

Location Intelligence
Infrastructure Asset Management

Confirm®

Performance Monitoring

v26.30a.AM

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October 02, 2026

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Performance Monitoring

The Performance Monitoring Folder

Performance Monitoring may be carried out in two ways: Feature Monitoring, and Work Monitoring.

Feature Monitoring

Feature Monitoring applies Contract Failures as a result of the application of a Condition Grade on a Condition Survey.

This means that Failure Types must be linked with Condition Grades. There is an additional variable of Feature Classification which will determine which Failure Type is applied based on the Feature to which the Condition Grade is applied.

These links are established by flagged certain Condition Grades (Observation Parameters) to indicate that they represent a Failure; and in the Feature Matrix which determined the Failure Type which will be applied. The Failure Matrix is related to the Feature Group. First Inspections Failure Types, Re-inspection follow-ups and subsequent inspection Failure Types are set in the matrix for each Classification within the Feature Group.

Work Monitoring

Work Monitoring is based on an assessment of the work carried out (rather than the condition of the Feature) and relies on a selection from committed Routine or Non Routine works within the system. Where work is not to standard, Failures can be raised, which may have penalties assigned to them under a Contract. Penalties can be either points or as financial penalties.

Failures are therefore produced either as a result of a Condition Assessment where Feature Monitoring is carried out, or directly where Work Monitoring is carried out. In either case, those Failures are put together on Notices to provide a means of notifying the Contractor. Where Penalties are assigned to Failures, these are tallied and displayed on the Failure Notice.

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Work Inspections

Works Monitoring Inspections are carried out to monitor the work that has been ordered in Confirm. A Works Inspection Batch therefore consists of items of ordered work, that is SORs that appear on committed Routine Works orders, and Jobs on Non Routine Orders.

A Works Inspection Item will be one occasion of Routine Work on an Asset, or one Job on an Asset.

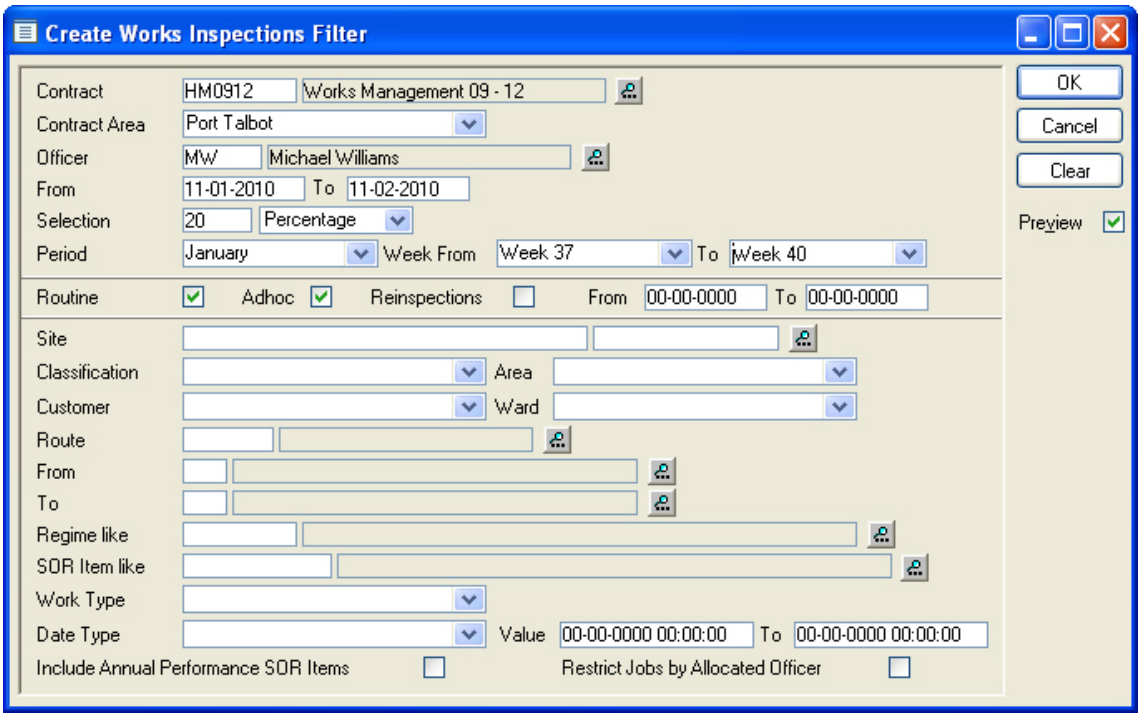
Prerequisites for Work Inspection

The following libraries and lookups will need to be populated to carry out a Work inspection:

- **Failure Severity**
- **Failure Type** on page 31
- **Monitoring System Settings** on page 32
- **Contract Penalties**

Create Works Inspections

The Create Works Inspections utility will reference all committed Routine Works which have not been paid (that is - are not on a committed Payment Batch), and all Jobs which have not been paid and are at the appropriate Job Status.



Contract: Select from the pick list. The pick list references awarded Contracts.

Contract Preparation\Contract

Contract Area: Select a Contract Area from the drop down list. The drop down list references Contract Areas listed on the Contract Area tab of the Contract form.

Contract Preparation\Contract - Coverage tab

Officer:	Select the officer who will carry out the Monitoring inspection. The pick list references the Action Officer lookup
From/To:	This range of dates represents the dates between which the Monitoring inspection will be carried out. The Monitoring Items selected in this batch cannot be then be selected by another officer between these dates. The current date will be entered in the 'From' field by default and may be edited. A 'To' date must be entered to complete the range.
Selection:	The selection of Sites to be Monitored may be limited to a percentage of those returned or an actual number of Sites. An entry must be made.
Period:	For Routine Work only. Select the Work Period from which work is to be selected. The drop down list references the Period lookup. **Asset Maintenance\Maintenance Lookups** **Note:** If only Period is entered, only Period work will be selected.
Week From\To:	For Routine Work only. Select a range of Weeks to include Weekly and Daily work in the selection of Monitoring Items. **Note:** Only the Weeks in the selected Period will be displayed in the drop down list.
Routine:	Check this to select from committed Routine Work.
Adhoc:	Check this to select from committed Jobs at the appropriate Job Status (that is - any Job Status which has 'Requires Monitoring' checked).
Reinspections - From/To:	Check this to include Monitoring Items that are flagged for reinspection. Enter a 'From' and 'To' date to select the reinspections from within a date range. These fields reference the Reinspection date entered against 'Inspected' Monitoring Items.

The area below the grey line allows the selection of Monitoring Items to be limited by any of the parameters shown. These fields include:

Route:	Select a Route from the pick list. The pick list references Site Routes created in the user's Work Group. **Site Register\Site Lookups\Operational Lookups**
Date Type:	Select a Date Type from the drop down list. The drop down list references the Date Type Lookup. **Asset Register\Feature Lookups** Use the Value fields to the right of the Date Type field to set the date rage from which to select **Note:** This option is only used for Adhoc inspections.
Include Annual ..:	Check this to include SOR Items that are flagged as Annual Performance in the SOR Item library. **Asset Maintenance\SOR Item**

This will be checked by default if the Monitoring Systems Settings allow Performance Items.

Restrict Jobs ..: Check this to restrict the creation of Adhoc Inspections to Jobs currently allocated to the Action Officer selected at the top of the filter.

This will be checked by default if the Monitoring Systems Settings allow Performance Items.

Note: This will not affect the creation of Routine Works Inspections and Routine Works Reinspections.

Click OK to create the Monitoring Batch. A preview will be displayed, listing the Sites selected, and the numbers of Monitoring Items in each category (Routine, Adhoc, and Reinspections), which have been selected. Click on Save to create the Monitoring Batch.

Feature Inspections

Feature Monitoring Inspections are linked with Condition Survey Inspections so that an assessment of the Feature Condition will generate Failures if the Condition Grade is 'unacceptable'.

