Location Intelligence
Infrastructure Asset Management

Confirm®

Confirm Web Interface

v26.10b.AM

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Install and Configure Confirm web interface

Introduction

The purpose of this document is to detail the installation instructions for the Confirm web interface. Confirm web interface is a multi-tenant web service which allows connectivity to multiple databases.

Confirm web interface supports side by side installation to deploy two different versions of web interface on same server at a time. To support the side by side installation two separate installers are provided, these are: **ConfirmWeb** and **ConfirmWeb Beta**. This will provide two independent URLs exposing functionality available for their version. This may be useful in upgrading one installer and adapting selected users to new functionality before exposing all users to upgraded version.

Note: both ‘ConfirmWeb’ and ‘ConfirmWeb Beta’ are installed in separate directories, uninstall or upgrade of one will not affect the other.

Microfrontend Architecture

Starting with the v23.20 release, Confirm Web development is embracing a new paradigm by transitioning towards a Microfrontend architecture. This entails bundling all Microfrontends and services within the Confirm Web installer, aligning with our commitment to enhance functionality and user experience.

Prerequisites

The version of the Confirm web interface must be greater than or equal to the version of the Confirm database being served.

Ensure that the following prerequisites are installed prior to configuring the Confirm web interface:

- Ensure that Web Server IIS role is installed.
- Roles and Features: Application Initialization feature is required for the background processes of the Outbox Reader. These can be added via the Server's Add Roles and Features Wizard.
- Visual C++ 2010 redistributable.
- .Net Framework 4.8
- .Net 8 hosting bundle
- MapXtreme 9.1 Redistributable

These prerequisites are available within the Prerequisites directory of the Confirm media.

Note: It is a best practice and highly recommended to use HTTPS deployment for ConfirmWeb.

Installation

Run the ConfirmWeb.exe and specify a location to install the web service. The default location is set to *C:\inetpub\wwwroot\Confirm*.

- Enabling the *Confirm UEIP* checkbox will allow both Web Service and Client to send anonymous usage information to Confirm to help us improve our products and services.

When the installation is completed you will need to reboot the ConfirmWeb server so that the environment path is updated.

Once Installed you will have the following directory structure:

- AngularShell
- AssetRegisterFE

- AssetRegisterService
- ConditionSurveyFE
- ConditionSurveyService
- ConfrmWeb
- ContractManagementFE
- ContractManagementService
- MaintenanceManagementFE
- MaintenanceManagementService
- OutboxReaderService
- StreetWorksService
- SiteRegisterFE
- SiteRegisterService
- StockManagementFE
- StockManagementService
- SystemAdministrationFE
- SystemAdministrationService
- What3WordsProxyService

Confirm Web Beta

Confirm Web Beta installation allows a side by side install for two versions of the Confirm Web application to be installed on the same server. The Beta installer is typically a different (beta) version to the normal installer.

Note: Confirm Web Beta should only be used when instructed to do so from Confirm support team.

Run the following steps to install ConfirmWeb Beta Interface:

- Run the ConfirmWebBeta.exe and specify a location to install the web service. The default location is set to *C:\inetpub\wwwroot\ConfirmBeta*
- Enabling the *Confirm UEIP* checkbox will allow both Web Service and Client to send anonymous usage information to Confirm to help us improve our products and services.

Note: Please follow steps from Installation section to complete the setup. And also when the installation is completed you will have to reboot the ConfirmWeb server so that the environment path is updated.

Registry Configuration

There are some registry settings that need to be configured on the ConfirmWeb Server, as follows:

O/S Type	Registry Location
32 bit Machines	HKEY_LOCAL_MACHINE\SOFTWARE\Confirm
64 bit Machines	HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Confirm

The following settings are applicable to all Confirm Components:

Registry Key	Description
CfgFile	Path to Database configuration file.
AuthProviderType	• Confirm - To Use Confirm Authentication. • ActiveDirectory - To Use ActiveDirectory.

The following settings are applicable to ConfirmWeb only:

O/S Type	Registry Location
32 bit Machines	HKEY_LOCAL_MACHINE\SOFTWARE\Confirm\Web
64 bit Machines	HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Confirm\Web

Registry Key	Description
LogFile	Path and Filename of the log file.
LoggingEnabled	Enable provider logging on or turn it off. (Yes/ No).

Note: It is recommended to disable RC4 ciphers as per the advisory released by Microsoft. For more information refer -**https://support.microsoft.com/en-in/help/2868725/microsoft-security-advisory-update-for-disabling-rc4**

Mixed Mode Authentication

Mixed mode is a combination of Active Directory(AD) and Confirm authentication i.e. AD users will be authenticated using their AD credentials and non-AD users will be authenticated using their Confirm credentials.

Confirm Configuration Service is required for configuring mixed mode authentication. Refer page **Installation, Configuring and Upgrading the Confirm Configuration Service** for more details.

Upgrading the Web Service

Upgrading from v23.10* or earlier

When upgrading from v23.10 or earlier, the Installation requirements have changed as ConfirmWeb is no longer considered the parent directory for the product. There are now multiple folders, which are:

- AngularShell
- AssetRegisterFE
- AssetRegisterService
- ConditionSurveyFE
- ConditionSurveyService
- ConfrmWeb
- ContractManagementFE
- ContractManagementService
- MaintenanceManagementFE
- MaintenanceManagementService
- OutboxReaderService
- StreetWorksService
- SiteRegisterFE
- SiteRegisterService
- StockManagementFE
- StockManagementService
- SystemAdministrationFE
- SystemAdministrationService
- What3WordsProxyService

When installing please review the directory shown during the installation process. Default values would be C:\inetpub\wwwroot\Confirm\ConfirmWeb. The installer will now place the multiple directories, mentioned above, into this directory. In this scenario, the full installation directory for the existing ConfirmWeb application will now be C:\inetpub\wwwroot\Confirm\ConfirmWeb\ConfirmWeb. To avoid this, it is recommended to remove the ConfirmWeb folder from the Install path shown on the installer, so that it would read C:\inetpub\wwwroot\Confirm. This ensures that the multiple directories are placed in the Confirm folder and retain the original directory structure for the ConfirmWeb application.

Published application

If the above change is not done and ConfirmWeb is currently published from C:\inetpub\wwwroot\Confirm\ConfirmWeb, the ConfirmWeb configuration will no longer work because the files will exist in a second ConfirmWeb folder underneath the first.

Note: This also impacts those who have installed to a folder which is not the default location. e.g. Previously installed to D:\Web\Confirm, the original contents will exist in the Confirm folder. When upgrading to this release, the contents of the Confirm folder would now be in a sub directory called ConfirmWeb.

Upgrading from v23.20 or later

Follow these steps in order to upgrade the Web Service: -

1. Ensure all users are logged out of the Confirm web interface.
2. Stop the Web Service.
3. Run ConfirmWeb.exe to upgrade.
4. Restart the Web Service.
5. Clear any browser caches.
6. Log into the Web Service.

IIS Configuration

Confirm web interface is now more than a single web application, as a result, multiple published applications are needed to provide full functionality for the Confirm web interface. Each application/service needs to be configured within *Internet Information Services (IIS)* and configuration details for each are listed in their own pages.

Ensure that each are installed and configured to ensure full functionality.

Confirm Web

The main Confirm web application hosts the majority of functionality available in Confirm Web and requires a published application setup, using IIS, with the following details.

Application Pool

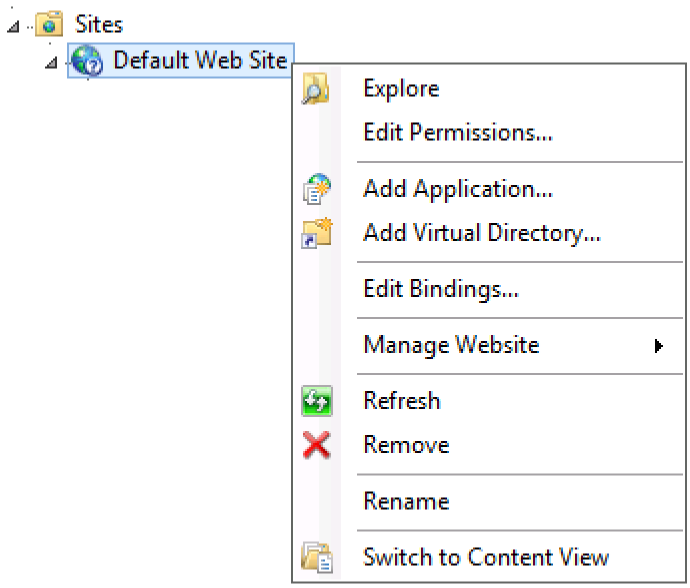
To create the application pool, go to the *IIS Manager* and right click on the *Application Pools* option and select *Add Application Pool*. Ensure that the following settings are applied to the new application pool, any settings not mentioned, can be left at default values.

Settings	Values
Name	ConfirmWeb
.Net Framework	Set to 'v4.0'
Enable 32-Bit Applications	Set to ‘True’
Managed Pipeline	Set to 'Integrated'
Identity	To view attachments on Job Tasks within ConfirmWorkzone®, an identity will need to be set here with the appropriate permissions to access the document store location.

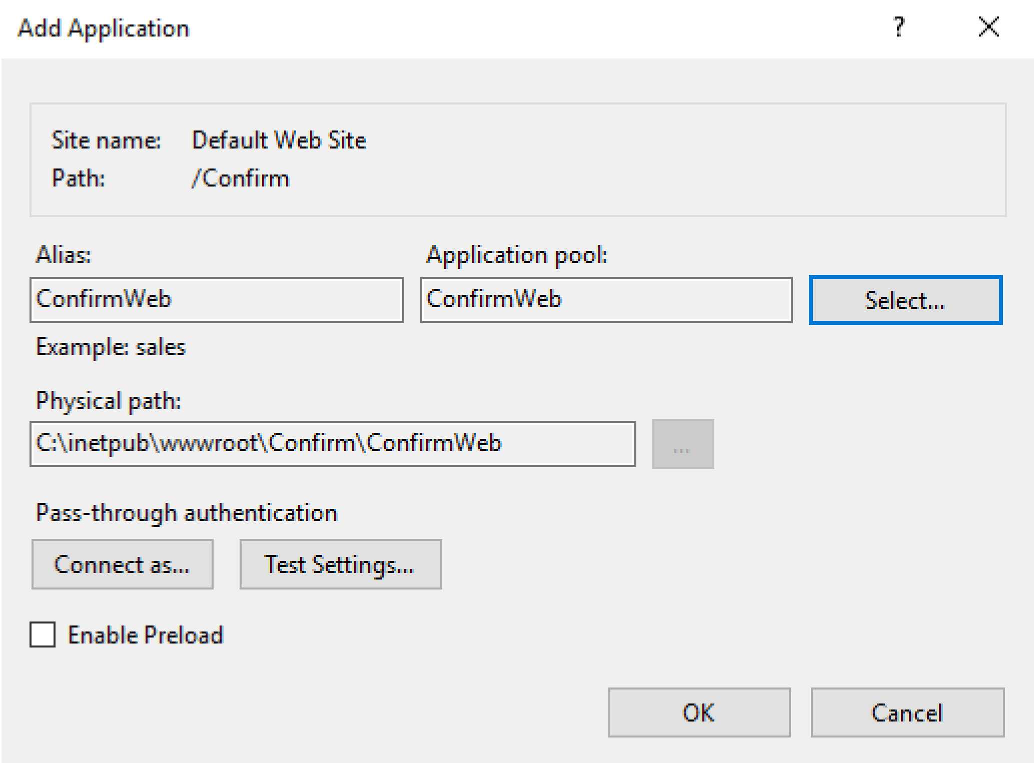
Note: The **Identity** and **Enable 32-Bit Applications** can only be set once the application pool has been created. Right click the application pool and select Advanced settings to locate these options.

Published Application

In IIS, right click on *Default Web Site* and select *Add Application*.



The *Add Application* window will appear.



- Set the *Alias* to the name you would like for your Web Service.
- Set the *Application pool* to the application pool initially created.
- Set the *Physical Path* as the folder where the Web Service files are stored.

- Finally click on *OK* to create the application.

Environment Settings

Introduced in v23.20, an environment settings file has been added to the default Confirm web application, and needs to be updated to allow it work with the additional services being added.

Perform the following and update the values mentioned accordingly, you do not need to change any other values: -

- Navigate to the ConfirmWeb assets directory and edit the environment.settings.json file e.g. C:\inetpub\wwwroot\Confirm\ConfirmWeb\app\assets\environment.settings.json

  Note: Launch the editor with administrator permissions so modifications can be saved.

```
{
  "baseUrl": "http://localhost/Confirm",
  "shellPublicPath": "/AngularShell",
  "bingUrl": "https://dev.virtualearth.net",
  "mfePublicPaths": [
    {
      "path": "contractmanagement",
      "url": "/ContractManagementFE",
      "remoteName": "contractmanagement"
    },
    {
      "path": "assetregister",
      "url": "/AssetRegisterFE",
      "remoteName": "assetregister"
    },
    {
      "path": "stockmanagement",
      "url": "/stockManagementFE",
      "remoteName": "stockmanagement"
    },
  ],
  "microServicePublicPaths": [
    {
      "name": "contractManagementService",
      "url": "/ContractManagementService"
    },
    {
      "name": "assetRegisterService",
      "url": "/AssetRegisterService"
    },
    {
      "name": "stockManagementService",
      "url": "/StockManagementService"
    }
  ],
  "logging": [
    {
      "name": "ContractManagement",
      "logLevel": [ "Info", "Errors", "Warnings", "Verbose"
 ]
    },
    {
      "name": "AssetRegister",
      "logLevel": [ "Info", "Errors", "Warnings", "Verbose"
 ]
    },
    {
      "name": "Stockmanagement",
      "logLevel": [ "Info", "Errors", "Warnings", "Verbose"
```

```
 ]
    }
  ]
}
```

- **"BaseUrl":** used by each PublicPath and is prepended to their respective urls.

  The "http://localhost/confirm" default value must be replaced with outward facing URL. for example: https://testserver.domain.name/confirm

  Note: Both http or https protocals can be used.

- **"BingUrl":** it is the Bing API URL and should be left at the default value.

Contract Management

Contract Management Service is used for Variations functionality within the Confirm web application and comprises of a service and a Microfrontend.

1. ContractManagementService
2. ContractManagementFE

Contract Management Service

The ContractManagementService is the back end component for the Variations functionality and needs to be published as an application with the following details.

Application Pool

To create the application pool, go to the *IIS Manager* and right click on the *Application Pools* option and select *Add Application Pool*. Ensure that the following settings are applied to the new application pool, any settings not mentioned, can be left at default values.

Settings	Values
Name	ContractManagementService

Published Application

Within IIS, create a Published Application called "ContractManagementService" and set it's application pool to the ContractManagementService created previously.

Configuration file

Contract Management Service has a configuration file which needs to be updated.

Perform the following and update the values mentioned accordingly, you do not need to change any other values: -

Navigate to your ContractManagementService folder and edit the appsettings.json file e.g. C:\inetpub\wwwroot\Confirm\ContractManagementService

Note: Launch the editor with administrator permissions so modifications can be saved.

```
{
"AllowedHosts": "*",
"OutboxUrl": "http://localhost/confirm/OutboxReaderService/api/v1/ten-
ants/{TENANT_ID}"
```

```
"DataSourceUrl": "http://localhost/Confirm/ConfirmWeb/api/{TEN-
ANT_ID}/common/datasource/{DATA_SOURCE_METHOD}"
}
```

- **"AllowedHosts"**: * allows all hostnames, this can be changed to allow only speficied hostnames. Use semi-colon to seperate values. **for example**: "AllowedHosts": "testserver.domain.name; localhost"
- **"OutboxUrl":** URL for the OutboxReaderService.

  The "http://localhost/confirm" default value must be replaced with outward facing URL. for example: https://testserver.domain.name/confirm/OutboxReaderService/api/v1/tenants/{TENANT_ID}

  Note: Both http or https protocols can be used.

- **"DataSourceUrl":** URL for the DataSources.

  The "http://localhost/Confirm/ConfirmWeb/api/{TENANT_ID}/common/datasource/{DATA_SOURCE_METHOD}" default value must be replaced with outward facing URL. for example: https://testserver.domain.name/confirm/ConfirmWeb/api/{TENANT_ID}/common/datasource/{DATA_SOURCE_METHOD}

  Note: Both http or https protocols can be used.

Registry Permission

The ContractManagementService's application pool identity requires Full permissions to the ConfirmWeb registry key to function correctly. Perform the following: -

- Launch regedit
- Navigate to "HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\Confirm"
- Right click the Confirm folder and select Permissions...
- Click Add
- Click Locations button and select the Server name at the top of the list and click ok.
- Enter "IIS APPPOOL\ContractManagementService" and click Check Names.

  This will return to the Permissions for Confirm security screen with the user added to the list of Group or user names.

- Select the newly added user and ensure the "Allow" check box is enabled for "Full control" permission.
- Finally, click Apply and then Ok.

Contract Management Front End (FE)

The Contract Management FE Service is used for displaying the Variations functionality within the Confirm Web application. All files and content will be served as static content.

Asset Register

The Asset Register Service is used for the Features functionality within the Confirm Web application and comprises of a service and a Microfrontend.

1. AssetRegisterService
2. AssetRegisterFE

Asset Register Service

The AssetRegisterService is the back end component for the Features functionality and needs to be published as an application with the following details.

Application Pool

To create the application pool, go to the *IIS Manager* and right click on the *Application Pools* option and select *Add Application Pool*. Ensure that the following settings are applied to the new application pool, any settings not mentioned, can be left at default values.

Settings	Values
Name	AssetRegisterService

Published Application

Within IIS, create a Published Application called "AssetRegisterService" and set it's application pool to the AssetRegisterService created previously.

Configuration file

Asset Register Service has a configuration file which needs to be updated.

Perform the following and update the values mentioned accordingly, you do not need to change any other values: -

Navigate to your AssetRegisterService folder and edit the appsettings.json file e.g. C:\inetpub\wwwroot\Confirm\AssetRegisterService

Note: Launch the editor with administrator permissions so modifications can be saved.

```
{
  "AllowedHosts": "*",
  "OutboxUrl": "http://localhost/confirm/OutboxReaderService/api/v1/ten-
ants/{TENANT_ID}"
}
```

- **"AllowedHosts"**: * allows all hostnames, this can be changed to allow only speficied hostnames. Use semi-colon to seperate values. **for example**: "AllowedHosts": "testserver.domain.name; localhost"
- **"OutboxUrl":** URL for the OutboxReaderService.

  The "http://localhost/confirm" default value must be replaced with outward facing URL. for example: https://testserver.domain.name/confirm/OutboxReaderService/api/v1/tenants/{TENANT_ID}

  Note: Both http or https protocals can be used.

Registry Permission

The AssetRegisterService's application pool identity requires Full permissions to the ConfirmWeb registry key to function correctly. Perform the following: -

- Launch regedit
- Navigate to "HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\Confirm"
- Right click the Confirm folder and select Permissions...
- Click Add
- Click Locations button and select the Server name at the top of the list and click ok.
- Enter "IIS APPPOOL\AssetRegisterService" and click Check Names.

  This will return to the Permissions for Confirm security screen with the user added to the list of Group or user names.

- Select the newly added user and ensure the "Allow" check box is enabled for "Full control" permission.
- Finally, click Apply and then Ok.

Asset Register Front End (FE)

The Asset Register FE Service is used for displaying the Features functionality within the Confirm Web application. All files and content will be served as static content.

Outbox Reader

The OutboxReaderService pulls all services together and needs to be published as an application with the following differences to the main Confirm Web application configured previously.

Application pool

To create the application pool, go to the *IIS Manager* and right click on the *Application Pools* option and select *Add Application Pool*. Ensure that the following settings are applied to the new application pool, any settings not mentioned, can be left at default values.

Settings	Values
Name	OutboxReaderService
Idle-Time out (minutes)	0
Start Mode	Always Running

Published Application

Within IIS, create a Published Application called "OutboxReaderService" and set it's application pool to the OutboxReaderService created previously. Ensure that the option "Enable Preload" is set to true for the Published Application.

Configuration File

OutboxReaderService has a configuration file which needs to be updated to work with the additional Web Service URLs.

Perform the following and update the values mentioned accordingly, you do not need to change any other values: - Navigate to your OutboxReaderService folder and edit the appsettings.json file e.g. C:\inetpub\wwwroot\Confirm\OutboxReaderService

Note: Launch the editor with administrator permissions so modifications can be saved.

```
{
  "AllowedHosts": "*",
  "BaseUrl": "http://localhost/confirm",
  "OutboxUrl": "http://localhost/confirm/OutboxReaderService/api/v1/ten-
ants",
  "CleanupIntervalInMilliseconds": "60000",
  "EnableEventCleanup": "true",
  "EnableSubscriberCleanup": "true",
  "EventMappings": {
    "web_monolith": {
      "variation_header": {
       "commit": [ "{BaseURL}/confirmweb/api/{TENANT_ID}/Consume/Vari-
ationHeader/Commit" ]
      },
      "PAYMENT_BATCH": {
        "commit": [
```

```
        "{BaseURL}/confirmweb/api/{TENANT_ID}/Consume/PaymentBatch/Com-
mit",
          "{BaseURL}/assetregisterservice/api/{TENANT_ID}/AssetRe-
gister/Consume/PaymentBatch/Commit"
        ],
        "commitFeature": [
          "{BaseURL}/assetregisterservice/api/{TENANT_ID}/AssetRe-
gister/Consume/PaymentBatch/CommitFeature"
        ]
      },
      "PAYMENT_JOB": {
        "commit": [
        "{BaseURL}/confirmweb/api/{TENANT_ID}/Consume/PaymentJob/Com-
mit"
        ]
      }
    },
    "sw_web_monolith": {
      "sw_web_monolith": {
      "streetwork": {
        "event_update": [ "{BaseURL}/StreetWorksService/api/{TEN-
ANT_ID}/AllSmEventImport/allSmNotification" ]
      }
    },
    "internal_feature": {
      "feature": {
       "internal_create": [ "{BaseURL}/AssetRegisterService/api/{TEN-
ANT_ID}/AssetRegister/featurePayload" ],
       "internal_update": [ "{BaseURL}/AssetRegisterService/api/{TEN-
ANT_ID}/AssetRegister/featurePayload" ],
       "internal_delete": [ "{BaseURL}/AssetRegisterService/api/{TEN-
ANT_ID}/AssetRegister/featureDeletePayload"     ]
  }
 },
    "brightly_integration_service": {
      "subscriber_metadata": {
        "type": "kafka",
        "bootstrap_servers": "kafkaexample.brightlysoftware.com",
        "default_topic": "Outbox",
        "ca_location": "C:\\Kafka\\certs\\ca.crt",
        "keystore_location": "C:\\Kafka\\certs\\node.p12",
        "keystore_password_location": "C:\\Kafka\\certs\\keystore-
pass.password"
      },
      "feature": {
       "create": [ "{default_topic}" ],
        "update": [ "{default_topic}" ],
        "delete": [ "{default_topic}" ]
      },
        "attribute_value": {
        "update": [ "{default_topic}" ]
      },
         "feature_type": {
         "update": [ "{default_topic}" ]
    }
    }
  }
 }
}
```


- **"BaseUrl":** used by each EventMapping (subscriber) endpoint. It is referenced by using the “{BaseURL}” placeholder, as shown in the variation_header example.

- **"OutboxUrl":** is used to connect services together and must point to the OutboxReaderService application URL.
- **"AllowedHosts"**: * allows all hostnames, this can be changed to allow only specified hostnames use semi-colon to seperate values. **for example**: "AllowedHosts": "testserver.domain.name; localhost"

  The "http://localhost/confirm" default values must be replaced with outward facing URLs. for example:

  - **BaseUrl** = https://testserver.domain.name/confirm
  - **OutboxUrl** = https://testserver.domain.name/confirm/outboxreaderservice/api/v1/tenants

- The event "internal_create/internal_update/internal_delete" is triggered when an Asset is created, updated, or deleted from the Confirm Web or Confirm Enterprise environment.
- The event "create/update/delete" is triggered when the Outbox Reader service receives an internal_create/internal_update/internal_delete event.

Registry Configuration

The following registry setting must be configured on all relevant servers where the applications listed below are installed:

- Confirm Enterprise
- Confirm Web
- Task Processor
- Connector

Navigate to the following location in the registry and add a value to the specified registry key.

32-bit Machine:

'HKEY_LOCAL_MACHINE\SOFTWARE\Confirm\Web'

64-bit Machine:

'HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Confirm\Web'

Registry Key	Description
OutboxUrl	https://testserver.domain.name/confirm/outboxreaderservice/api/v1/tenants

This setting specifies the endpoint for the OutboxReaderService, which the Confirm system uses to send notifications to the Outbox service when an internal_create, internal_update, or internal_delete event is triggered.

Ensure the URL is accessible from the Confirm Web server and aligns with the correct deployment environment.

Registry Permission

The OutboxReaderService's application pool identity requires Full permissions to the Confirm Web registry key to function correctly. Perform the following: -

- Launch regedit
- Navigate to "HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\Confirm"
- Right click the Confirm folder and select Permissions...
- Click Add
- Click Locations button and select the Server name at the top of the list and click ok.
- Enter "IIS APPPOOL\OutboxReaderService" and click Check Names.

  This will return to the Permissions for Confirm security screen with the user added to the list of Group or user names.

- Select the newly added user and ensure the "Allow" check box is enabled for "Full control" permission.
- Finally, click Apply and then Ok.

Adding new Subscribers

A new subscriber can be added under the "EventMappings" section e.g. "web_monolith", "brightly_integration_service".

Kafka Configuration

Kafka subscribers can be added as shown above including "subscriber_metadata" section containing settings required to connect to a Kafka topic.

Default topic can be added to events from the subscriber metadata, using "{default_topic}" place-holder.

Note: Confirm encryption is used to decrypt keystore passwords.

Legacy Configuration

The Outbox Reader is designed to fall-back to legacy configuration when subscriber metadata is not set. "Http" type and the base url set at root level in the appsettings are used as defaults.

Angular Shell

The AngularShell is used in conjunction with the Frontend service/s. All files and content will be served as static content.

Maintenance Management

The MaintenanceManagementService is used for the Search functionality within the Confirm Web application and comprises of a Service and a Microfrondend.

1. MaintenanceManagementService
2. MaintenanceManagementFE

Maintenance Management Service

The MaintenanceManagementService is the back end component for the What 3 Words Search functionality and needs to be published as an application with the following details.

Application Pool

To create the application pool, go to the IIS Manager and right click on the Application Pools option and select Add Application Pool. Ensure that the following settings are applied to the new application pool, any settings not mentioned, can be left at default values.

Settings	Values
Name	MaintenanceManagementService

Published Application

Within IIS, create a Published Application called " MaintenanceManagementService " and set its application pool to the MaintenanceManagementService created previously.

Configuration file

Maintenance Management Service has a configuration file which needs to be updated.

Perform the following and update the values mentioned accordingly, you do not need to change any other values:

Navigate to your What3WordsProxy folder and edit the appsettings.json file e.g. C:\inetpub\wwwroot\Confirm\MaintenanceManagementService

Note: Launch the editor with administrator permissions so modifications can be saved.

```
{
   "AllowedHosts": "*"
    }
```

- "AllowedHosts": * allows all hostnames, this can be changed to allow only specified hostnames. Use semi-colon to separate values. for example: "AllowedHosts": "testserver.domain.name; localhost"

Registry Permission

The MaintenanceManagementService's application pool identity requires Full permissions to the ConfirmWeb registry key to function correctly. Perform the following: -

- Launch regedit
- Navigate to "HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\Confirm
- Right click the Confirm folder and select Permissions...
- Click Add
- Click Locations button and select the Server name at the top of the list and click ok.
- Enter "IIS APPPOOL\ MaintenanceManagementService" and click Check Names.

This will return to the Permissions for Confirm security screen with the user added to the list of Group or user names.

- Select the newly added user and ensure the "Allow" check box is enabled for "Full control" permission.
- Finally, click Apply and then Ok.

Maintenance Management Front End (FE)

The Maintenance Management FE Service is used for displaying the Asset maintenance functionality within the Confirm Web application. All files and content will be served as static content.

Condition Survey

The Condition Survey Service is used for the Condition Survey functionality within the Confirm Web application and comprises of a service and a Microfrontend.

1. ConditionSurveyService
2. ConditionSurveyFE

Condition Survey Service

The ConditionSurveyService is the back end component for the Condition Survey functionality and needs to be published as an application with the following details.

Application Pool

To create the application pool, go to the *IIS Manager* and right click on the *Application Pools* option and select *Add Application Pool*. Ensure that the following settings are applied to the new application pool, any settings not mentioned, can be left at default values.

Settings	Values
Name	ConditionSurveyService

Published Application

Within IIS, create a Published Application called "ConditionSurveyService" and set it's application pool to the ConditionSurveyService created previously.

Configuration file

Condition Survey Service has a configuration file which needs to be updated.

Perform the following and update the values mentioned accordingly, you do not need to change any other values: -

Navigate to your ConditionSurveyService folder and edit the appsettings.json file e.g. C:\inetpub\wwwroot\Confirm\ConditionSurveyService

Note: Launch the editor with administrator permissions so modifications can be saved.

```
{
  "AllowedHosts": "*",
  "OutboxUrl": "http://localhost/confirm/OutboxReaderService/api/v1/tenants/{TENANT_ID}"
}
```

- **"AllowedHosts"**: * allows all hostnames, this can be changed to allow only speficied hostnames. Use semi-colon to seperate values. **for example**: "AllowedHosts": "testserver.domain.name; localhost"
- **"OutboxUrl":** URL for the OutboxReaderService.

  The "http://localhost/confirm" default value must be replaced with outward facing URL. for example: https://testserver.domain.name/confirm/OutboxReaderService/api/v1/tenants/{TENANT_ID}

  Note: Both http or https protocals can be used.

Registry Permission

The ConditionSurveyService's application pool identity requires Full permissions to the ConfirmWeb registry key to function correctly. Perform the following: -

- Launch regedit
- Navigate to "HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\Confirm"
- Right click the Confirm folder and select Permissions...
- Click Add
- Click Locations button and select the Server name at the top of the list and click ok.
- Enter "IIS APPPOOL\ConditionSurveyService" and click Check Names.

  This will return to the Permissions for Confirm security screen with the user added to the list of Group or user names.

- Select the newly added user and ensure the "Allow" check box is enabled for "Full control" permission.
- Finally, click Apply and then Ok.

Condition Survey Front End (FE)

The Condition Survey FE Service is used for displaying the Condition Survey functionality within the Confirm Web application. All files and content will be served as static content.

Street Works

The Street Works Service is used for the Street Works functionality within the Confirm Web application and comprises of a service .

1. StreetWorksService

Street Works Service

The StreetWorksService is the back end component for the Street Works functionality and needs to be published as an application with the following details.

Application Pool

To create the application pool, go to the *IIS Manager* and right click on the *Application Pools* option and select *Add Application Pool*. Ensure that the following settings are applied to the new application pool, any settings not mentioned, can be left at default values.

Settings	Values
Name	StreetWorksService

Published Application

Within IIS, create a Published Application called "StreetWorksService" and set it's application pool to the StreetWorksService created previously.

Configuration file

Street Works Service has a configuration file which needs to be updated.

Perform the following and update the values mentioned accordingly, you do not need to change any other values: -

Navigate to your StreetWorksService folder and edit the appsettings.json file e.g. C:\inetpub\wwwroot\Confirm\ StreetWorksService

Note: Launch the editor with administrator permissions so modifications can be saved.

```
{
  "AllowedHosts": "*",
  "OutboxUrl": "http://localhost/Confirm/OutboxReaderService/api/v1/tenants/{TENANT_ID}",
  "TopicArn": "arn:aws:sns:eu-west-2:262016201690:sandbox-event-topic"

}
```

- **"AllowedHosts"**: * allows all hostnames, this can be changed to allow only speficied hostnames. Use semi-colon to seperate values. **for example**: "AllowedHosts": "testserver.domain.name; localhost"
- **"OutboxUrl":** URL for the OutboxReaderService.

  The "http://localhost/confirm" default value must be replaced with outward facing URL. for example: https://testserver.domain.name/confirm/OutboxReaderService/api/v1/tenants/{TENANT_ID}

  Note: Both http or https protocals can be used.

- **"TopicArn":**

  For Production environment -

  "TopicArn": "arn:aws:sns:eu-west-2:287813576808:prod-event-topic"

  For Staging environment -

  "TopicArn": " arn:aws:sns:eu-west-2:262016201690:sandbox-event-topic"

Registry Permission

The StreetWorksService's application pool identity requires Full permissions to the ConfirmWeb registry key to function correctly. Perform the following: -

- Launch regedit
- Navigate to "HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\Confirm"
- Right click the Confirm folder and select Permissions...
- Click Add
- Click Locations button and select the Server name at the top of the list and click ok.
- Enter "IIS APPPOOL\StreetWorksService" and click Check Names.

  This will return to the Permissions for Confirm security screen with the user added to the list of Group or user names.

- Select the newly added user and ensure the "Allow" check box is enabled for "Full control" permission.
- Finally, click Apply and then Ok.

Street Works Front End (FE)

The Street Works FE Service is used for displaying Street Works information within the Confirm Web application. All files and content will be served as static content.

Site Register

The Site Register Service is used for the Site functionality within the Confirm Web application and comprises of a Service and a Microfrontend.

1. SiteRegisterService
2. SiteRegisterFE

Site Register Service

The SiteRegisterService is the back end component for the Site functionality and needs to be published as an application with the following details.

Application Pool

To create the application pool, go to the *IIS Manager* and right click on the *Application Pools* option and select *Add Application Pool*. Ensure that the following settings are applied to the new application pool, any settings not mentioned, can be left at default values.

Settings	Values
Name	SiteRegisterService

Published Application

Within IIS, create a Published Application called "SiteRegisterService" and set it's application pool to the SiteRegisterService created previously.

Configuration file

Site Register Service has a configuration file which needs to be updated.

Perform the following and update the values mentioned accordingly, you do not need to change any other values:

Navigate to your SiteRegisterService folder and edit the appsettings.json file e.g. C:\inetpub\wwwroot\Confirm\SiteRegisterService

Note: Launch the editor with administrator permissions so modifications can be saved.

```
{
  "AllowedHosts": "*",
  "OutboxUrl": "http://localhost/Confirm/OutboxReaderService/api/v1/tenants/{TENANT_ID}"
}
```

- **"AllowedHosts"**: * allows all hostnames, this can be changed to allow only speficied hostnames. Use semi-colon to seperate values. **for example**: "AllowedHosts": "testserver.domain.name; localhost"
- **"OutboxUrl":** URL for the OutboxReaderService.

  The "http://localhost/confirm" default value must be replaced with outward facing URL. for example: https://testserver.domain.name/confirm/OutboxReaderService/api/v1/tenants/{TENANT_ID}

  Note: Both http or https protocals can be used.

Registry Permission

The SiteRegisterService's application pool identity requires Full permissions to the ConfirmWeb registry key to function correctly. Perform the following: -

- Launch regedit
- Navigate to "HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\Confirm"
- Right click the Confirm folder and select Permissions...
- Click Add
- Click Locations button and select the Server name at the top of the list and click ok.
- Enter "IIS APPPOOL\SiteRegisterService" and click Check Names.

  This will return to the Permissions for Confirm security screen with the user added to the list of Group or user names.

- Select the newly added user and ensure the "Allow" check box is enabled for "Full control" permission.
- Finally, click Apply and then Ok.

Site Register Front End (FE)

The Site Register FE Service is used for displaying the Site functionality within the Confirm Web application. All files and content will be served as static content.

Stock Management

Stock Management Service is used for the management of stock levels functionality within the Confirm web application and comprises of a service and a Microfrontend.

1. StockManagementService
2. StockManagementFE

Stock Management Service

The StockManagementService is the back end component for managing the Stocks functionality and needs to be published as an application with the following details.

Application Pool

To create the application pool, go to the *IIS Manager* and right click on the *Application Pools* option and select *Add Application Pool*. Ensure that the following settings are applied to the new application pool, any settings not mentioned, can be left at default values.

Settings	Values
Name	StockManagementService

Published Application

Within IIS, create a Published Application called "StockManagementService" and set it's application pool to the StockManagementService created previously.

Configuration file

Stock Management Service has a configuration file which needs to be updated.

Perform the following and update the values mentioned accordingly, you do not need to change any other values: -

Navigate to your StockManagementService folder and edit the appsettings.json file e.g. C:\inetpub\wwwroot\Confirm\StockManagementService

Note: Launch the editor with administrator permissions so modifications can be saved.

```
{
  "AllowedHosts": "*"
}
```

- **"AllowedHosts"**: * allows all hostnames, this can be changed to allow only speficied hostnames. Use semi-colon to seperate values. **for example**: "AllowedHosts": "testserver.domain.name; localhost"

Registry Permission

The StockManagementService's application pool identity requires full permissions to the ConfirmWeb registry key to function correctly. Perform the following: -

- Launch regedit

- Navigate to "HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\Confirm"
- Right click the Confirm folder and select Permissions...
- Click Add
- Click Locations button and select the Server name at the top of the list and click ok.
- Enter "IIS APPPOOL\StockManagementService" and click Check Names.

  This will return to the permissions for Confirm security screen with the user added to the list of Group or user names.

- Select the newly added user and ensure the "Allow" check box is enabled for "Full control" permission.
- Finally, click Apply and then Ok.

Stock Management Front End (FE)

The Stock Management FE Service is used for displaying the the management of stocks functionality within the Confirm Web application. All files and content will be served as static content.

System Administration

The System Administration Service is used for the System Administration functionality that includes tools such as User Security setup, System Configuration settings and other administrative tools within the Confirm Web application and comprises of a Service and a Microfrontend.

1. SystemAdministrationService
2. SystemAdministrationFE

System Administration Service

The SystemAdministrationService is the back end component for the System Administration functionality and needs to be published as an application with the following details.

Application Pool

To create the application pool, go to the *IIS Manager* and right click on the *Application Pools* option and select *Add Application Pool*. Ensure that the following settings are applied to the new application pool, any settings not mentioned, can be left at default values.

Settings	Values
Name	SystemAdministrationService

Published Application

Within IIS, create a Published Application called "SystemAdministrationService" and set it's application pool to the SystemAdministrationService created previously.

Configuration file

System Administration Service has a configuration file which needs to be updated.

Perform the following and update the values mentioned accordingly, you do not need to change any other values:

- Navigate to your SystemAdministrationService folder and edit the appsettings.json file e.g. C:\inetpub\wwwroot\Confirm\SystemAdministrationService

Note: Launch the editor with administrator permissions so modifications can be saved.

```
{
    "AllowedHosts": "*",
}
```

- **"AllowedHosts"**: * allows all hostnames, this can be changed to allow only speficied hostnames. Use semi-colon to seperate values. **for example**: "AllowedHosts": "testserver.domain.name; localhost"

Registry Permission

The SystemAdministrationService's application pool identity requires Full permissions to the ConfirmWeb registry key to function correctly. Perform the following: -

- Launch regedit
- Navigate to "HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\Confirm"
- Right click the Confirm folder and select Permissions...
- Click Add
- Click Locations button and select the Server name at the top of the list and click ok.
- Enter "IIS APPPOOL\SystemAdministrationService" and click Check Names.

  This will return to the Permissions for Confirm security screen with the user added to the list of Group or user names.

- Select the newly added user and ensure the "Allow" check box is enabled for "Full control" permission.
- Finally, click Apply and then Ok.

System Administration Front End (FE)

The System Administration FE is used for the System Administration functionality that includes tools such as User Security setup, System Configuration settings and other administrative tools within the Confirm Web application. All files and content will be served as static content.

What3Words

The What3WordsProxy Service is used for the Search functionality within the Confirm Web application and comprises of a Service.

1. What3WordsProxyService

What3WordsProxy Service

The What3WordsProxyService is the back end component for the What 3 Words Search functionality and needs to be published as an application with the following details.

Application Pool

To create the application pool, go to the IIS Manager and right click on the Application Pools option and select Add Application Pool. Ensure that the following settings are applied to the new application pool, any settings not mentioned, can be left at default values.

Settings	Values
Name	What3WordsProxyService

Published Application

Within IIS, create a Published Application called " What3WordsProxyService" and set it's application pool to the What3WordsProxyService created previously.

Configuration file

What3WordsProxy Service has a configuration file which needs to be updated.

Perform the following and update the values mentioned accordingly, you do not need to change any other values:

Navigate to your What3WordsProxyService folder and edit the appsettings.json file e.g. C:\inetpub\wwwroot\Confirm\What3WordsProxyService

Note: Launch the editor with administrator permissions so modifications can be saved.

```
{
  "AllowedHosts": "*",
  "What3WordsUrl": "https://api.what3words.com/v3/"
}
```

- "AllowedHosts": * allows all hostnames, this can be changed to allow only specified hostnames. Use semi-colon to separate values. for example: "AllowedHosts": "testserver.domain.name; localhost"

Registry Permission

The What3wordsProxyService's application pool identity requires Full permissions to the Confirm-Web registry key to function correctly. Perform the following: -

- Launch regedit
- Navigate to "HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\Confirm
- Right click the Confirm folder and select Permissions...
- Click Add
- Click Locations button and select the Server name at the top of the list and click ok.
- Enter "IIS APPPOOL\What3WordsProxyService" and click Check Names.

This will return to the Permissions for Confirm security screen with the user added to the list of Group or user names.

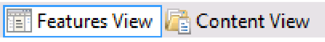
- Select the newly added user and ensure the "Allow" check box is enabled for "Full control" permission.
- Finally, click Apply and then Ok.

Other IIS Configurations

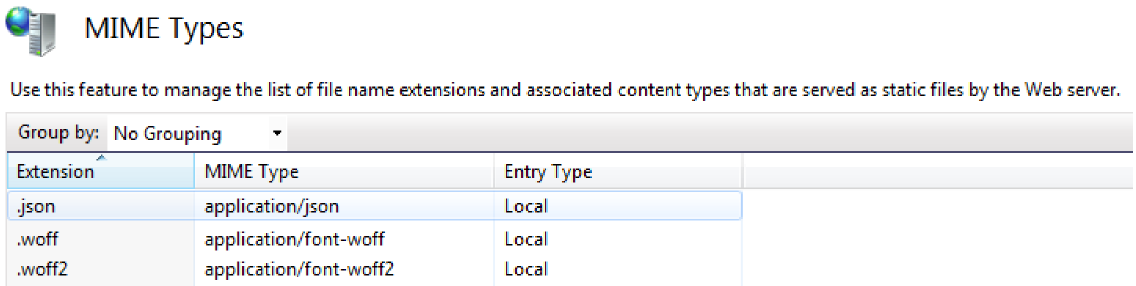
Some of the IIS Web Servers may not have File name extension ".json", ".woff" and ".woff2" added to *Mime Types* which can cause Confirm web interface to behave erratically. This section describes additional configurations required allow the application to work properly.

Set the .json, .woff and .woff2 Mime Types

Open IIS Manager, select Web Server name and ensure *Features View* is selected.



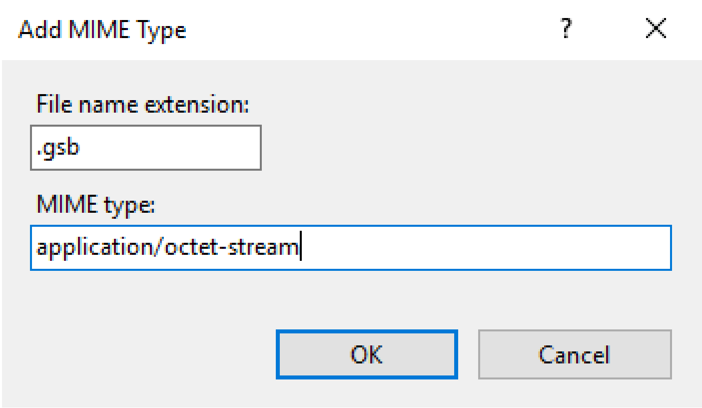
On the right hand panel double click *Mime Types* and check if there are entries for *.json*, *.woff* and *.woff2*



If there are any missing entries then add the corresponding entry on the Mime Types screen.

For example to add *.json*, right click on Mime Types screen and select *Add*. On the screen that follows set the *File Name Extension* to *.json* and the *Mime Type* to *application/json*.

From v25.10, Confirm Web requires **.gsp Mime type** to be configured. This is required for grid shift functionality for Confirm Web and ConfirmConnect.



Single Sign On

Confirm supports Federated Single Sign-On, a common approach for an application to rely on an external identity provider. It provides one stop solution to access all the applications User want to use.

Traditionally, enterprise applications are deployed and run within the company network. To obtain information about users such as user profile and group information, many of these applications are built to integrate with corporate directories. More importantly, a user's credentials are typically stored and validated using the directory.

However, with increased collaboration and the move towards the cloud, many applications have moved beyond the boundaries of a company's domain. Federated Authentication is the solution to this problem.

Note: For SAML configuration refer page **Installation, Configuring and Upgrading the Confirm Configuration Service**

Testing

Checking the Web Service is Configured Correctly

Once installation is done and publised applications have been created, IIS will need to be restarted to ensure changes have been made. To do this right click on the Web Server connection in the IIS Manager and opt to *stop* and then *start*.

