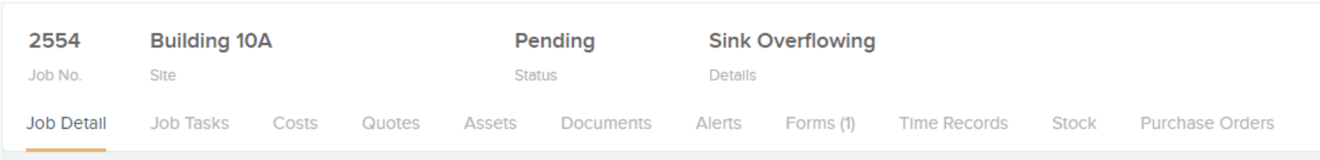
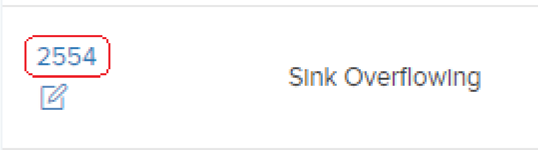
Job Details

The *Job Details* area allows you to view and manage all relevant information about a specific job:



The *Job Details* view can be accessed by clicking on the job number in the *Jobs List*:



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1. The Job Details tab allows you to view / edit the basic job information such as job description, type / sub-type, status / sub-status, category, priority, costs, team, assigned user(s), expected date, assigned site / location / sub-location, as well as any additional notes that have been added to this job.

You also have the option to instruct one or more resources on this particular job:

From the *Job Details* tab you can select the *Edit* button on the right-hand side to edit the existing information:

You also have the option for the job to require a permit. Ticking this option will allow you to choose the Permit Form. The *Select Form* button will display a pop-up window with forms for you to choose from:

As seen in the below screenshot, jobs can also be assigned to Teams from the *Job Details*

Below is a screenshot of the site information on the Job Details page. The contact details by default are associated with the chosen site. However these details can be changed by using the Edit button on this page.

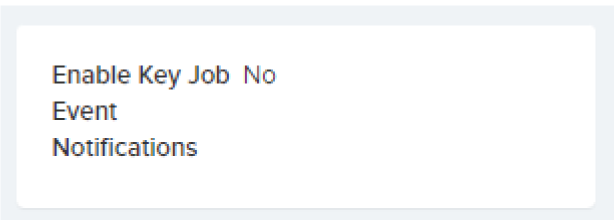
You can change the default setting so that the contact details will be associated with the Assigned User for that job.

This setting is in <Job Settings> in the Settings Area

Enable Key Job Event Notification

This covers events such as when the engineer starts travel, when the engineer starts task, when the engineer completes task and the job is completed.

The Main contact on that site will receive an email on all of the above events.



Open jobs will have the option to either *Complete* or *Cancel* a job:

There are additional options next to the *Edit* button as shown below:

- **Job Calendar** – This will take you to the *Jobs Calendar*.

- **Take Photo** – This will allow you to attach a photo to this job.
- **Print** – This will generate a PDF for the job and any associated forms.
- **Audit Trail** – This will display a pop-up showing the audit trail of key job changes.

If a job has previously been completed, the *Job Details* tab will have this additional option to “Re-Open Job” in the same drop-down menu:

Also available on the *Job Details* tab is the *Job Notes* area. This is a grid that records each key job event, to help keep track of the job life-cycle. Associated users can also add their own notes to this section.

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2. The Job Tasks tab allows you to view and manage job tasks that have been created for a specific job and all relevant information per task:

The *Job Tasks* grid also shows information such as travel start time, task start time, task finish time, when the task was marked as complete, and the status (pending / instructed / completed / cancelled).

From here you can also *Add Task* or export the *Job Task* list to an Excel sheet:

3. The Costs tab allows you to view and manage all costs related to a specific job. Within the *Job Costs* grid you can view or edit the information for each individual list item.

You can add a new cost from this tab:

There are also additional options to the top-right of the grid:

- **Audit Trail** – This will display a pop-up showing the audit trail of cost changes
- **Export to Excel** – This will allow you to export the *Cost List* to an Excel sheet.

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4. The Quotes / Estimates tab allows you to view and manage all quotes and estimates associated with a specific job. The *Quotes / Estimates* grid will show the Quote / Estimate number and the job task number it is associated with, as well as the quote / estimate description, reference, resource, status, requested date / time, submitted date, who it was submitted by, and the total value.

You can also *Create New Quote / Estimates* from this tab:

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5. The Assets tab allows you to view and manage all assets associated with a specific job. The grid on this tab shows all assets that have been assigned to this job, the description, location, code / serial number, model number, install date, warranty details, number of jobs the asset is currently assigned to, as well as costs information.

You can assign assets to the current job from this tab:

You can also remove assets from this job by selecting this button next to the asset in the list:

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6. The Documents tab allows you to view and manage all documents associated with a particular job. The *Job Documents* grid shows all documents / document names uploaded for this job, as well as the description, file type, created date / time, created by, status, and tags.

From this tab, you can upload new documents and view any documents for this job that have been archived. You can also apply filters to the *Job Documents* grid.

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7. The Alerts tab allows you to view and manage all alerts set up for a particular job / job task. The *Job Alerts* grid shows the job / job task number the alert has been assigned to, the assigned user, date / time, type, action required, who followed up the alert, when and the action taken.

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8. The Forms tab allows you to view and manage all forms / form results that have been assigned to a specific job. The *Form Results* grid shows all the forms for this job, the form details, whether the form has been submitted or not, of the form has any “failed” questions, and when / by whom the form was submitted.

Selecting the *Add Form* button will display a pop-up window displaying all available forms for you to choose from. Once you select a form from this pop-up, you will be taken to the *Form Details* view. You can fill out the form, or return to the previous page and leave it to be filled out at a later time.

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9. The Time Records tab allows you to view and track all the time records that have been logged for a particular job and any job tasks. The *Time Records* grid shows the site, resource and details of the job task. It also shows information such as the travel start time, task start time, left task time, total hours, and total costs.

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10. The Stock tab allows you to view and manage all stock that has been used or transferred for this job. The *Job Stock* grid shows all relevant information such as the type of stock, stock code, change type, from storage area, to storage area, job task number (if applicable), quantity, unit cost, and total cost.

From this tab you also have the options to *Use or Transfer Stock*, return to the *Job List*, and to *Export* the job stock list to an Excel sheet:

For Jobs with an Asset attracted a panel will appear showing important details as per screenshot below.

Contract	Client B
Site Name	JEDPLM
Location	
Contact Name	Darren
Telephone	
Email	dar@trackplanfm.com

Site Warning Note:

Be aware of dogs at the entrance

Asset Name	Drill
Asset Number	dr1
Asset Class	Lighting
Asset Sub Class	