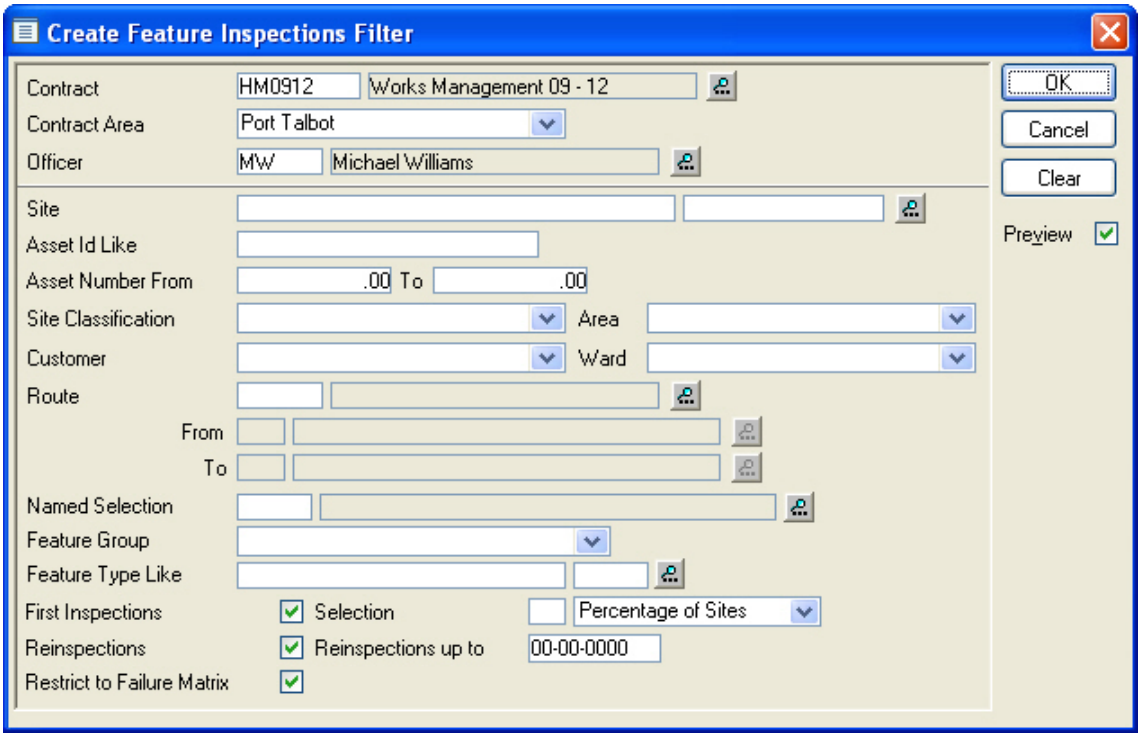
Prerequisites for Feature Inspections

The following libraries and lookups will need to be populated to carry out a Feature Inspection:

- **Failure Severity** on page 31
- **Failure Type** on page 31
- **Monitoring System Settings** on page 32
- **Contract Penalties**
- **Observation Parameters**
- **Observations Type**
- **Failure Matrix**
- **Inspection Type**
- **Ad hoc Route**
- **Condition Survey System Settings**

Create Feature Inspections

The Create Feature Inspections utility will make a selection of Features to inspect and add them to the task list of the selected officer.



Contract: Select from the pick list. The pick list references awarded Contracts.

Contract Preparation\Contract

Contract Area:	Select a Contract Area from the drop down list. The drop down list references Contract Areas listed on the Contract Area tab of the Contract form **Contract Preparation\Contract - Coverage tab**
Officer:	Select the officer who will carry out the Feature inspection. The pick list references the Action Officer lookup

The area below the grey line allows the selection of Inspection Features to be limited by any of the parameters shown. These fields include:

Route:	Select a Route from the pick list. The pick list references Site Routes created in the user's Work Group. **Site Register\Site Lookups\Operational Lookups**
First Inspections:	This is checked by default and will make a selection of Features (within the parameters defined above) that do not have a Failure re-inspection follow up set.
Selection:	The selection of Inspection Features may be limited to a percentage from the filter selection or a number of Sites from the filter selection. If no entry is made in the field, the selection will be of all Features that comply with the filter selections.
Reinspections:	This is checked by default and will include all Features that have a Failure with a reinspection follow up date set (up to the date entered in the next field)
Reinspections up to:	Enter a date to limit the reinspection to those that have a follow up date up to that date.
Restrict to Failure Matrix:	This is checked by default and will limit the selection to Features that have Failure Matrix Failures set.

Click on the OK button to generate the Feature Batch. A preview will be displayed listing the selected Sites, Features and the number of Monitoring Items in each category (First Inspection, and Reinspection), which have been selected. Click on the Save button to create the Feature Monitoring Batch.

Note: Confirm will not create a Monitoring Batch for a Feature that is already on a Monitoring Batch and has a Status of 'Outstanding'.

Monitoring Batch Print

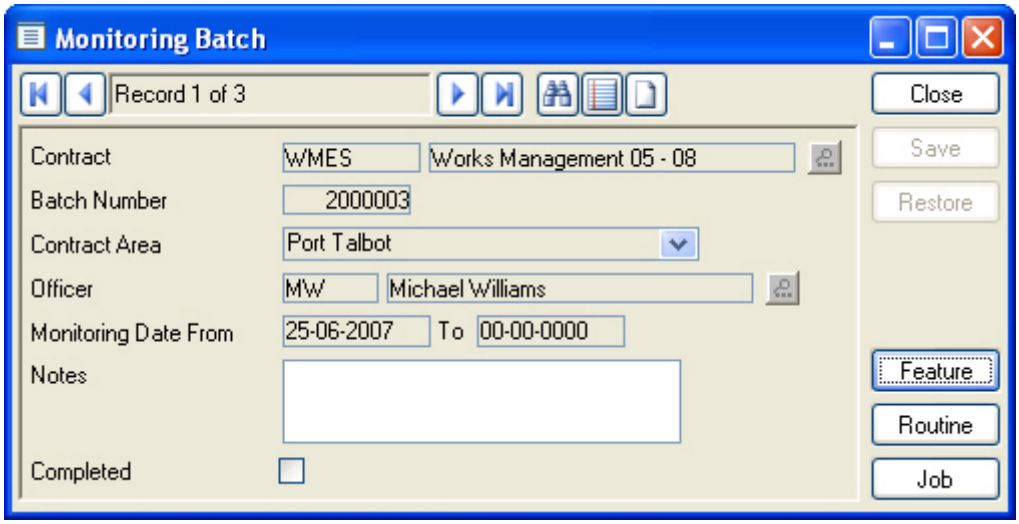
The Monitoring Batch Print will print a list of all selected Monitoring Items, providing columns for the manual entry of the results of an Inspection.

The Monitoring Inspection Filter can be used to limit the print to an Officer, a Route, a Contract, a range of Batches, or a Site.

Status:	Select from: 'Outstanding' - To print Batches which have not already been inspected. 'Inspected' - To print Batches which have been inspected. 'All' - To print both Inspected and Outstanding batches
Monitoring Type:	Select from: 'Works Monitoring'- To print batches containing Works Monitoring Items. 'Works Monitoring (Landscape)'- As above, in landscape format, with the addition of the Feature's Asset ID and Location. 'Feature Monitoring'- To print batches containing Feature Monitoring Items. 'Non-Routine Works Monitoring Detail' - To include SOR Item detail for Non Routine Monitoring Items, including items that have been added at Request.

Monitoring Batch

The Monitoring Batch library contains all Batches that have been created in the system. Use the 'Find' button to recall Batches into the form.



The Batch details will be entered and cannot be amended for recalled batches.