The Web Service can be tested by performing these actions:

1. Open the *IIS Manager* and ensure that the *Content* view is enabled.
2. In the connections panel of the manager navigate to **%Server%** > **Sites** > **Default Web Site** > **%ConfirmWeb%**
3. In the *SAM / Dashboard / Workzone* folder(s) you will find an *Index.html* file. Right click on the file and select *Browse*.
4. Ensure Cookies are enabled in your browser.
5. The default web browser will start to load the page. The ID of the Confirm database you want to connect to will need to be inserted to the URL after **index.html** (**?tenant=%database ID%**) as shown in the examples below.
6. Refresh the browser to connect to the web service. If successful, the login screen will appear in the browser.
7. Login using a valid Confirm Username and Password.

Example URLs:

Confirm Map URL: https://ConfirmWebServer/ConfirmWeb/app/index.html?tenant=TestDB#/map

Confirm Dashboard URL: https://ConfirmWebServer/ConfirmWeb/Dashboard/index.html?tenant=TestDB#/login

ConfirmWorkzone® URL: https://ConfirmWebServer/ConfirmWeb/Workzone/index.html?tenant=TestDB

Confirm Strategic Asset Management URL: https://ConfirmWebServer/ConfirmWeb/SAM/index.html?tenant=TestDB#/login

Confirm Web Settings URL: https://ConfirmWebServer/ConfirmWeb/app/index.html?tenant=TestDB#/settings

Note: Replace TestDB with the database ID found in the database configuration file, the location of which is specified in the registry. Any spaces in the URL will be represented as *%20*. Some browsers make this change automatically but some do not and the URL will need to be amended manually.

Troubleshooting

Microservice Unable to connect to Oracle

Make sure these 2 environment variables, ORACLE_HOME and TNS_ADMIN exist as these are used to specify the location of the Oracle client installation and the directory containing the Oracle Network Configuration files respectively. In case, it does not exist, here's how you can set them up:

- Set ORACLE_HOME: The ORACLE_HOME environment variable points to the directory where the Oracle Client is installed. To set it:

- Right-click on "This PC" or "My Computer" and select "Properties."
- Click on "Advanced system settings" on the left.
- Click the "Environment Variables" button.
- Under the "System Variables" section, click "New" and add:
- Variable Name: ORACLE_HOME
- Variable Value: Path to the Oracle Client installation directory

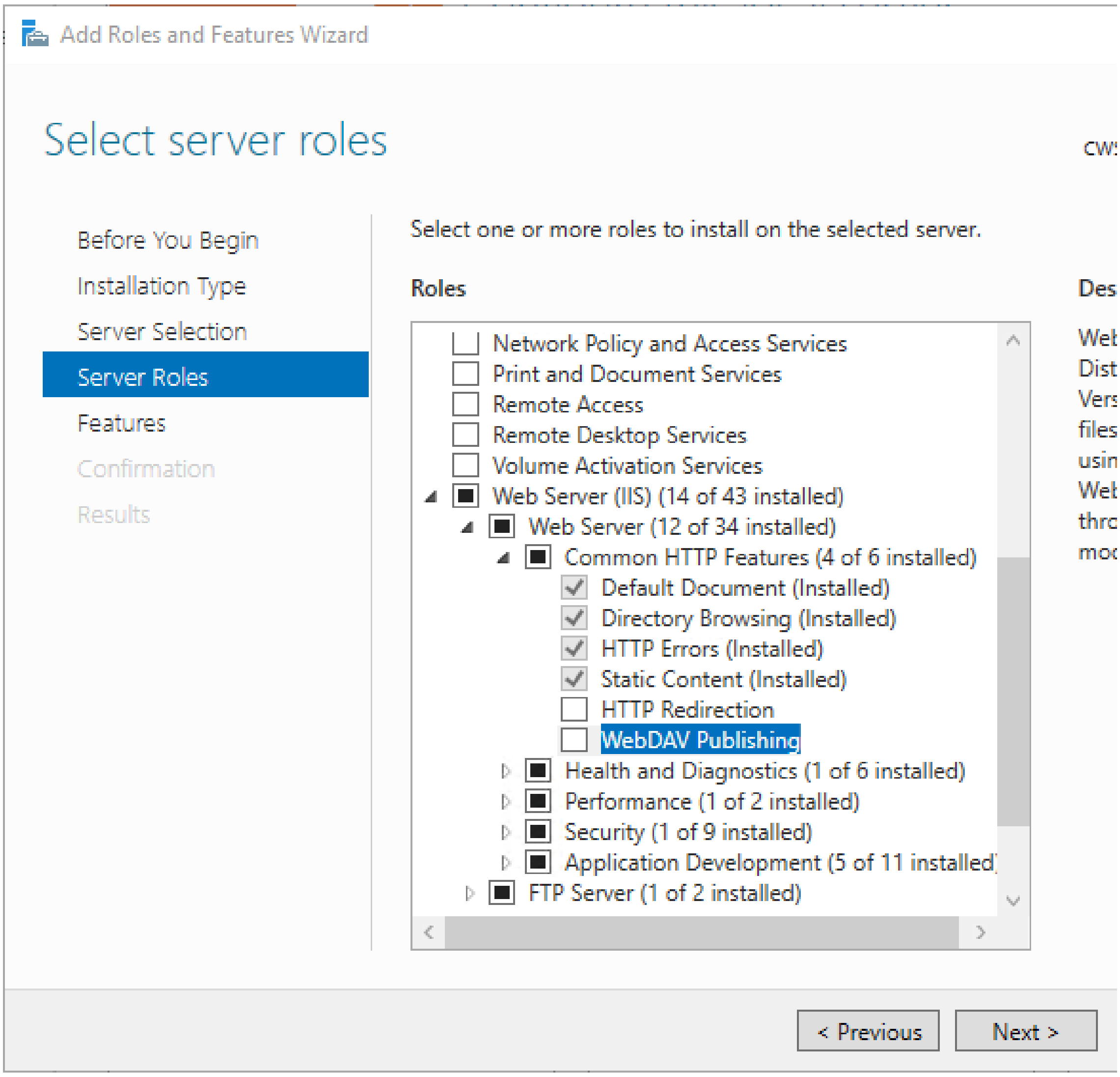
- Set TNS_ADMIN: The TNS_ADMIN environment variable specifies the directory where Oracle Net Services configuration files (tnsnames.ora, sqlnet.ora, etc.) are located. To set it:

- Similar to setting ORACLE_HOME, either add a new environment variable or edit the existing ones.
- Variable Name: TNS_ADMIN
- Variable Value: Path to the directory containing your Oracle Network Configuration files (e.g., where tnsnames.ora and sqlnet.ora are located)

- Restart machine: After setting these environment variables, it is recommended to restart the machine.

API returning 405 error

If a 405 error is received, ensure you have turned off the WebDAV Publishing role from within Server Manager.



Logging

If there is a problem initialising the Outbox Reader or Contract Management services and there are no log files, additional logging may be found at the following location:

C:\ProgramData\Confirm\Logs

Note that this path can be configured in the web.config file for the relevant service.

Ensure that the stdoutLogEnabled property is set to true, and the stdoutLogFile property is a valid path accessible to the service's IIS application pool.

Configuring the Confirm Database

Introduction

Once the web service has been installed and configured there are some Confirm web interface settings that need to be set in the Confirm database.

Configure the Confirm web interface Settings

The Confirm web interface system settings are provided in the Confirm Client under the screen. Any changes to the settings should be made on this screen.

Configure the Confirm Strategic Asset Management User Security

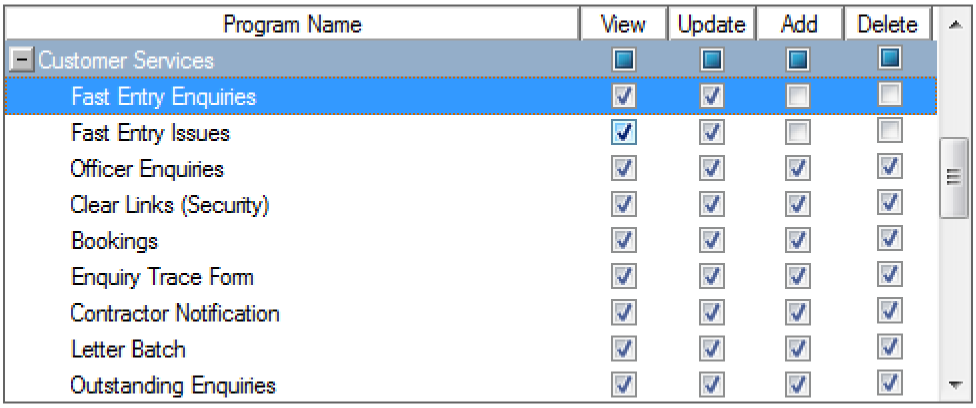
(This is applicable for Confirm Strategic Asset Management only)

The user access can be set in the Confirm Client under *user security*. There is an entry for Confirm Strategic Asset Management and update access is required for a user to be able to access Strategic Asset Management.

Configure the Confirm Customer Services User Security

(This is applicable for Confirm Customer Services only)

The user access can be set in the Confirm Client under *user security*. The user needs to have view (and update) access to either Fast Entry Enquiries or Fast Entry Issues (both of them are present under Customer Services) to be able to view (and create or edit) an Enquiry on web.

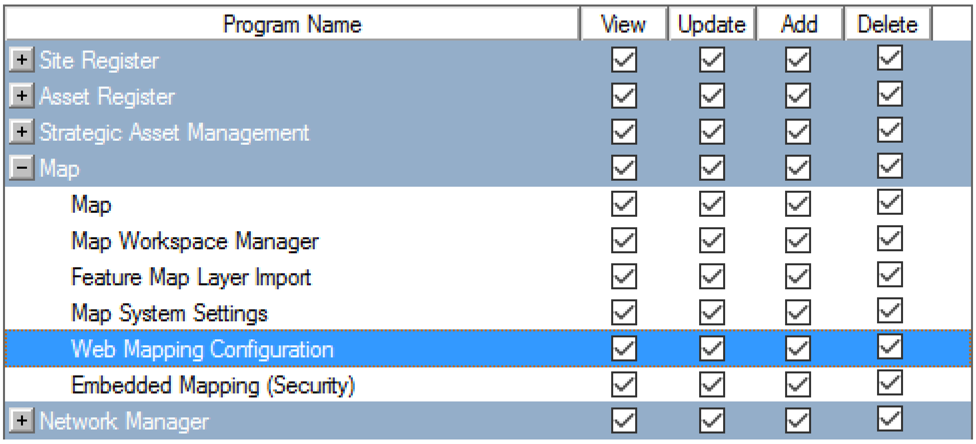


Configure the Confirm Map Symbol System Settings User Security

(This is applicable for Confirm Map Symbol System Settings only)

The Confirm database must be at v17.10 or later to use the Confirm Map Symbol System Settings screen.

The user access can be set in the Confirm Client under *user security*. The user needs to have update access for Web Map Symbol Settings.

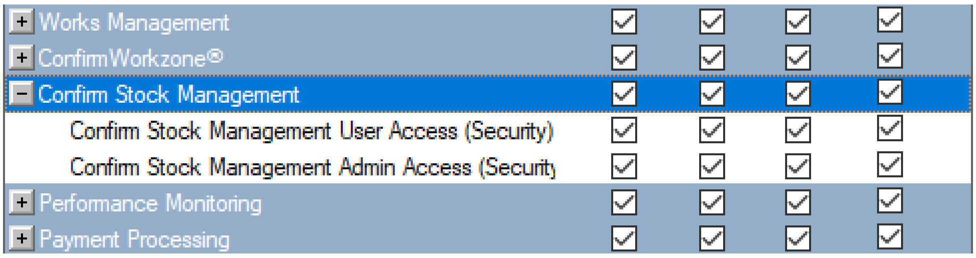


Note: If this permission is not given, the Confirm Map Symbol Settings screen will simply return to the sign in page.

Configure the Confirm Stock Management User Security

(This is applicable for Confirm Stock Management only)

The user access can be set in the Confirm Client under *user security*. There is an entry for Confirm Stock Management.

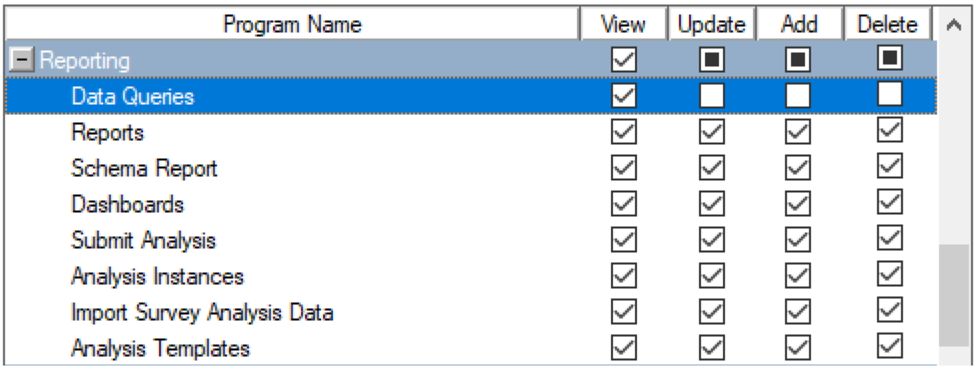


- Confirm Stock Management User Access (security). Enables access to Stock Management.
- Confirm Stock Management Admin Access (security). Enables access to the **Stock Management Settings** form.

Configure the Confirm Web Reporting User Security

(This is applicable for Confirm Web Reporting only)

The user access can be set in the Confirm Client under *user security*. The user needs to have view access to Data Queries to be able to create or run reports on the web.



Checking the Confirm web interface Configuration

Once Confirm web interface has been installed and setup it is recommended that the following actions are carried out to ensure that the system has been setup correctly.

1. Check that you can get to the login screen via the configured URL

Using one of the supported browsers you should be able to view the login screen. If there is a problem check the following:

- *Check the Tenant ID name is correct in the URL and matches a database connection name in the Confirm web interface configuration file.*
- *Ensure any spaces in the URL are represented as %20. Some browsers convert spaces automatically but some do not.*
- *Ensure that the browser version you are using is supported.*
- *Check that the Web Service is started and functioning. Try restarting the Web Service.*

If the login screen appears then the Confirm Web Service is working. If there are still issues viewing the login screen refer to the Web Service Install guide.

2. Check you can log onto Confirm web interface successfully with a valid Confirm user

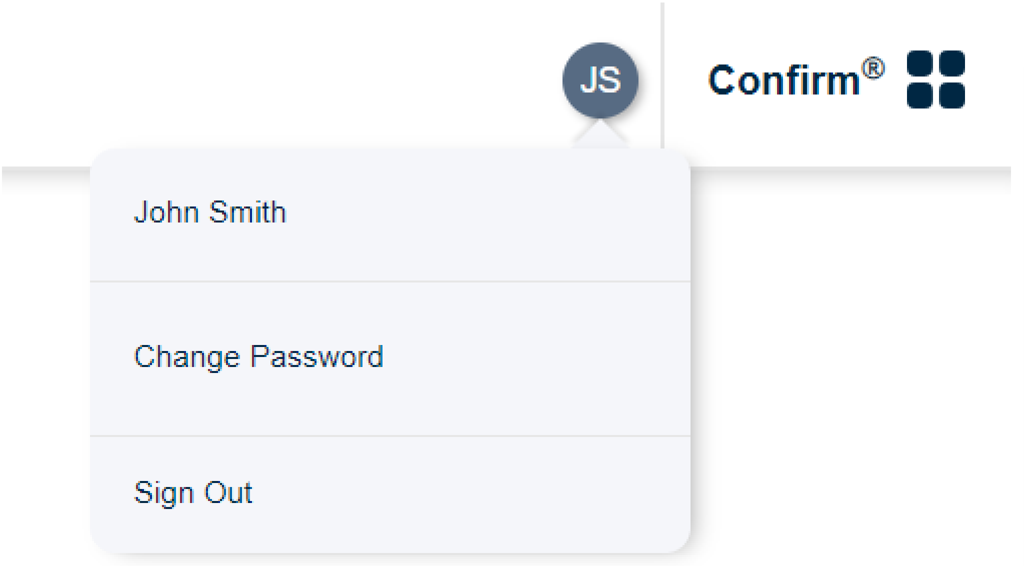
If you are unable to login into Confirm web interface with your chosen Confirm user check the following:

- *Error messages will appear on the screen if an invalid Confirm User Login Name or password is used. Check the user login details within the Confirm Client to clarify details.*
- *Check that the URL has the correct database connection name.*
- *Check that the user is not locked out in the Confirm Client.*

Confirm Web General Functionality

Change Password

It is possible for a user to change their password by clicking on the User menu in the Confirm web interface header bar and selecting 'Change Password':



Note: If Active Directory authentication is used, User Password will use the Current and New Password values to change the Active Directory password of the user.

Confirm Web Announcements

Confirm OnDemand Users may see a yellow exclamation mark on the Help button at the top of the Confirm web interface. This indicates a new notification has been published for Confirm On-Demand Users informing them of upcoming upgrades, planned maintenance activity or any issues being investigated / confirmation of service restoration etc.

To view the announcement, click on the Help icon, and then click on the Announcements option. Clicking the Announcement option will open the notification in a pop up. The User can choose to close the pop up or dismiss the notification. Dismissing the notification will indicate the User has acknowledged the notification and the yellow exclamation mark will be removed. The mark will reappear if there is a new notification that has been published since the last dismissal.

Confirm Web Accessibility

Confirm web interface is tested for web accessibility using automated tool(s). However, we recognise that automated tools are not always sufficient and we are therefore committed to working with customers to resolve any specific issues that affect the accessibility of our applications for their users.

Cookies in the Confirm Web Interface

Some features of the Confirm web interface need cookies to be enabled. We recommend enabling cookies on the browser for this application.

Confirm Web Navigation Panel

The Navigation Panel is designed to provide quick and intuitive access to various sections and features of the Confirm web interface, helping users navigate through the product with ease and efficiency.

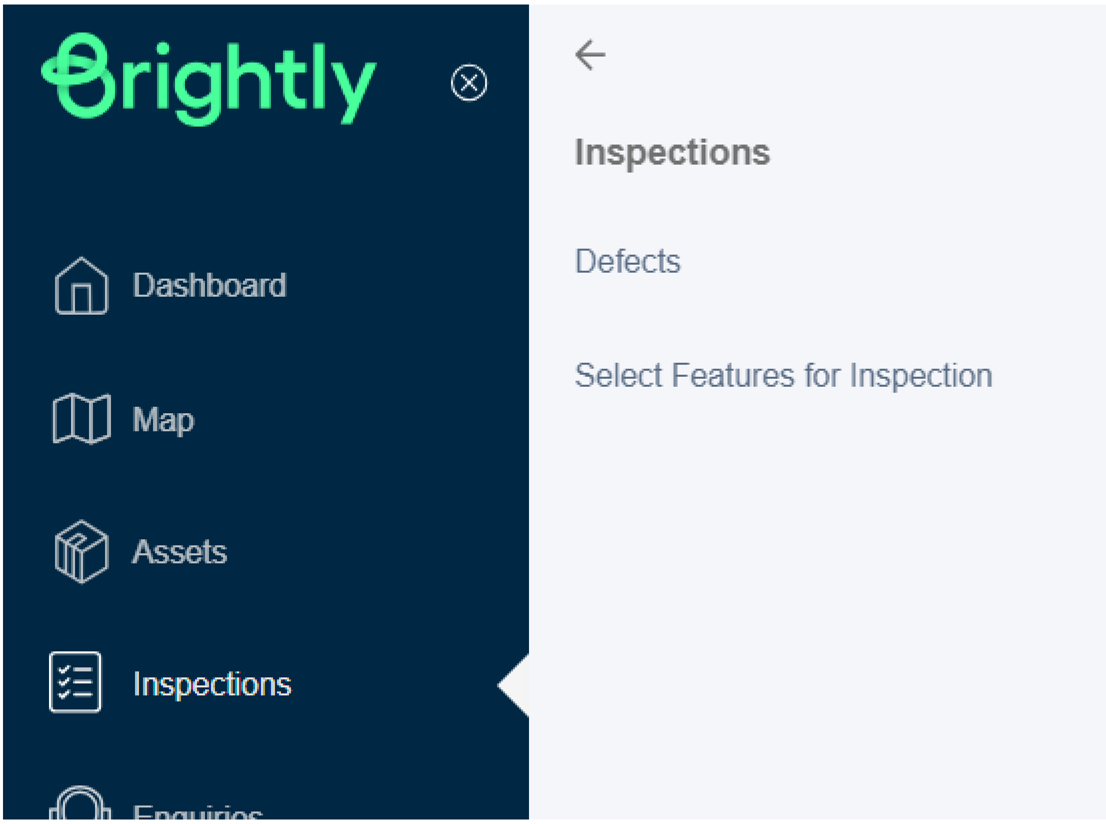
Note: The Navigation Panel will retain its previous presentation state (expanded or collapsed) when switching to other tabs across Confirm Web.

The Navigation Panel consists of the following main elements:

Menu Icons

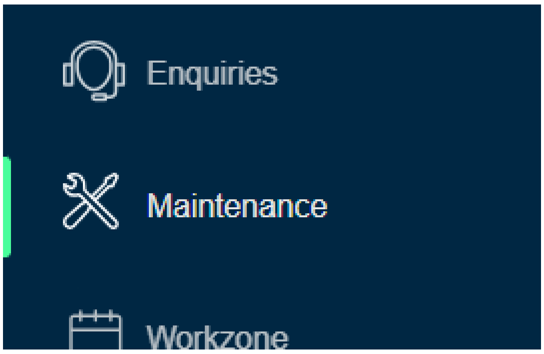
These icons represent different screens and applications available within the Confirm web interface.

For icons that provide a link to more than one screen or application, a sub-menu will be displayed providing further navigation options.



Active Indicator

The active indicator highlights the currently selected menu icon or sub-menu item, making it easy to identify your current location within Confirm.



Minimising the Navigation Panel

Click on the 'X' button at the top of the Navigation Panel to minimise it:

Once minimised, clicking on the triple-bar or 'hamburger' icon will re-open the Navigation Panel:

Note: Confirm Web users who want to access Stock Management and Strategic Asset Management modules will still have to navigate through the App Switcher at the top-right of the Confirm web interface screen:

Confirm Web Pagination

Pagination now divides large datasets into smaller, manageable chunks for better performance and usability. It displays a subset of records and loads pages as needed, making navigation faster and more efficient.

Pagination is integrated into various search screens, including:

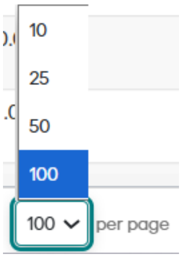
- Assets
- Jobs
- Sites
- User Management
- Inspection Batch
- Inspection Route
- Feature
- Defect

- Inspection Feature
- Order
- Variation
- Payment
- Payment Requests

Key Features of the Paginator:

Page navigation controls

Page size selector



Display of total records

Confirm Comment Library

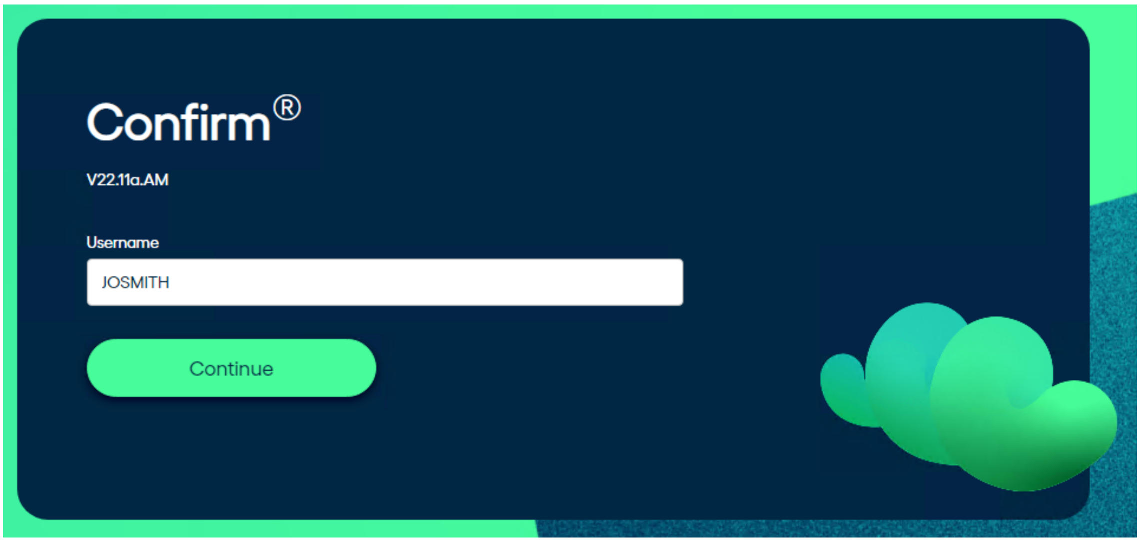
The Confirm Comment Library can now be used in Confirm Web, allowing predefined or template text to be inserted when editing text fields.

Applicable To

Enquiry - Comment will be available on Create Enquiry screen.

Sign-In

Browse to the URL provided by the Confirm Administrator. The Confirm Web Interface screen will be displayed:



Enter a valid Username and hit Continue, this will display the password field. Enter the password to login to Confirm web Interface.

Note: In case of Single Sign-On the password field will not be displayed on Confirm web Interface, instead user will be redirected to configured Identity Provider of the organisation for authentication.

Please refer to **Single Sign-on** page for more information on Federated Security.

Note: Password change will be required whenever a user's password is edited by System Administrator in Confirm user security screen or password expires.

Dashboard

Introduction

The Dashboard provides a graphical display of information from Confirm. That information is derived from Data Sources and transmitted to the Dashboard, using the Scheduled Reports functionality and the Task Processor, at user-defined intervals. The Dashboard is automatically refreshed at an interval specified in Dashboard User Settings.

The Dashboard has Fit In View option, which allows viewing all widgets without scrolling the page.

Switching

The active Dashboard can be changed by selecting a different Dashboard from the drop down list. All the Dashboards to which the current user has access are displayed in the drop down list. Typing search criteria in the drop down will filter the Dashboards displayed in the list.

Changing the active Dashboard in web interface will also change it in Confirm Client.

Drill-Down

The information of the data being displayed on the Dashboard can be viewed by clicking on the Category Text, or on the chart. The underlying information is displayed in a tabular form, in a new tab of the web browser. The table can be sorted by clicking on the column title.

Further details about Jobs, Enquiries, Defects and Features can be viewed from the Drill-down screen by clicking on the required item, provided the corresponding database table (Job, Enquiry/Central Enquiry, Defect, or Feature) is configured as a Linked Table.

Search

All the records in the Drill-down can be searched by entering the criteria. Records having the exact phrase entered will be filtered and displayed in the table. Clearing the search criteria by clicking 'x' icon will display all records in the table.

Export

All the records in the Drill-down can be exported to a CSV file by clicking Export. A file will be downloaded to the browser’s default download location. File name will be same as widget name.

Sites

Site Search

The users can search for a Site using Site Code, Site Name, Site Area, Site Type, Site Alias Name, Locality, Town and County, in the text filter provided at the top of the screen.

To search using multiple criteria, include a <space> between each word.

The list of Site matching the search criteria will be displayed below the search box. The list displays up to 100 Site that match the search criteria.

The list can be further filtered based on whether the Site is 'Live' by selecting an option from the *Status* drop down next to the search box.

Filters

The Filters button allows for advanced filtering of Sites by any of the following fields:

- Site Type
- Classification
- Area
- Customer
- Contract Area
- Ward
- Category
- Cost Code
- Locality
- Town
- County
- Address
- Naming Authority
- State
- Surface
- Start Date
- End Date
- Alias Locality
- Alias Town
- Alias County

The Site search grid will only display the first 100 results, although the results can be filtered to find the exact Site that you're looking for.

For any date filters, it is possible to select from a number of pre-defined date ranges or to provide a specific date range by selecting the 'Custom Date Range' option.

Site Screen

Site Details

The detailed list of attributes (listed below) for a Site can be seen on Site Details screen.

Site Code

Cannot be edited for an existing site. When creating a new site, and where the Street Gazetteer is being used, enter the Unique Street Reference Number (USRN). When creating new records the field may be used to enter a code, or left blank to have the system automatically generate the next available number from Site Seed Number.

Name

Name of the Site

Area

A list of (usually) geographical areas into which Sites and Features might fall.

Ward

A list of political wards into which Sites and Features might fall.

Category

A list of categories for Sites.

Type

Type drop down list references the Street Record Type lookup, and displays only those Street Record Types that have 'Applicable to Maintenance Management ' checked in the Street Record Type lookup.

Locality

In a new Site form, the defaults set in Site Systems Settings will be utilized to complete this.

Address

Where the Street Gazetteer is being used, enter the Street Descriptor into this field. The Town and County information will be appended to the Locality and displayed as site address.

Naming Auth

This will be completed by default, in a new Site form, from the defaults set in the Site System Settings. For Gazetteer records this should contain the Naming Authority, and will populate the SWA_ORG_REF_NAMING column for Type 11 records in a Gazetteer export.

Start Date

Street Gazetteer: Street Entry Date - the date on which the record was entered or a new version created.

End Date

Street Gazetteer: Street Closure Date - the date on which the street was closed or a new version replaced the record. This will be set automatically if the Dead flag is set. Conversely, blanking either the Dead flag or End Date will automatically blank the other when the record is saved.

Contract Area

Contract Area is used for defaulting of the Contract Area when creating Features for the Site.

Customer

The Customer to whom the costs of maintaining assets on this Site will be recharged.

Classification

Defines the level of maintenance to be applied to the assets on this Site.

Cost Code

The Cost Code to which the costs of maintaining the assets on this Site will be assigned.

Dead Flag

Flagging a Site as 'Dead' will give the User the option to delete it from any Routes, Gang Routes and Default Gang Allocation records. The User will also be given the option to 'Dead' any associated Features.

Note: Removing the 'Dead' flag will not reinstate any records that were removed.

Allow Site Rates

For Sites that will be quoted separately on a Bill of Quantities, 'Allow Site Rates' needs to be On before the BoQ is prepared.

State

State (only available with the Street Gazetteer module) references the State lookup and displays the life cycle of a site, both in the planning and construction process, through its life into the regeneration or demolition process.

State Date

The start date for current State of Site.

Surface

Street Surfaces is used to identify the surface finish of the Site.

Version Number

Street Gazetteer: Street Version Number - a sequential number indicating the version of record.

External Reference

A free text field for the optional entry of an external reference.

Notes

A free text field for the optional entry of any relevant notes. This field is asset specific and is individual to each user segment.

Central Notes

A free text field for the optional entry of any relevant notes. This field is part of the Central Site register and as such will be available to users in all segments.

Plan Number

A free text field for the optional entry of a plan number.

Tolerance

Street Gazetteer: Street Tolerance - the tolerance of the start and end co-ordinates. Tolerance is defined in meters.

Editing a Site

To update the details of a Site click on the pencil icon at the top of the Site Details panel.

Site Screen - Buttons

Create Site

The Create button will be available if the current User has User Security permission to Add Sites. On clicking the Create button, the Create Site screen will be opened in a new tab. The User can add the required information in Site's fields before saving.

The mandatory Attributes must be supplied with a valid value before saving the changes.

(Display) Address is dynamically updated as the user updates Address, Locality, Town or County.

Action- Delete

The option to Delete a Site is available under the Action button for Users with Site Delete permission.

On clicking the Delete button, the user is shown a validation pop-up to delete the site. If the user chooses to delete the site by selecting the Delete option then site would be deleted if there are no references depending on the site.

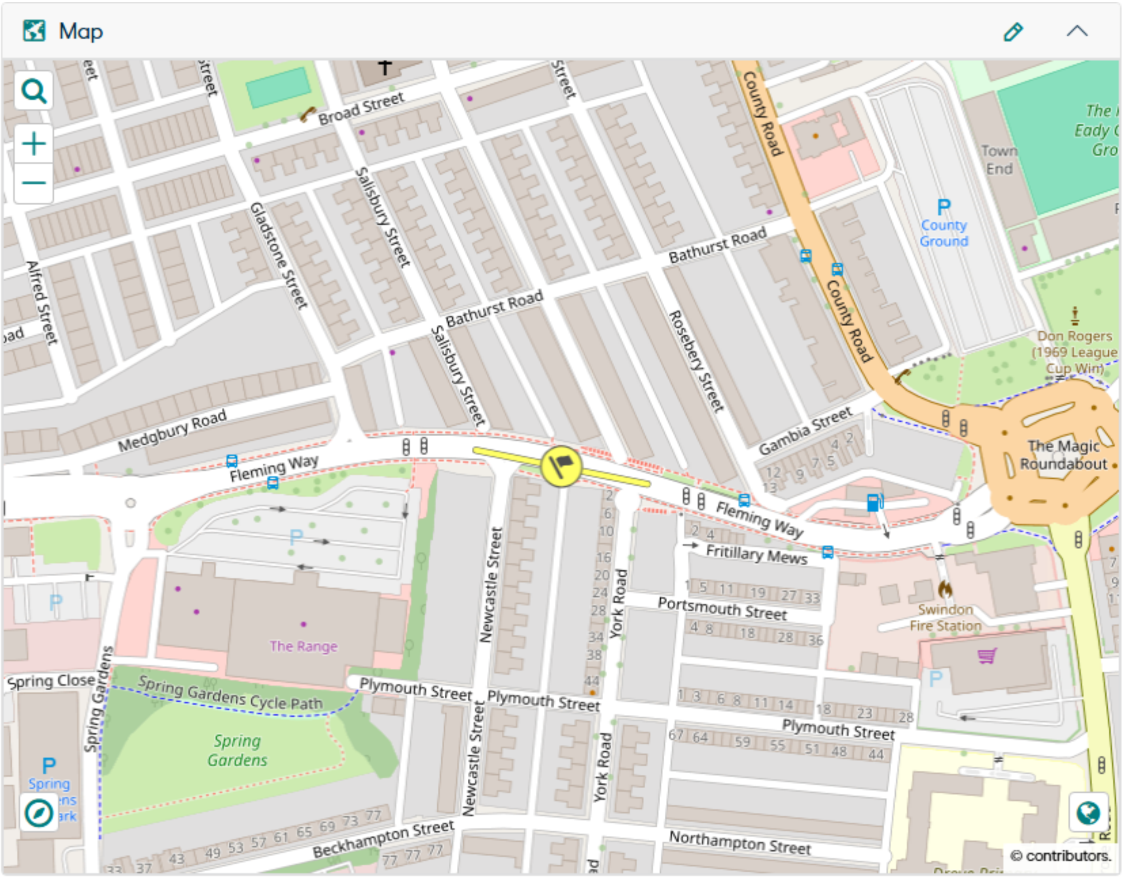
If there are references associated with Site which cannot be deleted then the user will be shown a validation message that the site cannot be deleted.

If there are references that can be deleted along with Site deletion then the user will be thrown a warning with the name of entities that will be deleted if the User chooses to delete the Site.

Site Screen - Map

Map

The Map displays the plotted Site Geometry. Site Geometry can be a Point, a Line, or a Polygon. If the Site does not have Geometry, a point is plotted using site extents



Please refer to the **Confirm Map** page for additional information.

Enable Map Editing for Sites

This is Web setting provides user the ability to show or hide the Map component during Site creation and enable or disable Map component when editing the site.

This web setting is placed in Confirm Web under "Configuration" -> "Web Settings" -> "General Web" -> "Enable Map Editing for Sites".

It has 2 values “Yes” and “No” and the default setting is “No”. The following actions happen based on user selection of the Web Setting value

- When “NO”
  - The Map is hidden when creating a Site.
  - The Map Edit button is disabled when viewing or editing an existing Site.
- When “Yes”
  - The Site Geometry can be plotted on the Site Map when creating a Site.
  - The Map Edit Button is enabled when viewing or editing an existing Site.

Site Screen - Designations

The Designations card on Site View Screen (with Street Gazetteer module) will display the Designations, associated with this Site. Designations are used to provide further information to companies who are planning to work on the selected Site. They are also used to indicate any restrictions that a Site has.

The details about a Site Designation can be viewed on the Site Designation Details section.

Designation: Designations can be added by selecting from the Designation drop down list.

Period: Select from the drop down list the Period that the Designation is in place.

Organisation: Select the Organisation who is enforcing the Designation from the Dropdown list.

Effect From / To: Dates when the currently selected Designation is in place.

From Time / To: If the Designation is only applied on specific times of the day, then that time period is entered here. E.g. a Site may be Traffic Sensitive every day between the Hours of 7am and 10am.

Applicable to: Select from the drop down whether the Designation applies to a specific section of the Street (Partial) or to the entire Street (Whole).

Location: Available when 'Partial' is selected in the 'Applicable to' field. This allows details of the precise Location of the Designation to be described.

Description: Free text field for any Notes relevant to the Designation / Restriction.

Start / End: Available when 'Partial' is selected in the 'Applicable to' field. This allows the precise coordinates of the Designation to be provided. If corresponding Type 67 records are available, the Start/End are same as first/last co-ordinate on Type 67 record.

Works Ref.: Supply a Works Reference for this Restriction.

Deadline: Only available when a 'Proposed' Section 58 Restriction has been selected. This should be used to enter a Date by when any Works Promoters can challenge the Restriction before it becomes 'In Force'.

Comments: Free Source text field for any Comments relevant to the Designation/ Restriction.

TRO Text: Displays the Traffic Restriction Order details. Available when the following restrictions are selected as Designations:

Height Restriction

Weight Restriction

Width Restriction

Ext. Version: The Version number that is used when sending the Restriction via EToN.

Record Start Date: Date when the Record started.

Value Metric: It is the value in metric system for the Height/Width/Weight Restriction (in Meters or tons). Available when the following restrictions are selected:

Height Restriction

Weight Restriction

Width Restriction

Record End Date: Date when the Record ends.

Logged: The User who logged the Designation record will be displayed here. This cannot be edited.

Editing a Designation

The User can click on the pencil icon against each designation record to modify it.

Creating a Designation

The User can click on the “+” icon on the Designation card to add a new designation.

Deleting a Designation

The User can click on the Bin icon against a Designation to delete that designation.

Assets

Feature Search

Search for Features by entering one or more of the following search criteria:

- Plot Number
- Central Asset ID
- Property ID
- External Asset ID
- Feature ID
- Location
- Feature Group Name
- Feature Type Name
- Site Code
- Site Name
- Locality Name
- Town Name
- County Name

To search using multiple criteria, include a <space> between each word.

The list of Features matching the search criteria will be displayed below the search box. The list displays up to 100 Features that match the search criteria.

The list can be further filtered based on whether the Feature is 'Live' by selecting an option from the *Status* drop down next to the search box.

Filters

The Filters button allows for advanced filtering of Features by any of the following fields:

- Site
- Feature Group
- Feature Type
- Area
- Ward
- Customer Code
- Contract Area
- Classification
- Cost Code
- Start Date
- End Date
- Survey Date

For any of the lookup fields it is possible to filter Features by one or more values.

The Site lookup will only display the first 100 results, although the results can be filtered to find the exact Site that you're looking for.

For any date filters, it is possible to select from a number of pre-defined date ranges or to provide a specific date range by selecting the 'Custom Date Range' option.

Batch

The ‘Batch’ button is used to perform certain batch actions on selected Assets. Currently it allows following actions

1. Allocate Regimes : Allocate a Regime to a single or multiple Asset/s.
2. Remove Regimes : Remove an Allocated Regime from a single or multiple Asset/s.
3. Resequence : Batch update capability for moving multiple Features to a new Site in one operation.

Note: Plot numbers must be unique within a Site. The system does not allow assigning a plot number already in use.

Feature Screen

Feature Type

The Feature Type pick list contains all Feature Types that are available in the same Feature Group. Updating the Feature Type will not affect the Attributes count.

Inventory

Please refer to **Feature Inventory** for more information about Inventory.

Attributes

The Attributes section displays all existing Attributes for the Feature and allows them to be edited. These includes : Measurements, Dates, Pick Lists and Text Attributes. The order in which the Attributes are listed is set by the display order number set in the relevant lookups.

Inspection Routes

A list of all the Inspection Routes, in inspection route name order, that are assigned to the feature being viewed.

Add

Select this option to Add the selected Feature to an Inspection Route. This option will be available only if the current User has the User Security permissions to Update Features and Inspection Routes.

Edit

Select this option to Edit the Inspection Route Feature. This option will be available only if the current User has the User Security permissions to Update Features and Inspection Routes.

Remove

Select this option to Remove the selected Feature from the Inspection Route. This option will be available only if the current User has the User Security permissions to Update Features and Inspection Routes.

Feature Conditions Inspection History

Inspection History details of a Feature's Condition can be viewed by clicking on any observation type under 'Current Conditions' section on the Feature page.The inspections related to that particular observation type will be shown in the form of pop-up card.

On click of each observation type a pop-up card opens up displaying details like Inspection Batch number, Inspection Type, Inspection route, Grade, score, Inspected Action officer name, notes and Inspected date.

The Inspection Batch records are sorted according to the inspected date, so the Inspection Batch that was recently inspected is displayed first.

User can view only 10 records at a time, to view more records scroll further down the list.Total records have been limited to 100 records for the device. Use Search functionality to search any specific record. User can search by Inspection batch number, Inspection route, Inspection Type, and Action officer. To search using multiple criteria, include a <space> between each word.

If user wants to view notes of particular inspection , expanding that particular inspection will open notes section below the inspection card.

Maintenance Regimes

The Maintenance Regimes section lists all Maintenance Regimes allocated to the current Feature.

Add

Select this option to Add a Regime to a Feature. This option will be available only if the current User has the User Security permissions to Update Features and Maintenance Regimes associated with Feature.

Edit

Select this option to Edit the Allocated Maintenance Regime to the Feature. This option will be available only if the current User has the User Security permissions to Update Features and Maintenance Regimes associated with Feature.

Remove

Select this option to Remove the Allocated Maintenance Regime from the Feature. This option will be available only if the current User has the User Security permissions to Update Features and Maintenance Regimes associated with Feature.

Job History

Job history details of a Feature can be viewed under the Job History Section.The selection of the level of details to view Job History of a feature can be categorized in 3 headers 'All Jobs', 'Historic Jobs' and 'Current Jobs' with respective number of Jobs being displayed with each of them.

'View Historic Jobs' - To view archived Jobs.

'View Current Jobs' - To view current Jobs.

'View All Jobs' - To display the full history of archived and current details.

On click of each header a pop-up card opens up displaying details like Job number, Priority, Job type,Job description, Job Location, Job Status, Actual Completion Date, Action Officer of each Job.

In the pop-up card top 10 Jobs will be displayed. It can be further scrolled down to view more Jobs.User can also filter out the Job based on the following search criteria Job number, Job type, Job description, Job location, Cost code, Site name, Site code. To search using multiple criteria, include a 'space' between each word. The list of Jobs matching the search criteria will be displayed below the search box.

If user wants to view more details about a Job, clicking on that particular Job will open Job screen in a new tab.

Note: Job History section will not be available to the Users who do not have access permission to the Job module and Feature History.

Defect History

Defect history details of a Feature can be viewed under the Defect History Section. The selection of the level of details to view Defect History of a feature can be categorized in 3 headers 'All Defects', 'Historic Defects' and 'Current Defects' with respective number of Defects being displayed with each of them.

'View Historic Defects ' - To view Defects with Action Not Required status.

'View Current Defects' - To view Defects with Action Required status.

'View All Defects' - To display the full history of historic and current Defects.

On click of each header a pop-up card opens up displaying details like Defect number, Priority, Defect type, Defect Description, Defect Location, Defect Status, Target Date, Action Officer of each Defect.

In the pop-up card top 10 Defects will be displayed it can be further scrolled down to view more Defects. User can also filter out the Defect based on the following search criteria Defect number, Defect type, Defect description, Defect location, Site name, Site code. To search using multiple criteria, include a 'space' between each word. The list of Defects matching the search criteria will be displayed below the search box.

If user wants to view more details about a Defect, clicking on that particular Defect will open Defect screen in a new tab.

Note: Defect History section will not be available to the Users who do not have access permission to the Defect module and Feature History.

Sensor History

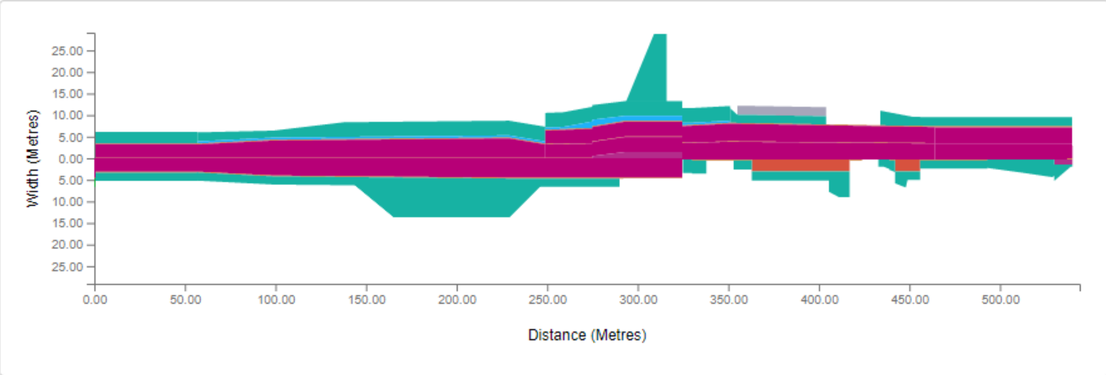
If the Feature is an IoT device or is fitted with one the Sensor History section will be displayed. To identify a Feature as having sensor readings it must have been provisioned by ConfirmConnect or have an Attribute with the Attribute Type Code defined in the IOT_ATTRIB_TYPE_CODE System Setting set. This component will display the device sensor readings for a specified date range. This component is initially collapsed and will show data from the last 7 days when expanded by default.

