

Job Completion by a Resource

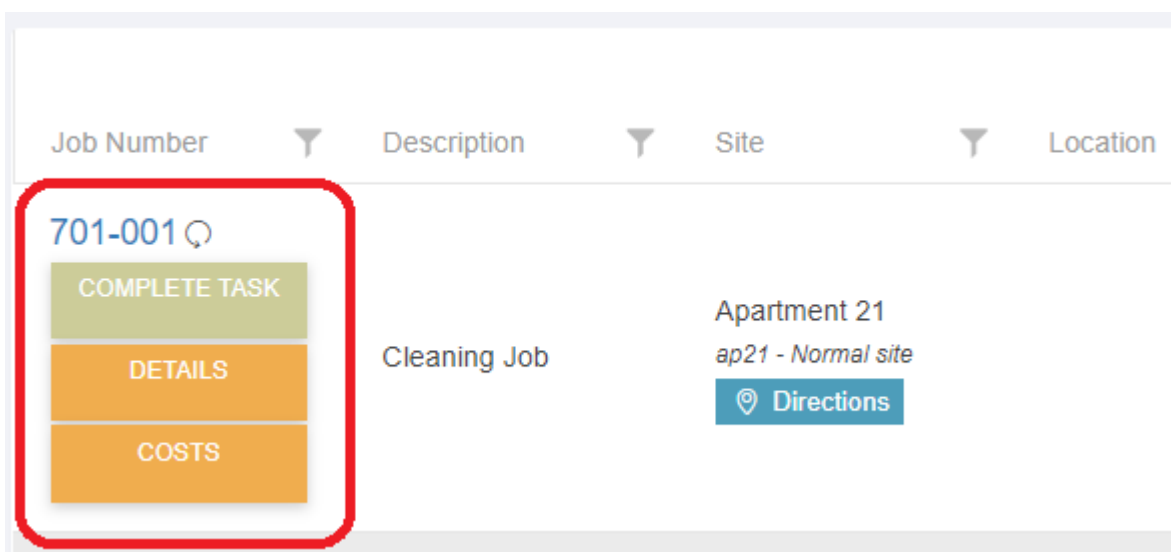
Completion of a job task by a resource (contractor / engineer) can fully complete job, or the status can be set to “Resource Confirmed Complete” still requiring full sign-off by a more senior member, or by the help-desk. These settings can be configured in the *Portal & App* tab of the *Resource Details*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

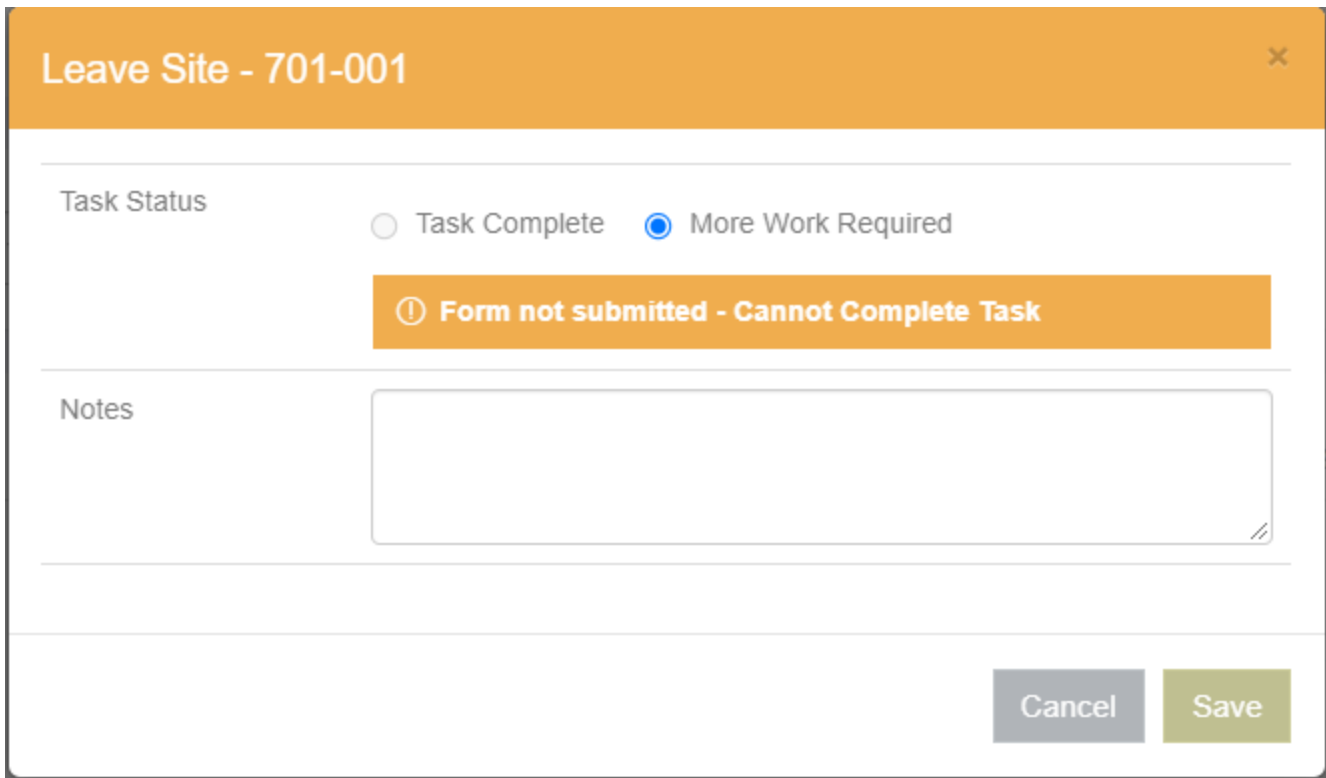


Once a resource as accessed the Contractors Portal (or Resource App) they will see all jobs that have been assigned to them. Selecting the Job Number (highlighted below) will open the *Job Details* view, which will display all relevant information for the job, including directions for travel.



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:



Leave Site - 701-001

Task Status

Task Complete More Work Required

① Form not submitted - Cannot Complete Task

Notes

Cancel Save

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:



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:

The screenshot shows a job summary card with the following details:

- Job No.: 2580
- Site: let - Cefni Hospital
- Status: Resource Confirmed Complete (highlighted with a red box)

Below the card is a navigation menu with the following items:

- Job Detail (underlined)
- 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:



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

The pop-up window is titled "Sign Off Job As Complete" and contains the following fields:

- Job Closure Date: 30/08/2021 10:30
- Notes: A large empty text area for additional information.

At the bottom of the window are two buttons: "Cancel" (with a close icon) and "Confirm" (with a play icon).

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

2580

Job No.

let - Cefni Hospital

Site

Complete

Status

Job Detail

Job Tasks(1)

Costs

Quotes

Assets

Documents