Batches may have been created in several different ways:

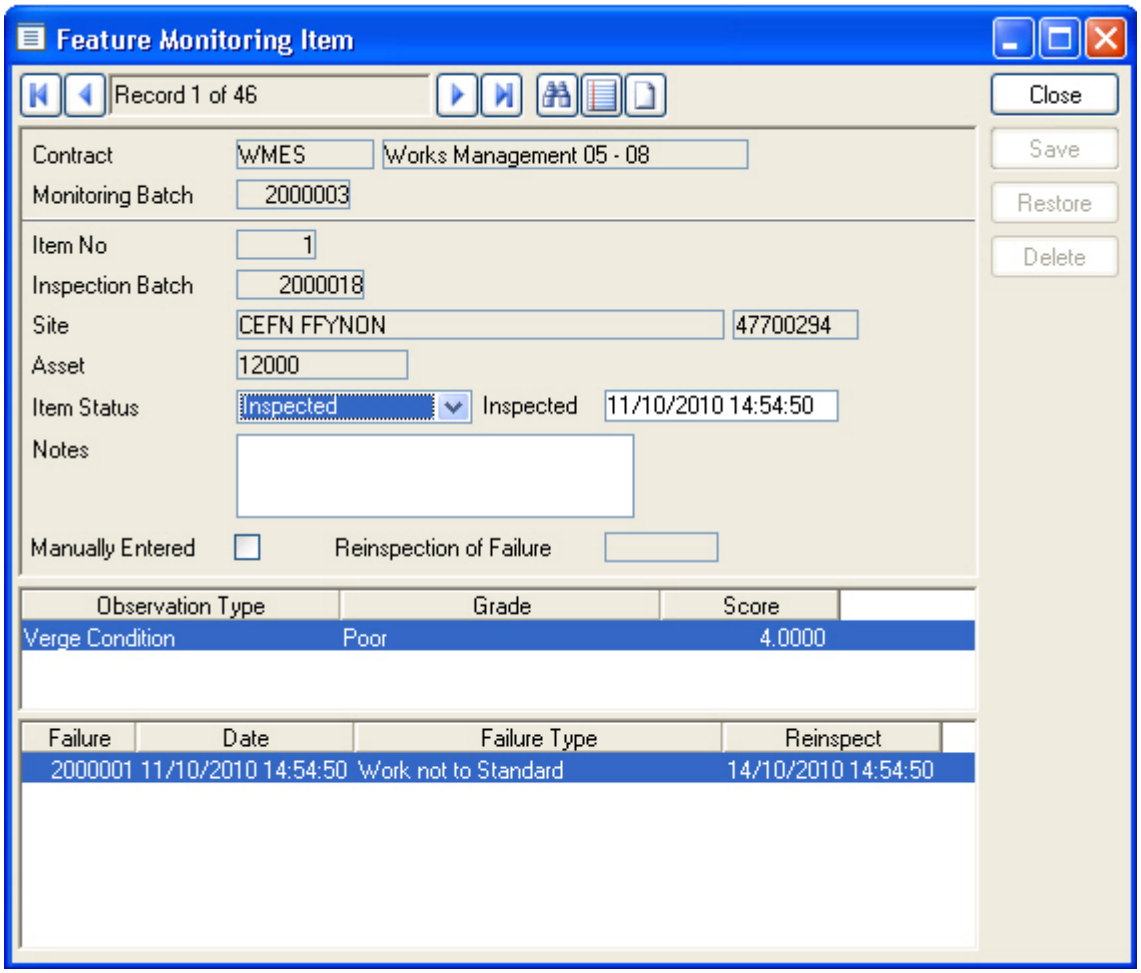
- From the Create Works Inspections utility
- From the Create Feature inspections utility
- From the Request Checking utility where the Non Routine Works Order Work Type dictates that these Jobs should be automatically monitored
- A Works Monitoring batch may be manually created by completing a blank Batch Header:

Contract:	Select from the pick list. The pick list references awarded Contracts. **Contract Preparation\Contract**
Batch number:	Enter an existing Batch number to recall an existing Batch. Where a new batch header is being created, leave the field blank - Confirm will assign a number from Work Group Seed numbers when the Header is saved. **System Administration\Security\Work Group**
Contract Area:	Select a Contract Area from the drop down list. The drop down list references Contract Areas listed on the Contract Area tab of the Contract form. **Preparation\Contract - Coverage tab**
Officer:	Select the officer who will carry out the Monitoring inspection. The pick list references the Action Officer lookup.
Monitoring Date From/To:	This range of dates represents the dates between which the Monitoring inspection will be carried out. The Monitoring Items selected in this batch cannot be then be selected by another officer between these dates. The current date will be entered in the 'From' field by default and may be edited. A 'To' date must be entered to complete the range.

Notes:	An optional free text field.
Completed:	The completed check box is used when all Monitoring Items have been inspected, and the Batch can therefore be 'closed'.

Feature button

The Feature button will display the Feature Monitoring Items associated with the selected Monitoring batch.



The Items will have been created when the Create Feature Inspections preview was saved, and will have been updated with Condition Grades and Failures on upload of the completed inspections from the mobile device.

Feature Monitoring Items may not be edited, and the Inspection results can only be recorded by upload from a mobile device.

Feature Inspection Failures

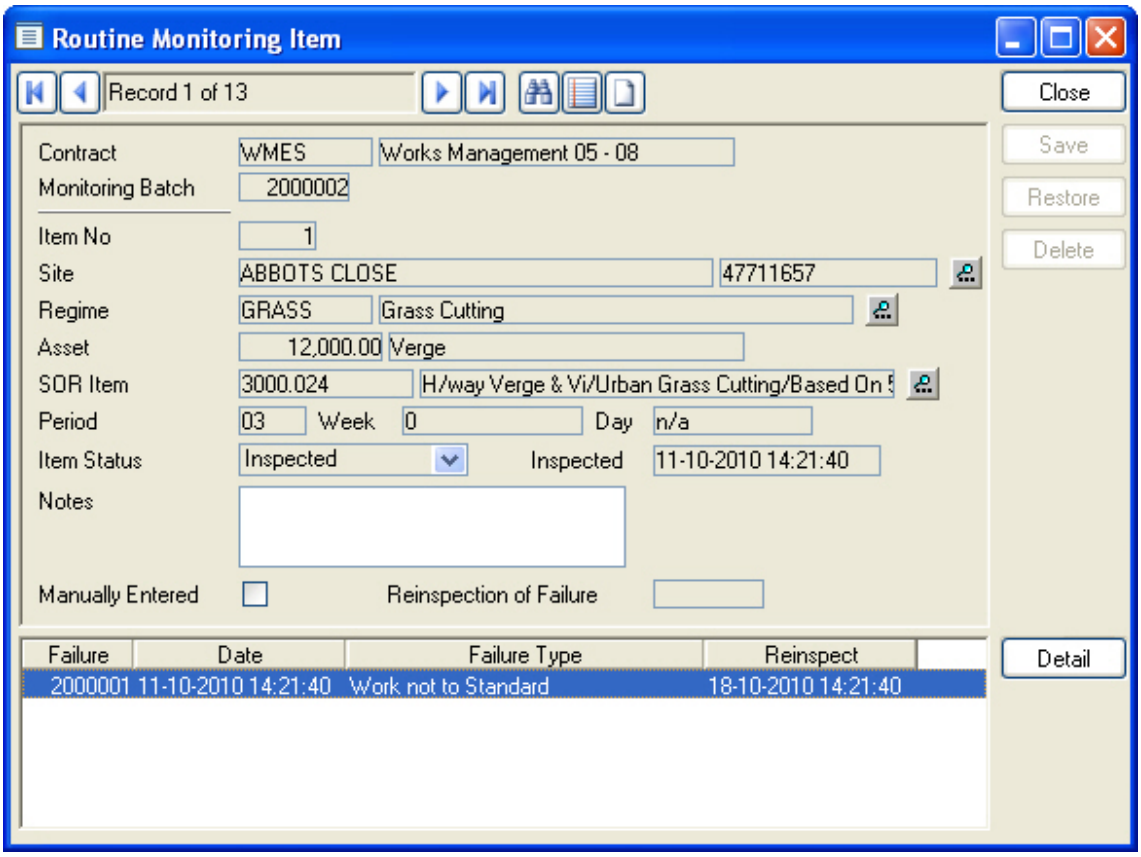
Failures are automatically generated from the Observation Type Grade applied during the Inspection.

Where the selected Observation Type Grade uses an Observation Parameter that has been flagged as 'Unacceptable', the Failure Matrix is referenced to derive a Failure Type and (where appropriate) a Reinspection date. A Failure is created and displayed in the lower pane of the Feature Monitoring Item window.

The Failures will be available to view in the Failure library.