Straight Line Diagrams: The Inventory Schematic (For Linear class Features)

This diagram uses the configured Cross Sectional Positions ordering, the selected Linear feature's own child Linear Feature Inventory (currently Discrete Features are not plotted), their Start and End Widths and their Start and End Distance to build a representation of the Feature as a straight line. Each Inventory item is coloured according to its Feature Type.

Inventory items are grouped by their Cross Sectional Position and then by their Feature Type. The separated Inventory groups are then stacked on top of each other going out from the centre.

When hovering over the Inventory with the mouse a tool-tip displays the Feature's Type and Cross Sectional Position.



Straight Line Diagrams: The Survey Browser (For Linear class Features)

This section lists any Surveys for the current Linear Feature which have a Start Date. If there are Observations available they are grouped by their Cross Sectional Position and plotted on a chart along the length of the Feature.

By default, this section will display the full extent of the Observation Type based on its configured Observation Parameter (from the Minimum to the Maximum of the Parameter Options). To toggle between the full extent of the Observation Parameter and the extent of the Observations you can click the chart or the arrow button above the Y-axis.

Cross Sectional Position visibility can be toggled by clicking on the Cross Sectional Position in the chart legend.

When hovering over the data points in the chart with the mouse a tool-tip displays the distance along the Feature and the Observation value.

Note: The Surveys will not be available to the Users who do not have access permission to the Defect module.

Feature Identification Image

The Feature Details screen can optionally display an identification image for the Feature currently being viewed. This option is available only if Show Identification Image is enabled for the Feature Group on the Display tab and a suitable image exists.

To be used as an identification image, the file must be an image (BMP, JPG, PNG, or GIF) that is attached to the Feature as a Document Link. URL links are not supported.

Users can override the default selection by marking an image as the Primary Image, which then becomes the Feature Identification Image. If no preference is selected, the system will automatically choose an image based on the Feature Group configuration—either the oldest or the most recent attached image.

Clicking the image opens it in a new browser tab for an enlarged view.

Feature Inventory

The Inventory tab is only present for those Features which have Inventory Types associated with them. The Inventory tab shows each relevant Inventory Type associated with that Feature Group. Depending upon the configuration there can be multiple Inventory Tabs assigned to a Feature.

After expanding the Inventory Type, a list of its contained Inventory Items becomes visible. Clicking on an Item will show the Item details in the side panel window.

The way in which an Inventory Type behaves, and the information that may be stored with it depends on the parameters that were set for it against the Feature Group.

Current & Future Dropdown:

'Current & Future' - displays all Items that have no End Date, including those whose Start Date is after today.

'Current' - displays all Items with no End Date, whose Start Date is before today.

'All' - displays all Inventory Items, including End-Dated items.

Item details panel:

The upper part of the side panel window section defines the Item like Feature Type, Cross Section, Customer, Start & End Distance, Start & End Width, Measurement and Classification, etc. These fields will be dynamic and will be displayed depending on the parameters that were set for it against the Feature Group.

Start Date: The date at which the Feature became or will become active. The status of the feature will be one of the following:

Live for a Feature with a Start Date in the past and no End Date.

Live Until for a Feature with a Start Date in the past and an End Date in the future.

End Dated for a Feature with an End Date in the past.

Proposed for a Feature with a Start Date in the future.

Survey Date: This field will be displayed if 'Show Survey Date' is flagged for the Inventory Type in this Feature Group. The date of the last Survey carried out, or imported, will be displayed in this field.

Start Distance:This field will be displayed if an Item Type other than 'No Distance or Width' has been selected for the Inventory Type in this Feature Group. The chainage position of a discrete Inventory Item, or the start chainage for a linear or Area Inventory Item should be entered here.

End Distance:This field will be displayed if any of the Linear or Area Item Types have been selected for the Inventory Type in this Feature Group. The end chainage for the Inventory Item should be entered here.

Start Width:This field will be displayed if any of the Linear (Width) or Area Item Types have been selected for the Inventory Type in this Feature Group. The Start Width for the Inventory Item should be entered here.

End Width:This field will be displayed if the Area (Two Widths) Item Type has been selected for the Inventory Type in this Feature Group. The End Width for the Inventory Item should be entered here.

Measurement:This will be calculated from the Start, End and Width fields if the Inventory Item Measurement is set to 'Automatic'. A Measurement may be directly entered if the Inventory Item is set to 'User Entered'.

Class:This field will be displayed if 'Parent Site Class' is set to 'Maintain' or 'Default' for the Inventory Type in this Feature Group. The entry will copy the Feature Classification`.

Customer:This field will be displayed if 'Parent Customer' is set to 'Maintain' or 'Default' for the Inventory Type in this Feature Group. The entry will copy the Feature Customer.

Linked Asset details panel:

The Site, Feature, Location, Description and Central Asset Id fields will be displayed if the Inventory Item has the Linked Feature set to 'Optional' or 'Mandatory' for the Inventory Type in the Feature Group.

An entry will be optional if the Feature Group specifies an 'Optional' Linked Feature. If the Feature Group specifies a 'Mandatory' Linked Feature, then the Feature cannot be saved until an Inventory Items in that Type have a linked Feature selected.

Use the fields to enter the Site and Feature Number location of the Feature that is linked to the Inventory Item. Click on that Inventory Item, which is having Linked Feature in the Inventory Tab, to open another copy of the Feature screen showing details of the Linked Feature in new Tab.

Attributes details panel:

The lower portion of the side panel window contains a list of all the Attributes that have been associated with the Inventory Type.

Each Attribute may have a value assigned to it in the method defined for the Attribute

Pick List - the value is selected from a drop-down list of pre-defined values associated with the Attribute Type in the Attribute Lookup.

Number - a number between the minimum and maximum values expressed for the Attribute Type may be entered.

Date or Date/time - The field will allow the entry of a date, or a date and time.

Text - free entry of any text string is allowed, up to the length defined in the Attribute Type lookup.

Each Attribute field is followed by an optional notes field into which any free text may be entered.

Existing Inventory Items can be edited by clicking on the ‘Edit’ option available on the side panel window.

Actions Button

Add

Select this option to Add the new Feature Inventory. This option will be available only if the current User has the User Security permissions to Update Features.

Copy

Select this option to Copy the current Feature Inventory. This option will be available only if the current User has the User Security permissions to Update Features.

End Date

Select this option to End Date the current Feature Inventory with/ without creating a new version. This option will be available only if the current User has the User Security permissions to Update Features.

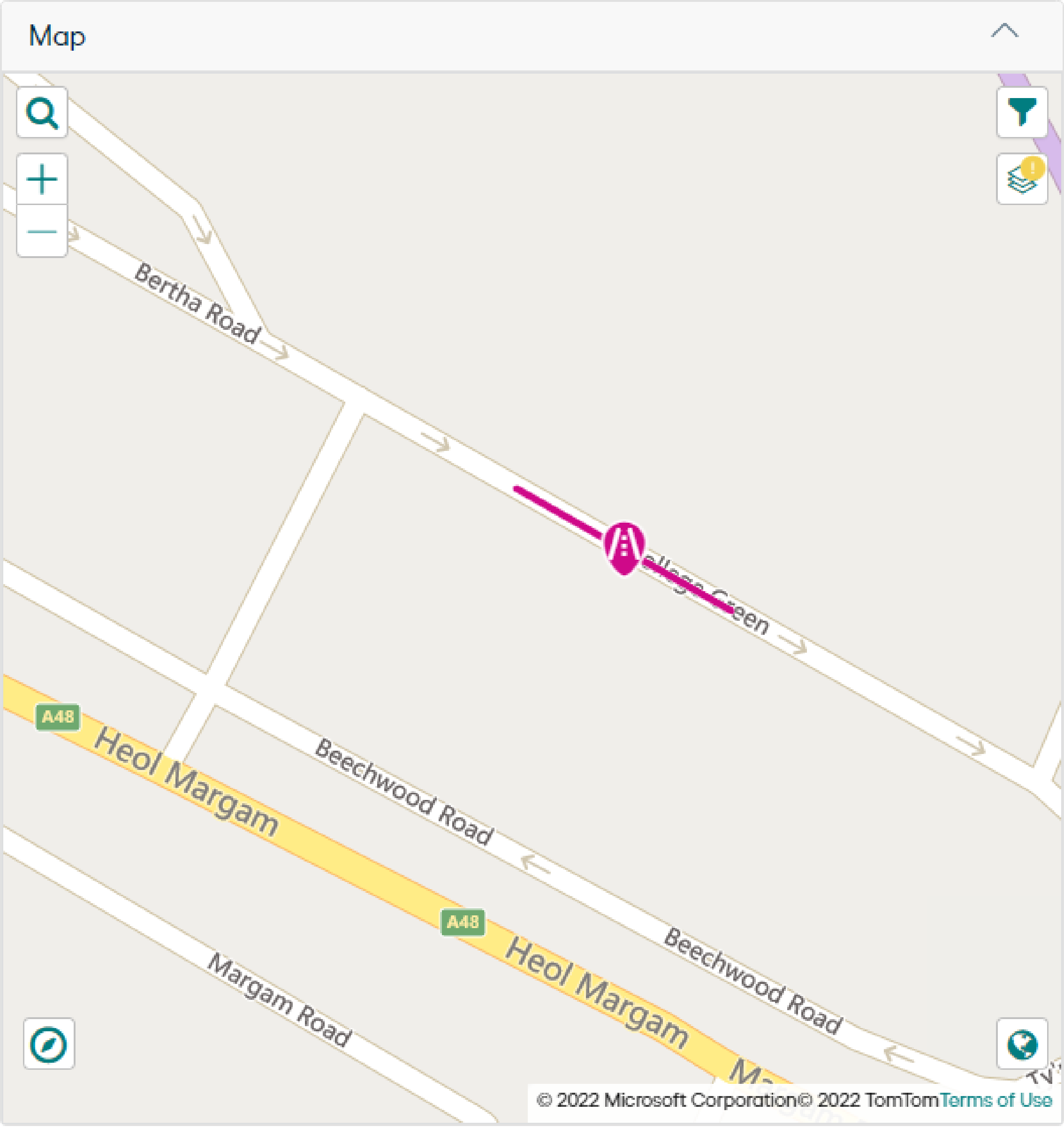
Delete

Select this option to Delete the current Feature Inventory. This option will be available only if the current User has the User Security permissions to Update Features.

Feature Screen - Map

Map

The Map displays the plotted Feature Geometry. Feature Geometry can be a Point, a Line, or a Polygon. If the Feature itself does not have Geometry, the Site Point Geometry is used instead.



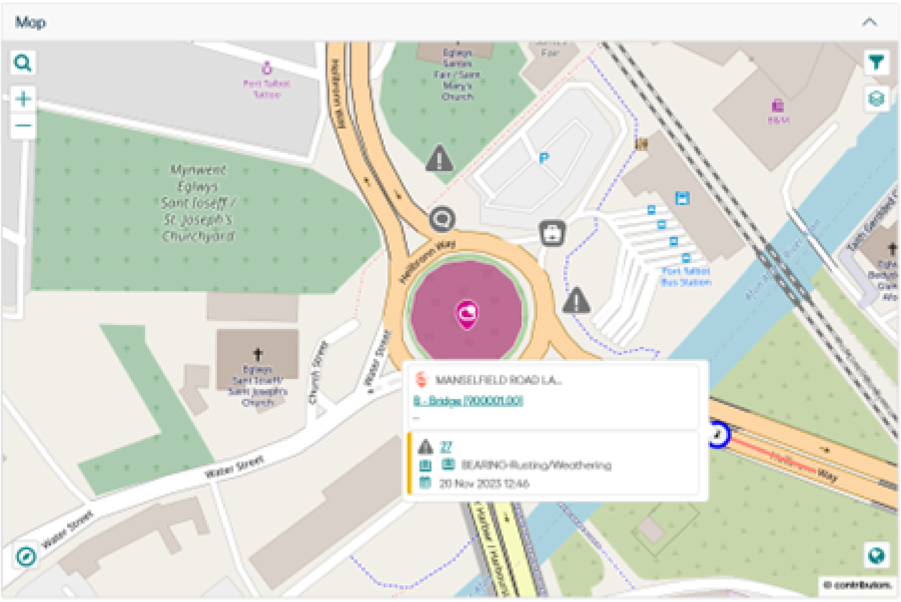
Please refer to the **Confirm Map** page for more information about the various buttons and features available on the Map.

What's Going On Here

Note: The following description applies to the Map section of the Feature screen only.

The Map on the Feature screen only uses spatial geometry data linked to the map entities (Jobs, Defects, Features, Enquiries) when displaying 'What's Going On Here' data. Easting and Northing data is not used.

If an entity does not have populated spatial data, it will rely on the spatial data of the entity's associated Feature instead. For example, Jobs/Defects will have a fall back to the spatial geometry of their linked Feature.



For example, here we can see the Defect does not have its own spatial geometry so it is shown with its Feature.

If neither the entity nor its associated Feature have spatial data, the entity will not be displayed. In this scenario it is advised that the spatial geometry data be populated using the Map section on the relevant entity screen in the Confirm web interface.

Feature Screen - Buttons

Create Feature

The Create button will be available if the current User has User Security permission to Add Features. On Clicking the Create button, a new Feature will open in a separate screen where the Feature's fields can be reviewed/edited before saving.

On selection of any Feature Type, All the Attributes linked to the associated Feature Group are added and the mandatory Attributes must be supplied with a valid value before saving the changes.

Selection of a Site will automatically update the values for Area, Ward, Cost Code, Classification, Customer, and Contract Area.

Action

Copy

Select this option to Copy the current Feature. This option will be available regardless of the User's Update permissions.

Resequence

Select this option to change the Plot Number of an existing Feature. You can:

- Update the plot number within the same Site.
- Move the Feature to a different Site.

Note: This option is available only to users with the required update permissions.

End Date

Select this option to End Date the Feature and create a new version which will have its Start Date set to the date specified in the Effective Date field. Any Surveys, Inventory, and associated data linked to the End Dated Feature will be copied to the new version. The 'New Version' checkbox is checked by default.

To create a Feature without generating a new version, simply uncheck the 'New Version' checkbox. This option is only available if the current user has the necessary security permissions to update Feature.

Reactivate

Select this option to Reactivate an end-dated Feature. This button is enabled when the Feature does not have any new version.

Create Defect

Add a defect associated with the feature.

Create Enquiry

Select this option to create an enquiry to the selected feature.

Create Job

Create a job tied to the feature.

Note: Create Enquiry, Create Defect, Create Job actions are not available for Features marked as 'Dead'

Feature Screen - Document Links

Document Panel

The Document panel shows images and files linked to Features.

Documents for the Feature can be viewed, uploaded, and edited in accordance with the user's Document User Security permissions.

Document Visibility

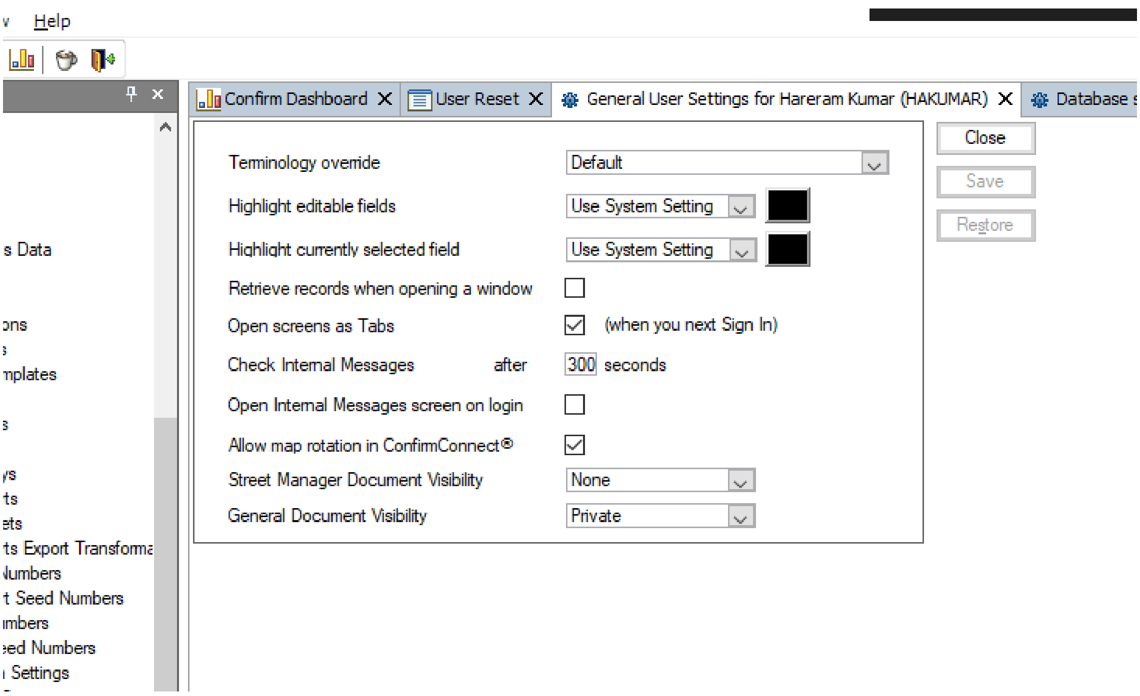
Users can now choose to set document visibility on Feature to Public or Private when attaching document links in Confirm web interface

This has been facilitated to help our customers with an ability to set the Public/Private flag on documents so that API responses used by a third party can provide the necessary context,such as determining which photos should be used.

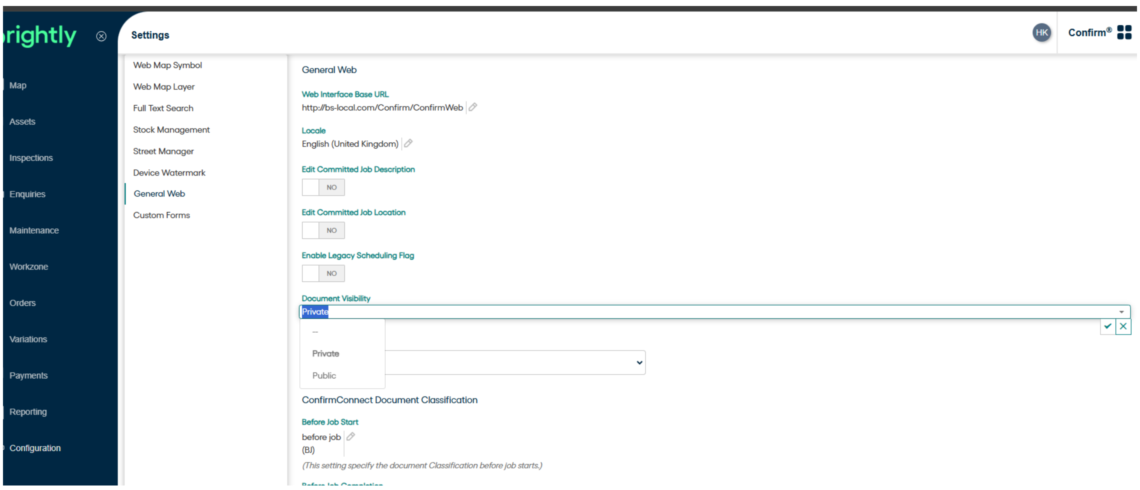
These tags are purely informational and do not impose any security restrictions on document visibility.

The visibility tag for a new document is determined by the settings configured at either the Tenant or User level.

User level setting is placed under "General User Settings" -> "General Document Visibility" in Confirm Enterprise:



Tenant level setting is placed in Confirm Web under "Configuration" -> "Web Settings" -> "General Web" -> "Document Visibility":

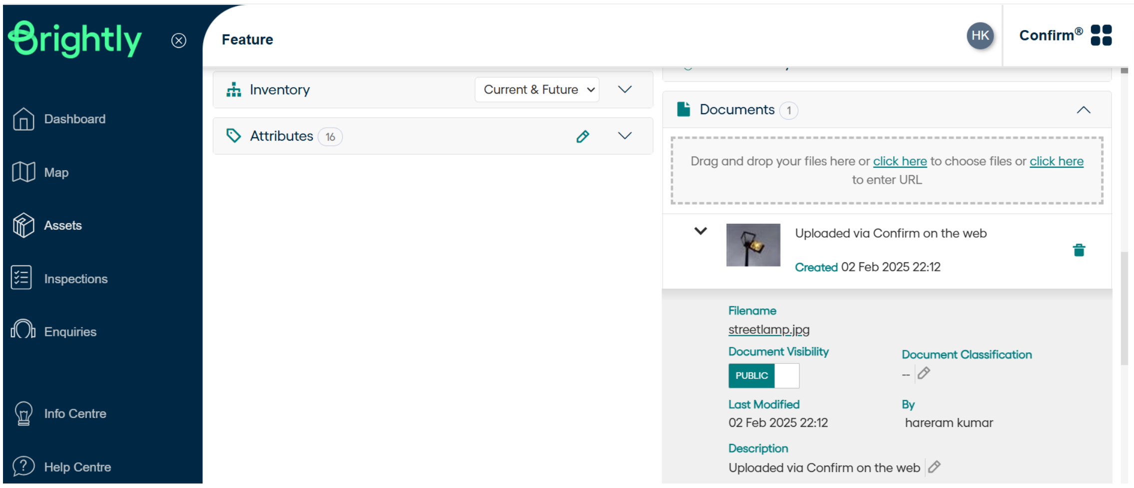


The setting has been defaulted to Private at tenant level,but can be changed to Public from "Document Visibility" dropdown in Confirm Web.

The Tenant level setting can be overridden for individual Users via User Level Setting in Enterprise.

If both settings are specified,the User level setting will take precedence over the Tenant level setting.

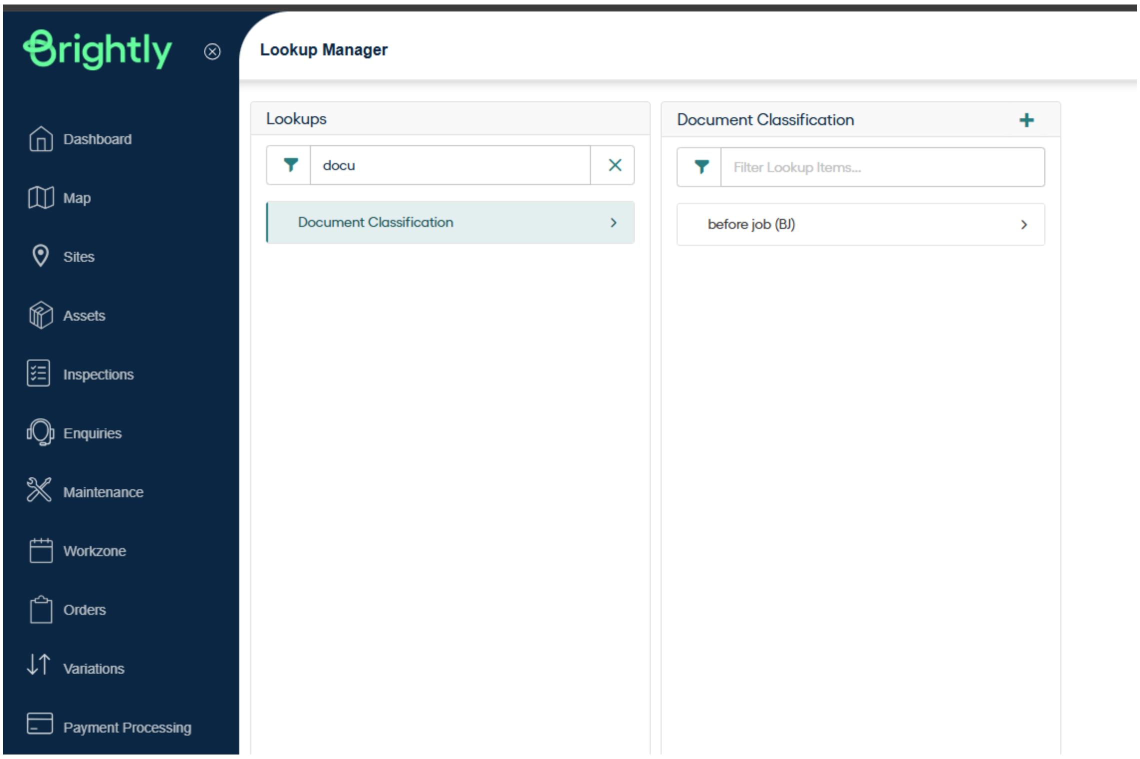
Additionally user has given the ability to change the document tag to Public or Private at any time,with User and Tenant level settings remaining intact. For Features,the document tag can be modified using the Document Visibility toggle button in the Documents Panel, as shown:



Document Classification

Users can now select the values from the Document Classification dropdown. By default it will be blank. A searchable drop down will present all the values that has been added under the Document Classification lookup.

Users can add Document Classification from lookups as shown:



Inspections

Inspection Batch

Inspection Batch Search

Search for Inspection Batch by entering one or more of the following search criteria: Batch number, Batch Description, Inspection Type, Action Officer or Completion Date.

To search using multiple criteria, include a <space> between each word.

The list of Inspection Batches matching the search criteria will be displayed below the search box. The first page shows up to 100 results, with additional batches shown in increments of 100 on the subsequent pages.

Filters

The Filters button allows for advanced filtering of Inspection Batch by any of the following fields:

- Inspection Batch
- Action Officer
- Inspection Type
- Inspection Route
- Completion Status
- Site
- Feature
- Batch Creation Date
- Batch Completion Date

For any of the lookup fields, it is possible to filter Inspection Batches by one or more values.

For any date filters, it is possible to select from a number of predefined date ranges or to provide a specific date range by selecting the 'Custom Date Range' option.

Inspection Batch Screen

Inspection Batches contain completed inspections and collect together the required Features for a particular Inspection. The Batch uses an Inspection Route to define the Features that must be inspected and assigns the Inspection to an Action Officer.

Inspection Feature

The section shows the list and information of all the Inspection Features linked to the Inspection Batch.

Expand each row to see more details about an Inspection Feature or click on the Feature Id/Type to open the Inspection Feature in a new screen.

The total count of Inspection Features on the Inspection Batch will be displayed in the header of the section.

The Officer and Inspected date fields can only be editable for the Features that have not yet been inspected, and the Inspection Batch is not completed. The Expiry Date field is editable once the Feature's Inspected Date is provided.

Features that do not have Inspected Date can only be deleted from the Inspection Batch. Features can only be added if the Inspection Batch is not completed.

Inspection Batch Screen - Buttons

Create

The Create button will be available if the Current User has User Security permission to Add Inspection Batch.

Clicking on the Create button will open a new Inspection Batch. The Inspection Batch's fields can be edited/reviewed before saving.

Defects

Defect Search

Search for Defects by entering one or more of the following search criteria: Defect number, Defect Type, Site or Site name, Defect location, Defect description, Defect Notes or Priority Code/ Priority name.

To search using multiple criteria, include a <space> between each word.

The list of Defects matching the search criteria will be displayed below the search box. The list displays up to latest 100 edited/updated Defects that match the search criteria. The list can be further filtered based on the date range by selecting the duration from the drop down available on the screen.

You can view list of all the Defects or filter based on the status for Action required or No action required by selecting the status from the drop down available on the screen.

Filters

The Filters button allows for advanced filtering of Defects by any of the following fields:

- Defect Type
- Logged Date
- Site
- Feature
- Priority
- Observation Type
- Raised By

For any of the lookup fields it is possible to filter Defects by one or more values.

The Site and Feature lookups will only display the first 100 results, although the results can be filtered to find the exact Site/Feature that you're looking for.

Note that, if the Site filter has any items selected, the Feature filter will only contain Features for the selected Sites.

For any date filters, it is possible to select from a number of predefined date ranges or to provide a specific date range by selecting the 'Custom Date Range' option.

Defect Screen

Defect Type

The Defect Type pick list contains all Defect Types that are valid for the Defect's Observation Type. If the Defect has no Observation Type, all active Defect Types will be included.

Updating the Defect Type may cause the Defect Attributes to change based on the Defect Type defaults.

Changing the Defect Type will also create a Job if the following conditions are met:

- The 'Raise a Defect Job' flag is enabled for the Priority
- The 'Classification' field on Defect Type is set to 'Internal'
- The Defect isn't already linked to a Job

Note: When a Defect Type with a classification of External is selected an Organisation must be supplied, otherwise the Organisation is cleared.

The Defect Type Description and External Reference field has been added as read-only field below the defect type field.

Both fields update dynamically when the defect type changes.

Both fields are displayed as -- incase the defect type description is not saved while creating defect type.

Site

Start typing in the Site field to search by Site Name, Code, Locality, Town, or County.

Supersedes Defect

If this Defect supersedes another, this field will be displayed with the number of the Defect that has been superseded. Click on the Defect number to view it.

Status

This field will be automatically set to 'Action Required' or 'No Action Required' based on the Classification of the Defect Type (Internal, External, or No Defect Found).

Where the Defect has been superseded by another this will show the superseding Defect number. Click on the Defect number to view it.

Raised By / Date

The Action Officer who raised the Defect, and the date on which it was raised.

Note: Changing the date will also require the Notes to be updated.

Priority

The Priority pick list contains all active Priorities to which the current user has Data Key access

Changing the Priority will create and link a new Job if the following conditions are met:

- The 'Raise a Defect Job' flag is enabled for the Priority
- The 'Classification' field on Defect Type is set to 'Internal'
- The Defect isn't already linked to a Job

Note: Changing the priority will also require the Notes to be updated.

Customer Reference

Allows a reference to be added to the Defect which will be used in the 'Cust Ref' field of any Job raised from this Defect.

Organisation

Where the Defect Type has a classification of External, the Organisation is available and must be supplied.

The Organisation specified here is the one to whom the External Defect Notification will be addressed.

Attributes

The Attributes section displays any existing Attributes for the current Defect, and allows them to be edited or deleted.

Attributes can also be added to the Defect using the ‘+’ button on the header of the Attributes panel while the Details panel is in edit mode.

When the Defect Type is changed, all the Attributes linked to the Defect Type are added and must be supplied with a valid value before saving the changes.

Note: Any modified Attributes will be retained when the Defect Type is changed. Attributes associated with the selected Defect Type cannot be deleted.

Defect Screen - Buttons

Open with...

External map system

This option will be available if the External Map URL has been configured on the ConfirmWorkzone Settings screen.

If the External Map Name has been configured on the ConfirmWorkzone Settings screen, the name of this button will match.

Selecting this option will open the current Defect in the configured external map system.

Create Job - Button

Allows a Job to be created from the Defect. Job page is opened in next tab and Job details can be edited before saving.

Only one Job can be raised on a Defect. The Raise Job button will only be available if there is no Job present on the Defect already and if Defect classification is Internal.

Site, feature and Priority will be defaulted from Defect. These can be changed when creating the new Job.

Reports

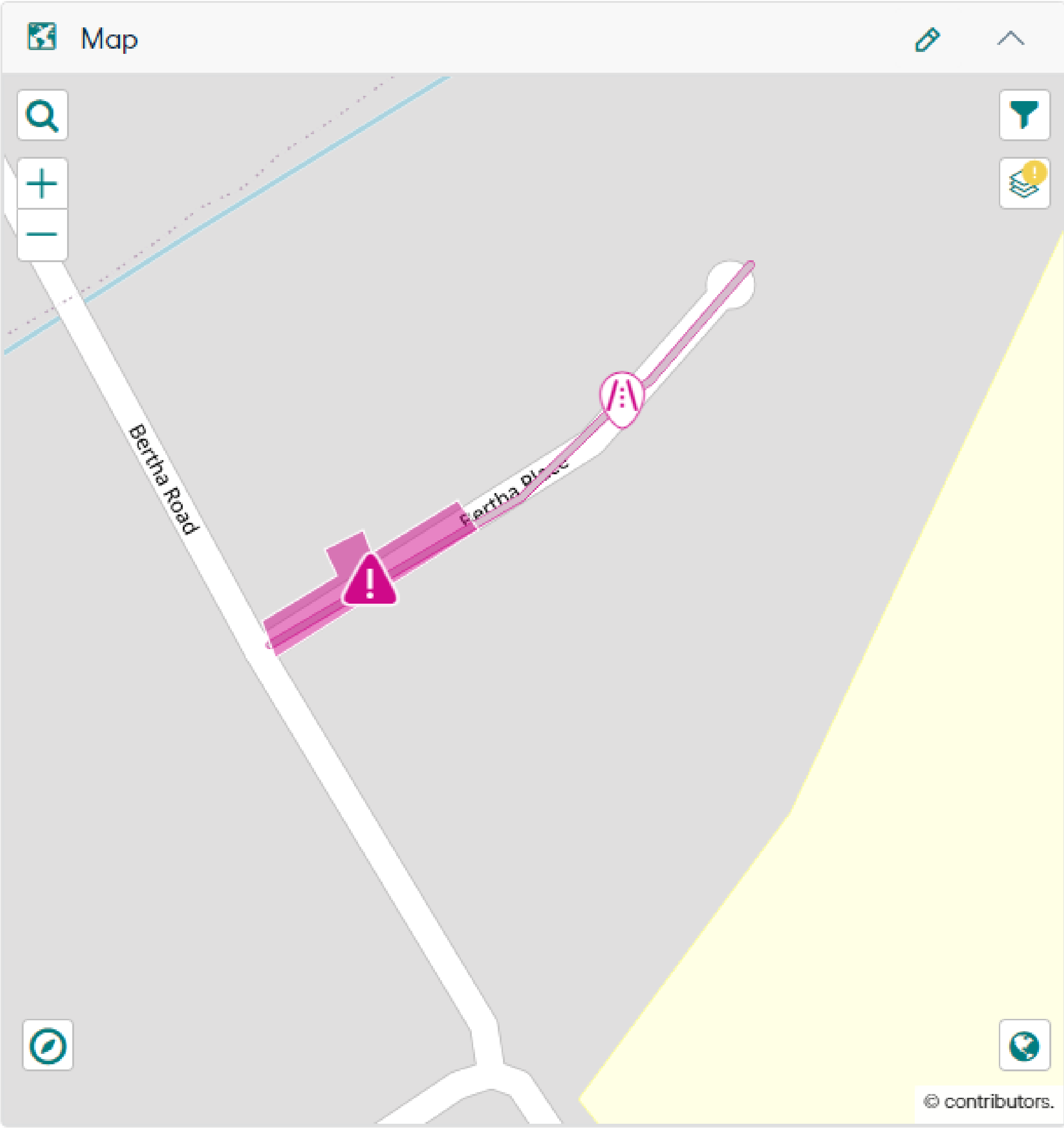
Use the Reports button to select and run any Reports linked to the Defect screen.

See the **Launch Entity Reports** page for more information.

Defect Screen - Map

Map

The Map displays the plotted Defect Geometry. Defect Geometry can be a Point, a Line, or a Polygon. If the Defect itself does not have Geometry, the Point Geometry of the linked Feature is displayed. If the linked Feature also does not have Geometry, the Site Point Geometry is used instead.



Edit Geometry

Clicking the pencil icon at the top of the map panel will display a popup map with the Drawing Tool Palette enabled, allowing the position and geometry of the current Defect to be updated.

See the **Confirm Map** page for more information on the Drawing Tool Palette.

Defect Screen - Document Links

Document Panel

The Document panel shows images and files linked to Defect.

Documents for the Defect can be viewed, uploaded, and edited in accordance with the user's Document User Security permissions.

Document Visibility

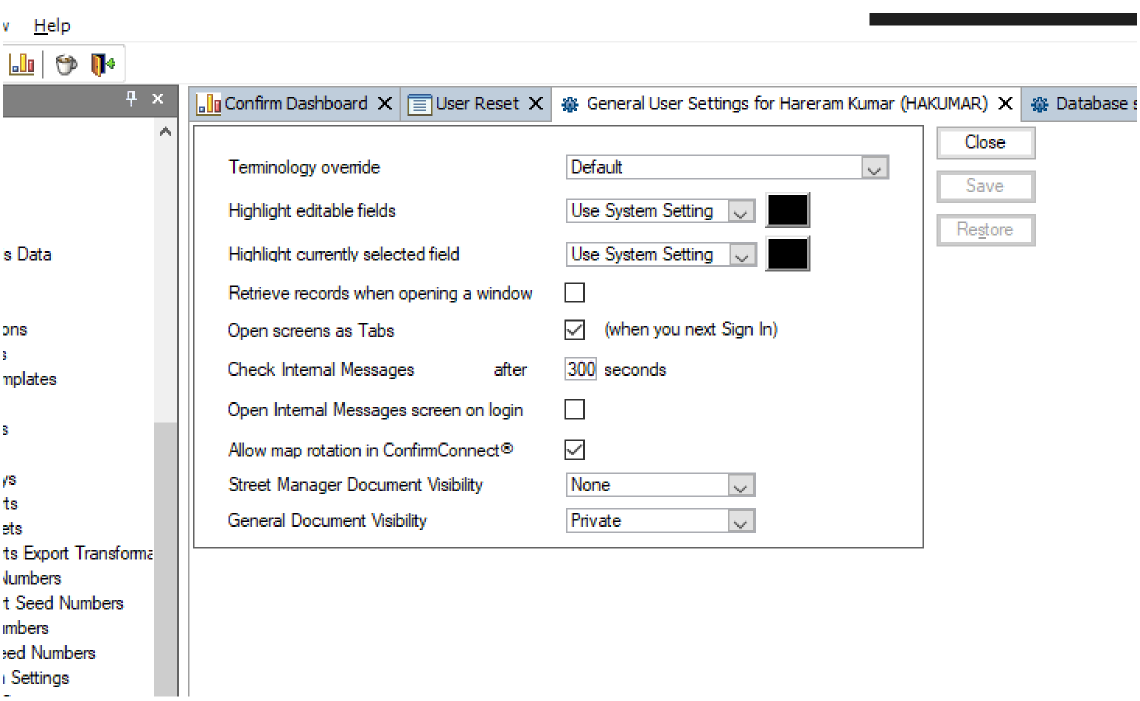
Users can now choose to set document visibility on Defects to Public or Private when attaching document links in Confirm web interface

This has been facilitated to help our customers with an ability to set the Public/Private flag on documents so that API responses used by a third party can provide the necessary context,such as determining which photos should be used.

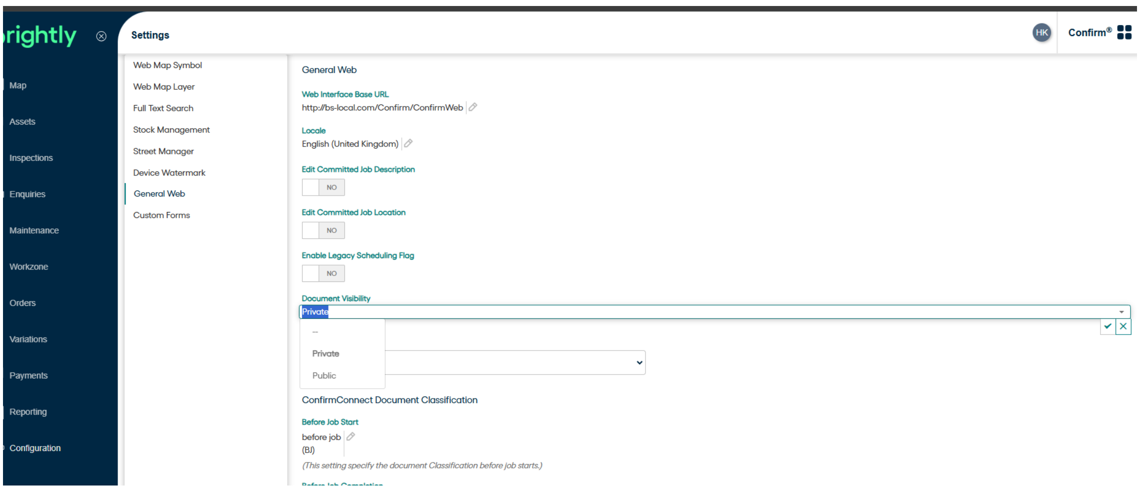
These tags are purely informational and do not impose any security restrictions on document visibility.

The visibility tag for a new document is determined by the settings configured at either the Tenant or User level.

User level setting is placed under "General User Settings" -> "General Document Visibility" in Confirm Enterprise:



Tenant level setting is placed in Confirm Web under "Configuration" -> "Web Settings" -> "General Web" -> "Document Visibility":

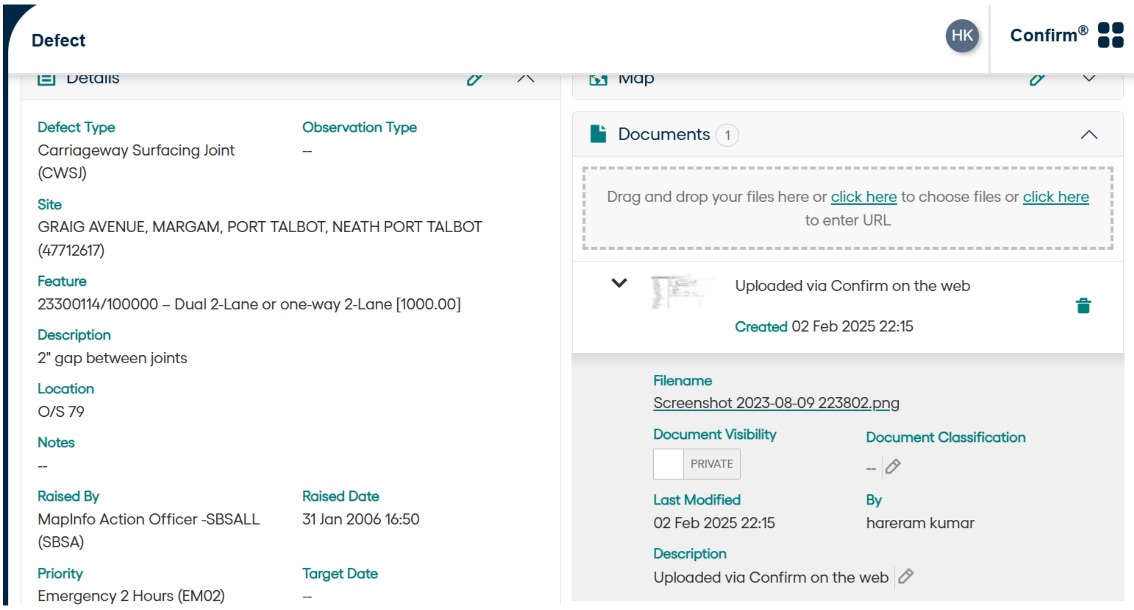


This setting has been defaulted to Private at tenant level,but can be changed to Public from "Document Visibility" dropdown in Confirm Web.

The Tenant level setting can be overridden for individual Users via User Level Setting in Enterprise.

If both settings are specified,the User level setting will override the Tenant level setting.

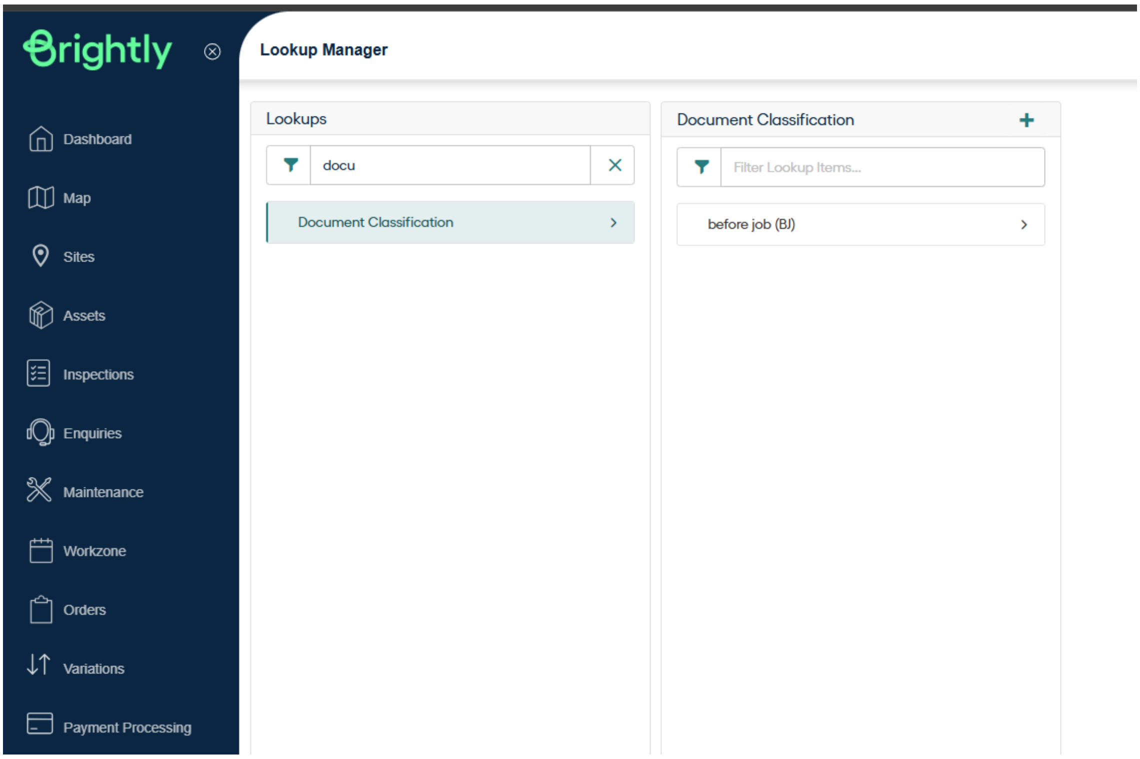
Additionally user has given the ability to change the document tag to Public or Private at any time,with User and Tenant level settings remaining intact. For Defects,the document tag can be modified using the Document Visibility toggle button in the Documents Panel, as shown:



Document Classification

Users can now select the values from the Document Classification dropdown. By default it will be blank. A searchable drop down will present all the values that has been added under the Document Classification lookup.

