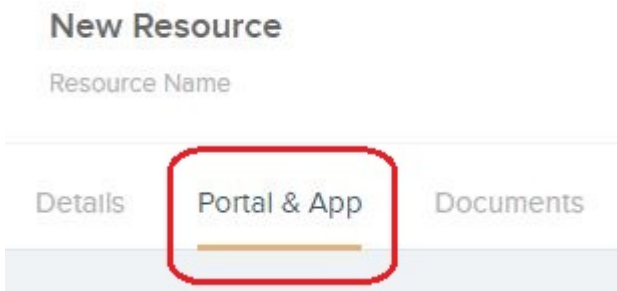


# Job Completion by a Resource

Completion of a job task by a resource (contractor / engineer) can fully complete job, or the status can be set to “Resource Confirmed Complete” still requiring full sign-off by a more senior member, or by the help-desk. These settings can be configured in the *Portal & App* tab of the *Resource Details* page:

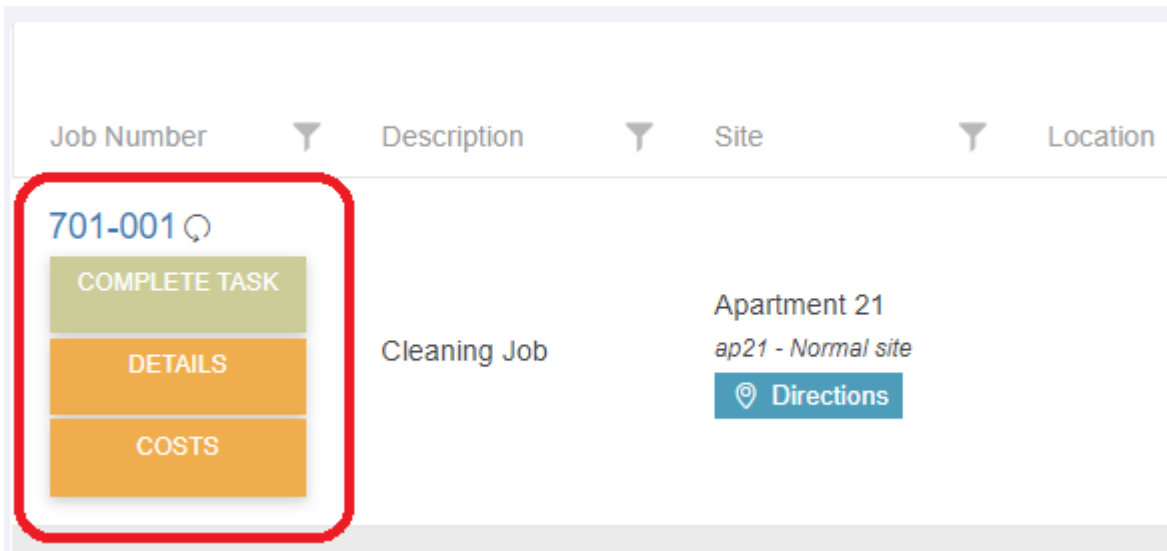


In the *Portal & App* tab, the “Settings Common to the Online Portal and Resource App” will have the option for you to decide if “Completing task completes job” for this resource:

## Settings Common to the Online Portal and Resource App

Completing task completes the job  Yes  No

Once a resource has accessed the Contractors Portal (or Resource App) they will see all jobs that have been assigned to them. Selecting the Job Number (highlighted below) will open the *Job Details* view, which will display all relevant information for the job, including directions for travel.



Selecting the *Complete Task* button (highlighted above) will prompt a pop-up window where a resource can choose “Task Complete” or “More Work Required” depending on the job status. A comment on the job will be required in the “Notes” section (For example, if “More Work Required” is selected, the Notes section may contain a list of tools required in order to continue with the job). All forms attached to the task must be completed at this stage:

A screenshot of a pop-up window titled 'Leave Site - 701-001'. The window has an orange header with a close button (X). Below the header, there is a 'Task Status' section with two radio buttons: 'Task Complete' (unselected) and 'More Work Required' (selected). Below the radio buttons is a red error message: 'Form not submitted - Cannot Complete Task'. Underneath is a 'Notes' section with a large text input area. At the bottom right, there are two buttons: 'Cancel' (grey) and 'Save' (green).

If “Require Customer Signature” is selected in the “Settings

Common to the Online Portal and Resource App” section of the *Resource Details* area, the resource will be asked to provide their signature when completing a task:

#### Settings Common to the Online Portal and Resource App

Completing task completes the job  Yes  No

Require Customer Signature  Yes  No

When a job has been completed by a resource, it will appear in the *Jobs List* with the status of “Resource Confirmed Complete” and will require further sign-off from a more senior member in order to be fully completed:

|            |                      |                             |        |        |               |
|------------|----------------------|-----------------------------|--------|--------|---------------|
| 2580       | let - Cefni Hospital | Resource Confirmed Complete |        |        |               |
| Job No.    | Site                 | Status                      |        |        |               |
| Job Detail | Job Tasks(1)         | Costs                       | Quotes | Assets | Documents (3) |

A job with the status of “Resource Confirmed Complete” will have the option to *Complete* or *Cancel* on the *Job Details* page:

< Job List   Cancel   Complete   Edit

Selecting *Complete* will prompt a pop-up window where the job closure date, job sub status, and additional notes can be added:

### Sign Off Job As Complete ✕

Job Closure Date

Notes

✕ Cancel ▶ Confirm

Once this step has been carried out, the Job Status will now display "Complete":

|                            |                              |                       |                        |                        |                           |
|----------------------------|------------------------------|-----------------------|------------------------|------------------------|---------------------------|
| <b>2580</b>                | <b>let - Cefni Hospital</b>  | <b>Complete</b>       |                        |                        |                           |
| Job No.                    | Site                         | Status                |                        |                        |                           |
| <a href="#">Job Detail</a> | <a href="#">Job Tasks(1)</a> | <a href="#">Costs</a> | <a href="#">Quotes</a> | <a href="#">Assets</a> | <a href="#">Documents</a> |