Routine button

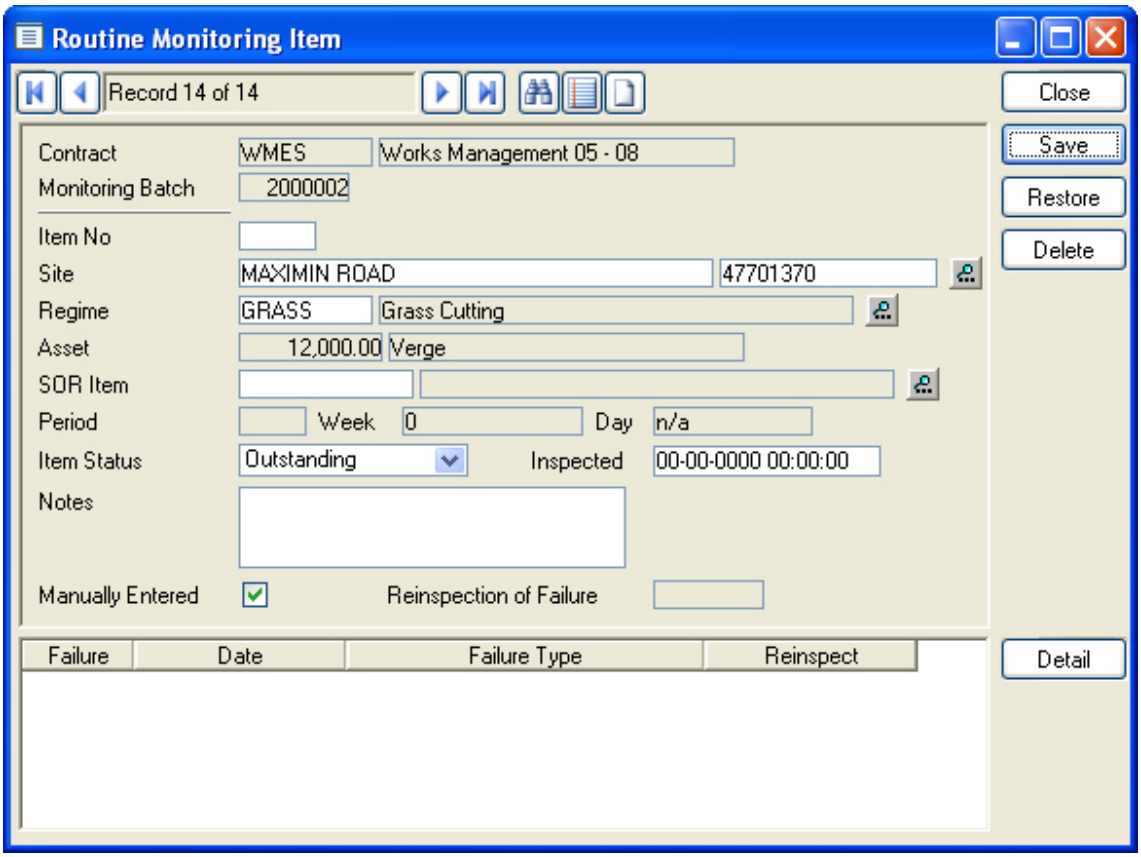
The Routine button displays the Routine Monitoring Item form. This will contain the details of Work Monitoring Items where an existing Batch has been recalled. The Routine Monitoring Item form may be used to manually add Work Items to a batch, and to record the results of a Works Inspection.



Contract and Monitoring Batch number are copied from the header and cannot be edited.

Where the Monitoring Item is recalled as part of previously created Batch, only 'Item Status', and 'Inspected' fields may be edited.

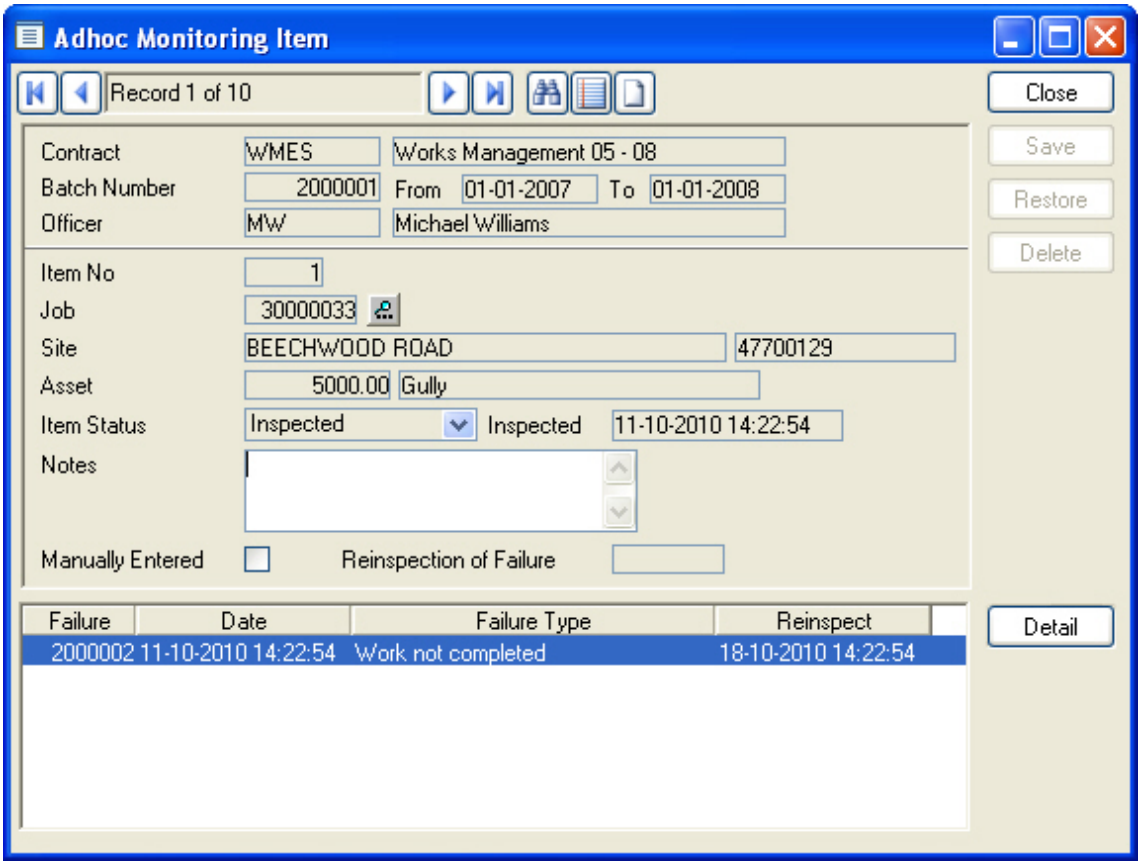
To Manually create a Routine Monitoring Item



Item No:	Leave blank - the system will sequentially number all Monitoring Items in the batch.
Site:	Select a Site, which must be in the same Contract Area as entered on the Batch header.
Regime:	Select a Regime. The pick list displays all the Regimes currently ordered (that is - on a committed Routine Works Order) for the selected Site. Regimes are listed with the plot numbers to which they relate.
Plot:	This field is automatically completed when a Regime/plot is selected in the Regime field. This field cannot be amended, except by selecting another Regime/Plot combination from the pick list for the Regime field.
SOR Item:	Select the relevant SOR Item from the pick list. The pick list displays only the SORs related to the Regime selected in the Regime field. All currently ordered occasions of the SOR Item(s) are displayed.
Period/Week/Day:	These fields are automatically completed when a SOR Item/occasion is selected in the SOR Item field. These fields cannot be amended, except by selecting another SOR Item/occasion combination from the pick list for the SOR Item field.
Manually Entered:	Will be automatically checked for Items added manually to the batch.
Reinspection of Failure:	Where this is a reinspection of a previously failed Item, the original Failure Number will be automatically entered.