Users can add Document Classification from lookups as shown:



Inspection Features

Inspection Feature Details

The details of the Inspection Feature and the Inspection Batch to which this Feature is linked will be displayed here.

Inspection Feature Defects

The Defect section shows list and information of all the Defects found during the Inspection of the Feature in view only mode.

Expand each row to see more details about the Defect or click on the Defect Number to open the Defect in a new screen.

The total count of Defects on the Inspection Feature will be displayed In the header of the Defect section.

Inspection Feature Conditions

The Conditions section shows the information of any Observation types that have been associated with this Feature during the Inspection. Expand each row to see notes added for that condition.

The total count of Observation Type on the Inspection Feature will be displayed In the header of the Condition section.

The total Count of Defects raised during the Inspection under each Observation Type is displayed as the hyperlink under the column Defect.

If only 1 Defect present under any Condition, then on click of hyperlink, Defect screen will open in new tab for more details. And if no Defect present, then 0 will be displayed and no hyperlink will be given.

If more than 1 Defect records present, then on click of hyperlink a pop-up card opens, displaying few details like Defect number, Priority, Defect type, Defect Description, Defect Location, Defect Status, Target Date, Action Officer of each Defect. If user wants to view more details about a Defect, clicking on that Defect will open Defect screen in a new tab.

Inspection Feature Search

Search for Inspection Feature by entering one or more of the following search criteria:

- Inspection Batch
- Action Officer
- Inspection Type
- Inspection Route
- Site Code
- Site Name
- Locality Name
- Town Name
- County Name

To search using multiple criteria, include a <space> between each word.

The list of Inspection Feature matching the search criteria will be displayed below the search box. The list displays up to 100 Inspection Features that match the search criteria.

Filters

The Filters button allows for advanced filtering of Inspection Features by any of the following fields:

- Inspection Batch
- Action Officer
- Inspection Type
- Inspection Route
- Site
- Feature
- Feature Group
- Feature Type
- Area
- Ward
- Batch Creation Date
- Batch Completion Date
- Inspection Date

For any of the lookup fields it is possible to filter Inspection Features by one or more values.

The Site and Feature lookups will only display the first 100 results, although the results can be filtered to find the exact Site/Feature that you're looking for.

Note that, if the Site filter has any items selected, the Feature filter will only contain Features for the selected Sites.

For any date filters, it is possible to select from a number of predefined date ranges or to provide a specific date range by selecting the 'Custom Date Range' option.

Select Features for Inspection

Use the Select Features for Inspection utility to select Features to be downloaded to a mobile device for inspection.

Action Officers

The User can access the list of all Action Officers. By selecting an Action Officer, the Inspection Routes linked to that Officer's assigned Work Group will be displayed.

Inspection Routes

Selecting a Route from the Inspection Routes list will display a list of all live Features present on that Route.

Feature List

Only 100 Features will be displayed at a time. If more than 100 Features are present on a Route, use the right/left arrow buttons at the bottom of the list to see the next/previous 100 Features.

The Feature list is sorted by Inspection Route order by default, but can be sorted by any of the other columns by clicking on the column header.

The Last Survey Date displayed is the date that the Feature was last included on a completed Inspection Batch and is not unique to the Route or Inspection Type. This date can also be seen on the on the Additional tab of the Feature screen in Confirm Enterprise.

The Due Date displayed is the date that the Feature is next due for inspection on the specific Route that has been chosen. It is calculated based on the Last Inspected Date and/or the previous Due Date, according to the rule specified on the Inspection Type screen. This date can also be seen on the Inspection Route screen in Confirm Enterprise.

Assigning, Un-Assigning and Re-Assigning

To Assign, Un-Assign, or Re-Assign Features for Inspection, tick the check-boxes for the required Features then select the required action from the Batch button.

Inspection Route

Inspection Route Search

Search for Inspection Route by entering one or more of the following search criteria: Inspection Route Code, Inspection Route Name, Earliest Due Date, Latest Due Date, Inspection Mode, or Work Group.

To search using multiple criteria, include a <space> between each word.

The list of Inspection Routes matching the search criteria will be displayed below the search box. The first page shows up to 100 results, with additional routes shown in increments of 100 on the subsequent pages.

Filters

The Filters button allows for advanced filtering of Inspection Route by any of the following fields:

- Inspection Route
- Inspection Type
- Inspection Mode
- Dead

For any of the lookup fields, it is possible to filter Inspection Routes by one or more values.

Inspection Route Screen

An Inspection Route lists all the Features, in route order, that will be inspected during the course of an Inspection cycle. An Inspection Route Feature must be unique within an Inspection Route.

Inspection Routes can be set as either 'Visual' or 'Machine'.

- Visual - Both Linear and Discrete Features (determined from Group Class on Feature Group) can be selected for an Inspection Route. These routes can be selected for the Asset/Condition Survey.
- Machine - Only Linear Feature Group Features can be added to these Inspection Routes - available with 'PMS - Observation Data' module (4010). These routes cannot be selected for the Asset/Condition Survey.

Inspection Route Features

The available Inspection Route Features are displayed in this section.

Adding an Inspection Route Feature

Use the + button at the top of the Inspection Route Features section to add a new Feature, then filter it using the Site and Feature fields.

Editing an Inspection Route Feature

To update the Next Inspection Due Date and Notes, click the pencil icon on the Inspection Route Feature.

Removing an Inspection Route Feature

To remove an Inspection Route Feature, click the delete button next to the desired Feature in the Route.

Inspection Route Screen - Buttons

Create

The Create button will be available if the Current User has User Security permission to Add Inspection Route.

Clicking on the Create button will open a new Inspection Route. The Inspection Route's fields can be edited/reviewed before saving.

Actions

Delete

The Delete option will be available if the Current User has User Security permission to Delete the Inspection Route. Select this option to Delete the current Inspection Route.

Enquiries

Enquiry Search

Search for Enquiries by entering one or more of the following search criteria: Enquiry number, Enquiry location, Enquiry description, Enquiry reference, Customer name, Customer reference, Customer email, External reference, Site name or Town.

To search using multiple criteria, include a <space> between each word.

The list of Enquiries matching the search criteria will be displayed below the search box. The list displays up to 100 Enquiries that match the search criteria.

The list can be filtered based on the last Enquiry Status update by selecting an option from the *Updated in* drop down next to the search box.

The list can be further filtered based on the Outstanding/Not Outstanding Status update by selecting an option from the Status drop down next to Updated in.

Filters

The Filters button allows for advanced filtering of Enquiries by any of the following fields:

- Service
- Subject
- Status
- Action Officer
- Classification
- Site
- Feature
- Feature Type
- Status Logged Date

For any of the lookup fields it is possible to filter Enquiries by one or more values.

The Site and Feature lookups will only display the first 100 results, although the results can be filtered to find the exact Site/Feature that you're looking for.

Note that, if the Site filter has any items selected, the Feature filter will only contain Features for the selected Sites.

Similarly, if the Service filter has any items selected, the Subject filter will only contain Subjects for the selected Services.

For any date filters, it is possible to select from a number of predefined date ranges or to provide a specific date range by selecting the 'Custom Date Range' option.

Enquiry Screen View

Users now have flexible control over how they view Enquiry data. A new toggle lets you switch between **List View** and **Column View**.

In List View, you can drill down into any Enquiry record to open the full Enquiry Detail screen.

Note:

The system remembers your preferred view and automatically applies it at every login, giving you a consistent, personalized experience.

Enquiry Screen

Subject

Updating the Subject may update the Enquiry Status, update the Commitments, and cause the Attributes to change based on the Enquiry Subject defaults.

Site

Start typing in the Site field to search by Site Name, Code, Locality, Town, or County.

Attributes

The Attributes section displays any existing Attributes for the current Enquiry, and allows them to be edited or deleted.

Attributes can also be added to the Enquiry using the ‘+’ button on the header of the Attributes panel while the Details panel is in edit mode.

When the Enquiry Subject is changed, all the Attributes linked to the Enquiry Subject are added and must be supplied with a valid value before saving the changes.

Note: Any modified Attributes will be retained when the Enquiry Subject is changed. Attributes associated with the selected Enquiry Subject cannot be deleted.

Customer

The Customer panel shows any Customers linked to the Enquiry and allows them to be edited.

See the **Enquiry Screen - Customer** page for more information.

Contact

Details of the Enquiry Contact will be displayed in the Contact panel.

It is possible to pre-populate the fields from an existing Contact using the Search Contact field, or enter new details.

Make Anonymous button

Clicking on 'Make Anonymous' button will clear all details of a Contact. It will replace the Contact Surname with the date the details were cleared and the user who cleared them.

Commitments

Commitments are attached to Enquiry Subjects so that any Enquiry with that Subject will acquire the Commitment.

The Commitment panel shows Commitments linked to the Enquiry; new Commitments can be added using '+' button on the header of the Commitment panel.

When adding or editing Commitments, the Commitment pop-up is displayed.

When the specified Status is reached, or a letter with the specified Correspondence Type is sent, the Commitment will be fulfilled, and the date of the fulfilment entered against the Commitment.

Enquiry Screen - Buttons

Actions

Clear Links

Select this option to clear links to any Features, Jobs, or Defects from the current Enquiry.

Create Job

Select this option to create a Job and link it to the current Enquiry. If no other Jobs are linked to the Enquiry, the first Job created will also be the Primary Job of the Enquiry.

Create Defect

Select this option to create a Defect from the current Enquiry. Multiple Defects may be created in this way, although only the first Defect will be directly linked to the Enquiry.

Open with...

External map system

This option will be available if the External Map URL has been configured on the ConfirmWorkzone Settings screen.

If the External Map Name has been configured on the ConfirmWorkzone Settings screen, the name of this button will match.

Selecting this option will open the location of the current Enquiry in the configured external map system.

Reports

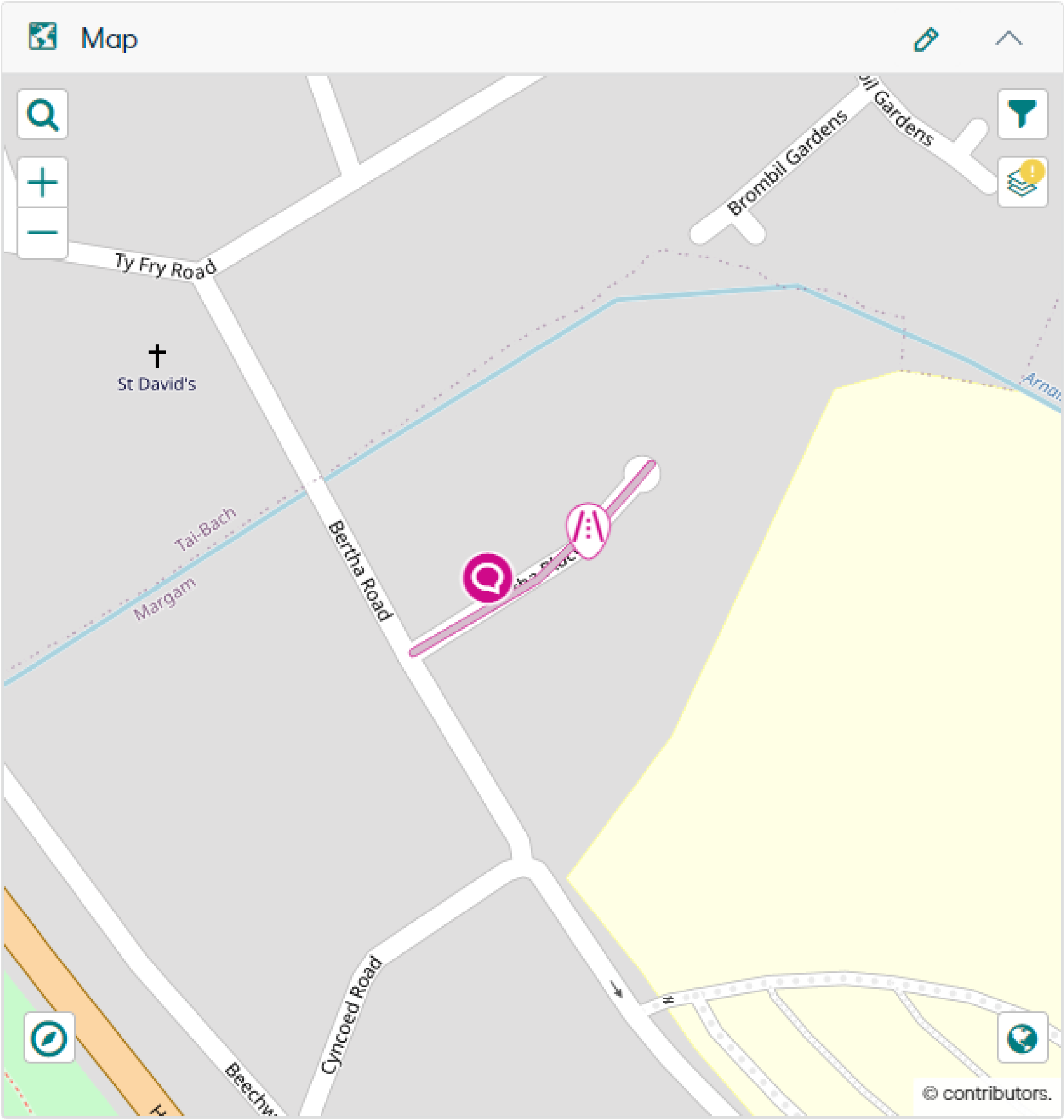
Use the Reports button to select and run any Reports linked to the Enquiry screen.

See the **Launch Entity Reports** page for more information.

Enquiry Screen - Map

Map

The Map displays the plotted Enquiry Geometry. If the Enquiry itself does not have Geometry, the Geometry of the linked Feature is displayed. If the linked Feature also does not have Geometry, the Site Point Geometry is used instead.



Edit Geometry

Clicking the pencil icon at the top of the map panel will display a pop-up map with the Drawing Tool Palette enabled, allowing the position and geometry of the current Enquiry to be updated.

See the **Confirm Map** page for more information on the Drawing Tool Palette.

Enquiry Screen - Customer

The Customer panel shows any Customers linked to the Enquiry and allows them to be edited.

Add Customer

Customers can be added to the Enquiry using the '+' button on the header of the Customer panel.

See the Customer Pop-up section below for more information.

View/Edit Customer

Click on the pencil icon for a Customer to view and edit the Customer details.

See the Customer Pop-up section below for more information.

Customer Pop-up

The Customer Pop-up allows details to be entered for new Customers, or details to be viewed and edited for existing Customers.

Customer Pop-up - Search Contact

It is possible to pre-populate the Name and Address fields for a Customer using the Search Contact field.

The Search will look in the Confirm Contacts list for matches on any of the following:

- Title
- Name
- Surname

Customer Pop-up - Search Address

It is possible to pre-populate the Address fields for a Customer using the Search Address field.

The Search Address field allows searching by any of the following:

- Flat/Building
- House Name/Number
- Street Name
- Locality
- Town
- Post Code

Customer Pop-up - Actions

Make Anonymous

Clicking on 'Make Anonymous' button will clear all details of a Customer. It will replace the Customer Surname with the date the details were cleared and the user who cleared them.

Copy this Customer

This option will create a new Enquiry and pre-populate it with a copy of the selected Customer's details i.e. create a *new* Customer Record for the new Enquiry.

New Enquiry for this Customer

This option will create a new Enquiry for the selected Customer record i.e. create a new Enquiry and link it to the *existing* Customer Record.

This can be used when a customer raises several Enquiries at the same time (in the same letter or during the same phone call for instance).

Enquiry Screen - Document Links

Document Panel

The Document panel shows images and files linked to an Enquiry.

Documents for the Enquiry can be viewed, uploaded, and edited in accordance with the user's Document User Security permissions.

Document Visibility

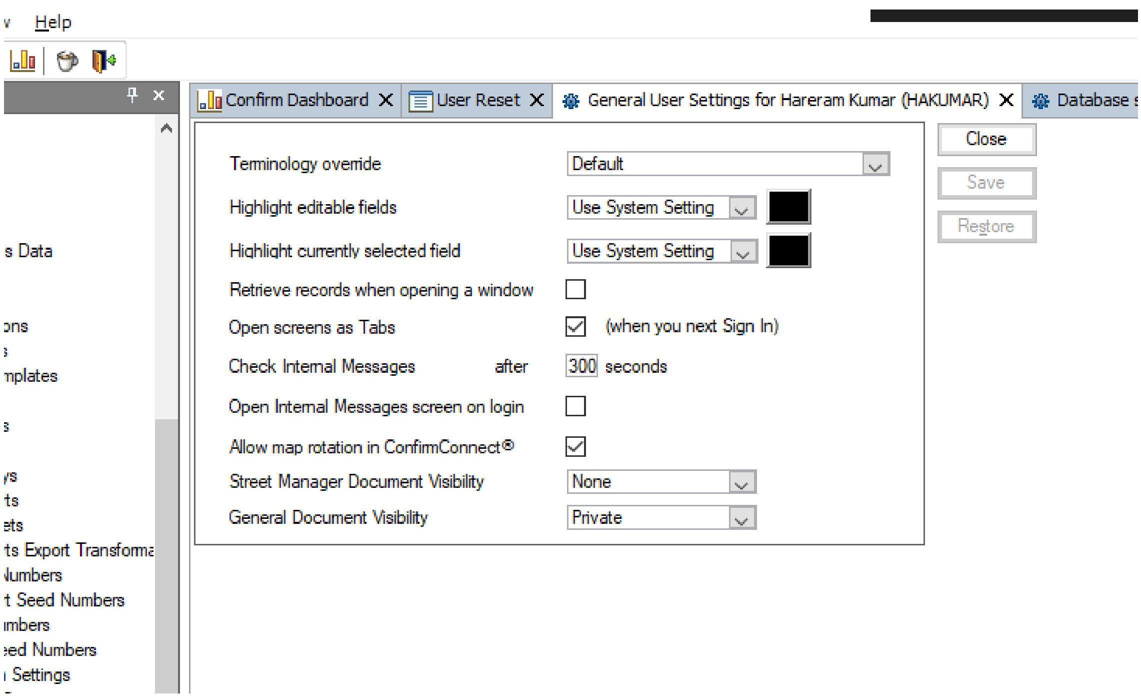
Users can now choose to set document visibility on Enquiries to Public or Private when attaching document links in Confirm web interface

This has been facilitated to help our customers with an ability to set the Public/Private flag on documents so that API responses used by a third party can provide the necessary context,such as determining which photos should be used.

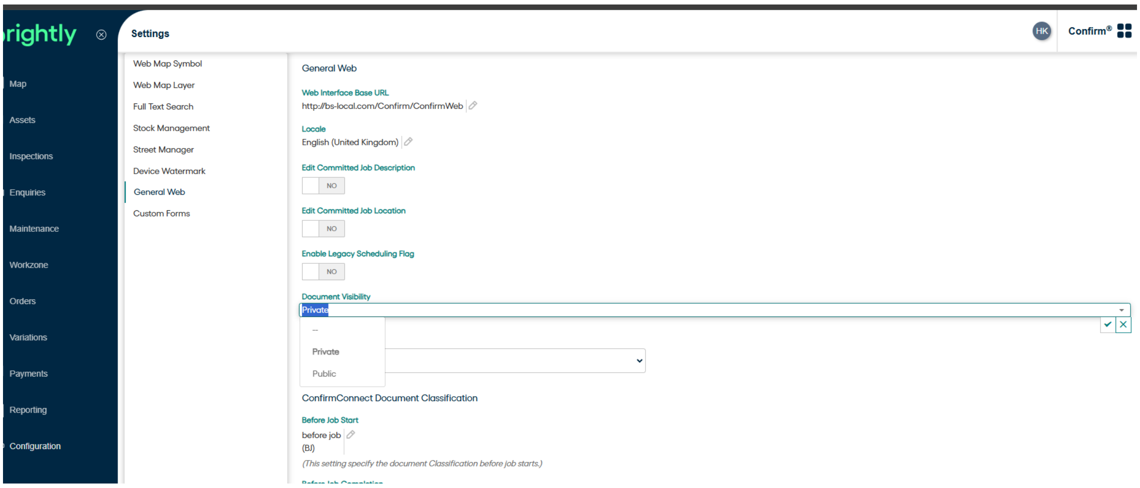
These tags are purely informational and do not impose any security restrictions on document visibility.

The visibility tag for a new document is determined by the settings configured at either the Tenant or User level.

User level setting is placed under "General User Settings" -> "General Document Visibility" in Confirm Enterprise:



Tenant level setting is placed in Confirm Web under "Configuration" -> "Web Settings" -> "General Web" -> "Document Visibility":

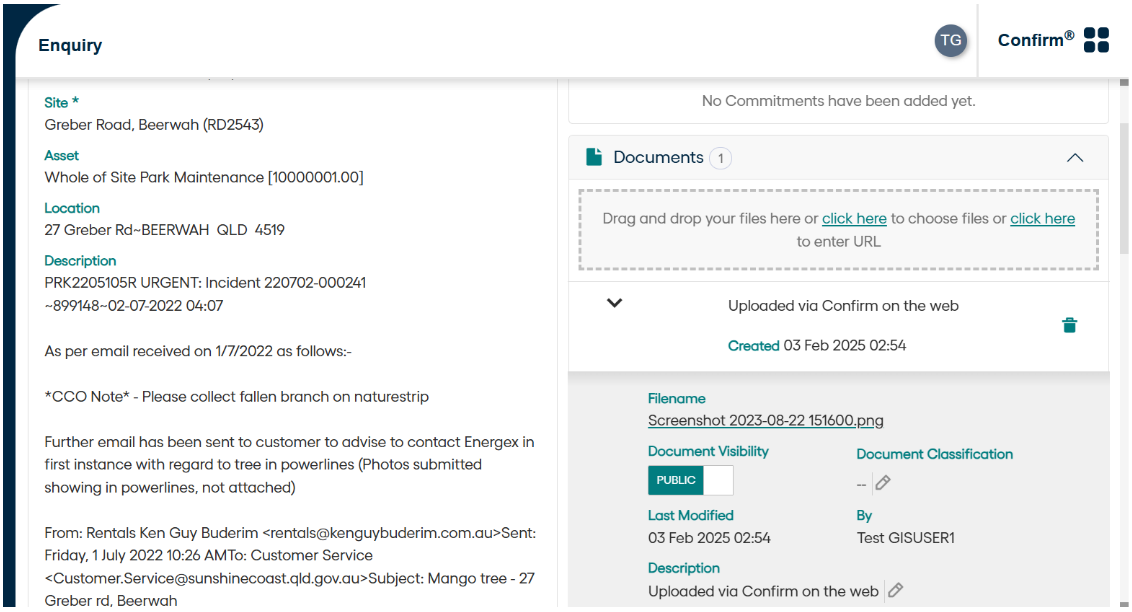


The setting has been defaulted to Private at tenant level,but can be changed to Public from "Document Visibility" dropdown in Confirm Web.

The Tenant level setting can be overridden for individual Users via User Level Setting in Enterprise.

If both settings are specified,the User level setting will take precedence over the Tenant level setting.

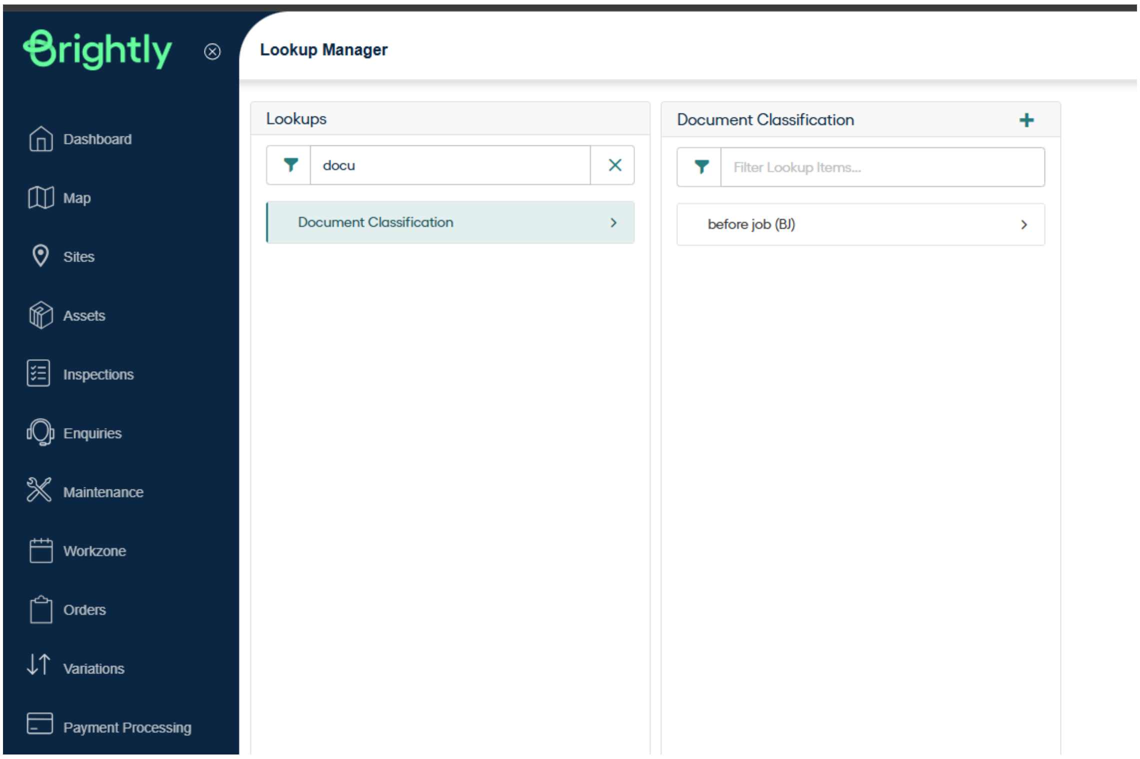
Additionally user has given the ability to change the document tag to Public or Private at any time,with User and Tenant level settings remaining intact. For Enquiries,the document tag can be modified using the Document Visibility toggle button in the Documents Panel, as shown:



Document Classification

Users can now select the values from the Document Classification dropdown. By default it will be blank. A searchable drop down will present all the values that has been added under the Document Classification lookup.

Users can add Document Classification from lookups as shown:


Brightly
Lookup Manager
Dashboard
Map
Sites
Assets
Inspections
Enquiries
Maintenance
Workzone
Orders
Variations
Payment Processing
Lookups
docu
Document Classification
Document Classification
Filter Lookup Items...
before job (BJ)

Jobs

Job Search

Search for Jobs by entering one or more of the following search criteria: Job number, Job Type, Job location, Job description, Cost Code, Site name, or Site code.

To search using multiple criteria, include a <space> between each word.

The list of Jobs matching the search criteria will be displayed below the search box. The list displays up to 100 Jobs that match the search criteria.

The list can be further filtered based on the last Job Status update by selecting an option from the *Updated in* drop down next to the search box.

Use the 'Status' drop down to search for 'Archived' or 'Live' Jobs.

Filters

The Filters button allows for advanced filtering of Jobs by any of the following fields:

- Job Type
- Site
- Feature
- Priority
- Status
- Action Officer
- Cost Code
- Traffic Management
- Price Factor
- Contract Area
- Contract
- Contractor
- Status Logged Date
- Entry Date
- Estimated Start / Completion Dates
- Actual Start / Completion Dates
- Target Completion Date
- Jobs for Payment

For any of the lookup fields it is possible to filter Jobs by one or more values.

The Site and Feature lookups will only display the first 100 results, although the results can be filtered to find the exact Site/Feature that you're looking for.

Note that, if the Site filter has any items selected, the Feature filter will only contain Features for the selected Sites.

For any date filters, it is possible to select from a number of predefined date ranges or to provide a specific date range by selecting the 'Custom Date Range' option.

The Filters also contain a 'Jobs for Payment' Quick Filter option making it easier to identify any Jobs that are ready for Payment. This will retrieve any Jobs that meet the following criteria:

- Job is committed.
- Current status must have the 'Commit', 'Outstanding' and 'Payment' flags set to true.
- Order Job must have the partial payment flags set to false.
- Job must not already be linked to a Payment or Payment Request.

Batch

The 'Batch' button allows users to perform batch actions on selected jobs. Batch options available are:

- Payment Batch
- Archive Jobs

Payment Batch: For selected Jobs move ' for Payment' toggle to 'Yesv under 'Quick Filters'.

- Clicking on 'Payment Batch' under the 'Batch' button will display a pop-up to enter a 'Finance Period' value.
- Clicking on 'Continue' will show the preview pop-up displaying the Payment Batches that will be created along with any invalid Jobs with the reasons for failure.
- Clicking on 'Continue' again will submit the request to batch the selected Jobs onto Payment Batches(Note that the Continue button will not be enabled if there are no valid Jobs).
- After submission, a pop-up will show a list of successful Payment Batches and any failed Jobs with their reasons for failure.
- Each row is interactive, and clicking on it will navigate to the corresponding Payments or Jobs page.

Note: Batch Payment rows are not interactive in the preview pop-up.

Archive Jobs: For selected Jobs from the search result.

- Clicking on 'Archive Jobs' under the 'Batch' button will display a preview pop-up listing of all the jobs that are eligible for archiving. If no jobs are eligible, the pop-up will show a message 'No jobs are eligible for archiving from the selected list.'
- Clicking on 'Save' in the preview pop-up will archive the job.
- After saving, a pop-up will appear stating 'Jobs archived successfully'.

Select All Jobs

It is now possible to select all Job records in the search results by choosing the 'Select All' option from the dropdown menu in the header to perform 'Payment Batch' operation (only applies when the 'Jobs for Payment' toggle is set to 'Yes' under 'Quick Filters).

Job Screen

Job Type

Defaulted on the Create Job screen from 'Default Job Type' (Job System Settings).

The Job Type field is only editable for Uncommitted Jobs.

Updating the Job Type may cause the Traffic Management, Hazard Type and related Attributes to change based on the Job Type defaults.

Site

Start typing in the Site field to search by Site Name, Code, Locality, Town, or County.

Feature

Start typing in the Feature field to search by Plot Number, Central Asset ID, Property ID, External Asset ID, Feature ID, Location, Feature Group, or Feature Type.

When a Site has been selected in the Site field, the Feature search will be restricted to Features on that Site.

The Feature field is only editable for Uncommitted Jobs.

Updating the Feature will automatically cause the Price Factor to be updated when appropriate.

Hazard Type

The Hazard Type field is editable for Jobs which are not on an Order.

Updating the Hazard Type will cause the Job Attributes to be updated with those linked to the new Hazard Type.

Priority

Defaulted on the Create Job screen from the default 'Priority' (Job System Settings).

The Priority field is only editable for Uncommitted Jobs.

Updating a Job's Priority will automatically cause the Price Factor, Estimated Completion Date and Target Completion Date values to be updated based on the Priority's Price Factor and Completion configuration.

Changing the Priority may affect the Current Status, in which case the Status History will be updated.

Note: This functionality is only available to users with the necessary User Security.

Price Factor

The Price Factor field is editable for Jobs which are not on an Order.

Estimated Start Date

You may enter an Estimated Start Date from which the Estimated Completion will be calculated in preference to the Entered Date.

Using this field will ensure that the Estimated Completion date accurately reflects the date on which the work was started rather than the date on which the Job was entered into Confirm.

Estimated Completion

Estimated Completion is automatically calculated in three different ways:

- The default is for Estimated Completion to be calculated on committal of the Job, based on the committal date and the Follow Up set on the Priority. In this case the Estimated Completion field remains blank until the Job is committed.
- If the Job System Settings 'Set Estimated Completion Date When Job Raised' is flagged, then an Estimated Completion is calculated based on the 'Logged date' and the Follow Up set on the Priority when the Job is raised.

- If a Start Date is entered for the Job, then regardless of Systems Settings, or Committal date, the Estimated Completion will be based on the Start Date and the Follow Up set on the Priority.

An Estimated Completion may also be directly entered, and will remain unaltered when the Job is committed.

Actual Start Date

Enter the date to record when the Job actually started. This will be automatically set if a Job Status is selected with the 'In Progress' setting ticked.

Target Completion

Defaulted on the Create Job screen from the selected 'Estimated Start Date' and the Follow Up set on the selected 'Priority'.

Actual Completion

Enter the date to record when the Job actually started. This will be automatically set if a Job Status is selected with the 'In Progress' setting ticked.

Traffic Management

Defaulted on the Create Job screen from the selected 'Job Type'.

This field will default from the Job Type 'Default Traffic Management' setting but can be changed for Jobs that are not on an Order.

Estimated Value

Calculated based on the Job Items. The rate used in the calculation will come from the Contract Site BoQ if the Job has a Contract specified and the Site BoQ is populated. The rate will come from the Contract BoQ if the Contract is specified, the Site BoQ is not populated and the Contract BoQ is populated. If no Contract is populated the rate will come from the SOR Item.

Note: This functionality is only available to users with view permissions for the "Show Job Estimated Value (Security)" User Security option.

Workstream

The Workstream field allows Jobs to be placed onto a Workstream, which allows for the grouping of Jobs when scheduling in ConfirmWorkzone.

The Workstream field is only visible when at least one Workstream lookup has been defined.

Attributes

The Attributes section displays any existing Attributes for the current Job, and allows them to be edited or deleted.

Attributes can also be added to the Job using the '+' button on the header of the Attributes panel while the Details panel is in edit mode.

When the Hazard Type is changed, all the Attributes linked to the Hazard Type are added and must be supplied with a valid value before saving the changes.

Note: Any modified Attributes will be retained when the Hazard Type is changed. Attributes associated with the selected Hazard Type cannot be deleted

Job Items

Any Items on the Job will be displayed in the Job Items section. If the Job is Uncommitted, existing Items can be edited or deleted, and new Items can be added either individually or using the SOR Group button.

Start typing in the SOR Group box to search for SOR Groups by name or code.

Only the SOR Groups with at least one SOR Item included in the BoQ of the current Job's Contract and Price Factor can be selected. Any Items that are not on the BoQ will be ignored.

Entering a Length, Width, Depth, or Quantity will apply those values to all applicable Items in the Group when they are added to the Job.

Orders

The Orders section shows information on any Works Order(s) to which the Job belongs.

It is possible to add the Job to an existing Order or create a new one using the 'Add' button at the top of the Orders panel.

After clicking the 'Add' button, fill in the Order No. field to link the Job to an existing Order or leave it blank to create a new one.

Note: The 'Add' button is only available it the Job has valid Items.

For Uncommitted Orders it is also possible to edit the Order Details or remove the Job from the Order.

Parent/Child Jobs

Where the Job is part of a parent/child hierarchy, the related Parent Job, and/or Child Jobs, will be displayed. Clicking on a Parent or Child Job will launch it in a new screen.

Variations

The Variations section shows information on all the Variations linked to the Job.

Variations are shown in the order that they were Committed (latest first), followed by Uncommitted Orders in the order that they were created.

Expand the row to see more details about the Variation, or click on the Variation Number to open the Variation in a new screen.

Click on the Variation record in the list to open the Variation screen in the side panel.

The Variation side panel enables the user to:

- View the current Variations associated with a Job.
- Edit a Works Target Completion Date and also vary Order Items.
- Create new Variations with the Add button on the panel.
- Remove the Variation Job & Items.
- Commit an uncommitted Variation by navigating to the Variation screen.

See the **Variations** page for more information.

Payments

The Payments section shows information on all the Payments linked to the Job.

Payments are displayed based on the Commit dates, with latest first, or Payment date if they are Uncommitted.

Expand the row to see more details about the Payment, or click on the Payment Number to open the Payment in a new screen.

Customer

This field will default to the Customer for the Feature that has been selected. Use the drop down list to alter this if necessary.

Customer Reference

An optional free text field into which a reference can be entered. This can be used as a grouping mechanism to later report on a series of Jobs which all carry the same reference.

Job Screen - Buttons

Commit

The Commit button will be enabled if the following conditions are met:

- The current User must have User Security permission to Commit
- The Job must be ‘Uncommitted’
- The Job must have Items
- The Job must have a Contract selected
- The Job can’t be on an Order that is pending authorisation (based on the ‘Order Commit Authorisation’ flag on the Job’s Contract)

The Job cannot be Committed if it is already on an Order with other Jobs.

Clicking the Commit button will place the Job on an Order (if it is not already), and Commit the Order.

Open with...

ConfirmWorkzone

This option will be available if the current User has User Security permission for ConfirmWorkzone.

Clicking this option will open the current Job in ConfirmWorkzone in a new browser tab. Note that the Job must already be present in ConfirmWorkzone.

External map system

This option will be available if the External Map URL has been configured on the ConfirmWorkzone Settings screen.

If the External Map Name has been configured on the ConfirmWorkzone Settings screen, the name of this button will match.

Selecting this option will open the current Job in the configured external map system.

Create...

The Create button will be available if the current User has User Security permission to Add Jobs. Each of the following options will open the new Job in a separate screen so that the Job's fields can be reviewed/edited before saving.

New

Select this option to create a new Job.

Copy

Select this option to create a copy of the current Job.

Copy as Child

Select this option to create a copy of the current Job as a child of the current Job.

Copy as Sibling

Select this option to create a copy of the current Job that will share the same parent as the current Job. This option is only available if the current Job is a child Job.

Reports

Use the Reports button to select and run any Reports linked to the Job screen.

See the **Launch Entity Reports** page for more information.

Action

Link Parent Job

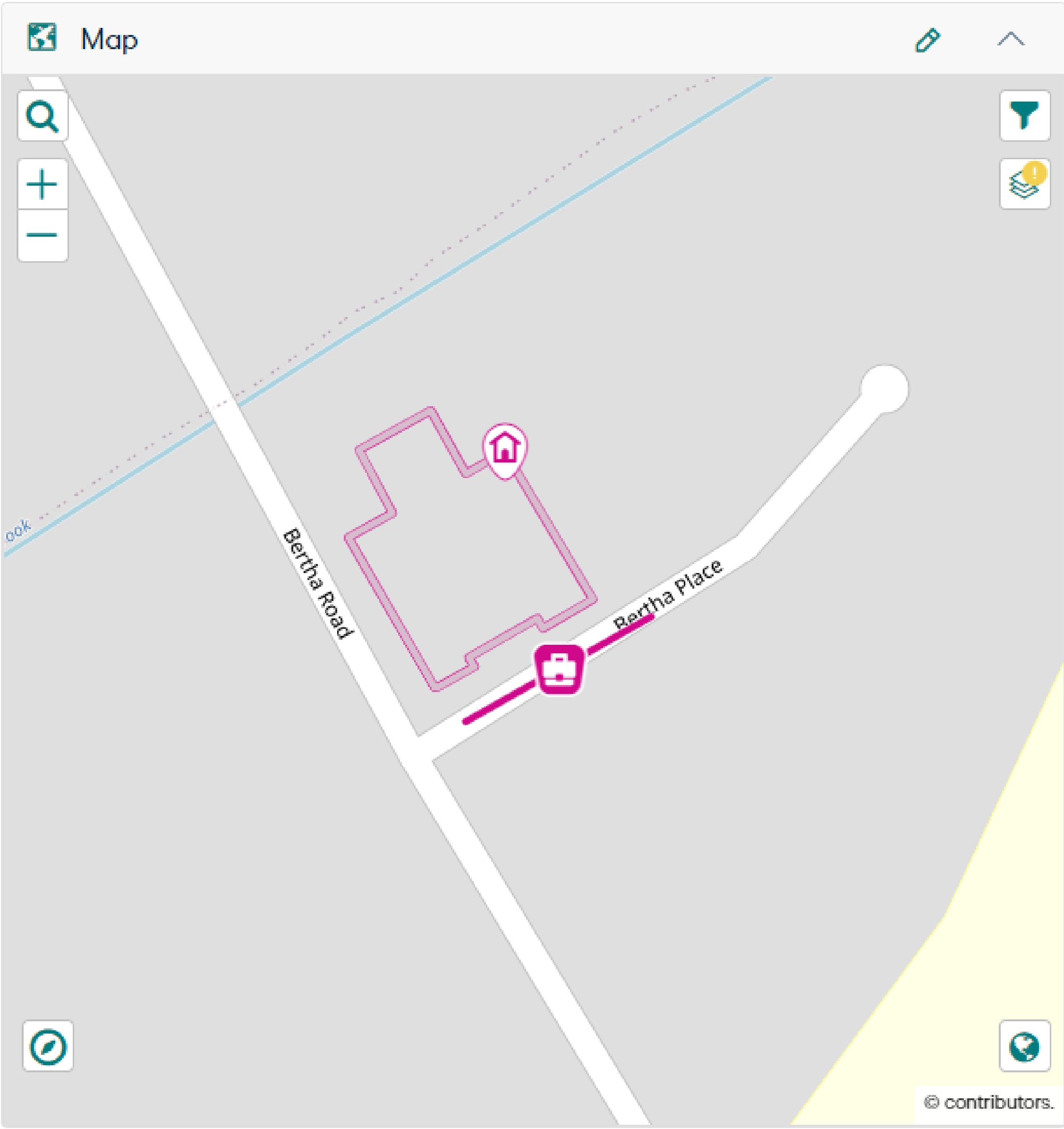
Select this option to link a parent Job to an existing child Job. This option is disabled if a parent Job is already linked to the child Job.

To unlink the parent Job, click on the unlink option in the Parent Job panel. The Link Parent Job option is enabled only when the child Job does not have any parent Job linked, and the current user has the required security permissions to update the Job.

Job Screen - Map

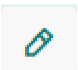
Map

The Map displays the plotted Job Geometry. Job Geometry can be a Point, a Line, or a Polygon. If the Job itself does not have Geometry, the Point Geometry of the linked Feature is displayed. If the linked Feature also does not have Geometry, the Site Point Geometry is used instead.



Please refer to the **Confirm Map** page for more information about the various buttons and features available on the Map.

Edit Geometry



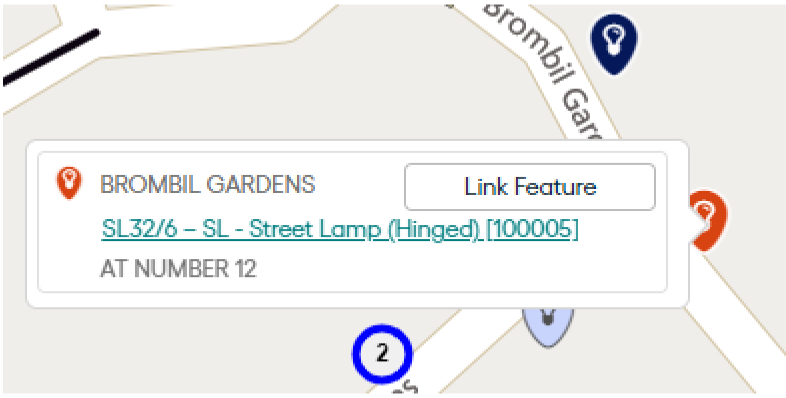
Clicking the pencil icon at the top of the map panel will display a popup map with the Drawing Tool Palette enabled, allowing the position and geometry of the current Job to be updated.

Note: When creating a new Job, the Drawing Tool Palette is available on the main map.

See the **Confirm Map** page for more information on the Drawing Tool Palette.

Selecting the Feature from the Map

The Map can also be used to change the Feature linked to the current Job. This can be done by clicking on the Feature symbol of the Feature you would like to link to (the Feature layer will need to be visible). This will bring up the Feature details which will include the 'Link Feature' button that you can click on to confirm the link. The Feature can be changed until the Job has been added to an Order. Linked Features must be from a Site with a Street Record Type applicable to Maintenance Management.



Job Screen - Document Links

Document Panel

The Document panel shows images and files linked to a Job as well as those for any Defects or Enquiries related to the Job.

The Document panel will only be visible to users with Document User Security access. Any linked Defect document will be visible in the panel regardless of the user's Defect User Security settings. Enquiry documents will only be visible if the user has access to the Enquiry (via Enquiry Subject or Action officer data key security).

Documents for the Job can be uploaded and edited in accordance with the user's Document User Security permissions.Documents for related Defects or Enquiries are read only on the Job screen.

