation Job Status is a status that has both its *Complete* and *Outstanding* options unchecked on the Job Status Lookup.

After all Job conditions have been supplied the Notice will be created.

Viewing, Creating and Linking Notices From the Job Screen

VIEWING NOTICES

Notices can be viewed from the *Job* and *Order Job* screens.

To do this the Job's *Job Type* must have its *Street Works Noticing* field set to anything other than *None Required*. This will ensure that the *Notice* button is enabled on the *Job* and *Order Job* screens.

Click on the *Notice* button and select the *Display Notice* option. Any Notices raised against the Job will be displayed.

If no Notices have been raised against the Job the *Display Notice* option will be greyed out.

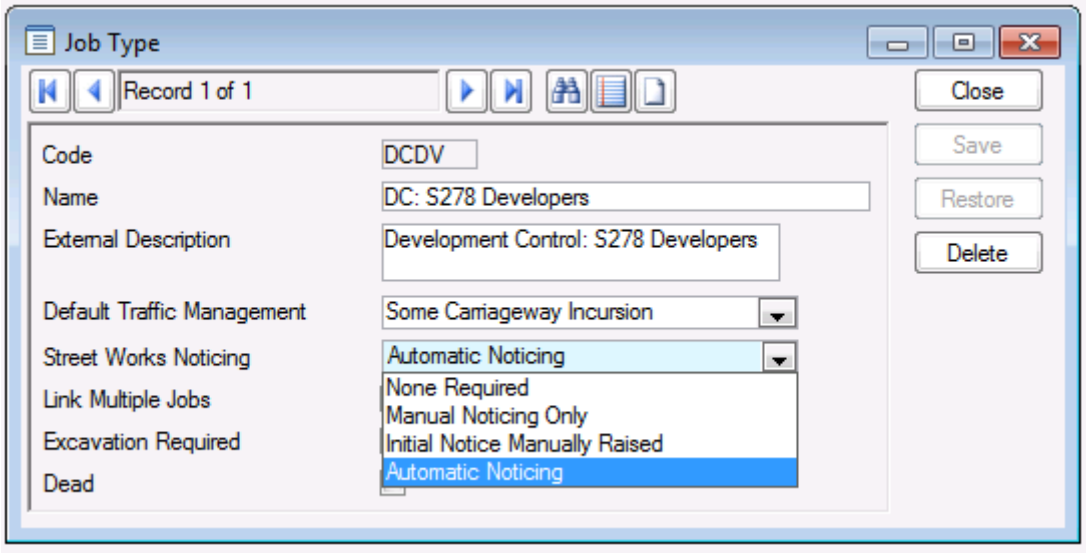
Notice Visual Indicators

There are a couple of visual indicators that are displayed on the *Job* and *Order Job* screens when Notices are created.

- A green tick on the Notice button indicates that the last Notice was created successfully.
- A red cross on the Notice button indicates that the last Notice was unsuccessful.

Note: To see these indicators the *Show visual indicator of button contents* option must be ticked on the **General System Settings** screen

CREATING NOTICES



Notices can be created manually from the *Job* and *Order Job* screens.

To do this the Job's *Job Type* must have its *Street Works Noticing* field set to anything other than *None Required*. This will ensure that the *Notice* button is enabled on the *Job* and *Order Job* screens.

Click on the *Notice* button and select the *Create Notice* option. The appropriate Street Works Wizard will appear to create the required Notice.

LINKING NOTICES

Notices that have already been created can be linked to a Job via the *Job* and *Order Job* screens.

To do this the Job's *Job Type* must have its *Street Works Noticing* field set to anything other than *None Required*. This will ensure that the *Notice* button is enabled on the *Job* and *Order Job* screens.

Click on the *Notice* button and select the *Link to Notice* option. A filter screen will appear to select a Notice to link to the Job. Note that any Notices already linked to a Job will not be available for selection.

The linked Notice can be viewed by selecting the *Display Notice* option from the *Notice* button.

UNLINKING NOTICES

Notices can be unlinked from Jobs by selecting the *Clear Link to Notice* option from the *Notice* button.