Job button

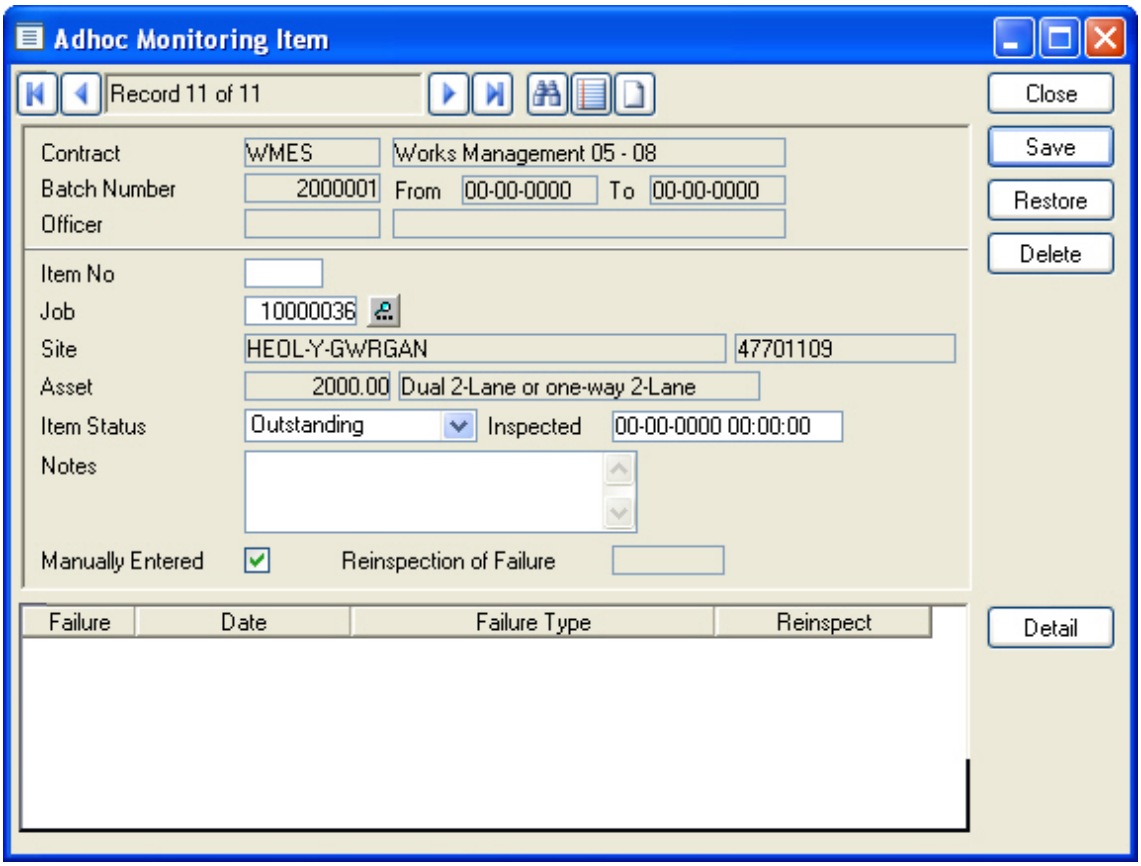
The Job button displays the Adhoc Monitoring Item form. This will contain the details of Work Monitoring Items where an existing Batch has been recalled. The Adhoc Monitoring Item form is used to manually add Work Monitoring Items to a batch, and to record the results of a Works Inspection.



Contract and Monitoring Batch number are copied from the header and cannot be edited.

Where the Adhoc Monitoring Item is recalled as part of previously created Batch, only 'Item Status', and 'Inspected' fields may be edited.

To Manually create an Adhoc Monitoring Item



Item No:	Leave blank - the system will sequentially number all Monitoring Items in the batch.
Job:	Enter a Job number, or select from the pick list. The pick list references all Jobs at the appropriate Job Status (that is - any Job Status that has 'Requires Monitoring' checked)

The 'Site' and 'Plot' fields will be completed from the Job details and cannot be edited.

Note: Jobs included on a Monitoring Batch, either manually or as a result of the Create Monitoring Inspections utility, will acquire the Job Status set for 'Being Monitored' in the Monitoring System Settings.

Entering the result of the Monitoring Inspection will advance the Job Status in two ways:

Where no Failure is logged, the Jobs Status is advanced to the 'Inspected' status set in the Monitoring System Settings.

Where a Failure is logged, the Jobs Status is advanced to the 'Failed' status set in the Monitoring System Settings.

Completing a Monitoring Batch

When all the results of Inspections have been entered, the Monitoring Batch may be 'Completed', preventing any further editing of the Batch.

To Complete the Batch, check the 'Complete' check box on the Batch header, and click on the 'Save' button.

If the batch contains any items whose Item Status is 'Outstanding', a message will be displayed asking the user if the remaining, outstanding inspections should be flagged as 'Inspected'.

Select 'Yes', to set the Item Status to 'Inspected' for all Items on the Batch. Non Routine Jobs so flagged will take on the 'Inspected' Job Status defined in the Monitoring System Settings (assuming that no Failures have been logged in them).

Select 'No', to leave the item status at 'Outstanding' for all un-inspected Items. Where those Items relate to Non Routine Jobs, the Job Status is set to the 'Completed Not Inspected' Job Status defined in the Monitoring System Settings.

To record the results of a Works Inspection

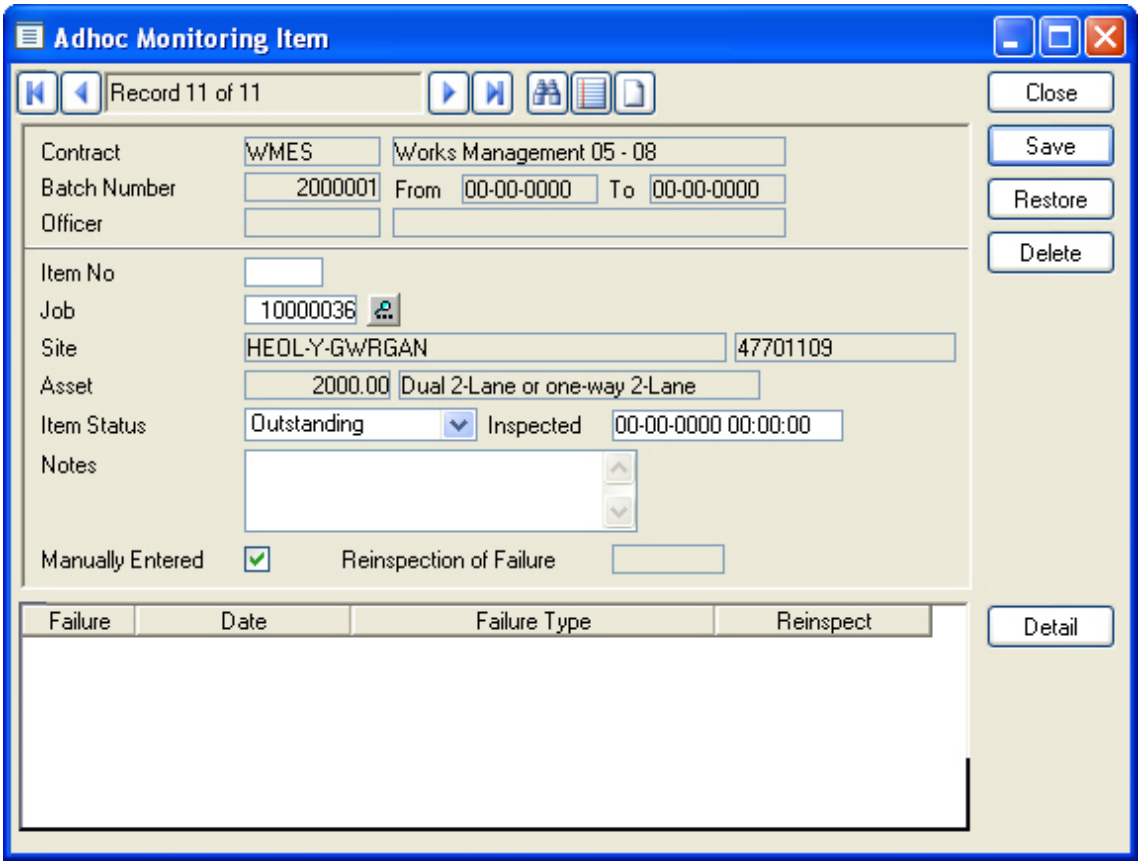
The results of the Works Inspection are recorded in the same way for Routine Monitoring Items, and for Adhoc Monitoring Items. In each case, the Inspection is logged against the Item by setting the Item Status to 'Inspected'. This may happen in several ways:

It may be done manually where no Failure is to be recorded, by simply changing the Item Status.

It will be done automatically, for all Monitoring Items still 'Outstanding', when the 'Complete' check box on the Batch Header is checked and the Batch Header is saved.

It will be done automatically when a Failure is logged against the Monitoring Item.

Where no Failure is to be recorded



Item Status: All Works Monitoring Items, when created, will default to 'Outstanding'. To record that a Works Inspection was carried out on this Item of work, select 'Inspected' from the drop down list.

Note: This field will automatically change to 'Inspected' if the batch is 'Completed', or a Failure is logged against this Monitoring Item.