Document Visibility

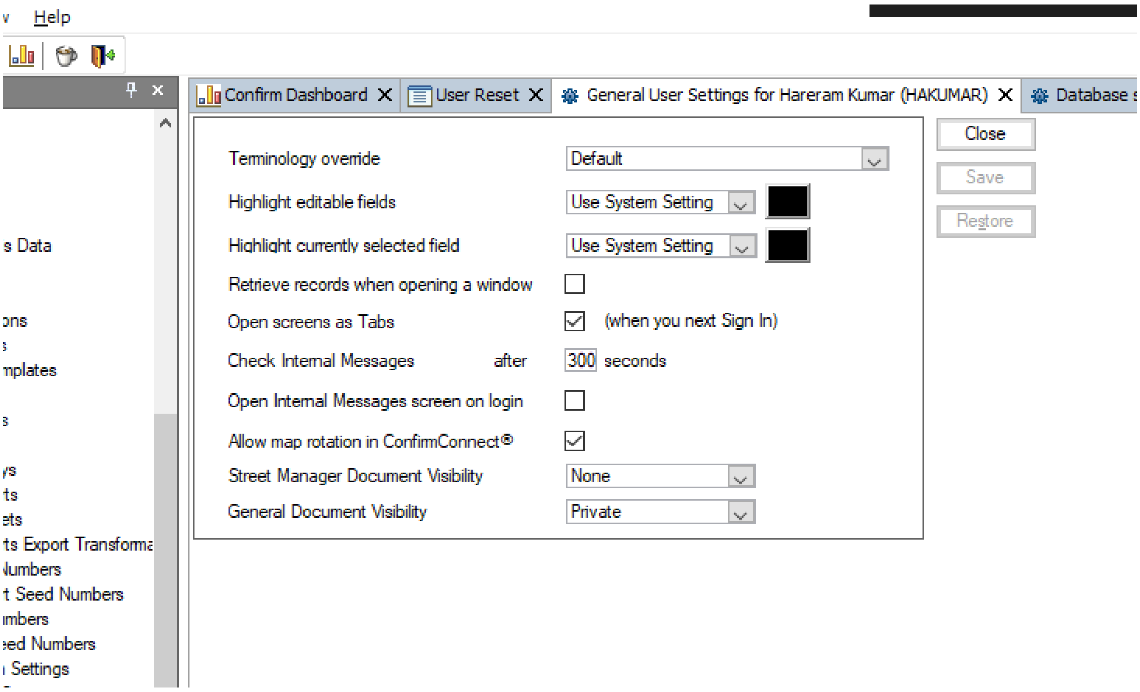
Users can now choose to set document visibility on Jobs to Public or Private when attaching document links in Confirm web interface

This has been facilitated to help our customers with an ability to set the Public/Private flag on documents so that API responses used by a third party can provide the necessary context,such as determining which photos should be used.

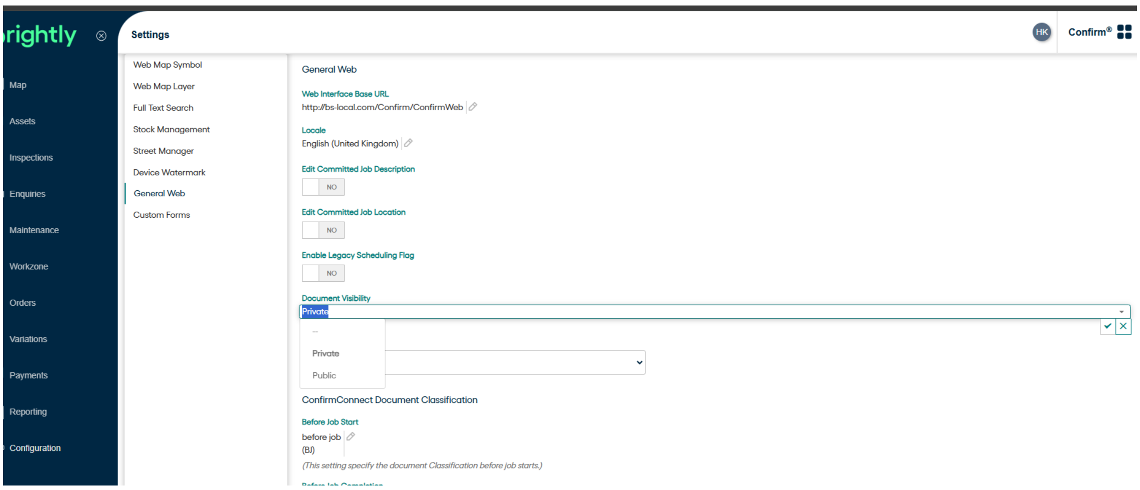
These tags are purely informational and do not impose any security restrictions on document visibility.

The visibility tag for a new document is determined by the settings configured at either the Tenant or User level.

User level setting is placed under "General User Settings" -> "General Document Visibility" in Confirm Enterprise:



Tenant level setting is placed in Confirm Web under "Configuration" -> "Web Settings" -> "General Web" -> "Document Visibility":

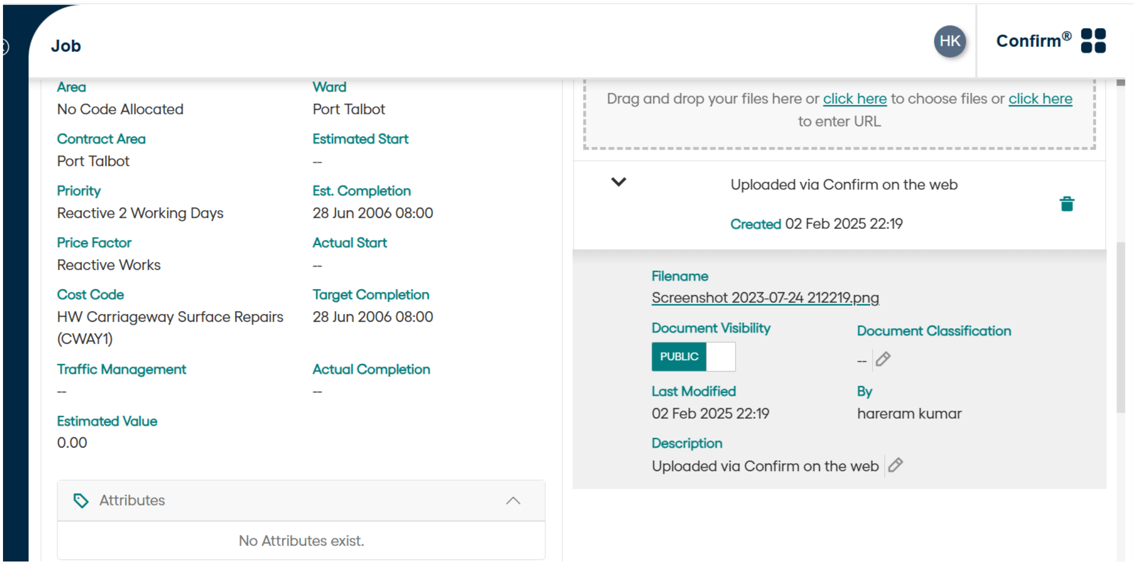


The setting has been defaulted to Private at tenant level,but can be changed to Public from "Document Visibility" dropdown in Confirm Web.

The Tenant level setting can be overridden for individual Users via User Level Setting in Enterprise.

If both settings are specified,the User level setting will take precedence over the Tenant level setting.

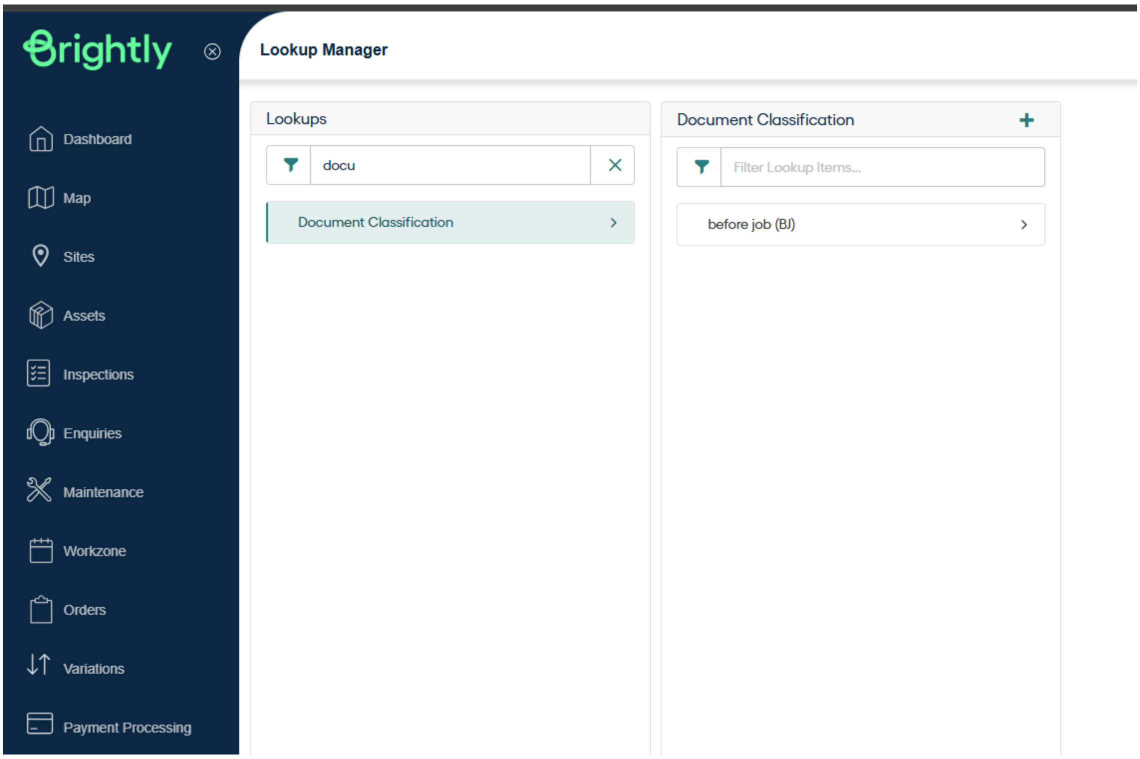
Additionally user has given the ability to change the document tag to Public or Private at any time,with User and Tenant level settings remaining intact. For Jobs,the document tag can be modified using the Document Visibility toggle button in the Documents Panel, as shown:



Document Classification

Users can now select the values from the Document Classification dropdown. By default it will be blank. A searchable drop down will present all the values that has been added under the Document Classification lookup.

Users can add Document Classification from lookups as shown:



Orders

Order Search

Search for Orders by entering one or more of the following search criteria: Order number, Contract (name or code), Contractor (name or code), Work Type, External Reference, or Notes.

To search using multiple criteria, include a <space> between each word.

The list of Orders matching the search criteria will be displayed below the search box. The list displays up to 100 Orders that match the search criteria.

Filters

The Filters button allows for advanced filtering of Orders by any of the following fields:

- Work Type
- Contract Area
- Status
- Confirmation Only
- Contract
- Contractor
- Order Date
- Committed Date
- Estimated Completion Date

For any of the lookup fields it is possible to filter Orders by one or more values.

For any date filters, it is possible to select from a number of predefined date ranges or to provide a specific date range by selecting the 'Custom Date Range' option.

Order Screen

Order Details

The detailed list of fields (listed below) for an Order can be seen on Order Details screen.

Contract Code

The Contract under which this Order will be issued.

Contractor

The contractor who will be executing the contract

Contract Area

A list of Contract Areas that may be applied to Sites and Features.

Work Type

Enter, or select from the drop down list the appropriate Work Type. If a Contract has been specified in against the selected Work Type and one has not already been entered on this screen, it will be entered in the Contract field.

Date/Time

The current date and time is automatically entered

Estimated Completion Date

The date by when the Order is estimated to be completed.

External Reference

Optional field to input additional information

Order Value

Displays the total value of the Order when Jobs are added.

Notes

An optional, free text field

Confirmation of Works Already Requested

Check this to print the words 'Confirmation Only' across the top of the Works Order print out

Order Jobs

Jobs associated with the Order are part of the Order Jobs panel.

Add

Select this option to add pre-existing Job to an Order.

Delete

Select this option to delete an existing Job added to an order.

Actions Buttons

Create

Create button will be available if the User has the User Security permission to Add Orders. It will open a new job in a separate tab.

Variations

Variation Search

Search for Variations by entering one or more of the following search criteria: Variation number, Contract (name or code), Contractor (name or code), Work Type, External Reference, or Notes.

To search using multiple criteria, include a <space> between each word.

The list of Variations matching the search criteria will be displayed below the search box. The list displays up to 100 Variations that match the search criteria.

The list can be further filtered based on the Variation Date by selecting an option from the *Created in* drop down next to the search box.

Filters

The Filters button allows for advanced filtering of Variations by any of the following fields:

- Work Type
- Contract Area
- Status
- Confirmation Only
- Contract
- Contractor
- Creation Date
- Committed Date

For any of the lookup fields it is possible to filter Variations by one or more values.

For any date filters, it is possible to select from a number of predefined date ranges or to provide a specific date range by selecting the 'Custom Date Range' option.

Variation Screen

Variation Details

The details of the Variation are shown here. It is possible to edit Uncommitted Variations using the pencil button.

Contract

This refers to the Contract under which the Variation will be issued. This field is only editable when creating a new Variation.

Work Type

This refers to the classification used to categorize different types of Work Orders within a system.

Contract Area

The Contract Area field becomes editable once a Contract is selected. It will display all Contract Areas associated with the chosen Contract. This field is only editable when creating a new Variation.

Date/Time

This will be defaulted to the current date/time when creating a new Variation, but can be manually overridden.

Confirmation only

Check this to print the words “Confirmation Only” across the top of the Variation Order printout via Confirm Enterprise.

Variation Jobs

Any Jobs on the Variation will be displayed here. If the Variation is being viewed in the Job screen side-panel, only the current Job will be displayed.

Clicking on a Job will display the Variation Job details and any Variation Items applicable to that Job.

Adding a Job

Use the + button at the top of the Variation Job section to add a Job to the Variation and filter for the Job using the Job Number field.

Set a New Target Completion Date and New Price Factor as required.

Editing a Job

To update the Target Completion Date or Price Factor click on the pencil button at the top of the Job Details panel.

Variation Items

Any Items currently being varied for the selected Job will be displayed here.

Adding an Item

Use the + button at the top of the Variation Item section to add an Item to the Variation.

On the Add Variation Item pop-up, either select an existing Item number to vary an existing Item, or enter a new one to add an Item.

The Item Dimensions and Quantity can be updated while adding the Item. For new Items, the Cost Code must also be entered.

Editing an Item

To update the Dimensions or Quantity of an Item already on the Variation, click on the pencil button for the required Item.

Variation Screen - Buttons

Commit

The Commit button will be enabled if the following conditions are met:

- The current User must have User Security permission to Commit
- The Variation must be ‘Uncommitted’.
- The Variation Job must have Items.

When the Variation is ready to be applied, click the Commit button.

Clicking on the Commit button will display a preview of the proposed changes plus any restrictions preventing the Commit.

Click the Save button on the Preview to Commit the changes and apply the Variation to the Jobs.

Note: The Commit button will only be visible to the users on database version 23.20 or above.

Create

The Create button will be available if the Current User has User Security permission to Add Variations.

Click on the Create button to create a new Variation. It will open a New Variation on a separate screen.

Payments

Payment Search

Search for Payments by entering one or more of the following search criteria: Payment number, Contract (name or code), Contractor (name or code), Invoice number, External Reference, or Notes.

To search using multiple criteria, include a <space> between each word.

The list of Payments matching the search criteria will be displayed below the search box. The list displays up to 100 Payments that match the search criteria.

The list can be further filtered based on the Payment Date by selecting an option from the *Created in* drop down next to the search box.

Filters

The Filters button allows for advanced filtering of Payments by any of the following fields:

- Finance Period
- Contract Area
- Status
- Contract
- Contractor
- Payment Date
- Received Date

For any of the lookup fields it is possible to filter Payments by one or more values.

For any date filters, it is possible to select from a number of predefined date ranges or to provide a specific date range by selecting the 'Custom Date Range' option.

Payment Screen

Payment Details

The details of the Payment are shown here. It is possible to edit Uncommitted Payments using the pencil button.

Payment Jobs

Any Jobs on the Payment will be displayed here. Clicking on a Job will display the Job details and any Payment Items applicable to that Job.

Adding a Job

Use the + button at the top of the Payment Job section to add a Job to the Payment and filter for the Job using the Job Number field.

Editing a Job

To update the Job Closed flag or Price Factor click on the pencil button at the top of the Job Details panel.

Deleting a Job

To remove the payment Job, click on the delete button for the required Job. All the associated Items will be deleted.

Payment Items

Any Items currently being paid for the selected Job will be displayed here.

Adding an Item

Use the + button at the top of the Payment Item section to add an Item to the Payment.

On the Add Payment Item pop-up, either select an existing Item number to pay an existing Item, or enter a number that does not exist on the Order Job to add an Item.

The Item Quantity and Tax Adjustment can be updated while adding the Item. For new Items, the Cost Code must also be entered.

Editing an Item

To update the Item Quantity or Tax Adjustment of an Item already on the Payment, click on the pencil button for the required Item.

Deleting an Item

To remove the payment Item, click on the delete button for the required Item.

Payment Screen - Buttons

Commit

The Commit button will be enabled if the following conditions are met:

- The current User must have User Security permission to Commit
- The Payment Batch must be ‘Uncommitted’.

When the Payment Batch is ready to be applied, click the Commit button.

Clicking on the Commit button will display a preview of the proposed changes plus any restrictions preventing the Commit.

Click the Save button on the Preview to Commit the changes and apply the Variation to the Jobs.

Note: The Commit button will only be visible to the users on Confirm database v25.00 or above.

Create

The Create button will be available if the Current User has User Security permission to Add Payments.

Click on the Create button to create a new Payment. It will open a New Payment on a separate screen. The Payment's fields can be edited/reviewed before saving.

Clear Payment

Available on uncommitted Payment Batches.

Click on the Clear Payment button under Action dropdown to clear all payment details from the Payment Batch.

Payment Requests

Payment Request Search

Search for Payment Requests by entering one or more of the following search criteria: Request Reference, Contract (name or code), Contractor (name or code), Request Classification, or Notes.

To search using multiple criteria, include a <space> between each word.

The list of Payment Requests matching the search criteria will be displayed below the search box. The list displays up to 100 Payment Requests that match the search criteria.

The list can be further filtered based on the Request Date by selecting an option from the *Created in* drop down next to the search box.

Filters

The Filters button allows for advanced filtering of Payment Requests by any of the following fields:

- Contract Area
- Job Action Officer
- Request Status
- Status
- Request Classification
- Contract
- Contractor
- Request Date

For any of the lookup fields it is possible to filter Payment Requests by one or more values.

For any date filters, it is possible to select from a number of predefined date ranges or to provide a specific date range by selecting the 'Custom Date Range' option.

Batch

The 'Batch' button allows you to perform batch actions on selected Payment Requests only when the 'Payment Request Checking', 'Payment Request Authorisation' or 'Batch Create Payment' toggle is selected as 'YES' under 'Quick Filters' :

1. Request Checking
   - Clicking on 'Request Checking' under the 'Batch' button shows the preview of the payment requests that have been checked, any payment requests that do not meet the request checking criteria will be displayed with the reasons for failure.
   - Clicking on 'Save' will update the Request Status to the 'Checked – OK' or 'Checked – Suspended' Statuses configured in Payment System Settings.
   - After submission, a pop-up message will appear 'Payment Request updated successfully'
2. Request Authorisation
   - Clicking on 'Request Authorisation' under the 'Batch' button will display a pop-up to enter an 'Authorised By' value.
   - Clicking on 'Continue' will show the preview pop-up displaying the Payment Requests being Authorised along with any payment requests that cannot be authorised with the reasons for failure.

- Clicking on 'Save' will update the Request Status to the 'Authorised' Status configured in Payment System Settings.
- After submission, a pop-up message will appear 'Payment Request updated successfully'.

3. Payment Batch

- Clicking on 'Payment Batch' under the 'Batch' button will display a pop-up to select the finance period.
- Clicking on 'Continue' will show a preview displaying a list of Payment batches that will be created.
- Clicking on 'Save ' will create the payment batches and generate the required payment numbers.
- After submission, a pop-up message will appear 'payment Request updated successfully'.

Once Jobs are entered onto Requests with the amounts requested for Payment, the requested values are checked against the original Job values and 'passed ' or 'failed ' according to the tolerances set in the Contract and the checks performed by a Request Checking Data Source which has optionally been supplied in the Payment System Settings.

Requests which are 'passed' will be available for Authorisation for payment.

Where the Payment Value is different from the original value, an automatic Variation Order will be raised and committed to account for the difference when the Request is paid.

The Jobs on these Requests can then be placed on a Payment Batch and paid.

Request Authorisation will automatically update all requests with a current Status of 'Checked' to a Status of 'Authorised'.

Payment Request Screen

Payment Request Details

The details of the Payment Request are shown here. It is possible to edit Uncommitted Payment Requests using the pencil button.

Payment Request Jobs

Any Jobs on the Payment Request will be displayed here. Clicking on a Job will display the Job details and any Payment Request Items applicable to that Job.

Adding a Job

Use the + button at the top of the Payment Request Job section to add a Job to the Payment Request and filter for the Job using the Job Number field.

Editing a Job

To update the Job Closed flag, Requested Value, Remeasured Flag, or Price Factor, click on the pencil button at the top of the Job Details panel.

Removing a Job

To remove the Payment Request Job, click on the bin button for the required Job. All the associated Items will be removed.

Payment Request Items

Any Items priced under the Contract for the selected Job will be displayed here.

Adding an Item

Use the + button at the top of the Payment Request Item section to add an Item to the Payment Request.

On the Add Payment Request Item pop-up, either select an existing Item number to pay for an existing Item or enter a number that does not exist on the Order Job to add an Item.

The Item Quantity and Tax Adjustment can be updated while adding the Item.

Editing an Item

To update the Item Quantity or Tax Adjustment of an Item already on the Payment Request, click on the pencil button for the required Item.

Removing an Item

To remove the Payment Request Item, click on the bin button for the required Item.

Payment Request Screen - Buttons

Create

The Create button will be available if the Current User has User Security permission to Add Payment Requests.

Click on the Create button to create a new Payment Request. It will open a New Payment Request on a separate screen. The Payment Request's fields can be edited/reviewed before saving.

Confirm Map

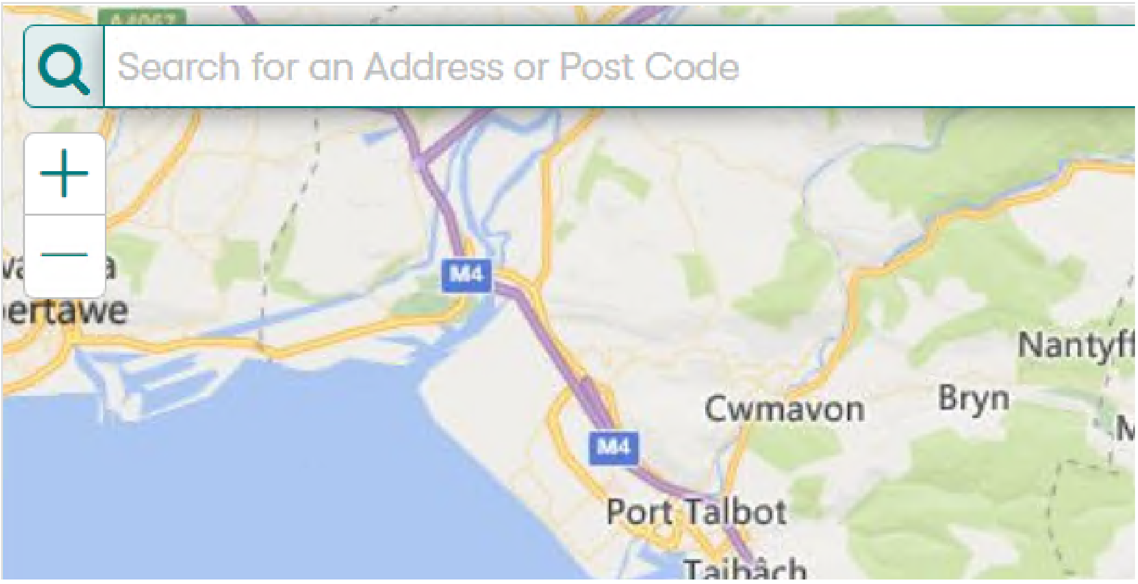
The Map enables text and spatial searching across Enquiries, Jobs, Defects and Features.

Please refer to the **Confirm Map** page for more information about the various features available on the Map.

Map

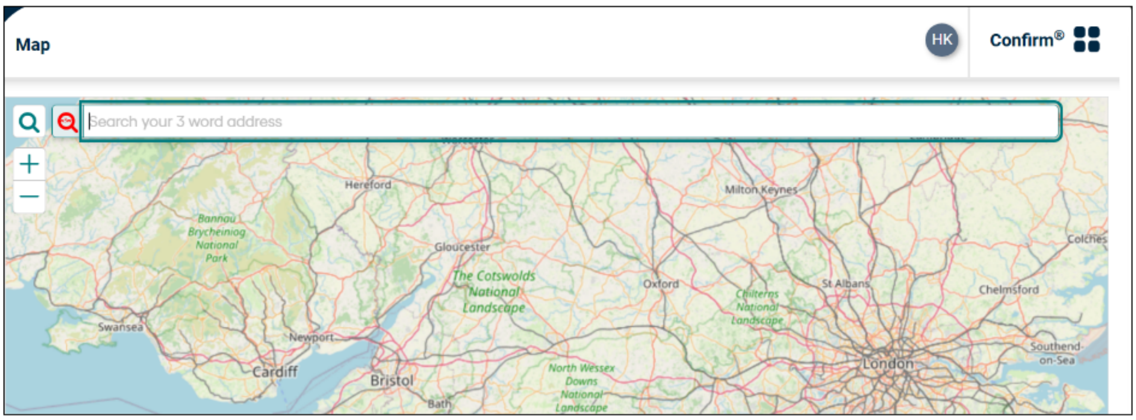
Map Search Button

Locations, addresses, and post codes can be searched for by clicking the Search button.



What 3 Words Search Button

Location can be searched by clicking the What3Words Search button and entering the 3 words associated with a location.

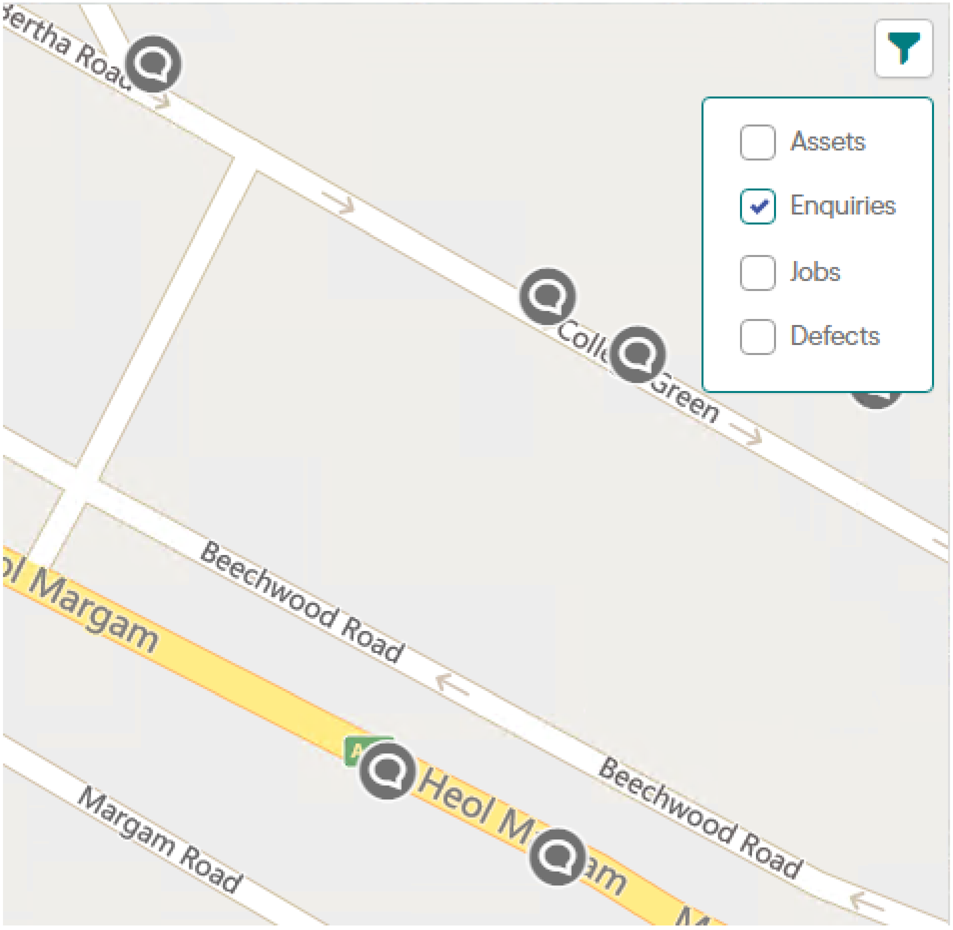


The What3Words search icon will be hidden by default. The User would have to purchase and enter the What3Words API Key under Integrations. The purchase can be made by the User from **plans and pricing**.

Once the subscription quota for the selected plan is exhausted, Quota exceeded error will be shown to the User. The User would have to either upgrade their plan (if they want to do more searches within that month) or wait for the month to get over and then again enable the What3Words search icon for their Users, from What3Words API Key page under Integrations.

What's Going On Here

When zoomed in to a location nearby entities can be shown by clicking the What's Going On Here button at the top right of the map and selecting the options from the list. The entities will refresh as the map is moved.



Entities are included according to the following rules:

Features

- Features are restricted by Device Data Key Security on the Feature Group (see the Feature Group lookup in the Confirm desktop client).

Enquiries

- Enquires will be displayed that have been created or updated in last six months.

Jobs

- The Job is scheduled to start in the next thirty days.

- Or the Job has been completed within the last year.
- Or the Job has not been completed but some activity has been performed on it within the last year and the Job has not been archived.
- For Contractor users, the Job must also be at a Job Status with the 'Available to Contractor' flag ticked.

Defects

- Defects will be displayed if they are not superseded, and are not set to 'No Action Required'.

Map Filter Button

The 'What's Going On Here' results can be filtered by the following:

All entities

- Feature ID
- Feature Group
- Feature Type

Jobs

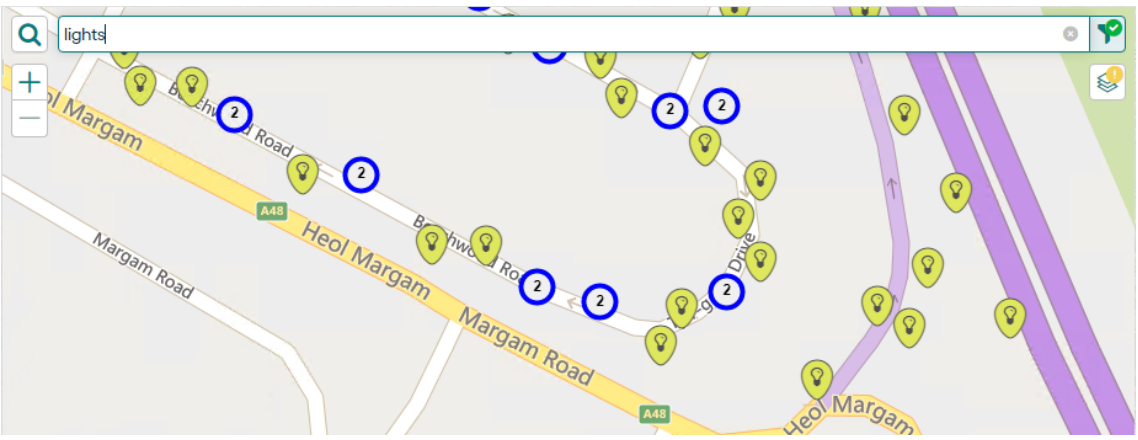
- Job Number
- Type
- Status
- Description
- Location

Enquiries

- Enquiry Number
- Subject
- Service
- Location

Defects

- Defect Number
- Type
- Location
- Priority



Current Entity Button

When viewing the Map on the Job, Defect, or Feature screen, this button will pan/zoom the map to the current Job, Defect, or Feature respectively.

Drawing Tool Palette

On the Job screen, the Drawing Tool Palette allows the geo-location and geometry of the Job to be edited. The Drawing tools support point, line, and polygon geometries.

Click the pencil button to open the Drawing Tool Palette and select the Point, Line, or Polygon drawing tool.

Clicking the 'X' button to clear the current geometry.

Nodes can be added to a line geometry by clicking on the required position on the line. Similarly, nodes can be added to a polygon geometry by clicking on any edge.

Nodes can be removed by clicking on them.

To draw free-hand, hold down the 'shift' button on your keyboard while drawing.

Aerial Map Button

Click the Aerial Map button to change the background map to the 'aerial' map, as configured on the Web Settings screen.

Road Map Button

Click the Road Map button to change the background map to the 'roads' map, as configured on the Web Settings screen.

Info Popup

Clicking on any item on the map will display the Info Popup.

The Info Popup displays the following details:

Features

- Site
- Feature ID (if available)
- Type
- Plot Number

Jobs

- Job Number
- Job Type
- Status
- Target/Actual Completion Date

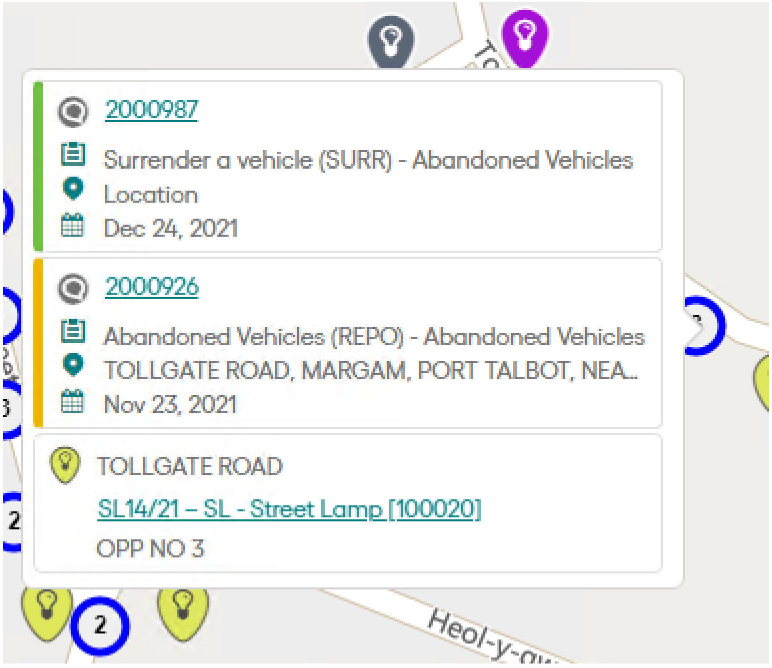
Enquiries

- Enquiry Number
- Status
- Description (or Subject if Description not available)
- Location (or Site if Location not available)
- Logged Date

Defects

- Defect number
- Defect Type
- Defect Creation Date

If more than one entity is at same location, a cluster is displayed in that location, with the count of overlapping entities.



Reporting

Reporting Configuration

Introduction

The Confirm Web - Reporting is a web-based interface for creating and running reports.

The Reporting page can be accessed via the Navigation Panel.

To access the Confirm Web Reporting, users will need ‘View’ access to the 'Data Queries' screen in their user Program rights in Confirm.

How to use Confirm Web - Reporting

The Confirm Web – Reporting screen is split into three sections:

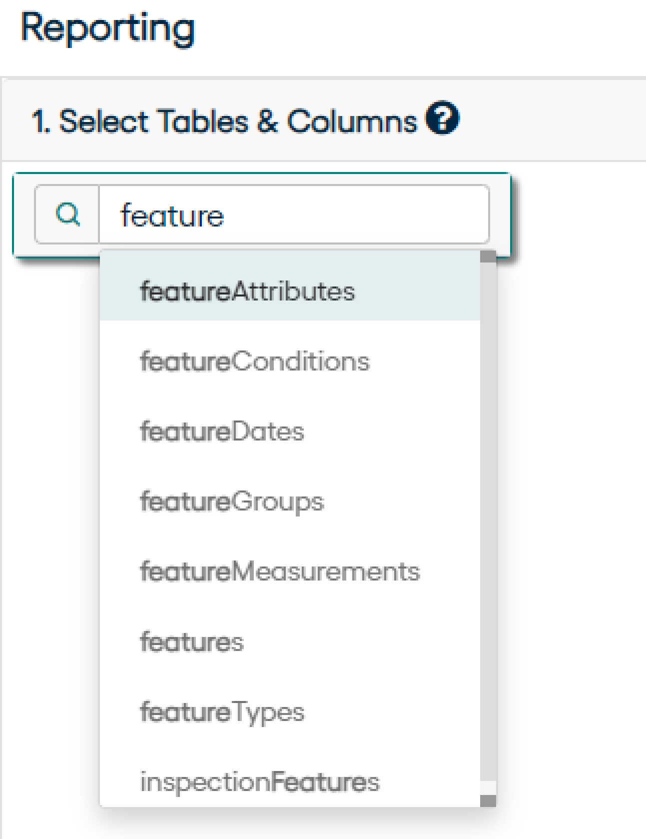
- The **Select Tables & Columns** section, at the top left, where the tables and columns to be interrogated are selected.
- The **Set Display Preferences** section is found in the tabbed box at the top right-hand side.
- The **Set Filters** section is found on the other tab of the top right-hand box.
- The **Report Results** are seen along the bottom of the screen.

Select Tables & Columns

In this section users can select table(s) and corresponding column(s). Users can select multiple tables and columns to generate a report.

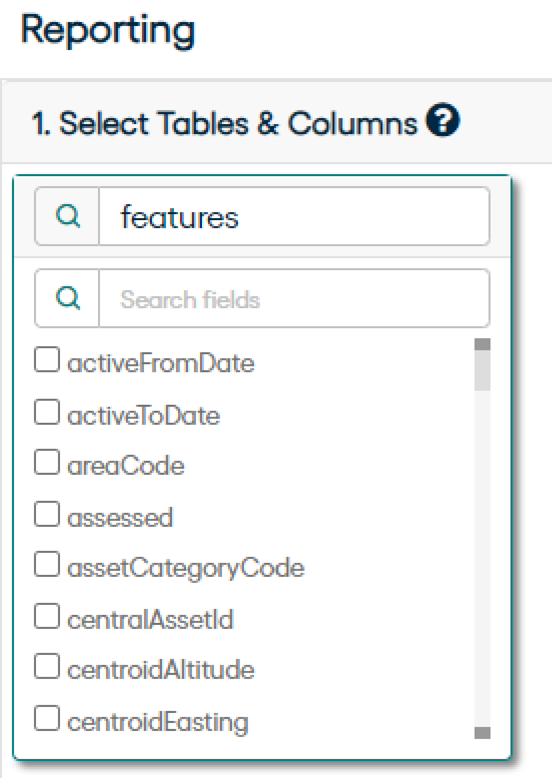
Clicking on the 'Search entities' box will list all available entities. Table and Column names are typically based on the names in Confirm.

For instance, Feature related tables can be found by searching for text 'feature'. To select columns available within Feature table, select Features which loads the Feature entity and lists available columns in search-able drop-down list, as seen below:



Columns can be selected from the list, or by searching using the ‘Search entities’ box.

The first table of the report, displayed at the top left is the root table. Linked tables may be opened to the right of the root table by selection from the 'Search fields' list. Linked Tables will be seen with a greater than (>) symbol at the end of their names.



Set Display Preferences

This section is used to set the preferences for displaying the results.

Report Name	Apply a name for the report which can be used in header or footer in the PDF output. This setting is available only in the root table of the report and defaults to the root table name.
Image Maximum Height/Width (in px)	This setting determines the height and width for images that will be included in the report and can be specified as values between 30 and 9999 pixels. When one of the image dimensions - height or width exceeds the maximum size, it is reduced to meet the maximum size, and the aspect ratio is maintained by reducing the other dimension. This setting is available only in the root table (first on the left) of the report and defaults to the 1000 pixels.
Table Name	This field is only available for tables other than the root table. It can be used to override the display name of the selected table. This field defaults to the actual table name.
Display Layout	This can be used to specify the layout of the selected table. Currently, three display options are supported: • Display as Table • Display as Cards • Display follows from parent. The parent table is the table immediately to the left of the selected table, and if this option is selected this layout will trickle down from the parent. This field defaults to the 'Display as Table' for the root table and for all other tables 'Display follows from parent' is used as default.
Columns Name	This can be used to override the display name of the columns in the selected table. Defaults to the actual column name.

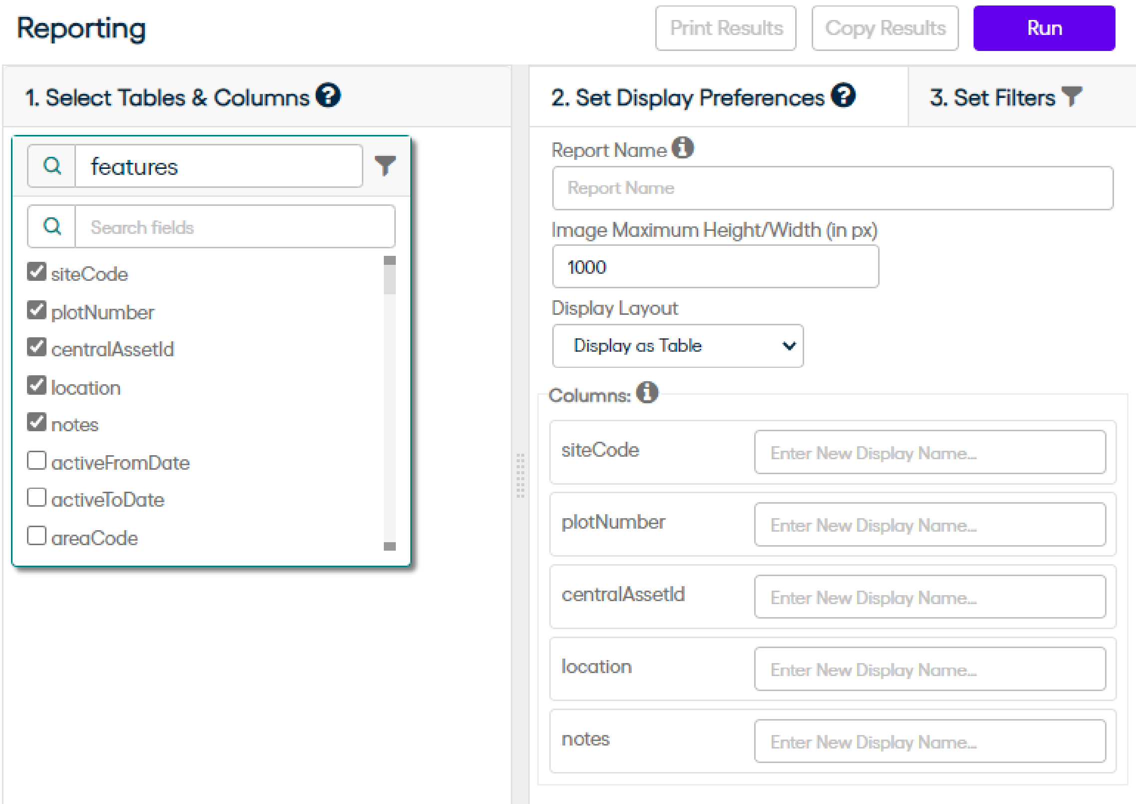
'Report Name', 'Table Name(s)' and 'Column Name(s)' must:

- Be made up of only alphanumeric characters,
- Start with an alphabetic character,
- Have no spaces.

Special characters, except underscore ‘_’, are not supported.

All Display Preferences are optional and if not specified then default values will be used while running the report.

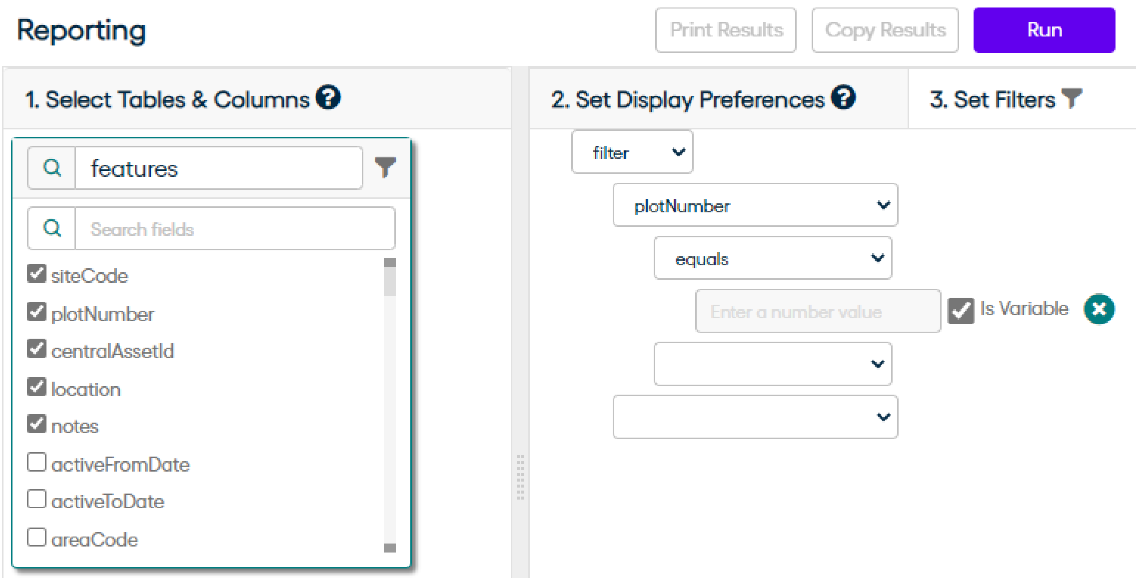
Sample screen-shot is as below:



Set Filters

This is used to filter the results. Once the filter is applied to a table, it will display a filter icon

- Static filters will be applied every time the report is run unless the filter options are changed.
- Dynamic filtering is applied by selecting the 'Is Variable' checkbox. This means that the filter value must be entered each time the time the report is run.

