

Job Sign Off Workflows

In Settings → 'Sign Off Steps' you can activate and create templates and steps to produce Job sign off Workflows.

1. To activate this feature set 'Enable Sign Off Steps' to Yes.
2. Click 'Add Sign Off Template' to create your first template. Give the Template a name and save. At this point you have the ability to select certain Asset classes & Asset Sub classes to the template. (Sites, Regions, Site Types, Job Types & Job Sub Types will be coming soon)
3. Click the Green arrow to the left of the Template name to reveal the second grid where you can now start adding the Template Steps.
4. Click 'Add Sign Off Template Step' to create the first step or flow. A pop-up will appear where you will configure the rules of that flow. You can change the order of the steps by dragging and dropping the individual line.

Sign Off Steps Settings

Enable Sign Off Steps

☒ Yes ☐ No

ADD SIGN OFF TEMPLATE

Template Name	Created By	# Asset Classes	# Asset Sub Classes	# Sites	# Regions	# Site Types	# Job Types	# Job Sub Types	
▶ Inspection	Facilities1	5	1	0	0	0	0	0	
▶ Test Template	Team	1	0	0	0	0	0	0	
▶ User Inspection	Facilities1	1	0	0	0	0	0	0	

ADD SIGN OFF TEMPLATE STEP

Order	Can be Signed Off by Jobs Assigned User or Team	Can be Signed Off By User	Can be Signed Off By Team	Sign Off Type	On Sign Off Assignment Behaviour	On Sign Off Assign to User	On Sign Off Assign To Team	Can Reject	
1	Yes	Facilities1	--	Confirm Complete	No Action	Team	--	No	
2	No	Facilities1	--	Complete	Reassign to first flow	--	--	Yes	

1 - 2 of 2 Items

1 - 3 of 3 Items

Create Sign Off Template Step ×

Order	3
Can be Signed Off by Jobs Assigned User or Team	<input type="checkbox"/>
Can be Signed Off By User	<Assigned Users> ▼
Can be Signed Off By Team	<Teams> ▼
Sign Off Type	Confirm Complete ▼
Can Reject	<input type="checkbox"/>
On Sign Off Assignment Behaviour	No Action ▼
On Sign Off Assign to User	<Assigned Users> ▼
On Sign Off Assign To Team	<Teams> ▼

⊗ Cancel ▶ Confirm

Once the Templates and Steps are set up, **Planned Jobs** created from a Planned Schedule which is associated to an Asset under a selected Asset class or sub class will automatically have this feature available to view on the Job Details page. This will also work for **Reactive Jobs** under a asset class or subclass.

In addition to this you can still attached a Template to any Reactive Job and it will follow the steps/flows that are set up.

Job DetailsJob TasksCostsQuotesAssetsDocuments (1)AlertsForms (1)Time RecordsStockPurchase OrdersSign Off Steps

< Job List

⊕ Attach Sign Off Template

Can be Signed Off by

On Sign Off Assignment Behaviour

Order	Signed Off by User	Signed Off Date	Sign Off Type	Jobs Assigned User or Team	By User	By Team	Action	Assign To User	Assign To Team	Can Reject
No Records										

⏪ ⏩ 0 ⏪ ⏩ 10 Items Per Page

No Items to Display

Select Sign Off Template

SELECT

⬅️

Inspection

SELECT

Test Template

SELECT

User Inspection

⏪ ⏩ 1 ⏪ ⏩ 10 Items Per Page

1 - 3 of 3 Items