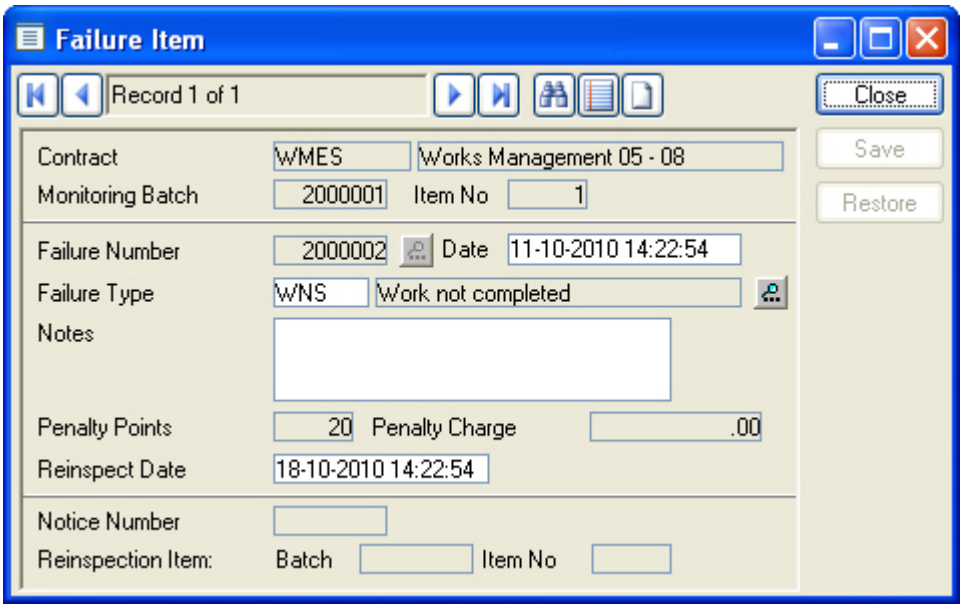
Inspected:	The current date will be automatically entered when 'Inspected' is entered as the Item Status. The date may be amended.

To record a Failure

Failures are logged in the same way for Routine and Adhoc Monitoring Items

Do not complete the Item Status, or Inspected fields of the Works Monitoring Item. These will be automatically updated to 'Inspected' when a Failure is logged and saved against this Monitoring Item.

Click on the 'Detail' button to display the Failure form.



Contract and Monitoring Batch number are copied from the header and cannot be edited.

Failure Number:	Leave blank. A number will be automatically assigned from Work Group Seed numbers when the record is saved. **System Administration\Security\Work Group**
Date:	The current date is entered by default. This may be edited.
Failure Type:	Select a Failure Type from the pick list. The pick list references all Failure Type appropriate to this Inspection.
Notes:	An optional free text field. Any notes entered here will be displayed on the Failure Notice.
Penalty Points:	The Penalty points assigned to the selected Failure Type, under this Contract, will be entered here. This may only be amended if the Monitoring System Settings allow it. .
Penalty Charge:	The Penalty charge assigned to the selected Failure Type, under this Contract, will be entered here. This may only be amended if the Monitoring System Settings allow it.
Reinspection Date:	If the selected Failure Type is flagged in the Failure Type Lookups for reinspection, then a reinspection date will automatically be entered.

The reinspection date is calculated by adding the reinspection follow up set in the Monitoring System Settings, to the current date. This may only be amended if the Monitoring System Settings allow it.

The fields under the grey line record information about the Failure. These fields are completed by the system and cannot be edited:

Notice Number:	Records the Notice Number of the Failure Notice onto which this Failure is placed.
Reinspection:	Where this Monitoring Item is a reinspection, with a previously logged Failure, the Batch and Item number of the previous Monitoring Item is recorded.

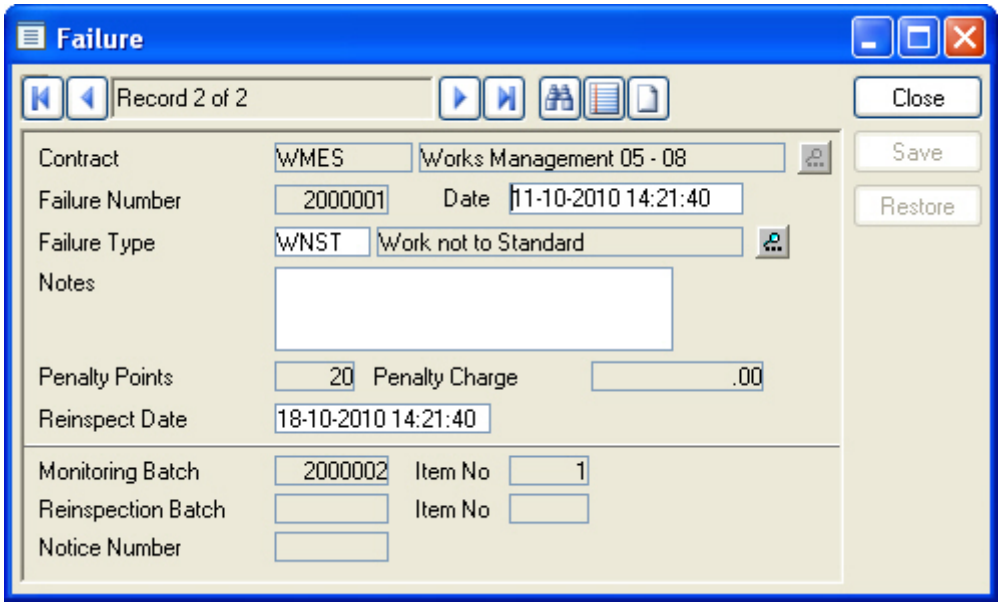
Several Failures may be logged against a single Monitoring Item.

Failures

The Failures library contains all Failures that have been created in the system. Use the 'Find' (binocular) button to recall Failures into the form.

Failures may be logged against a Monitoring Item, in a Batch, as a result of a Monitoring Inspection.

Failures may also be logged directly into the Failure form, usually for 'Non Work related' Failures. In this case, the Failure is not associated with a particular Job or SOR Item and occasion.



Contract:	Select from the pick list. The pick list references awarded Contracts. **Contract Preparation\Contract**
Failure Number:	Enter a number to recall an existing Failure. Leave blank when logging a new Failure. A number will be automatically assigned from Work Group Seed numbers when the record is saved. **System Administration\Security\Work Group**
Date:	The current date is entered by default. This may be edited.
Failure Type:	Select a Failure Type from the pick list. The pick list references all Failure Types that are set as 'Non Work Related' or 'All Inspections' in the Failure Type Lookup.
Notes:	An optional free text field. Any notes entered here will be displayed on the Failure Notice.
Penalty Points:	The Penalty points assigned to the selected Failure Type, under this Contract, will be entered here. This may only be amended if the Monitoring System Settings allow it.
Penalty Charge:	The Penalty charge assigned to the selected Failure Type, under this Contract, will be entered here. This may only be amended if the Monitoring System Settings allow it.
Reinspection Date:	A Reinspection date cannot be entered for directly entered Failures.

Failures originally logged against Monitoring Item being viewed in the Failure Form will carry the Reinspection date set at the time the Failure was logged.

The fields under the grey line record information about the Failure. These fields are completed by the system and cannot be edited:

Monitoring Batch/Item No:	Where the Failure was logged against a Monitoring Item, the Batch and Item number of the Monitoring Item will be entered.
Reinspection Batch/Item No:	Where the Failure was reinspected, the Batch and Item number of the reinspection Monitoring Item will be entered.
Notice Number:	Records the Notice Number of the notice onto which this Failure is placed.

Create Failure Notices

Failures, once created, are put onto Failure Notices. Failure Notices are Severity, and Contract Area specific. for information on Failure Severity.

The Create Failure Notice utility will batch Failures onto Notices according to the filter criteria.

The filter may be left blank to batch all available Failures onto Notices. Only Failures not already on a Notice will be included.

Use the filter options to limit the Notices.