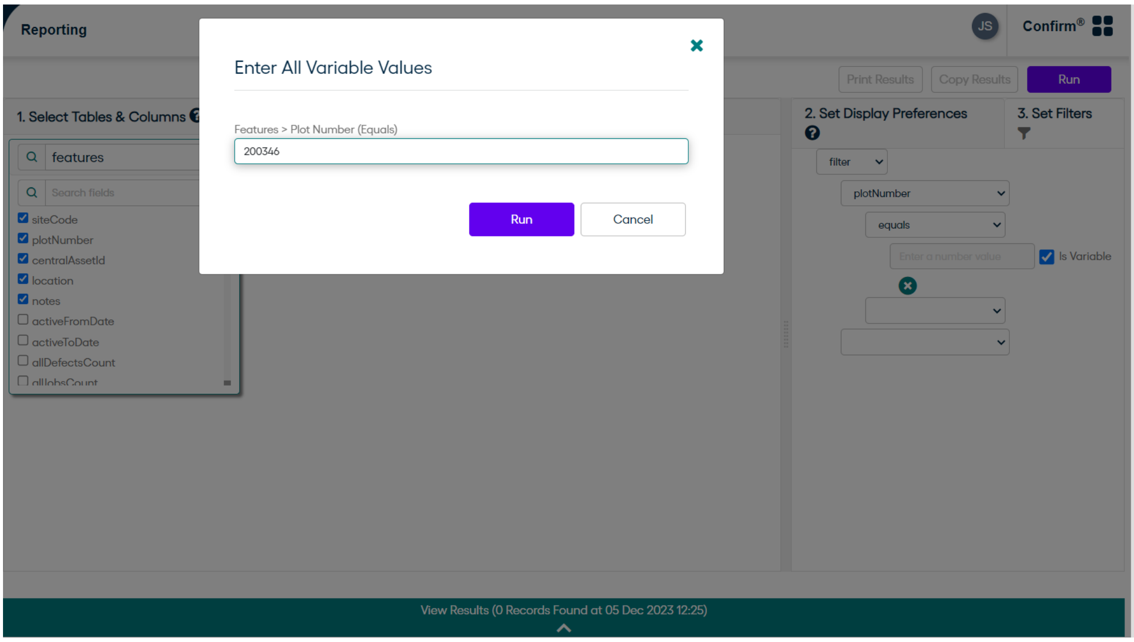


Once a filter is set it can be removed by clicking the Clear Filter icon.

Running a Report

Clicking on the 'Run' button will display the results in the results panel, which is maximized by default. Users can toggle between the Result panel and the Settings panel as desired.

If one or more columns are indicated as variable(s) clicking on the run button will prompt the user to enter value(s) for the specified column(s).



Populating the variables and clicking the 'Run' button on the Pop-Up will run the report and display the results.

The results can be saved in the PDF format by clicking on the 'Print Results' button after expanding the Results panel.

The output PDF can also include custom header and footer, these can be simple html snippets which could include text and images like logos etc

Note: The SQL to enable a custom Header and Footer can be obtained by reaching out to the Confirm Technical Support.

'Copy Button' can be used to copy the results and then paste it in external applications like excel spreadsheet.

Saving a Report

Running a Report embeds its configuration in the URL. Bookmark the report URL to save it and make it available to be run again.

Where a linked document is an image, the images linked to an entity can be viewed in the results and included in the output PDF as well.

Where the linked document is not an image, an icon will be displayed with the file extension.

Files that can be opened by a browser, such as text files or with the help of a plug-in like Adobe Reader for PDFs, will open directly in the browser.

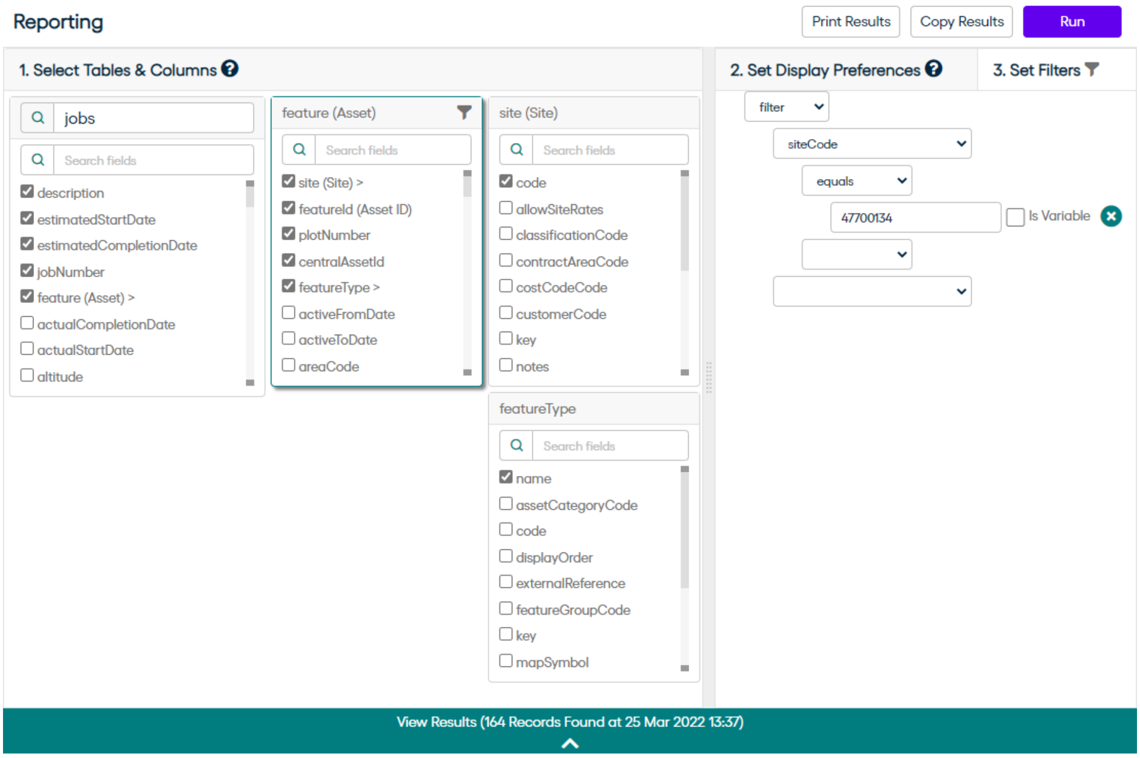
Where a file cannot be displayed it can be downloaded locally on the User's computer.

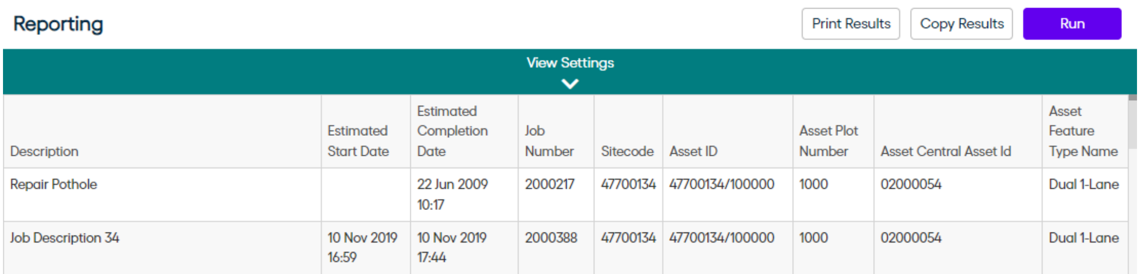
Example Report

Below is an example of a sample Job report having few Job details, some columns from associated Feature table, some columns from linked Defects & Jobs, linked documents and the jobNumber is set as a variable here.

Sample URL: *http://ConfirmWebServer/confirm/web/app/index.html?tenant=DatabaseId#/reporting?query=%7BJobReport:jobs(filter:%20%7BjobNumber:%20%7Bequals:$jobs_jobNumber_equals%7D%7D)@_card@_size_800%7BjobNumber%20asset:feature@_table@_size_800%7Bsite@_size_800%7BcentralSite@_size_800%7BsiteName:name%7D%7D%20Alias:featureId%20sequenceNumber:plotNumber%20featureType@_size_800%7BassetType:name%7D%20centralAssetId%7D%20description%20location%20estimatedStartDate%20estimatedCompletionDate%20jobType@_size_800%7BjobType:name%7D%20statusLogs@_table@_size_800%7BloggedDate%20jobStatus@_size_800%7BjobStatus:name%7D%20statusNotes%20loggedByUser@_size_800%7BloggedByUser:email%7D%7D%20attachments:documents@_card@_size_800%7BimageName:documentNotes%20image:url%7D%20enquiries@_card@_size_800%7BenquiryNumber%20centralEnquiry@_size_800%7BenquirySubject@_size_800%7BsubjectName:name%7D%20loggedDate:loggedDate%20statusLogs@_table@_size_800%7BloggedDate%20enquiryStatus@_size_800%7BjobStatus:name%7D%20notes%20loggedByUser@_size_800%7BloggedByUser:email%7D%7D%20attachments:documents@_size_800%7BimageName:documentNotes%20image:url%7D%7D%7D%20defects@_size_800%7BdefectNumber%20defectType@_size_800%7Bname%7D%20loggedDate%20targetDate%20attachments:documents@_size_800%7BimageName:documentNotes%20image:url%7D%7D%7D%7D*

Note: DatabaseId in the URL is the database ID found in the configuration file, the location of which is specified in the registry.





Launch Entity Reports

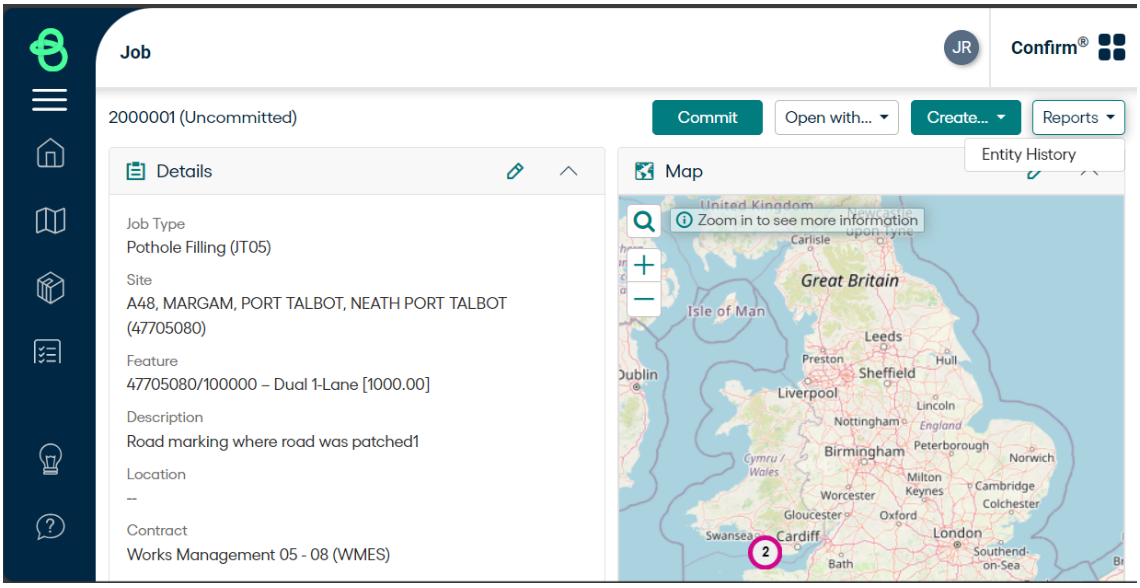
Introduction

The Confirm Web - Reporting screen has been integrated with the various entity screens such as Jobs, Enquries and Defects.

When a report is linked to an Entity then that page will display a "Reports" button.

Launching a Report

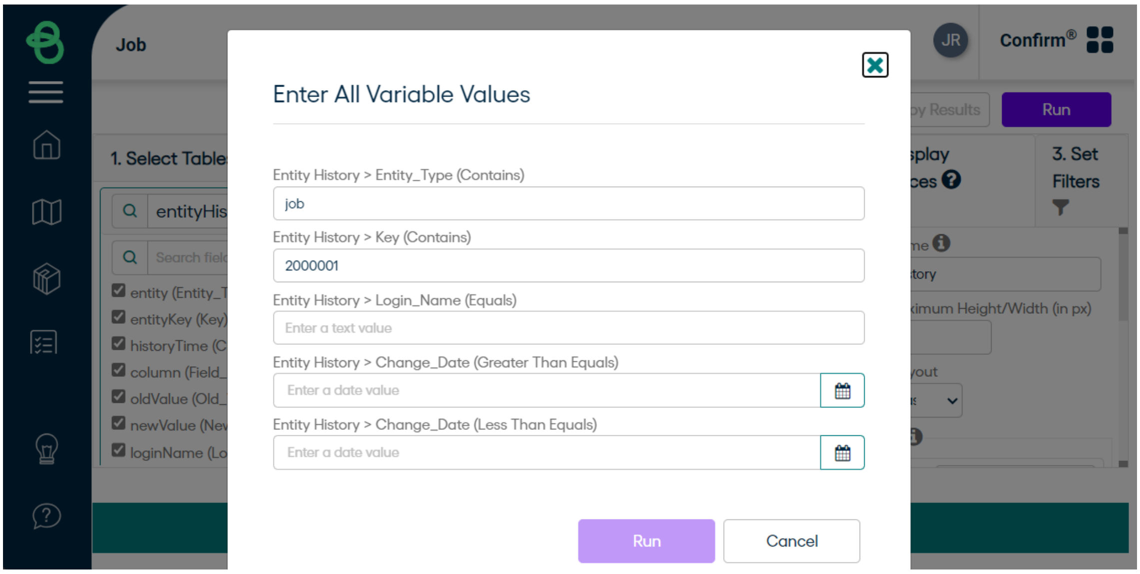
When the report button is clicked, any Reports linked to that entity will be displayed in a list:



Clicking on one of the reports will open that report in a new window.

If the report is linked to filter criteria then these will be defaulted to the values from the Entity where possible.

For example, launching the "Entity History" report will cause the entity key filter to be automatically populated with the entity key from the screen where the report was selected.



Strategic Asset Management

Confirm Strategic Asset Management allows asset managers to predict long term condition of their assets using current condition and applying algorithms. It also allows asset managers to assess cost of maintenance over long term to meet their service levels.

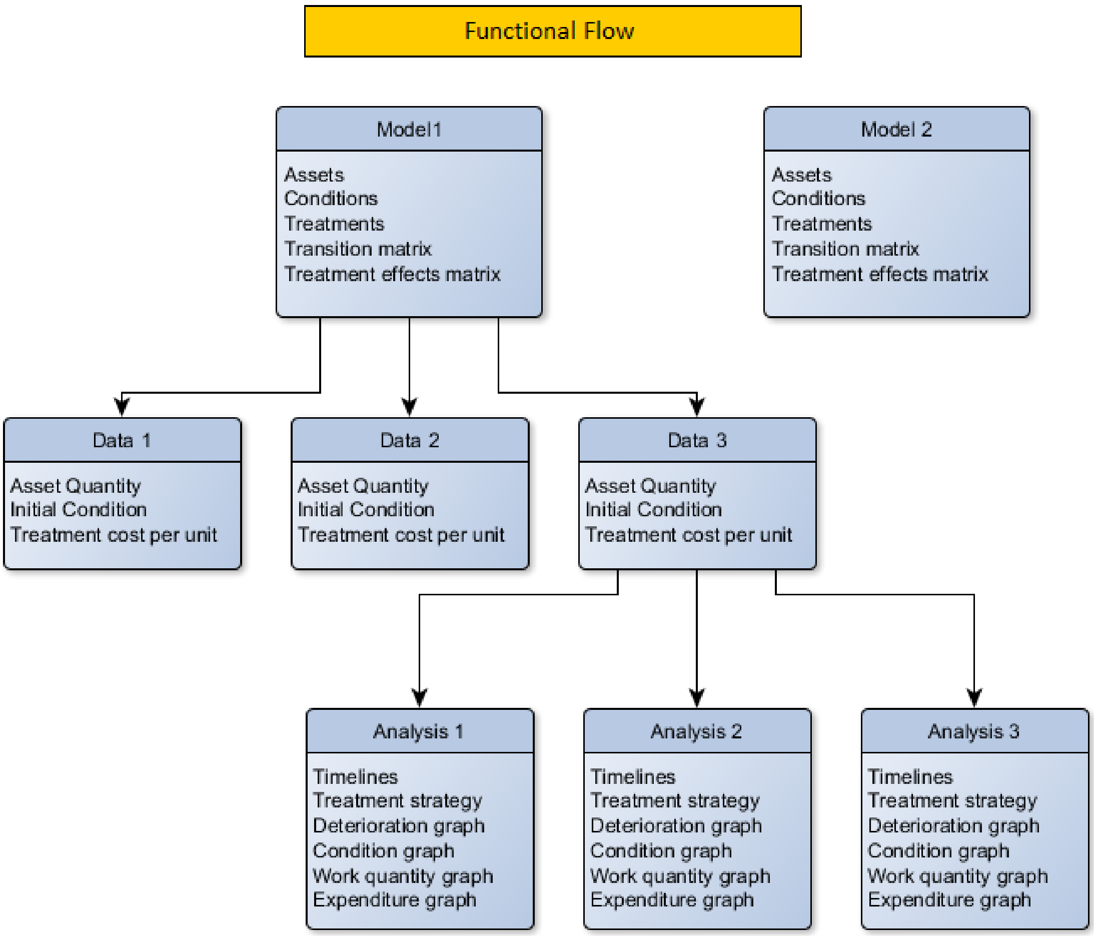
Confirm Strategic Asset Management application has three main parts: Model, Data and Analysis.

Model allows user to create asset groups and rule sets which are input to algorithms determining long term condition and cost analysis.

Data allows user to provide asset group quantity, initial condition and unit cost of treatment distribution which is used during Analysis. Application has the capability to pull asset and initial condition attribution data from Confirm.

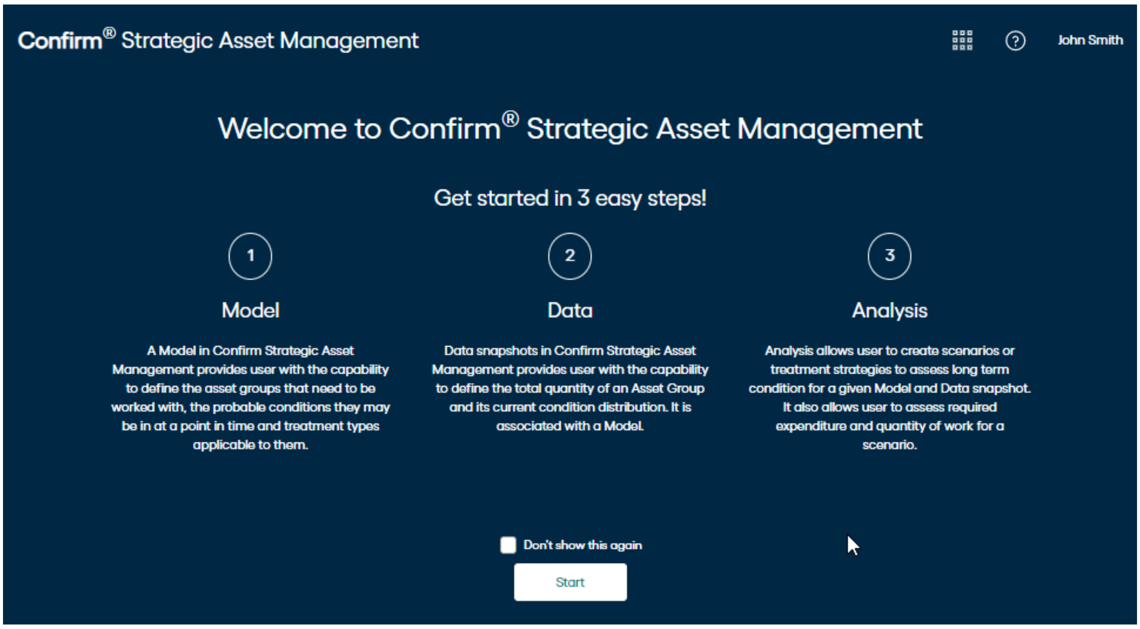
Analysis allows user to create scenarios or treatment strategies to assess long term condition and expenditure for a scenario. Before carrying out any Analysis, a set of Model and Data is required.

The flowchart below describes the functionality of Confirm Strategic Asset Management application at a high level.



Landing Page

On successful sign in, user will be redirected to the landing page of Confirm Strategic Asset Management, like below:



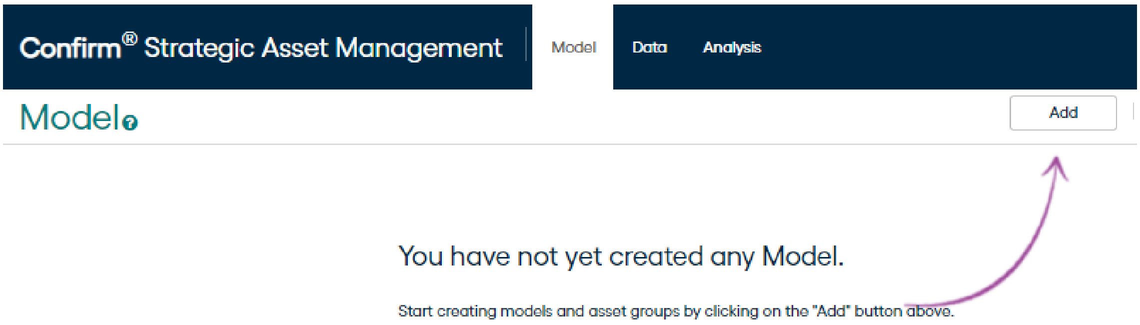
Start button will take user to the main application.

Note: Do not show this again: ticking will skip the landing page for user on all subsequent login.

Model

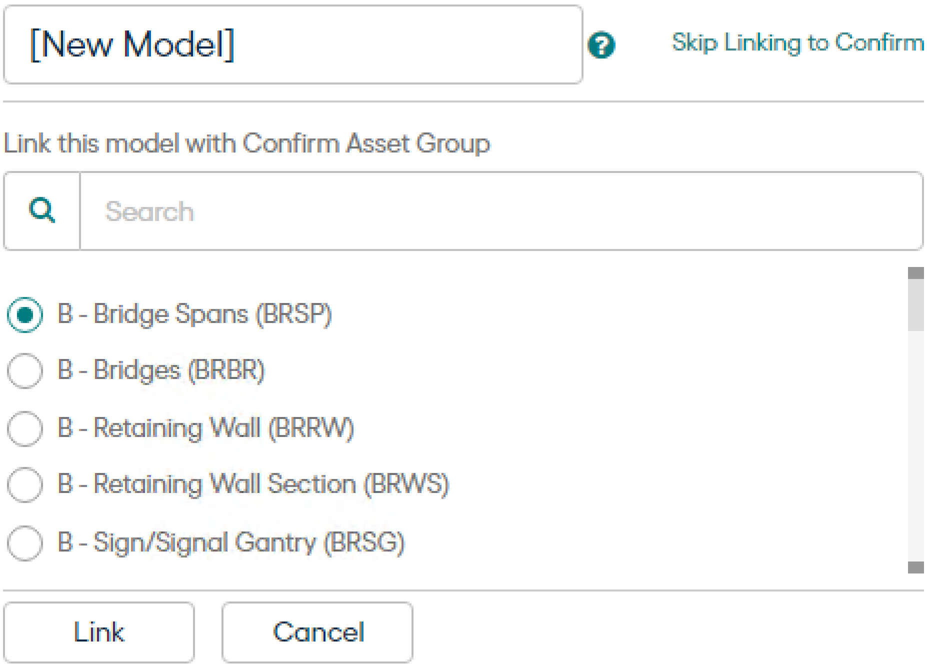
Creating Model is the first step in using Confirm Strategic Asset Management. A Model in Confirm Strategic Asset Management provides user with the capability to define the asset groups that need to be worked with, the probable conditions they may be in and treatment types applicable to them. This enables the application with the asset groups and rule sets which are input to algorithms determining long term condition and cost analysis.

Click Add button to start creating a Model.



Linked Model or Independent Model

A Model can either be linked to Confirm feature group or created independently. Model Name can be specified in [New Model] placeholder.



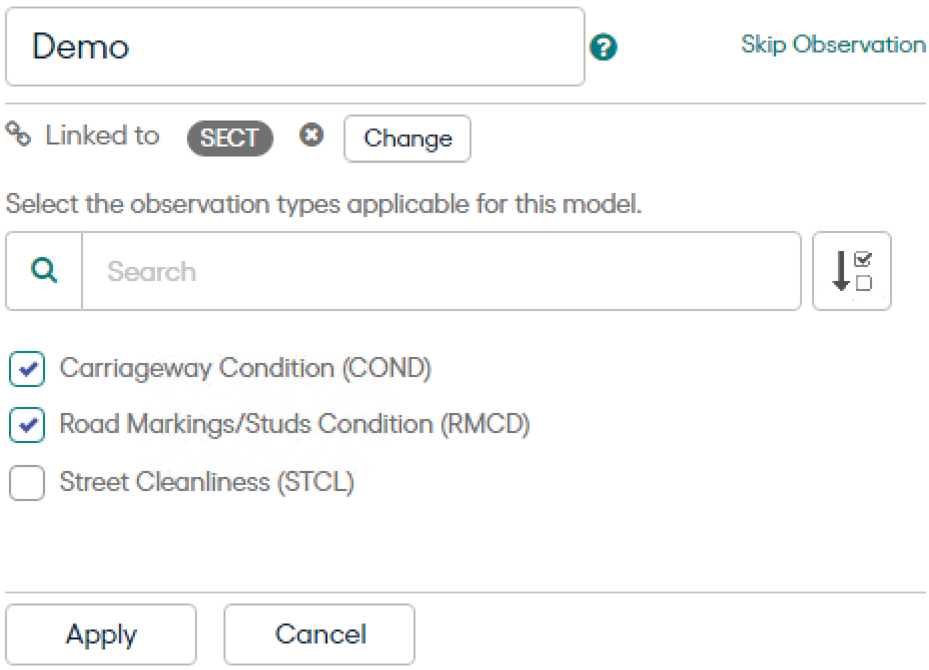
A linked Model is one which can refer to a Feature Group in Confirm to get all the asset and condition information. To create a Confirm Linked Model, user needs to choose a Confirm Feature Group from a list of Feature Group displayed.

Link Button: Links the selected Feature Group to the Model and proceeds to selecting the Observation Types (which have been enabled for Condition Assessment in Confirm) to be selected, for the linked Confirm Feature Group.

Skip Linking to Confirm: Use this option to create an independent Model which is not linked to Confirm Data. This option will take user to Model creation.

Select Observations

This page is available only for linked Model. The observation types associated with selected Feature Group and marked for Condition Assessment in Confirm, are available for selection.

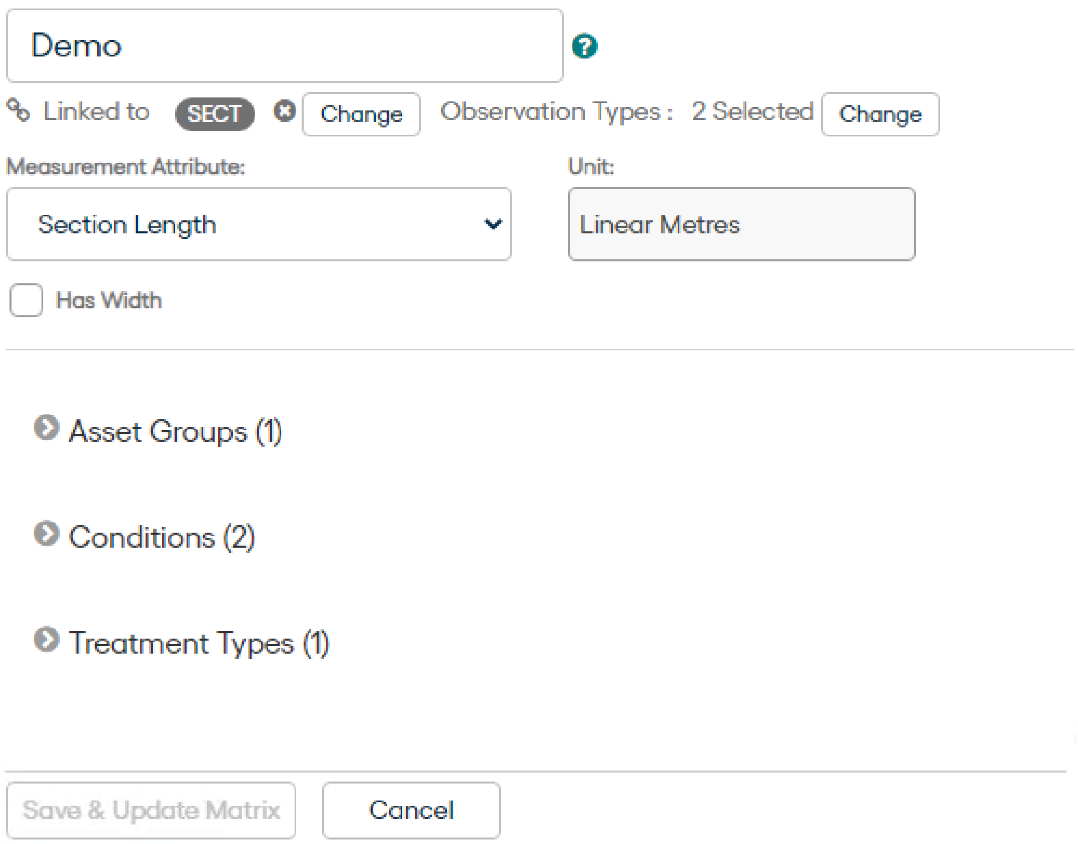


Apply: links the selected observation type to the Model being created

Skip Observation: Use this option to not link any observation type to the Model being created

Model Creation

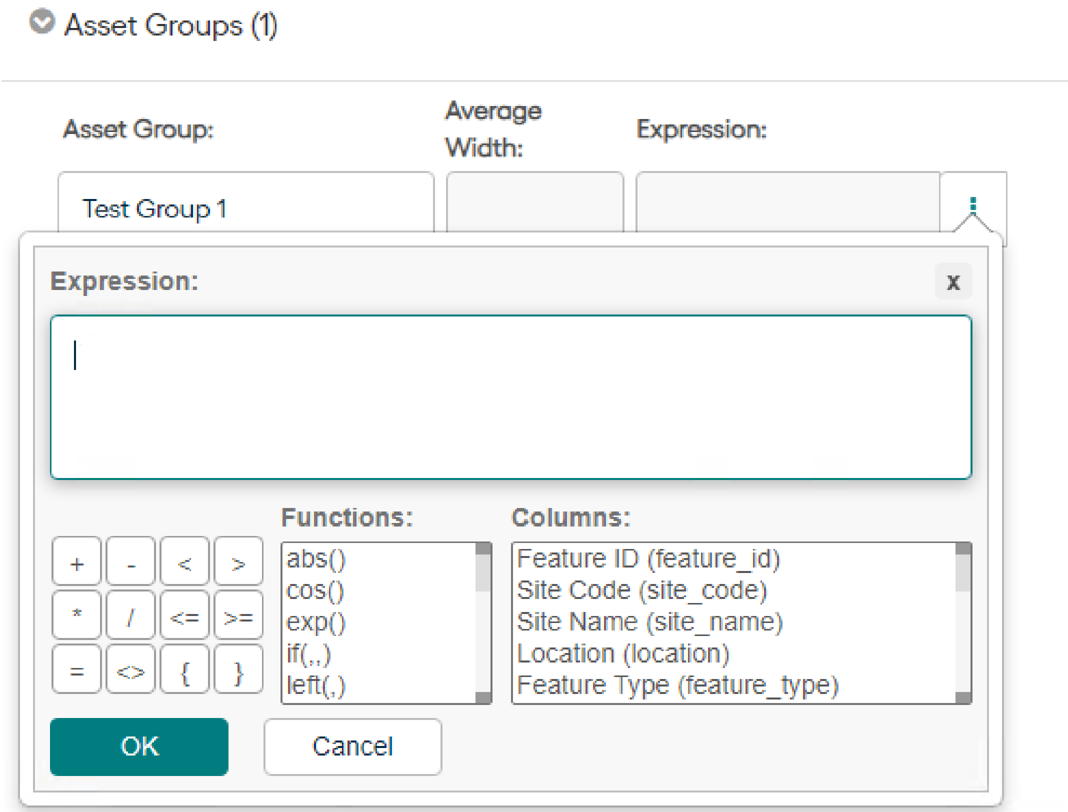
Model creation requires Asset Groups, Conditions and Treatment Types to be defined:



Measurement Attribute: Available only for Confirm Linked Model. Allows to select a measurement attribute that will be used to fetch asset quantity for the asset groups defined. We should also discuss about Units. This is automatically populated for Linked Model but is a selectable dropdown for Independent Model.

Has Width: Checking will consider Asset Groups as having width and user can specify width against each asset group. We should mention that for linked model this will be enabled only for linear assets.

Expression builder: Expression builder is available for Asset Groups and Conditions for Confirm Linked Models. It allows user to define an expression which is used to bring data from Confirm and assign corresponding Asset Quantity and Condition distribution value (in Data tab) for the Model.



Following columns are available and in that order in the expression builder to create expressions:

Feature ID, Site Code, Site Name, Location, Feature Type, Area Code, Contract Area, Classification.

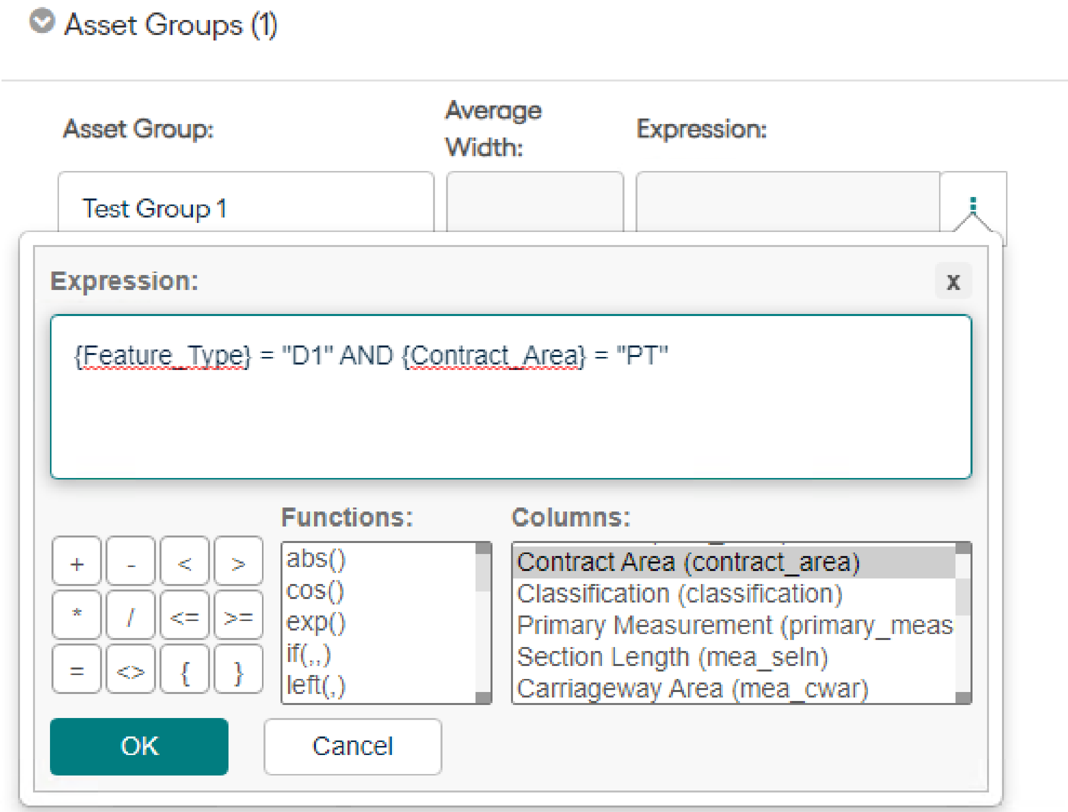
Except Feature ID, Site Name and Location, all other columns use their value code as defined in Confirm lookups for expression evaluation. All Measurement Attributes and Primary Measurement of Feature Group can also be used to create expressions. Condition Observations selected while creating Model can also be used to create expression. Additionally, all user defined pick list attributes are also available to create expression.

The measurement attributes, observations and user defined pick list attributes are evaluated for the value stored in them.

The operations and functions as available in expression builder can used to create expressions. The column value for a non-numeric field need to be specified within double quotes “” for a valid expression.

Asset Groups: The asset categorization according to which they need to be analyzed over a period of time.

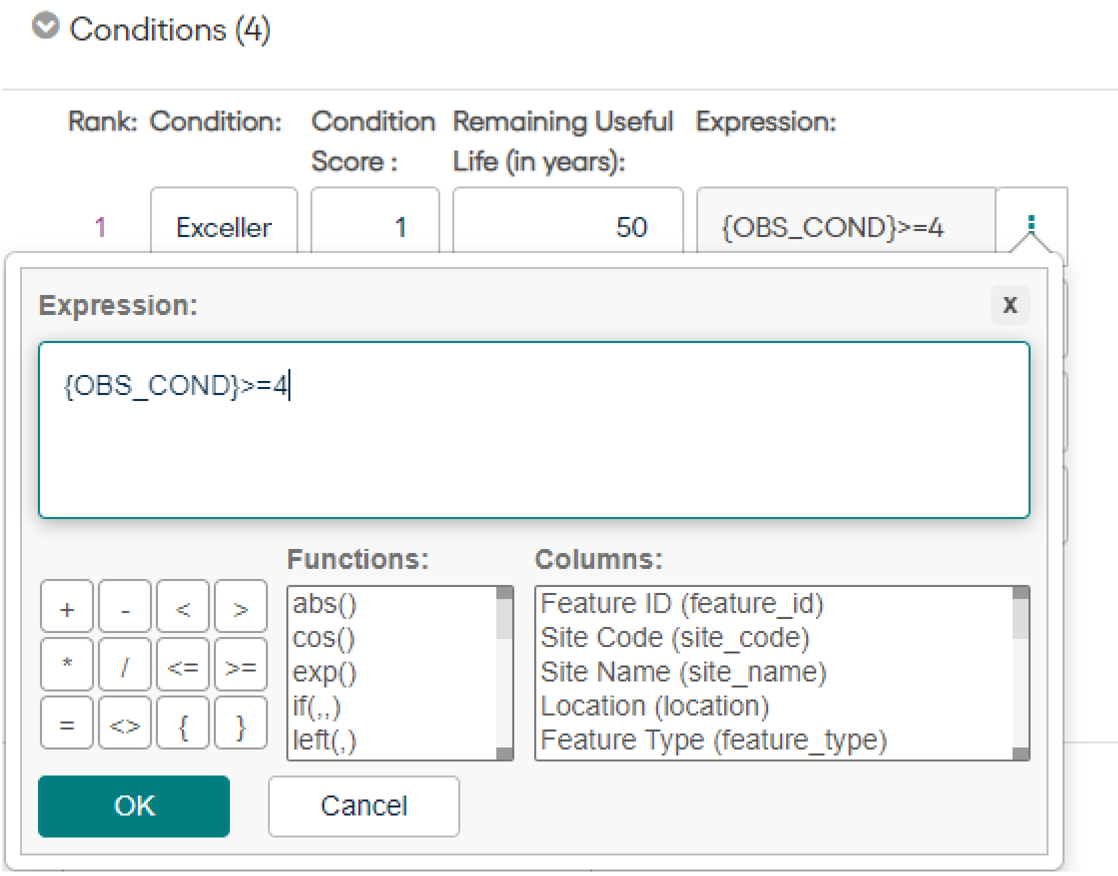
Asset Group: Name of the Asset group being created.



Average Width: Enabled only if ‘Has Width’ has been checked. It will be used in treatment costing while doing analysis by multiplying the quantity with the width. It is useful in linear assets like roads that are measure in length but treatment costs are in square units.

Expression: Enabled only for Confirm linked Model. It is used to define expression which will be evaluated against feature group assets and put the quantity against each asset group as per expression. Like in the image above, all assets with Feature Type ‘D1’ and within Contract area ‘PT’ will be put under Test Group 1 and a quantity as per sum of their primary measurement will be assigned to Test Group 1 in Data tab if data is pulled from Confirm.

Conditions: the probable condition bands in which an asset class can be in.



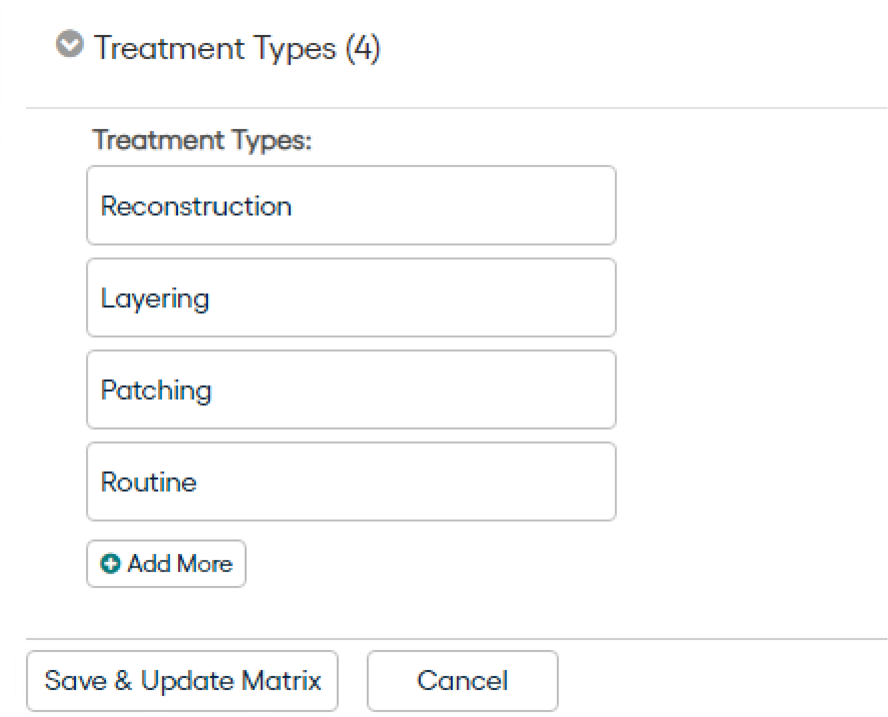
Rank: Rank of the Condition. It is ranked from best to lowest, with 1 being the best and is read only.

Condition Score: It is the numerical score assigned for each condition.

Remaining Useful life: Expected Remaining Useful Life of asset defined in years.

Expression: Enabled only for Confirm Linked Model. It is used to define expression which will be evaluated against feature group asset condition. The resulting features' quantity will be aggregated and put in the Initial Condition against each condition defined. Like in the image above, all assets with Feature Condition having 'Carriageway Condition' Observation of value greater than 4, will be considered under Excellent condition within Test Group 1. And a quantity as per sum of their primary measurement will be assigned to Test Group 1 in Data tab if data is pulled from Confirm. The language in this para seems to be cryptic and difficult to understand. This document should be given to a new user in confirm and asked to follow these steps.

Treatment Types: The interventions that can be done with the asset groups while creating Analysis.



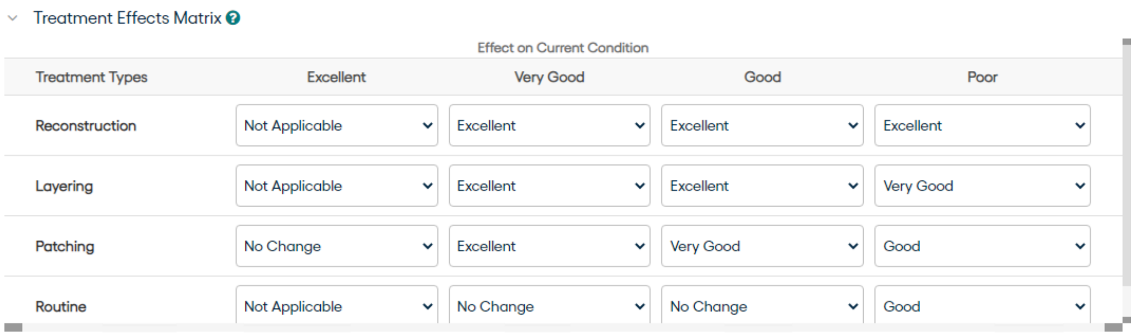
Save & Update Matrix will create a Model definition and take user to Matrix page.

Transition Matrix: Transition Matrix within a model is a transition probability matrix in 'As-is' state. Transition Matrix determines the probability with which an Asset Group in a Model will remain in current condition if no treatment is applied to it, in one year. It also determines the probability of Asset Group to deteriorate to worse condition(s) in a year if no treatment is applied. The matrix values need to be provided by users.