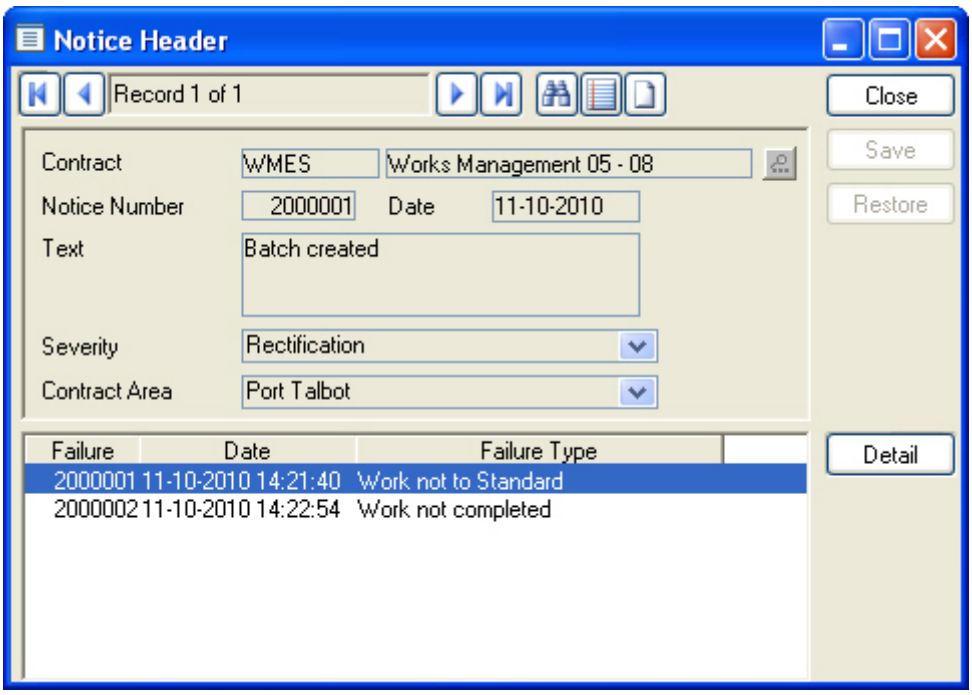
Contractor:	You may select a Contractor from the pick list. The pick list references the Contractor library. **Contract Preparation\Contractors** **Note:** Notices are issued to Contractors - and may therefore draw Failures from several Contracts or Contract Areas, if all the Contracts are awarded to the same Contractor.
Contract:	You may select a Contract from the pick list.
Severity:	You may select a Severity from the drop down list. The drop down list references the Severity Lookup.
Failure Date:	You may enter a range of dates to restrict the selection to Failures raised between those dates.
Contract Area:	Select from the drop down list.

Click on OK to run the utility. A Preview will display a list of the Notices that will be created, and display, for each Notice, the Failures which will be included on that Notice. Save the Preview to create the Notices.

Failure Notices

The Failure Notices library contains all Failure Notices that have been created in the system. Use the 'Find' button to recall Failure Notices into the form.

The Notice details will be entered and cannot be amended for recalled Notices.



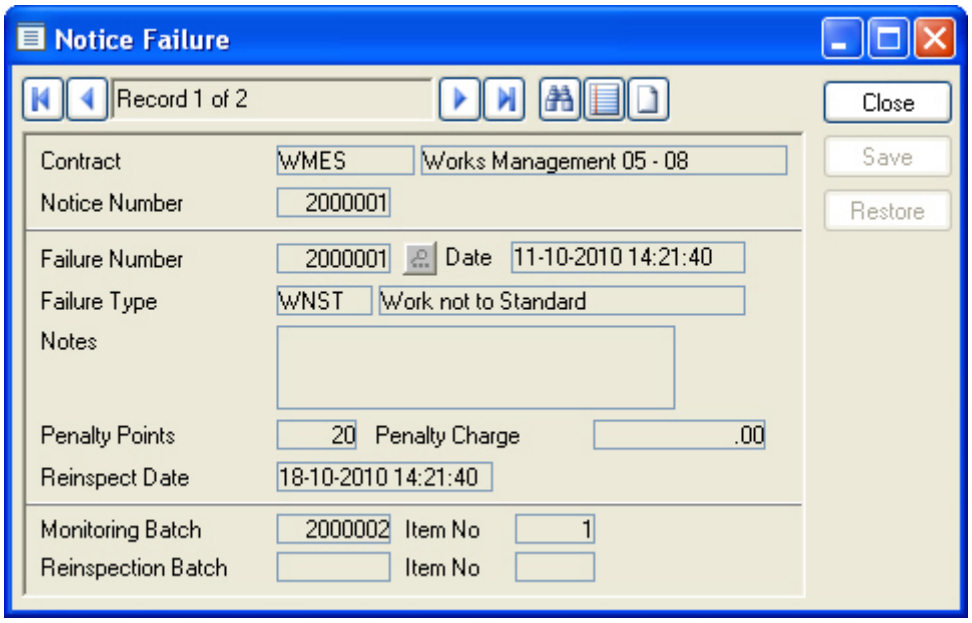
A Notice may be manually created by completing a blank Notice Header and manually adding the Failures.

Contract:	Select from the pick list. The pick list references awarded Contracts. **Contract Preparation\Contract**
Notice Number:	Enter a number to recall an existing Notice. Leave blank when creating a new Notice Header. A number will be automatically assigned from Work Group Seed numbers when the record is saved. **System Administration\Security\Work Group**
Date:	The date the Notice was created will be entered. For a new Notice header the current date is entered by default. This may be edited.
Text:	'Batch Created' will be entered for Notices created using the Create Failure Notices utility. An optional free text field for a new Notice Header.
Severity:	Notices are Severity specific. The Create Failure Notices utility will create a separate Notice Header for each Severity requested in the Create Failure Notices filter. For a new Notice Header, select a Severity from the drop down. The drop down list references the Severity Lookup.

Contract Area: Notices are Contract Area specific, within each Severity. The Create Failure Notices utility will create a separate Notice Header for each Severity and Contract Area requested in the Create Failure Notices filter.

For a new Notice Header, select a Contract Area from the drop down.

Click on the 'Detail' button to view the Failures that have been included, or to add Failures to the Header.



Failures are displayed in the Notice Failure from which is similar to the Failure form - see **Failures** on page 23.

All the fields are greyed out and may not be edited.

To add a Failure to a Notice Header

Contract and Notice Number will be copied from the Notice Header and may not be edited.

Enter a Failure Number, or select from the Failure Number pick list. The pick list references all Failures of the Severity specified on the Batch Header.

All other details will be automatically entered and cannot be edited.

Failure Notice Print

Failure Notices, once created, may be printed. The filter may be left blank to print all Notices.

Use the filter options to limit the Notices.

Contractor:	You may select a Contractor from the pick list. The pick list references the Contractor library. **Contract Preparation\Contractors**
Contract:	You may select a Contract from the pick list.
Severity:	You may select a Severity from the drop down list. The drop down list references the Severity Lookup.
Failure Date:	You may enter a range of dates to restrict the selection to Failures raised between those dates.
Contract Area:	Select from the drop down list.

Monitoring Inspections - Step-by-step

Prerequisites for Work Inspections:

- Routine Maintenance - a committed Routine Maintenance Works Order must be in place for the period that is to be monitored (Does not apply to ConfirmConnect®).
- Non-Routine Works - **Job Statuses for Performance Monitoring** on page 33 must be in place and linked to **Monitoring System Settings** on page 32.
- Jobs to be monitored must be at a Status that allows monitoring.
- **Failure Severity** on page 31 and **Failure Type** on page 31 Lookups must be complete. Failure Types must be linked with the Contract through the **'Penalties' button on the Contract form.**

Prerequisites for Feature Inspections:

- **Observation Types** and **Observation Parameters** must be correctly set-up and allocated to Features.
- A **Failure Matrix** must be completed for each Feature Group that contains Features that are to be inspected.
- A Condition Survey 'Monitoring' Inspection Type must be in place in the **Condition Survey System Settings**, together with an AdHoc Type and Route.
- The AdHoc route must be specified as such in the **Condition Survey Seed Numbers**, and each **Feature Group** that contains Feature subject to Feature Monitoring must have the 'Select for AdHoc Inspections' flag set.
- **Failure Severity** on page 31 and **Failure Type** on page 31 Lookups must be complete. Failure Types must be linked with the Contract through the **'Penalties' button** on the Contract form.

To carry out an Inspection:

- Create an Inspection batch - using **Create Works Inspections** on page 8 for Work Inspections, or **Create Feature Inspections** on page 11 for Feature Inspections.
- **Monitoring Batch Print** on page 13, or download the Inspection tasks to a mobile device.

To log Inspection results

- Feature Inspection results are logged by upload from a mobile device. On upload a Condition survey Inspection batch is created based on the AdHoc Inspection Route, and the Feature Monitoring batch is updated from with the Observation Type grades, and any resulting Failures.
- Work Inspection results may be logged by upload from a mobile device, or may be manually entered as follows:

~ By recalling a Works Inspection batch into the Monitoring Batch form and logging Failures against those Monitoring Items that have failed.

~ Check the 'Completed' check box on the Header and save to batch flag all other Monitoring Item as 'Inspected'.

Creating Failure Notices

- At the end of the monitoring period: **Create Failure Notices** on page 25.
- **Failure Notice Print** on page 28.

Monitoring Reports

Failure Report

The Failure Report may be derived for Work failures or Feature failures by selection in the 'Report Level' drop-down field.

The Work report provides a list of all selected Failures, by Failure Type and Site. A Detailed report will give each Failure with details of the Regime and SOR or Job, the Penalty or Charge that has been applied, and the 'Nominal Value' - that is the value that the work carries in the Routine or Non Routine Works order.

The Feature report provides a list of all selected Failures, by Contract, or by Contract and Site. A Detailed report will give each Failure, by Contract, Site, and plot number, with details of the Penalty or Charge that has been applied.

The report provides Site totals, Failure Type totals and Report totals.

Monitoring Performance Report

The Monitoring Performance Report can be obtained at two levels.

At 'Detail' level it will list all the selected Monitoring Items, by Site, giving details of the type of inspection, the date of inspection, and the results in terms of point or charges where an Inspection has been carried out.

At Site Summary level it will analyse the selected Monitoring Items to provide numbers of Monitoring Items inspected at each Site, together with a percentage that is calculated from Items inspected against Items still outstanding in the same Site, in other words, the percentage of Monitoring items Inspected.

Points and charges are also given.

These details are totalled for the Contract, and average points given.

Monitoring Lookups

The Monitoring Lookups provide a list of Failure Types, which are grouped into Severities. The Failure Severity provides Notice headings.

System Settings for Monitoring are set in the Monitoring System Settings.

Failure Type

The Failure Type Lookup describes the characteristics of permissible Failure categories.

Failure Code:	Up to four alphanumeric characters
Description:	Up to thirty characters
Severity:	Select from the drop down list. The drop down list references the **Failure Severity** on page 31.
Applicability:	Select from: All Inspections: - to make this Failure Type available for first inspections and reinspections. Failure Type with this Applicability will also be available for Failures entered directly into the Failure form. First Inspections Only: - these Failure Types will only be available for first inspections Reinspections Only: - these Failure Types will only be available for the second and subsequent Inspections of the same item of work. Non-Work Related: - these Failure Types are not available in Monitoring Batches and can only be applied for Failures entered directly into the Failure form. **Note:** 'Non-Work Related' Failure Types are the only ones which may be used in the Customer Services module to log a Failure against a Customer Enquiry
Reinspection:	Check this to enable the 'Reinspect Date' field for a new Failure. This date on a new Failure will be defaulted according to the Default Follow Up setting on the Monitoring System Settings screen. **Note:** Reinspection cannot be selected for 'Non-Work Related' Failure Types.

Contract Penalties

Failure Types are assigned to Contracts, and acquire their Penalty Points, or Penalty Charges under the Contract.

Failure Types will not be available for Failures raised in a Contract, unless they are assigned to the Contract using the 'Penalties' button of the Contract form.

Contract Preparation\Contract\Contract form

Failure Severity

Failure Type will be grouped into Severities. Notices are issued by Severity, so the Failure Severity Lookup could be considered as a list of the various Notices that may need to be issued.

Severity Code:	Up to four alphanumeric characters.
Name:	Up to thirty characters.
Notice Type:	Up to 30 characters. Text entered here will appear as the Notice title on Notices printed for this Severity.

Monitoring System Settings

Monitoring System Settings define the statuses for Jobs that are monitored, and set defaults for reinspections, users ability to change entries, and Monitoring Batch creation.

Being Monitored:	Select from the pick list the Job Status that the system will assign to a Job that is placed on a Monitoring Inspection batch. The pick list references the Job Status Lookup. **Asset Maintenance\Maintenance Lookups**
Inspected:	Select from the pick list the Job Status, which the system will assign to a Job on a Monitoring batch that has an Item Status of 'Inspected', and has no Failure logged against it. The pick list references the Job Status Lookup. **Asset Maintenance\Maintenance Lookups**
Failed:	Select from the pick list the Job Status that the system will assign to a Job on a Monitoring Batch that has a Failure logged against it. The pick list references the Job Status Lookup. **Asset Maintenance\Maintenance Lookups**
Completed Not Inspected:	Select from the pick list the Job Status that will be set when a Monitoring batch is completed, on all the Non-Routine Monitoring Items that will be completed, but are not flagged as 'Inspected'. The pick list references the Job Status Lookup sset Maintenance\Maintenance Lookups
Default Follow Up:	This box is used when setting a Reinspection Date for a failed Inspection. A Reinspection is scheduled only if the Failure Type selected has the Reinspection checkbox ticked. **Failure Type** on page 31
Allow User to override:	Check the boxes to allow the user to change: • Penalty points (Not used by ConfirmConnect®) • Penalty charges (Not used by ConfirmConnect®) • Reinspection date - when raising a Failure (Used by ConfirmConnect®) **Note:** Users will need to sign out of ConfirmConnect® for the change to Resinspection date to take effect.
Include Annual Performance SOR Items:	Check this box to set a default, which will check the 'Include Annual Performance SOR Items' check box on the Create Monitoring Inspections Filter. This may be unchecked in the filter when creating Monitoring Inspections.
Default of Restrict Jobs by Allocated Officer	Check this box to set a default, which will check the 'Restrict Jobs by Allocated Officer' check box on the Create Monitoring Inspections Filter. This may be unchecked in the filter when creating Monitoring Inspections.

Job Statuses for Performance Monitoring

Code	Name	Com	Comp	Pay	O/s	Insp	Mon	Cont	Prevent Author
J50	Contractor Completed	X	X		X		X		X
710	Job being Monitored	X			X		X		X
720	Monitored - OK	X			X				
730	Monitored - Failed	X			X		X		X
740	Complete - not Inspected	X			X		X/0		X/0

A Job Status at which the Job may be included on a Monitoring Batch is required. This may be an existing Status such as 'Work Completed', or a new Status such as 'Requires Monitoring'. In either case - the Status at which the Job is to be monitored should have the 'Requires Monitoring' check box checked. It may also have 'Prevent Payment Request Authorisation' checked if Jobs at this status are not to be authorised for payment through the Request system.

Note: Setting the 'Requires Monitoring' flag for a Job Status is not to say that all Jobs at this Status must be monitored. It simply makes Jobs at this Status available for inclusion on a Monitoring Inspection batch.

While the Job is being monitored it will be held at a Status that indicates that it is currently an Outstanding Monitoring Item on a Monitoring Inspection Batch. It may also have 'Prevent Payment Request Authorisation' checked if Jobs at this status are not to be authorised for payment through the Request system.

If the Job is 'Inspected' without a Failure being logged, the system will update the Status to reflect this. This may be a 'Monitored - OK' status, or it may be the current 'Payment Authorised' Status, which would automatically forward Jobs to the next Payment Batch that is raised

A Status that indicates that a Job is 'Inspected' and carries a Failure is required. This Status should have 'Requires Monitoring' checked, if it is to be reinspected. It may also have 'Prevent Payment Request Authorisation' checked if it is not to be authorised for payment until the Job is successfully monitored.

A Monitoring Batch may be completed without flagging outstanding Items as 'Inspected'. The system will allocate this status to those Jobs. The 'Requires Monitoring' flag or the 'Prevent Authorisation' flag may be set, depending on whether payment or a further monitoring inspection would follow this status.

Asset Maintenance\Maintenance Lookups\Job Status

Setting Seed Numbers for Monitoring

Monitoring Inspection batches, Failures, and Notices are all numbered, within Contracts, for each Work Group. Seed Numbers must be set for each Work Group and Contract.

System Administration\Security\Work Groups