Transition Matrix

	Condition after one year (Probability %)				
Current Condition	Excellent	Very Good	Good	Poor	Δ
Excellent	50	30	15	5	0.00%
Very Good		50	40	10	0.00%
Good			70	30	0.00%

Treatment Effect Matrix: Treatment Effects Matrix Treatment Effects Matrix determines the effect on condition of an Asset Group when a particular treatment type is applied to it. A treatment type can only keep the condition of Asset Group same or make it better.



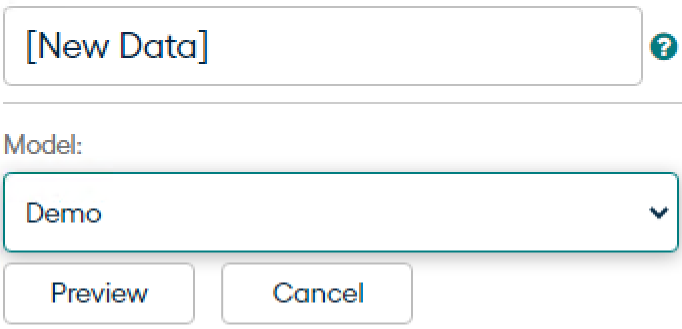
Treatment Effects Matrix

	Effect on Current Condition			
Treatment Types	Excellent	Very Good	Good	Poor
Reconstruction	Not Applicable	Excellent	Excellent	Excellent
Layering	Not Applicable	Excellent	Excellent	Very Good
Patching	No Change	Excellent	Very Good	Good
Routine	Not Applicable	No Change	No Change	Good

Clicking Save on top of the Model page will save metrices and Model creation is now complete.

Data

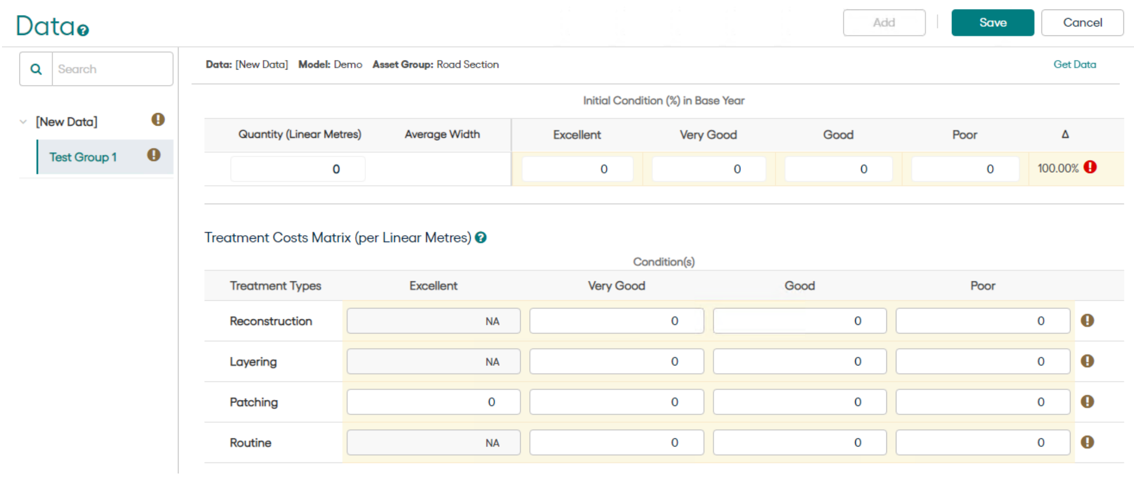
Data in Confirm Strategic Asset Management provides user with the capability to define the total quantity of an Asset Group and its current condition distribution. It is associated with a Model.



New Data: Placeholder to define Data Name strategy.

Model: Allows to select a Model, for which Data needs to be created.

Preview will create the Data definition and will navigate page to define Data metrices



Get Data: The link is available only for Confirm Linked Model and its associated Data. It will activate the Data fetch from Confirm as per expressions defined in Model for Asset Group and Conditions.

The Data fetch may take some time during which Syncing... will indicate that process is in progress. User may click on Reload View to check if the process has complete. Once the Data fetch is complete, Refresh Data may be used to refresh the data from Confirm database. Any errors during data fetch are reported as Get Data Errors.

Quantity

Will be populated with the Data fetched from Confirm using Get Data. Contains the asset quantity, aggregated by the primary measurement, as per expression of the Asset group in the associated Model. It can also be populated/updated manually, which will always be the case for independent Model based Data.

Initial Condition

Will be populated with the Data fetched from Confirm using Get Data. Contains the asset quantity, aggregated by the primary measurement, as per expression of the Conditions in the associated Model. It can also be populated/updated manually, which will always be the case for independent Model based Data.

If the total condition distribution is not 100% of Asset Quantity, the deviation will be notified. Any distribution more that 100% is not allowed to be saved. Any distribution of less than 100% will be removed from quantity while creating Analysis so as to allow Analysis creation only on condition data available.

Get Data Errors

Get Data Errors are encountered if the expressions in the corresponding model are not calculating the data correctly. This may require re-visiting the expressions and correct them. Following three types of Get Data Errors may come:-

1. Quantity is zero for all asset groups.
2. Some Asset(s) have been counted multiple times for calculating Quantity.
3. Some Asset(s) have been counted in multiple Initial Conditions.

To verify which asset quantity and/or conditions are causing the problem, check the latest output file generated after Get Data or Refresh Data operation. The file ConfirmToSAM_Data-Sync_[timestamp].csv is generated at the Export File Path specified within ConfirmWeb Settings screen.

Reading the output file:

IsQuantityOverlapped column in file refers to an asset where quantity is being calculated multiple times. IsConditionOverlapped column refers to an asset where the condition is being calculated multiple times. Any TRUE value in these columns will cause the Get Data errors.

Treatment Costs Matrix

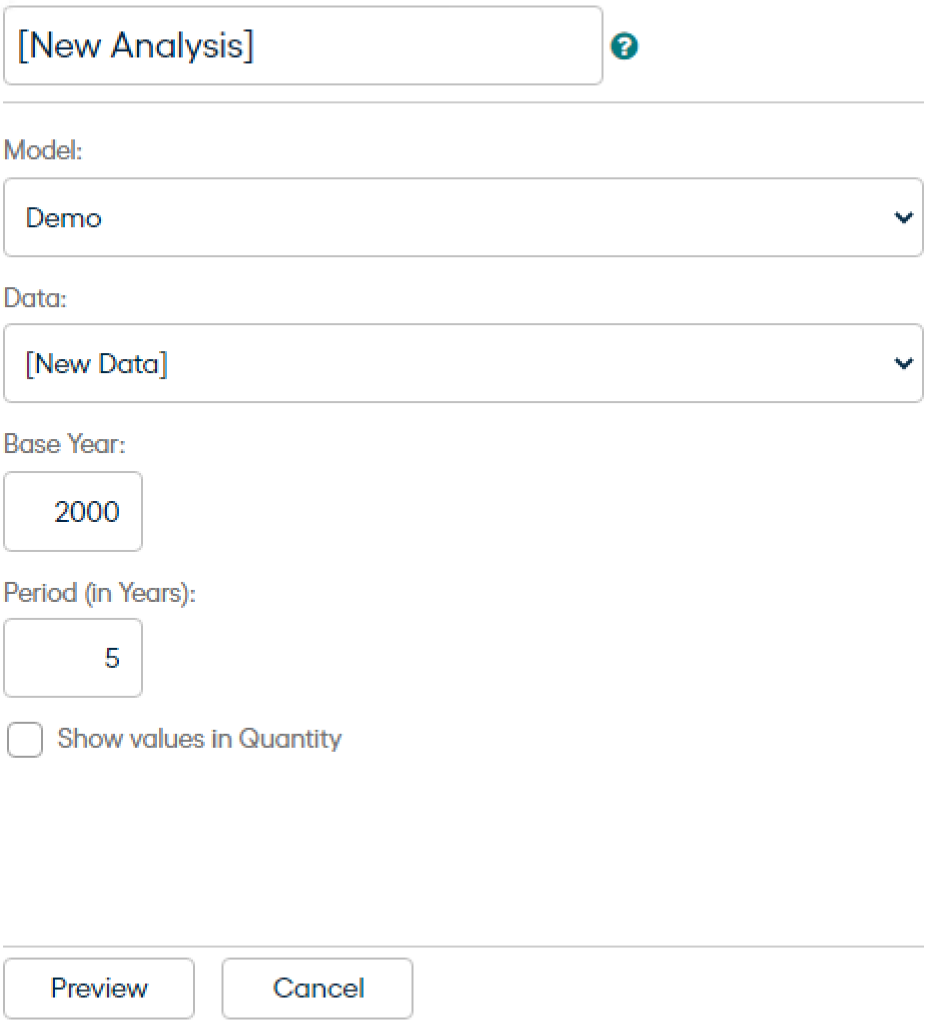
Treatment costs matrix defines the unit cost per treatment type per condition for each Asset Group. This unit cost is used in Analysis while projecting expenditure for a treatment strategy.

Treatment Costs Matrix (per Linear Metres)

	Condition(s)			
Treatment Types	Excellent	Very Good	Good	Poor
Reconstruction	NA	900	900	900
Layering	NA	500	500	600
Patching	250	325	325	400
Routine	NA	100	100	120

Analysis

Analysis allows user to create scenarios or treatment strategies to assess long term condition for a given Model and Data set.



New Analysis: Placeholder to define Analysis Name.

Model: Allows to select a Model, based on which Data will be populated, for which Analysis is to be created.

Data: Allows to Select a Data for the Model selected, for which Analysis is to be created.

Base Year: Start year of the Analysis.

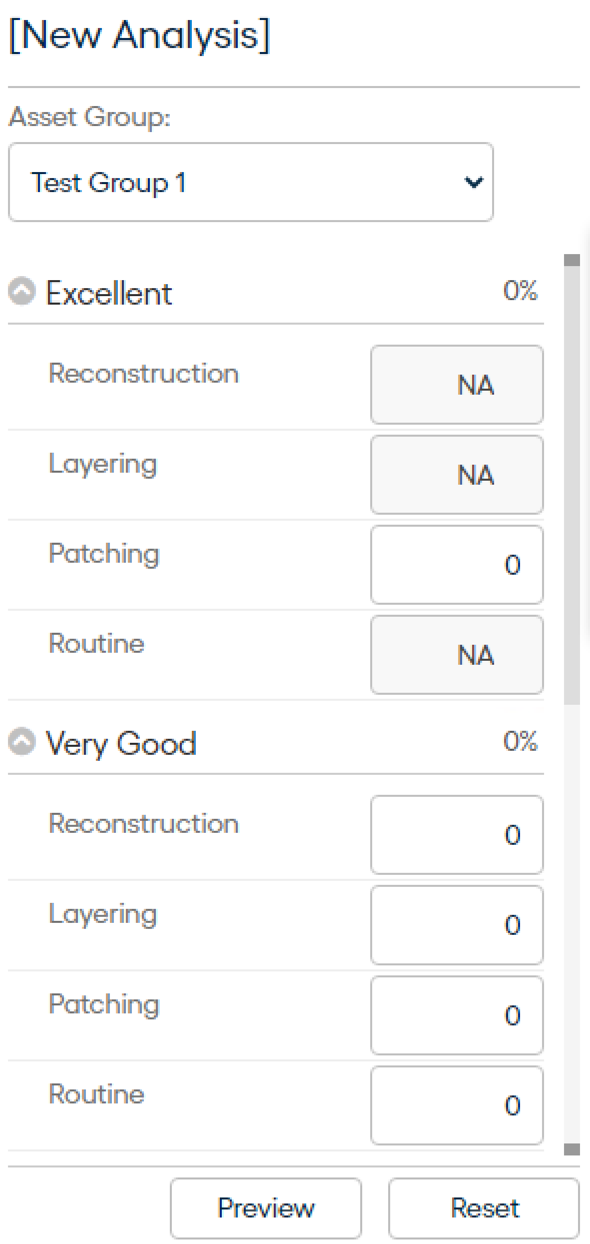
Period: No. of years for which analysis output is to be generated.

Show values in Quantity: If checked, the analysis graphs will show value in quantity, else percentage.

Preview will create a blank analysis and allow user to define a Treatment Strategy.

Treatment Strategy

Treatment Strategy allows user to create scenario(s) wherein user decides the treatment types that are to be done on an Asset Group, in a given condition. It also allows users to specify the percentage of total quantity of Asset Group that should be covered with a treatment type, in a given condition. Treatment Strategy is formulated per Asset Group.



Asset Group: Allows to select the Asset Group within the Model/Data of the Analysis to create a treatment Strategy.

All the conditions for each Asset Group are available to define a treatment strategy.

Preview: Generates following output graphs, for each Asset Group, based on treatment strategy created for each Asset Group.

Individual Distribution

Condition - Do Nothing: It displays the long term condition profile of an Asset Group in case of no treatment strategy in place.

Condition - Treatment Strategy Applied : It displays the long term condition profile of an Asset Group with treatment strategy applied.

Work Quantity Graph: It displays the work done per Asset Group per Treatment Type for the strategy formulated. In case of no strategy, the graph displays no data

Expenditure by Treatment Graph: Expenditure by Treatment graph displays the expenditure per Asset Group per Treatment Type for the strategy formulated. In case of no strategy, the graph displays no data.

Expenditure by Condition Graph: It displays the expenditure per Asset Group per Condition for the strategy formulated. In case of no strategy, the graph displays no data.

Overall values

Set of graphs for each Asset Group with Average Remaining Useful Life of the asset group and corresponding expenditure based on Treatment Strategy.

Average Remaining Useful Life: Takes the average of individual condition distribution and generates an overall condition of the Asset Group for each year based on the remaining useful life defined for each condition.

Average Condition Score: Takes the average of individual condition distribution and generates an overall condition of the Asset Group for each year based on the condition score defined for each condition.

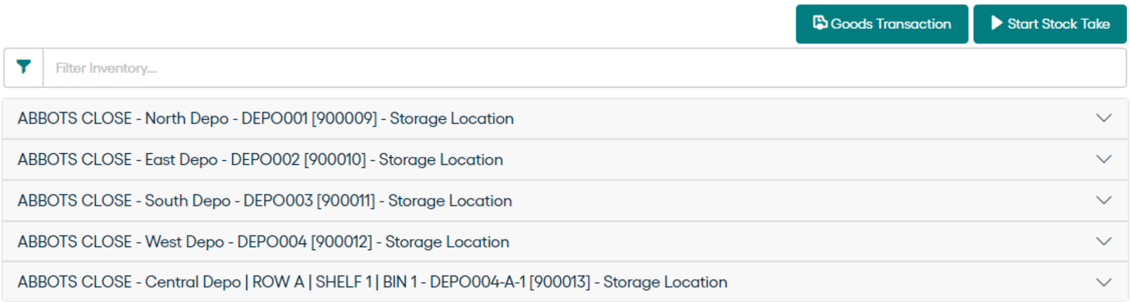
Total Expenditure: Aggregates the expenditure for each year for the Asset Group.

Aggregate: Switching Aggregate ON will generate the aggregated view of all the Asset Groups within the Analysis. All the individual graphs and the overall value graphs are aggregated. For independent Model if Asset Groups are measured in different units then only Expenditure Graph is aggregated.

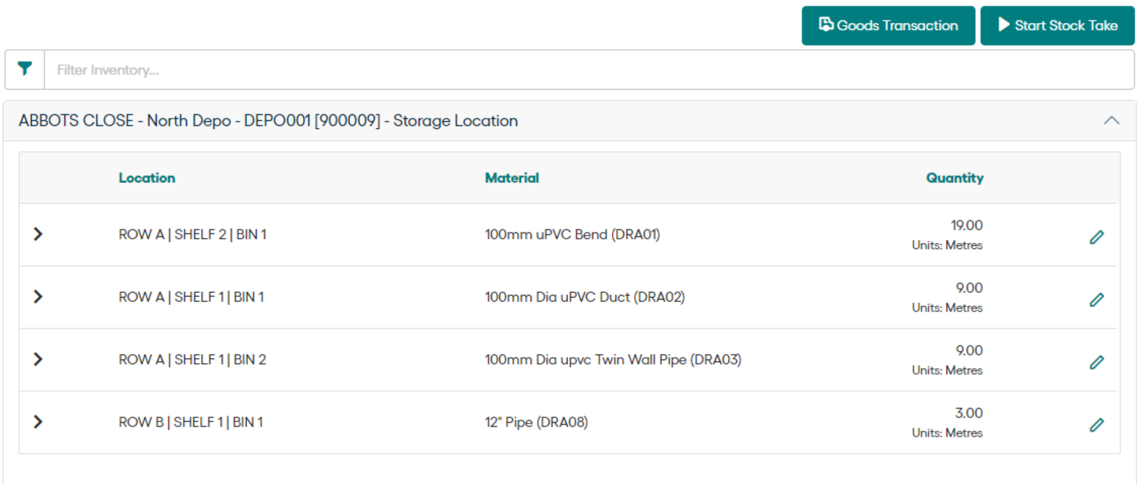
Compare: Allows two or more analysis sharing the same Model, Data and Base Year to be compared with each other for overall values.

Stock Management

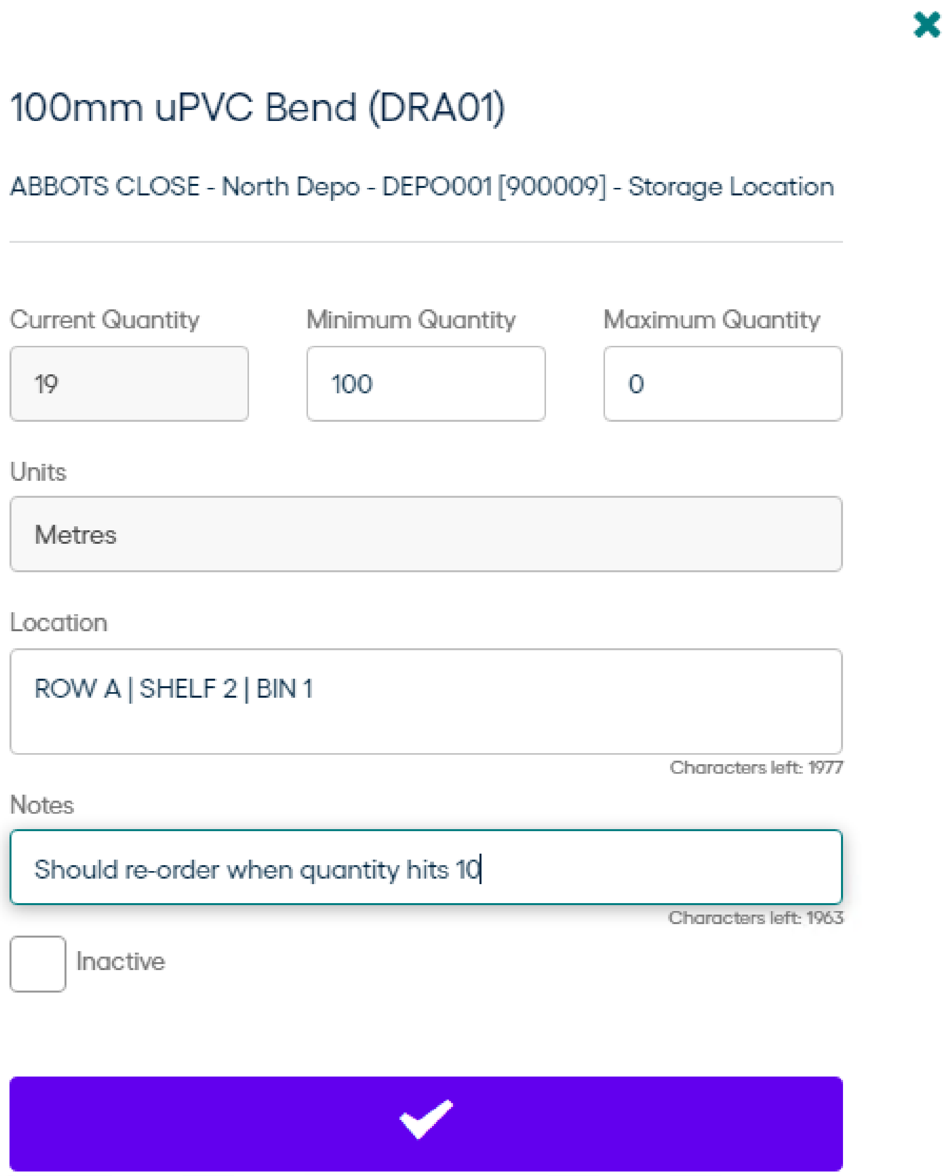
Stock Management provides an easy to use web interface to manage stock levels aimed for use by tablet devices. The main page shows the Goods Transaction and Start Stock Take buttons and a list of all Stock Locations (Confirm Features) for which the user has Contract Area access. The search bar can be used to filter this list via location or inventory details.



Selecting a Location shows the Inventory of Materials at the chosen Location, including quantities.



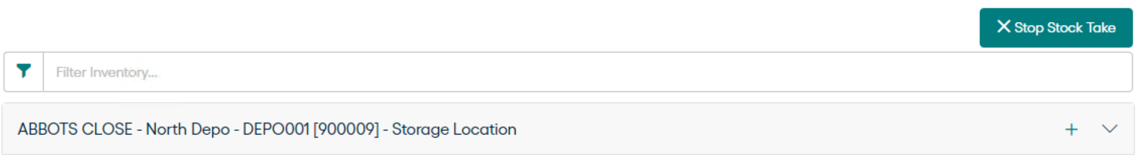
By using the Pencil icon, it is possible to edit the Minimum and Maximum Quantities, Location, Notes and Inactive details of existing Stock. Minimum Quantity can be used to indicate when an order must be placed. Whereas the Maximum Quantity can be used to indicate when not to place an order, or, this is the Maximum quantity that can be stored at said Location. Location and Notes fields can be used to further describe the inventory. The Inactive flag, when enabled, will grey out (disable) this Inventory item, this will not clear any existing details and prevents further changes until it is marked as active again.



Stock Take

A Stock Take can be initialised by tapping the 'Start Stock Take' button.

Once a Stock Take has been initialized then Inventory can be added to the Location by using the + button.



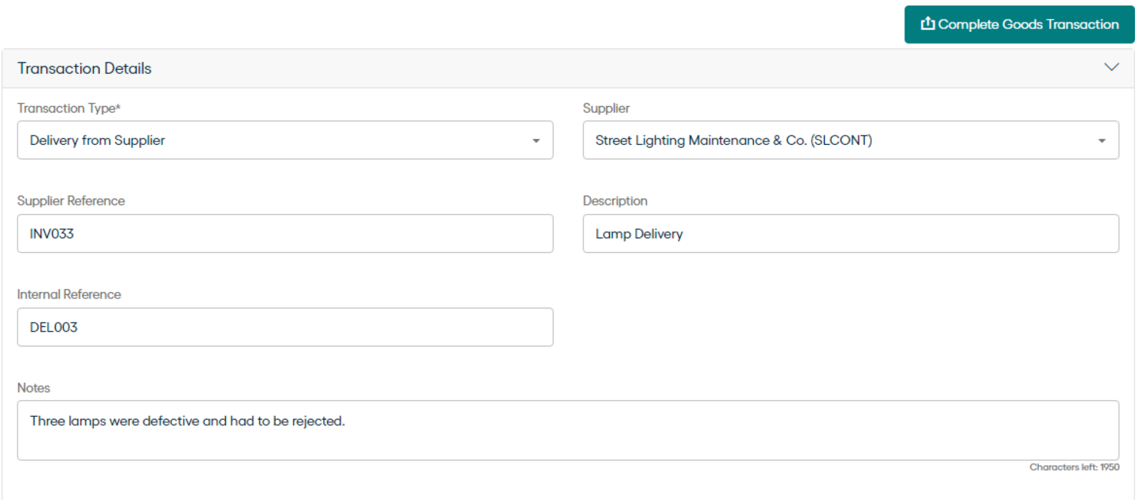
This also allows the current quantity of Inventories to be updated by value in the list. When a value is updated in the list and the user taps away from that text box the value will be automatically saved.

Once the Stock Take is completed then you can tap the 'Stop Stock Take' to highlight that the batch of updates is finished.

Goods Transactions

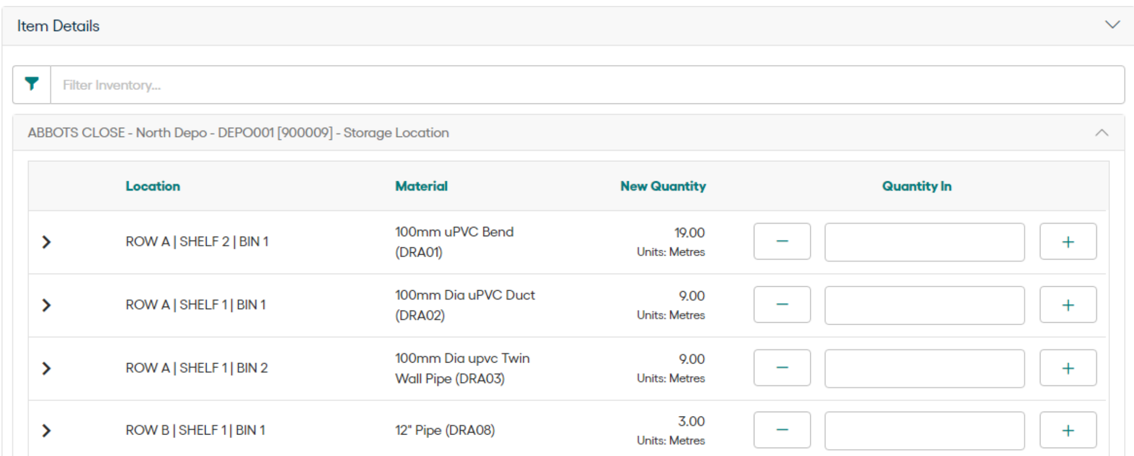
A Goods Transaction can be initialised by tapping the 'Goods Transaction' button. This allows the recording of when Inventory items are either taken out or brought in.

Once a Goods Transaction has been initialised the Transaction type needs to be selected before the specific fields for that type and the list of Locations will be shown. For example: "Return from Gang" would be used when Inventory is returned by the gang, at the end of the day, who had previously taken Inventory out. Whereas Delivery from Supplier would indicate Inventory is being entered as the result of a delivery.



Once you expand the chosen Location, it will then be possible to enter the amount of each item involved in the transaction by entering that value into the item details panel.

For any transaction type a positive number is entered and the software will calculate whether this value is added to or removed from the total. Note: the + and - buttons can be used to add or deduct one from the currently entered value. It is not possible to enter a negative number. The New Quantity field shows the new value once the Quantity In/Out value has been added/deducted from current Quantity.



Once the information required has been entered the 'Complete Goods Transaction' button would be used to save a record of the transaction in Confirm.

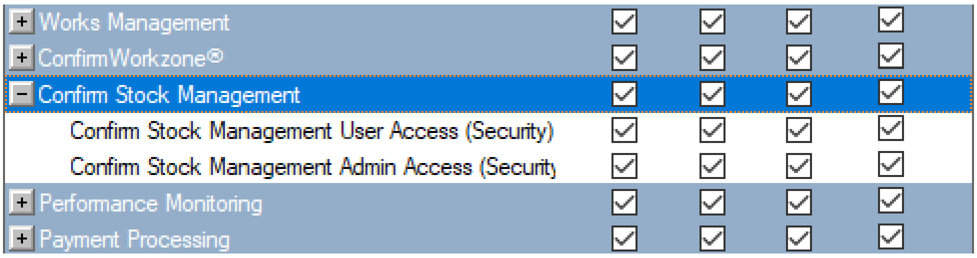
If you no longer need to record a Goods Transaction then the back button on the browser can be used to return to the Stock Inventory screen.

Administration

Configure the Confirm Stock Management User Security

(This is applicable for Confirm Stock Management only)

The user access can be set in the Confirm Client under *user security*. There is an entry for Confirm Stock Management.



- Confirm Stock Management User Access (security). Enables access to Stock Management.
- Confirm Stock Management Admin Access (security). Enables access to the **Stock Management Settings** form.

- In Confirm web interface, sign in as an Admin user and launch the Web Settings > **Stock Management Settings** form. Set the **Location Feature Group** to the required Feature Group.
- Locations (Features) appear in the list of Locations if the following is met:
  - Users **Work Group** has **Contract Area** access to the required Features.

Configuration

Lookup Manager

Lookups

Upon launching the Lookup Manager, you are presented the option to filter for existing lookups within Confirm. Simply filter and select your desired lookup.

Items List

Upon selecting your desired lookup, a list of existing lookup items will be shown. Filter and select your desired lookup item.

To Add a new Lookup item click the plus Icon which will launch a popup window displaying all the required fields to create a new item for the chosen lookup.

Details

Upon selecting an existing or by saving a new lookup item, the details section will display the relevant details. Some of these details can be edited, which are indicated by the pencil icon adjacent to the relevant field.

It is also possible to delete a selected item by clicking the bin (delete) icon

Mandatory Fields

As with all Confirm Web screens, mandatory fields are marked with an * and must be populated.

Lookup Manager - Maintenance Regimes

The Maintenance Regime allows the viewing and creation of new *Repeating Job* Maintenance Regimes.

For *Cyclic* or *Routine* Maintenance Regimes, please use the Maintenance Regime screen in the Confirm desktop client.

To Add a new Regime click the plus Icon which will launch a popup window displaying all the required fields to create a new Regime.

Allow Past Due Dates

Select this option to allow new Jobs to be created with a due date set in the past.

Job Details

Enter the details for the Jobs that will be created as part of this Regime.

Due Date Rule

The next Job will be due based on the calculated date of the chosen trigger event selected from this list.

This Due Date is set when the Repeating Agent next runs after the current Job has been completed.

Note: It is possible to prevent Jobs from being created too far into the future by applying a value to the *Repeating Routine Jobs Future Period* field on the Job System Settings screen.

Repeating Period

Use the Repeating Period to determine the follow-up period between Repeating Jobs. To vary the follow-up period throughout the year, please see *Seasonal Follow Ups* instead.

Regime Items

Displays a list of Items (SOR) which will be added to Jobs created as part of this Regime

To add SOR Items:

Click on the + to display the Regime Item form

Item: - find an SOR item, start typing to filter the items.

Measurement Type: - select a Measurement Type. Only those Measurement Types using the Unit of Measure as that applied to the SOR will be seen in the list.

Note: The Measurement Type selected must also exist on the feature to which the Regime is allocated, and have a measurement entered against it, in order for this SOR to be included on the job

Seasonal Follow Ups

Seasonal Follow Ups can be added to change the period between Repeating Jobs, allowing different follow ups throughout the year.

Seasonal Follow Ups apply from their Start Day/Month until superseded by the next Seasonal Follow Up. This means that the last Seasonal Follow up entered in the list will continue to operate until the date of the first Seasonal Follow Up in the list is reached again.

Seasonal Follow Ups

Start Day	Start Month	Follow Up
1	March	2 Weeks
1	April	5 Working Days
1	September	2 Weeks
1	October	5 Months

In the illustrated example, the task is carried out every 2 weeks from March to April, every week from April to September, fortnightly again during September, and then not again for 5 months, which cycles us back to March for the following year.

Note: The Repeating Period on the Regime will not be used when Seasonal Follow Ups are in use.

Repeating Type Selection

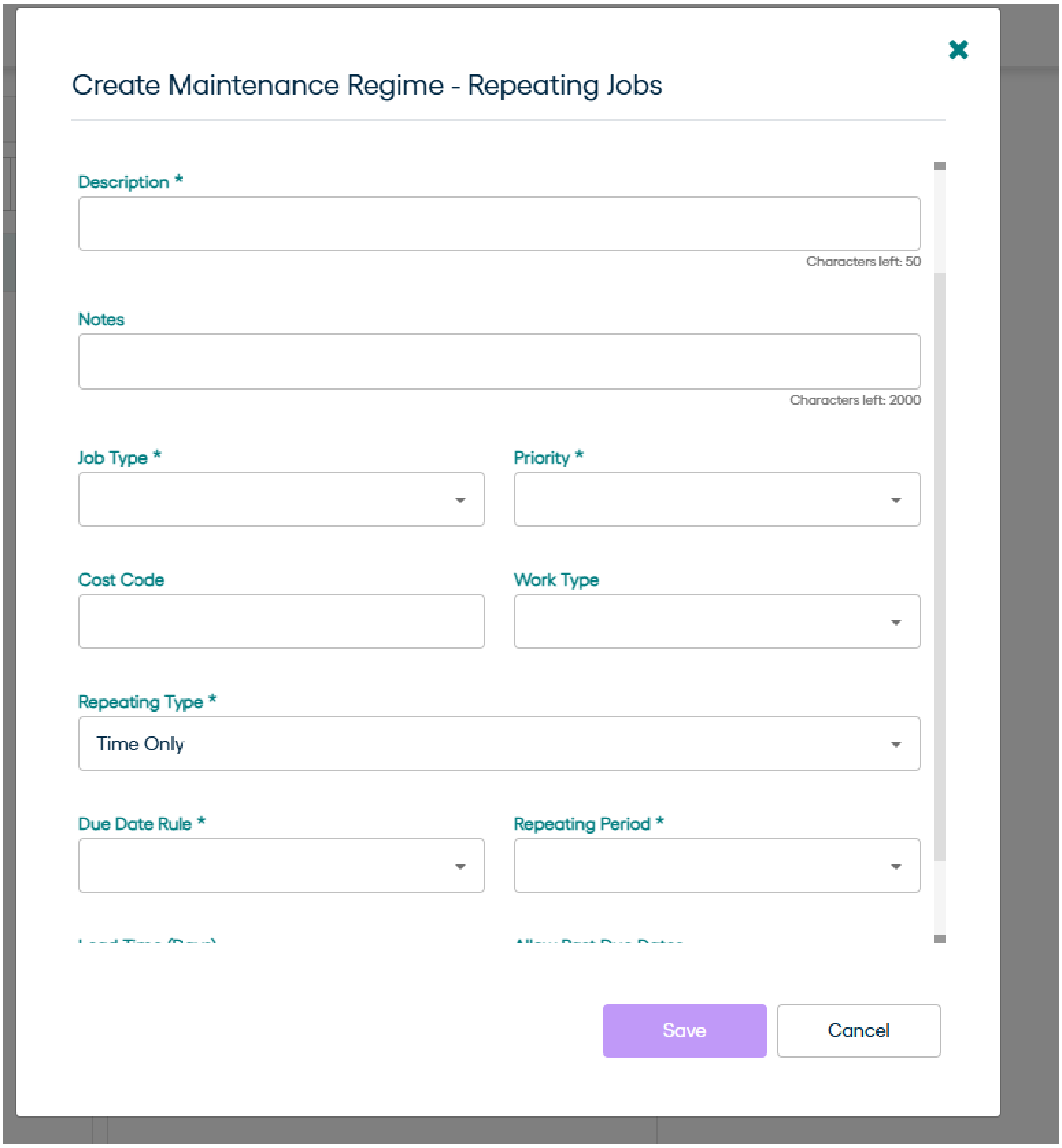
The repeating type defines the nature of the maintenance regime.

Time: - Schedule jobs based on repeating period.

Meter: - Schedule jobs based on asset readings/usage.

Time or Meter: - Jobs can be triggered by either time or usage.

Time-Based Regimes



Lead Time:

Set how many days ahead to create the job.

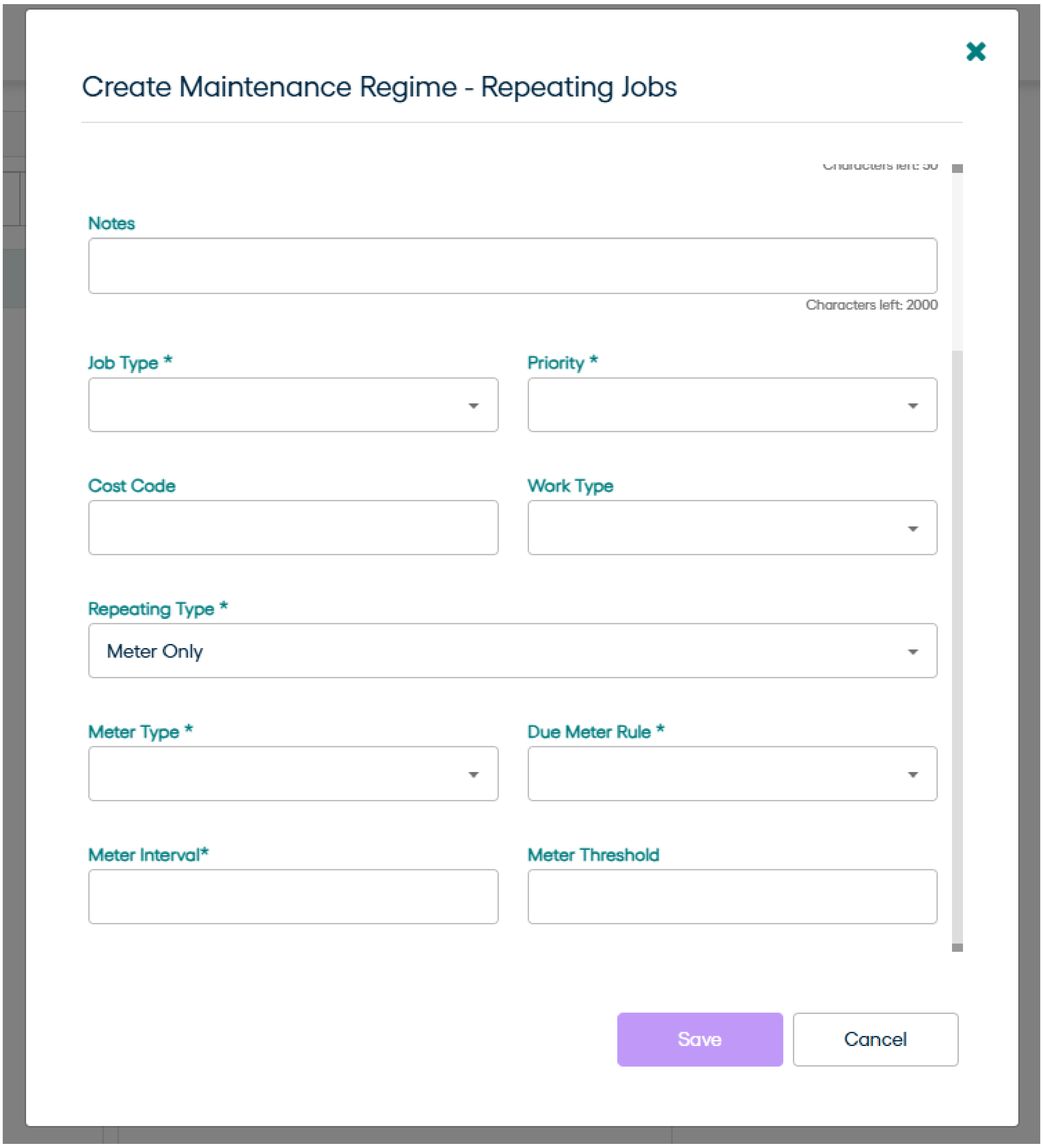
For example, a job due in 30 days, but with a Lead Time of 5, will be created 5 days before it's due.

Lead time should be less than repeating period.

Lead time accepts positive numeric value.

Lead time is disabled when repeating period is less than 2 days.

Meter-Based Regimes



Configure with these fields:

Meter Type

Select the relevant numeric observation type.

If you don't see the right type, contact your system admin—Meter Types are created in the Observation Type screen.

Meter Interval

Represents meter’s usage interval.

It accepts only positive numeric values greater than 0.

Meter Threshold

Sets how much before reaching interval the job is created.

Meter threshold must be less than Meter interval.

Meter threshold must be a positive numeric value greater than or equal to 0.

Due Meter Rule

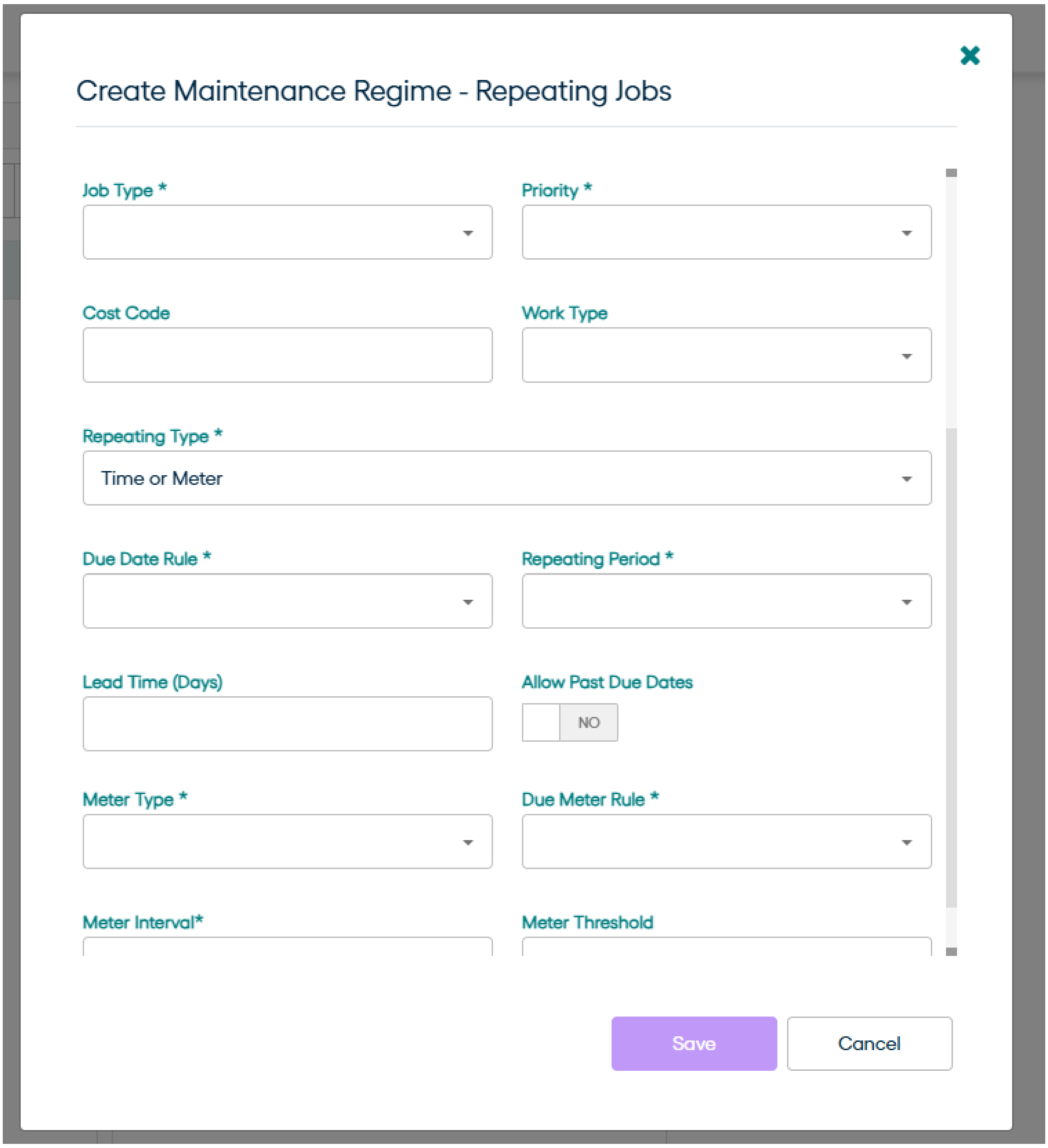
Choose how the next job's due meter is calculated:

Allocated Regime Meter Next Due

Lower of the Meter Next Due or Last Service Meter

Higher of the Meter Next Due or Last Service Meter

Time or Meter Regimes



Select "Time or Meter" to configure both sets of rules.

Fill in all required fields for Time and Meter.

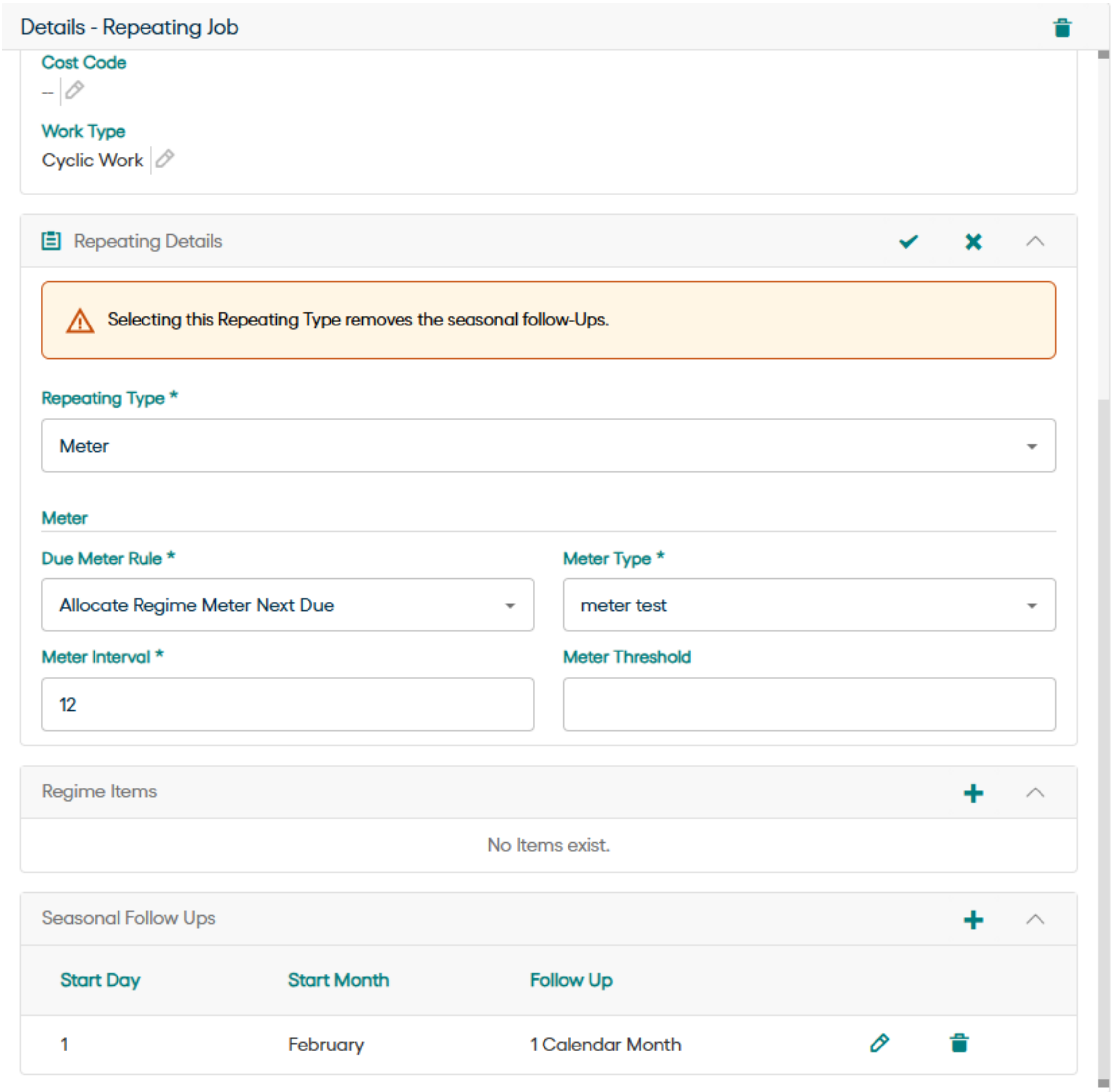
Jobs will be created when either the time or meter threshold is reached.

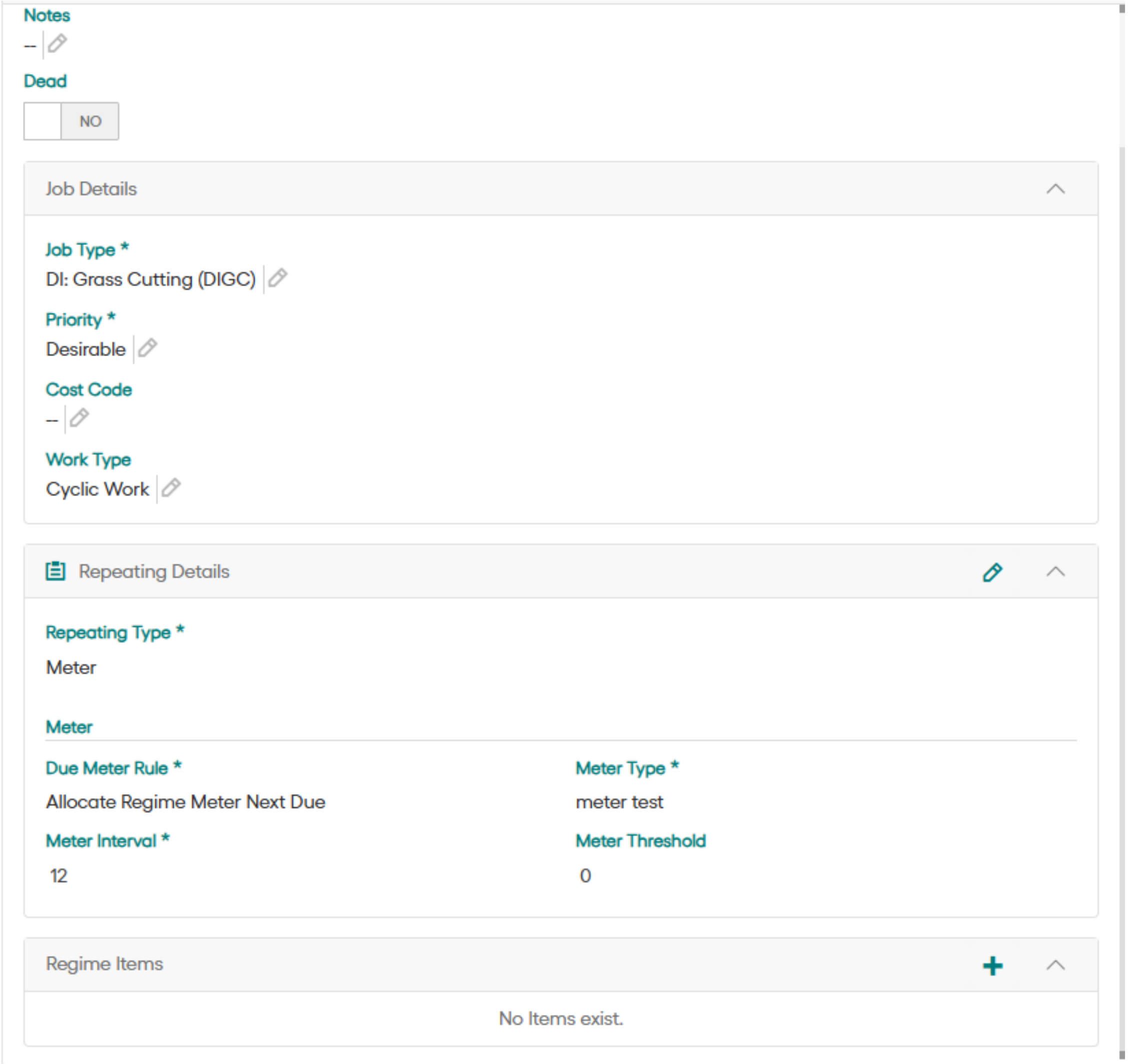
Editing a Regime

To update a regime, click Edit on the regime card.

All fields for your selected repeating type will display.

Note: If seasonal follow up is added and repeating type is changes to meter only then following disclaimer is displayed and on saving the details, seasonal follow up will be deleted.





Lookup Manager - Shift Patterns

The Shift Pattern screen allows the viewing and creation of new Shift Patterns. Shift Patterns are used in ConfirmWorkzone to display the availability/working hours of Gangs. Shift Patterns can be assigned to a Gang via the Lookup Manager in the Confirm web interface.

To Add a new Pattern click the plus Icon which will launch a pop-up window displaying all the required fields to create a new Pattern.

Start Date

The Start Date is the date of the first working day in the pattern.

For example, for a 7-day shift pattern that runs from Monday to Sunday, the Start Date could be any Monday.

But for any pattern that isn't 7 days long, a date on which the pattern begins should be specified.

Note: The Start Date does not indicate when the Shift Pattern will become 'live'.

Shift Slots

Shift Slots can be added in the Shift Pattern, allowing multiple working/non-working days.

Each slot represents a consecutive day from the start date of the pattern.

Start Date *
07 Feb 2023

Shift Slots

Shift#	Start Time	End Time	Duration	Notes
1	09:00	17:00	8	Monday
2	09:00	17:00	8	Tuesday
3	09:00	17:00	8	Wednesday
4	09:00	17:00	8	Thursday
5	09:00	17:00	8	Friday
6	Non-Working Day			
7	Non-Working Day			

In the illustrated example, the Shift Pattern is repeated every week with 5 working days and 2 non-working days.

Note:
- Shift Pattern can not to be deleted if it is in use. However, Shift Slots can be edited/deleted individually.
- Shift Slots can not be edited from working day to a non-working day and vice versa.
- A Shift Pattern can not start with a non-working day.

Lookup Manager - Defect Types

The Defect Type details section allows users to view, edit, create and delete Defect Types.

Defect Types define problems relating to Features and will usually lead to some sort of action to resolve the problem.

The action will depend on the Defect classification.

Defect Classification

- **Internal Defect Types** are those which will be resolved by raising work within Confirm. Jobs may be raised on Internal Defects. They can have SOR Groups added to specify the work to be done to resolve the Defect.
- **External Defect Types** are the responsibility of another Organization. External Defects will be resolved by sending an External Defect Notification to the responsible Organization.
- **No Defect Found Defect Types** may be used to make a positive affirmation that no Defect was found at the time of inspection. These Defects do not need to be resolved, and no actions may be carried out from them.

Rating: An optional rating system using numbers to define the severity of the Defect.

Category: Select from the drop down list the Category for the type of Defect.

Subject: Defect Types can optionally be linked to a Type of Service and Enquiry Subject.

Job Type: Select a Job Type which will be used as a default for any Job created from a Defect of the Type.

Device Data Key: Optionally specify a Data Key to restrict which Users will have this lookup transferred to the mobile device.

Dead: Set the 'Dead' flag to archive Defect Types.

Fast Defect: Set the 'Fast Defect' flag to enable a Defect Type to be chosen as a Fast Defect on ConfirmConnect when doing Route Surveys.

Mandatory Photo When Creating Defect: Set the 'Photo Mandatory' flag to make attaching a photo compulsory in ConfirmConnect® when creating a Defect.

SOR Groups

SOR Groups may be used to create Jobs. They will therefore only be relevant to 'Internal' Defects.

Attributes

These define the extra data that should be recorded for a Defect of this Type. When Attributes are configured for a Defect Type, these Attributes will automatically be added when creating a Defect of this Defect Type. Display Order is used to set the order in which the Attributes are displayed on a Defect of this Defect Type.

Lookup Manager - Observation Types

The Observation Types section allows users to create, view, edit, and delete Observation Types.

This section work together with Observation Parameters and Observation Impacts to define how the condition of a Feature is assessed.

Field Descriptions

Description: An optional freetext field used in ConfirmConnect to provide additional details that help clarify the intent of the Observation Type.

Parameter: Select a Parameter from the pick list. The pick list references the Observation Parameter lookup.

Impact: Defines the order in which the Observation Type appears on the Feature Condition screen.

Display Order: Select a Job Type which will be used as a default for any Job created from a Defect of the Type.

- Lower numbers appear at the top.
- Higher numbers appear at the bottom.
- Unnumbered Types appear before numbered ones.

Data Type: Select 'Numerical Value' to configure a meter based Observation Type.

Device Data Key: Optionally specify a Device Data Key, if required.

External Reference: Used when creating mapping.

- 'Full Name of Element' - 'Component/Material Type'
- 'Full Name of Element' - 'Proximity to Traffic Spray Zone'

Feature Groups

Allows linking the Observation Type to a Feature Group.

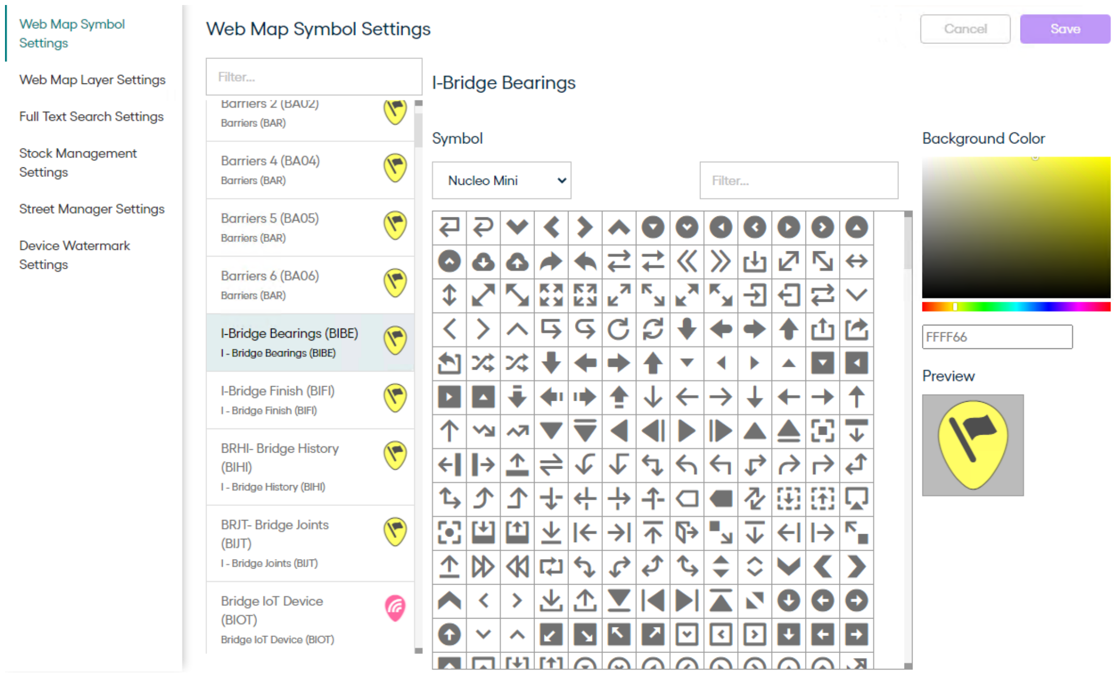
Defect Types

Enables associating one or more Defect Types with the current Observation Type.

Web Settings

Web Map Symbol Settings

Gives the ability to set custom symbols for Features displayed in the What's Going on Here functionality in ConfirmConnect®. This allows the user to set a symbol and background colour of the icon. The foreground or symbol colour will be automatically set to provide the best contrast for the chosen background colour.



Note: A default symbol has been pre-selected for all Feature Types, should there be a need to reset to this default symbol, filter for location_flag-diagonal-33 in the Nucleo Mini font and the default colour is hex number #ffff66.

Search

Text based filter for the Feature Type list.

Fonts

Select from a list of available font types.

Search Symbols

Text based filter for the grid of symbols available for the selected Font.

For Example: Entering the text 'tree' will limit the symbols to those containing 'tree' in their name.

Note: Hovering the cursor over a symbol will display a tooltip containing its name.

Colour Picker

Select the desired colour. The text field beneath the colour picker allows the entry of a hex number should a specific colour be required.

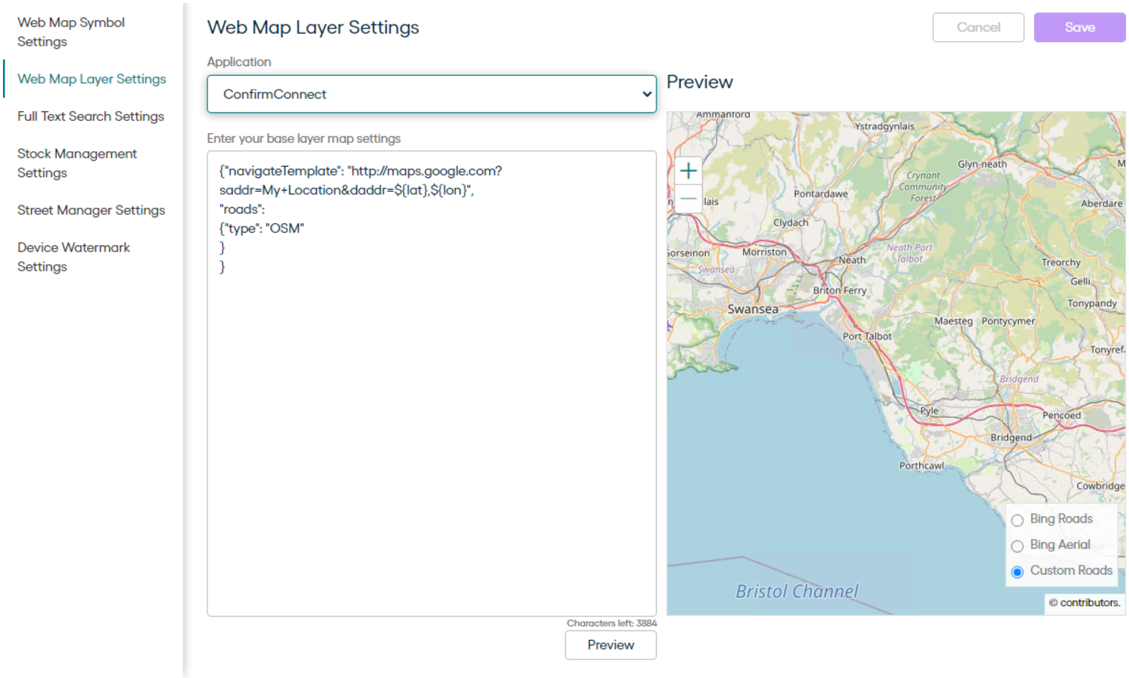
Preview:

Displays the chosen Symbol for the currently selected Feature Type.

Web Map Layer Settings

This page provides the ability to configure background map layers for Confirm Customer Services, ConfirmConnect® and ConfirmWorkzone® which can be used to replace the default Bing maps, along with the preview of the map layer.

The map preview displays Bing layer, if the extents of the custom layer cannot be determined, with an option to switch to custom and aerial views (if available).



Note: The page removes the need to request SQL from Confirm to apply these settings. It will ensure that the entered text is within the database limit of 4000 characters and will use simple parsing to validate JSON text.

This will apply to all users of ConfirmConnect® who do not currently have a settings.js file loaded on their device.

Bing™ Maps

Web Mapping uses Bing maps by default, the only requirement is to have an active connection to the Internet.

If there is no Internet connection, the maps will not be displayed.

Caching Bing maps (ConfirmConnect® only)

Bing maps can be cached on ConfirmConnect® for a 24 hour period, after which ConfirmConnect® must have an active connection to the Internet in order to update the cached mapping data.

Note: Map Caching only occurs when ConfirmConnect® has a wireless network connection due to the quantity of data downloaded.

Note: Map Caching is disabled for the Win32 version of ConfirmConnect®. This has been done as there is currently no method to identify if the Win32 client has a Wireless or 3G/GPRS connection.

Tile Services

Overview of a Tile Server

Tile services provide a grid of uniformly sized images (typically 256x256 pixels) with a different set of images for each zoom level / resolution.

Each tile is uniquely identified by the combination of row (y) and column (x) of that tile in the grid for the zoom level (z).

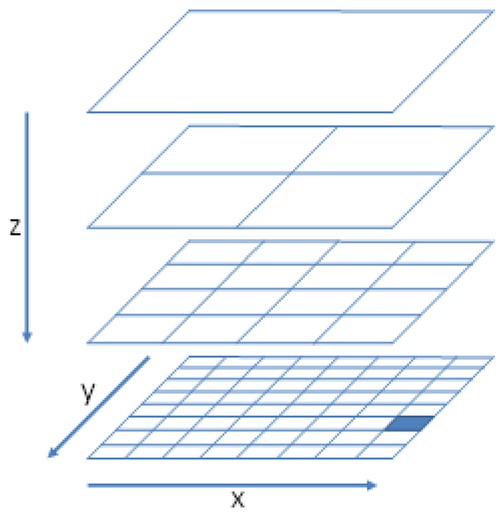
The URL for a tile is found by taking these values and substituting them into a placeholder in the "url" parameter provided in the map layer setting. For example, if the url in the setting is set to:

"http://stratus.ondemand.eu/connect/gettile?mapcfg=Main&name=Base&level=${z}&row=${y}&col=${x}&output=image/gif"

Then the URL generated for zoom level 3, row 5 and column 7 would be:

"http://stratus.ondemand.eu/connect/gettile?mapcfg=Main&name=Base&level=3&row=5&col=7&output=image/gif"

Note: For tile services the row starts at the top (north) and increases going south, which is the opposite from the way that coordinates typically go. This is depicted in the following diagram:



In order to work out the column, row and zoom of the tile that need to be specified for a particular map coordinate (x,y) it goes through the following process:

- The zoom is set to the zoom level. Zero is the most zoomed out level.
- The resolution is determined from the zoom level.
- The distance of the x and y from the tile origin is determined (top left corner of the maximum extent of the map).
- These distances are converted to pixels by dividing them by the resolution
- The distances in pixels are then divided by the tile size and rounded down to determine the row and column.

For example, if a Tile server had an origin of 0,1000000 a tile size of 256x256 pixels and resolutions 1000,500,250,125 then the row and column for point 400000,300000 at the second most detailed zoom level would be calculated as follows:

- Zoom is 1 (as the least detailed zoom level is zero).
- The resolution is 500 (second item in the list of resolutions).
- Distance from origin is 400000 for x and 700000 for y (1000000 – 300000).
- These distances in pixels are 800 for x and 1400 for y.
- The column is therefore 3 (800 / 256, is 3.125 rounded down) and the row is 5.

In the above example, this would generate the following URL:

"http://stratus.pbondemand.eu/connect/gettile?mapcfg=Main&name=Base&level=1&row=5&col=3&output=image/gif"

ArcGIS Tile Cache

The below is an example setting for using an ArcGIS Tile Cache.

```
{
 "roads":{
  "type": "ArcGISCache",
  "url": "Server Name/ArcGIS/rest/services/Map Name/MapServer",
  "resolutions" : [
   92.6043518753704,
   26.4583862501058,
   13.2291931250529,
   6.61459656252646,
   5.29167725002117,
   3.96875793751588,
   2.64583862501058,
   1.32291931250529,
   0.661459656252646,
   0.264583862501058],
  "tileSize": [512, 512],
  "tileOrigin" : [-5220400, 4470200],
  "projection": "EPSG:27700",
  "projectionDef": "+proj=tmerc +lat_0=49 +lon_0=-2 +k=0.9996012717
+x_0=400000 +y_0=-100000 +ellps=airy +datum=OSGB36 +units=m +no_defs
",
  "units": "m",
  "restrictedExtent": [230000,629267,320000,704092],
  "maxExtent": [230000,629267,320000,704092]
 }
}
```

How do I obtain the settings required for the above?

Most of the required settings can be determined by querying the map layer to get its properties, by appending "?f=json&pretty=true" to the end of the url in a browser, e.g.:

http://server name/ArcGIS/rest/services/map name/mapserver?f=json&pretty=true

This will return a JSON description of the map from which the settings can be obtained:

"type":	this value must be set to "ArcGISCache"
"url":	This is the base URL for the ArcGIS Tile Cache.
"resolutions":	Enter a list of all the resolutions required. Find the section that begins with "lods" under "tileInfo" and list the resolution values separated by commas.

	e.g. "resolutions" : [42.3334180001693, 21.1667090000847, 10.5833545000423],
"tileSize":	This is in the "tileInfo" section. List the values for "rows" and "columns" separated by a comma. e.g. [256, 256] or [512, 512].
"tileOrigin":	List the "x" and "y" found under "tileInfo" > "origin"
"projection":	Refer to **Projections** page for details.
"projectionDef":	Refer to **Projections** page for details.
"units":	must be entered as "m", as shown in the example. m = metres.
"restrictedExtent":	List the xmin, ymin, xmax, ymax values. These are shown under the "fullExtent". It is specified as a comma separated list of coordinates inside the square brackets as follows: Minimum X,Minimum Y,Maximum X,Maximum Y
"maxExtent":	Set to the same as the "fullExtent" entered in the "restrictedExtent" entry. It is specified as a comma separated list of coordinates inside the square brackets as follows: Minimum X,Minimum Y,Maximum X,Maximum Y

Spatial Server

The below is an example setting for configuring a Web Map Service.

```
{
    "roads":{
        "type": "Tile Service Layer",
        "url": "Server name/rest/EnterpriseMapping/MapTilingService",

        "mapName": "Map Folder/Map Name",
        "maxResolution": Maximum resolution,
        "projection": "Projection Code",
        "projectionDef": "Projection Definition",
        "units": "m",
        "maxExtent", [Maximum extent]
    }
}
```

"type":	this value must be set to "TileServiceLayer"
"url":	This is the base URL for the Spatial Server named tile service.
"mapName":	Map Folder/Map Name - as configured in your mapping service.
"maxResolution":	Maximum resolution - as configured in your mapping service.
"projection":	Refer to **Projections** page for details.
"projectionDef":	Refer to **Projections** page for details.
"units":	must be entered as "m", as shown in the example. m = metres.
"maxExtent":	This is the minimum and maximum northings and eastings that the map covers. It is specified as a comma separated list of coordinates inside the square brackets as follows: Minimum X,Minimum Y,Maximum X,Maximum Y

Stratus

The below is an example setting for configuring a Stratus service containing a Base and Business layer.

```
{
    "roads":{
        "type": "Group",
        "projection":"EPSG:27700",
       "projectionDef":"+proj=tmerc +lat_0=49 +lon_0=-2 +k=0.9996012717
 +x_0=400000 +y_0=-100000 +ellps=airy +datum=OSGB36 +units=m +no_defs
 +nadgrids=ostn02 ",
        "attribution":"(c) Crown Copyright",
        "maxResolution" : 390.625,
        "maxExtent": [531000.0, 161000.0, 631000.0, 261000.0],
        "layers": {
            "Base": {
                "type":"StratusLayer",
                "url": "Servername/folder/controller/tiling/gettile?
mapcfg=Configuration%20Name&name=Map%20Name
&level=${z}&row=${y}&col=${x}&output=image/gif",
            },
            "Business": {
                "order": 1,
                "type": "StratusLayer",
              "url": "Servername/folder/controller/mapping/getmap?lay-
ers=/foldername1/foldername2/Lay-
er%20Name&width=${tw}&height=${th}&x=${bx}&y=${by}&zoom=${bw}&srs=EPSG:27700&out-
put=image/png"
            }

        }
    }
}
```

"type":	this value must be set to "StratusLayer"
"url":	This is the base URL for the Stratus service.
"maxResolution":	Maximum resolution - as configured for your map service.
"projection":	Refer to **Projections** page for details.
"projectionDef":	Refer to **Projections** page for details.
"units":	must be entered as "m", as shown in the example. m = metres.
"maxExtent":	This is the minimum and maximum northings and eastings that the map covers. It is specified as a comma separated list of coordinates inside the square brackets as follows: Minimum X,Minimum Y,Maximum X,Maximum Y

The following settings are only required for Stratus Business layers:

"tw" and "th":	These are the tile Width and Height.
"bx" and "by":	These are the coordinates of the tile bounds.
"bw":	The width of the tile bounds in Map units.

Generic Tile Server

There are various different Tile Services options available, if you are using one which is not mentioned previously then you can configure the map using the details here.

```
{
 "roads":{
  "type": "xyz",
  "url": "URL with placeholders for ${z}, ${y}, and ${z}",
  "resolutions" : [Resolution list],
  "tileSize": [Tile Size],
  "tileOrigin" : [Tile Origin],
  "projection": "Projection Code",
  "projectionDef": "Projection Definition",
  "units": "m",
  "restrictedExtent": [Restricted extent],
  "maxExtent": [Maximum Extent]
 }
}
```

"type":	Set this value which is applicable to your Tile Service. **Note:** If your tile service is one based, rather than zero based (i.e. the most zoomed out zoom level is 1 and the first row and column is 1 rather than 0), then use a "type" of "StratusLayer" rather than "XYZ".
"url":	This is the full URL for an individual tile. Use the placeholders ${z}, ${y} and ${x} to specify the relevant zoom, row and column in the URL.
"resolutions":	Enter a list of all the resolutions required. e.g. "resolutions" : [42.3334180001693, 21.1667090000847, 10.5833545000423],
"tileSize":	This is the width and height of an individual tile, in pixels. e.g. [256, 256] or [512, 512].
"tileOrigin":	This is the coordinates of the top left hand corner of the tile at row zero, column zero. This is only needed if it is different from the maxExtent
"projection":	Refer to **Projections** page for details.
"projectionDef":	Refer to **Projections** page for details.
"units":	must be entered as "m", as shown in the example. m = metres.
"restrictedExtent":	This is the maximum extent of the map that a user would be allowed to see. Does not need to be supplied if this is the same as the maxEtent below.
"maxExtent":	This is the minimum and maximum northings and eastings that the map covers. It is specified as a comma separated list of coordinates inside the square brackets as follows: Minimum X,Minimum Y,Maximum X,Maximum Y

Web Map Service (WMS)

The below is an example setting for configuring a Web Map Service.

```
{
```

```
    "roads":{
        "type": "WMS",
        "url": "Service URL",
        "projection": "Projection Code",
        "projectionDef": "Projection Definition",
        "units": "m",
        "maxExtent": [Maximum extent],
        "parameters": {
            "layers": ["Layer name"]
        }
    }
}
```

"type":	this value must be set to "WMS"
"url":	This is the base URL for the WMS service. e.g. "http://www.os-mgb.org.uk/ogc/wms": To test this in a browser, enter the base URL followed by "?Service=WMS&REQUEST=GetCapabilities", e.g. if the base URL was "http://www.os-mgb.org.uk/ogc/wms" then enter : -**http://www.osmgb.org.uk/ogc/wms?REQUEST=GetCapabilities** This should return an XML document describing the capabilities of the service. **Note:** Do not include anything after the "?" in the Service URL setting.
"projection":	Refer to **Projections** page for details.
"projectionDef":	Refer to **Projections** page for details.
"units":	must be entered as "m", as shown in the example. m = metres.
"maxExtent":	This is the minimum and maximum northings and eastings that the map covers. It is specified as a comma separated list of coordinates inside the square brackets as follows: Minimum X,Minimum Y,Maximum X,Maximum Y
"parameters":	You can add other parameters to this list in the format "name":"Value". These will be added to the end of the URL that is sent to the WMS service in the format "&NAME=Value". The following parameters are currently supported (all in lower case): • "format": • "transparent": • "login": • "password": • "country": • "key": • "product": • "url": • "tiled": • "resolutions": • "tileOrigin": • "maxExtent": • "layers": **Note:** "layers": - You may specify a single layer in this list. Multiple layers are currently not supported.

Note: All parameters are passed in plain text, so be aware of this when passing passwords and other secure information over the network.

Cached WMS

Some WMS services, such as Geoserver, pre-cache data on the assumption that the client will always ask for discrete ranges of data. If this is the case then you may also need to provide other tile-related parameters in the settings, such as the list of "resolutions" and the "tileOrigin" or "maxExtent". Most vendors provide OpenLayers examples of how to access their services, so you can obtain most of the settings you need from these examples.

Multiple Map Layers

The "Roads" layer can only be defined when customising map settings. However, it is possible to overlay data from multiple sources on top of each other using a "Group" layer. This is useful where background data is stored in a Tile Service but additional layers are only available in a separate WMS service.

Group Layers are also likely to be needed when working with local vector or raster data as one would typically not want to show all layers at all zoom levels.

The group layer sets overall properties that are shared between layers within that group and also determines the zoom levels at which different layers are displayed. A typical configuration for a Group layer might look like this:

```
{
    "roads":{
        "type": "Group",
        "projection": "EPSG:27700",
        "projectionDef": "+proj=tmerc +lat_0=49 +lon_0=-2
+k=0.9996012717 +x_0=400000 +y_0=-100000 +ellps=airy +datum=OSGB36
+units=m +no_defs +nadgrids=ostn02 ",
        "attribution": "(c) Crown Copyright",
        "maxExtent": [290000,190000,510000,410000],
        "resolutions" : [
            33.866734,
            16.933367,
            8.466684,
            4.233342,
            2.11667,
            1.058335,
            0.5291675,
            0.264584,
            0.132292,
            0.066146
        ],
        "layers": {
            "Overview" : {
                "minimumResolution": 2.11667,
                "order": 1,
                "type": "GeoPackageTile",
                "url": "raster.gpkg",
                "table": "overview"
            },
            "Place Labels" : {
                "maximumResolution": 0.264584,
                "order": 3,
```

```
                "type": "GeoPackageFeature",
                "url": "labels.gpkg",
                "table": "CartographicText",
                "column": "geometry",
                "style": {
                    "label": "${textstring}",
                    "labelAlign": "cm"
                }
            },
            "Features" : {
                "maximumResolution": 1.058335,
                "order": 2,
                "type": "GeoPackageFeature",
                "url": "areas.gpkg",
                "table": "TopographicArea",
                "column": "geometry",
                "style": {
                    "fillColor": "orange",
                    "fillOpacity": 0.5,
                    "strokeOpacity": 0.2,
                    "strokeWidth": 1
                },
                "styleBy": "featurecode",
                "styles": {
                    "10021": {"fillColor": "red"},
                    "10053": {"fillColor": "brown"},
                    "10172": {"fillColor": "grey"},
                    "10111": {"fillColor": "green"}
                },
                "info": "Feature Type: ${featurecode}"
            }
        }
    }
}
```

"type":	This value must be set to "Group"
"projection":	The projection for all of the layers in the Group. Note that all layers must share the same projection. Refer to **Projections** page for details.
"projectionDef":	Refer to **Projections** page for details.
"maxExtent" "resolutions" "maxResolution" "numZoom-Levels":	These settings are determined by the layers that are contained within the group and must be consistent for all layers in the Group. Typically, if the group contains a Tile Service then the settings from the tile service should be used. If only local SQLite maps are being used then it is possible to simply specify the "maxExtent" and "numZoomLevels".
"layers":	This contains the list of layers that are contained within the group, enclosed in curly brackets {}. Each layer should be given a unique name, followed by a colon and then the specific settings for that layer. In addition, the following settings can also be specified for each layer:
"minimumResolu-tion"	These determine when the layer is switched on and off as the user zooms in and out.
"maximumResolu-tion":	Values represent the number of metres to show per pixel on the current zoom scale. In other words the more detailed map you have the lower the setting you should use. For example:

"minimumResolution": 0.0 will never turn off the layer no matter how far in you zoom.

"maximumResoltuion": 5.0 would show items until the user zooms out beyond 5 metres per pixel. This equates to an approximate scale of 1:20000 (1 metre screen size = 20000 distance to the ground) on a 96dpi device.

"order": Use the "order" to control which layers appear on top if more than one can be displayed at a time (e.g. draw labels on top of areas). The layer with the highest order appears on top.

Projections

ConfirmConnect®, ConfirmWorkzone®, and Confirm web are capable to transform all data coming from Confirm into your specified coordinate system, so that it can be displayed properly on the map. The popular visualisation system (EPSG:3785) used by Google and Bing is included as a standard. But for other coordinate systems, the definition needs to be provided, which is required for all map service types.

The definition for a coordinate system should be provided on Web Map Settings as follows:

"projection": This is the EPSG code of the coordinate system that you want to use. E.g. "EPSG:27700" is the EPSG code for British National Grid.

"projectionDef": ConfirmConnect® uses the Proj4 format for coordinate system definitions.

You can find the Proj4 definition for your coordinate system here: **http://spatialreference.org/**.

For example, **http://spatialreference.org/ref/epsg/27700/proj4/** gives:

+proj=tmerc +lat_0=49 +lon_0=-2 +k=0.9996012717 +x_0=400000 +y_0=-100000 +ellps=airy +datum=OSGB36 +units=m +no_defs

Note: Enter this on a single line in the projectionDef parameter.

Grid Shift

Some countries apply a grid shift in order to provide high accuracy coordinate conversions from default GPS coordinate systems into their own native coordinate systems. For example, in the UK the Ordnance Survey base maps use the OSTN15 grid. See the **Ordnance Survey** website for details.

In order for ConfirmConnect®, ConfirmWorkzone®, and Confirm web to accurately plot entities on map where this type of conversion is required, Confirm needs to be notified of the grid used so the grid shift file can be included. These files have not all been included by default due to their initial size and potential performance implications.

The OSTN02, OSTN15 & A66 National grid shift files have been included with ConfirmConnect®, ConfirmWorkzone® and Confirm Web, if you use OS background maps, you will need to include an additional **projectionDef** value. Append '+nadgrids=ostn15' onto the end of the current line, for example:

+proj=tmerc +lat_0=49 +lon_0=-2 +k=0.9996012717 +x_0=400000 +y_0=-100000 +ellps=airy +datum=OSGB36 +units=m +no_defs +nadgrids=ostn15

Note: For A66, use +nagrids=A66_National

GDA2020

Confirm supports the new GDA2020 coordinate reference system.

A GDA94 projection can be converted to a GDA2020 projection by adding another projectionDef value which is "+towgs84=-0.06155,0.01087,0.04019,-0.0394924,-0.0327221,-0.03289790,0.009994".

For example:

The projection definition for MGA zone 55 from spatialreference.org is:

"+proj=utm +zone=55 +south +ellps=GRS80 +towgs84=0,0,0,0,0,0,0 +units=m +no_defs"

Which can be converted to GDA2020 as follows:

"+proj=utm +zone=55 +south +ellps=GRS80 +towgs84=-0.06155,0.01087,0.04019,-0.0394924,-0.0327221,-0.03289790,0.009994 +units=m +no_defs"

Note: Note: Enter this in a single line in the projectionDef parameter.

Full Text Search Settings

Confirm web interface supports full text search for Enquiry search and customer address. This enables faster search of Enquiry and customer address in the web interface.

Before enabling the full text search, Confirm Database need to be configured

Configuring SQL Server for enabling full text search

The instructions mentioned **here** must be followed, to enable full text index feature in SQL server.

Note: Ensure the windows service 'SQL Full-text Filter Daemon Launcher' is running and it's startup type is set to Automatic.

Configuring Oracle Server for enabling full text search

The instructions mentioned **here** must be followed, to enable full text index feature in Oracle database.

In Oracle, for every schema user (that needs to use full text search) in the asset_type table, following things are needed:

1. The database user needs to be given the role of CTXAPP (to allow them to create/manage full text preferences/indexes.
2. Execute permissions need to be given for the oracle text packages CTXSYS.CTX_CLS, CTXSYS.CTX_DDL, CTXSYS.CTX_DOC, CTXSYS.CTX_OUTPUT, CTXSYS.CTX_QUERY, CTXSYS.CTX_REPORT, CTXSYS.CTX_THES, CTXSYS.CTX_ULEXER.

Once the database configuration has been done, the following settings need to be enabled in the to enable full text search in the web interface:

1. The 'Address' checkbox needs to be selected to enable full text search for customer address.
2. The 'Enquiry' checkbox needs to be selected to enable full text search for Enquiry.

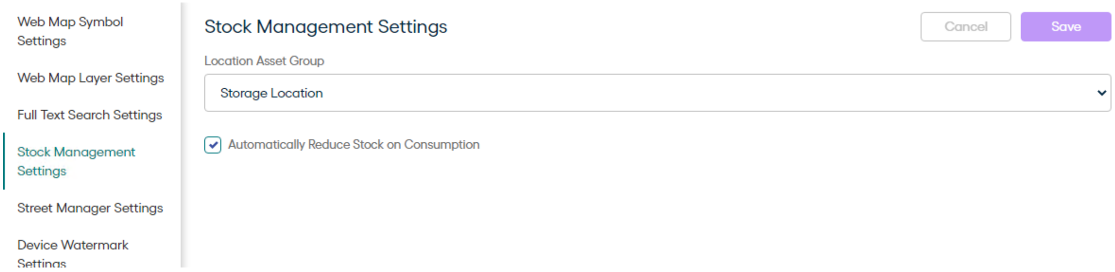
This will add the Full Text Index agent in the Scheduled Tasks. The Full Text index agent creates and maintains the full text index on Enquiries and customer address

After the index has been created, full text search functionality will be used in the web interface for searching Enquiries and customer address.

If the 'Enquiry'/'Address' checkbox is deselected, the full text search is disabled for Enquiry/Address and the corresponding index will be deleted.

Stock Management Settings

This page is used to configure Stock Management.



Location Feature Group

Set which Confirm Feature Group will be used for Stock Management. This allows any Features, of a Feature Type within this group, to be available as locations.

Automatically Reduce Stock on Consumption

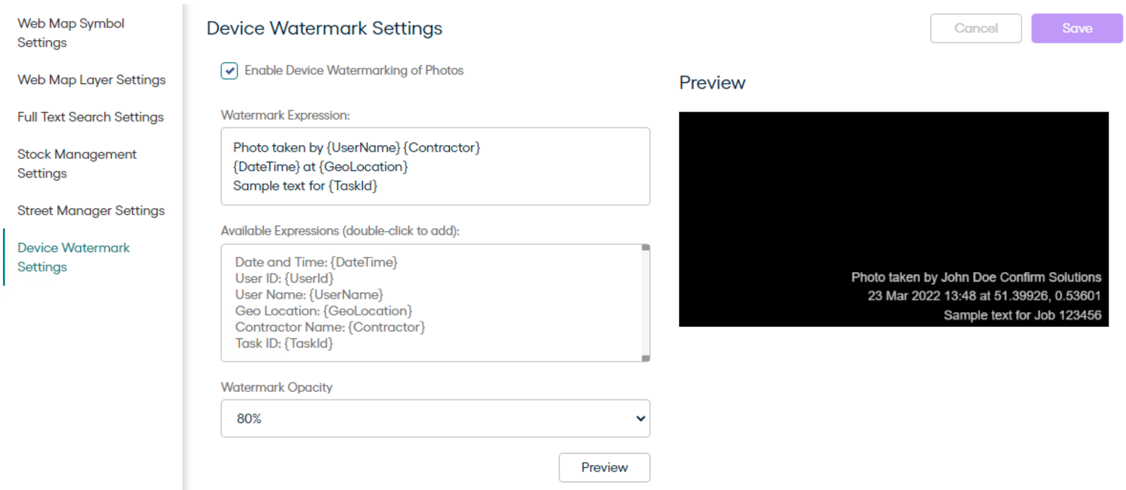
Set whether Inventory levels should be decreased when Jobs are completed in ConfirmConnect.

Street Manager Settings

Street Manager Settings screen is used to configure Confirm to interact with Street Manager. All the fields on the screen have in-line help, refer to the page for further information.

Device Watermark Settings

This page is used to configure how photos are watermarked within ConfirmConnect.



Enable Device Watermarking of Photos

When checked, ConfirmConnect will watermark all photos that are taken on a device using the expression defined on this settings screen.

Watermark Expression

This field is used to configure a watermark using a combination of static text and/or dynamic expressions that will be calculated at the time of taking a photo in ConfirmConnect. The result will be stamped on the photo as a watermark.

Available Expressions

This list contains all the available expressions that can be added to the Watermark Expression above. Each expression can be added to the watermark expression field by a double-click. Alternatively the expression code can be typed into the watermark expression field manually. Each expression will be evaluated at the time a photo is taken in ConfirmConnect.

Note: Geolocation data can be added to the watermark using the {GeoLocation} expression. This data will be displayed in Latitude/Longitude using Decimal coordinates.

Watermark Opacity

Set the Opacity of the text shown on the image.

Note: Text has a subtle dark border to allow it to be visible on lighter images.

Preview

Click the "Preview" button to show an example of how the watermark might look based on the current values in the Watermark Expression field.

General Web Settings

Web Interface Base URL

The Web Interface Base URL setting is used to provide access to the Confirm web interface Job, Defect, and Feature screens from within ConfirmConnect®.

The base URL can be derived from the URL that would normally be used to access the Confirm web interface via a browser.

For instance, if the Confirm Web Interface Map URL is:

https://localhost/confirm/confirmweb/app/index.html?tenant=t#/map

Then, the base URL should be:

https://localhost/confirm/confirmweb

It is important to omit the 'app' path and 'tenant' as demonstrated above.

Edit Committed Job Description

Allows the Description field to be edited on committed Jobs in the Confirm web interface.

Note: Users must also have User Security permissions to edit Jobs to be able to edit the Job Description

Edit Committed Job Location

Allows the Location field to be edited on committed Jobs in the Confirm web interface.

Note: Users must also have User Security permissions to edit Jobs to be able to edit the Job Location

Enable Legacy Scheduling Flag

This setting determines whether allocation actions in Enterprise are enabled for Jobs allocated via Workzone.

Selecting 'Yes' will use the legacy behavior which disables allocation actions.

Selecting 'No' will allow Job allocation actions in Enterprise.

If you are using the legacy Scheduling screen in Enterprise you should use the legacy behaviour and set this option to 'Yes'.

Note: Changing the setting only affects new Jobs. It will not update existing Jobs.

Note: Selecting 'No' affects the scheduled_flag field on the gang_job table in the database, any Reports dependent on this field will need to be reviewed.

Document Visibility

The default visibility level for documents linked to Confirm entities - Jobs, Defect, Enquiries, and Features.

Note: It is possible to set the default visibility level for individual users on the General User Settings screen.

Measurement Units

The default units when using the map measurement tool on the locate map in ConfirmConnect.

Note: This setting can be overridden for individuals on the Settings / About option in the Confirm-Connect menu

Custom Form Settings

Custom Form Configuration

Define Custom Forms that can be opened from within the Confirm Product, for example opening Mendix forms within ConfirmConnect.

The following details can be set for each Custom Form:

- Name: Displayed to the User when choosing a form to open.
- Description: Displayed to the User when viewing more information about a form.
- URL: The URL of the custom form.
- Workflows: The areas in Confirm this form will be displayed.
- Data key: Limit access to this form by Data key.
- Enabled flag: Only enabled forms will be displayed as an option for Users to open.

It's possible to use placeholders in the URL to pass data to the Custom Form.

The following placeholders are supported:

- {{ENTITY_ID}} : Entity Identifier, for example Job Number, Enquiry Number, etc.
- {{ENTITY_TYPE}} : The type of the current entity, e.g. Job, Enquiry, etc.
- {{SITE_CODE}} : Code for the current entity's Site.
- {{PLOT_NUMBER}} : Plot Number for the current entity's Feature.
- {{CENTRAL_ASSET_ID}} : Central Asset Id for the current entity's Feature.

For example: www.customforms.com/my_form/{{SITE_CODE}}/{{PLOT_NUMBER}}

Note: If the form is launched from a workflow with the placeholder value missing (e.g. an Enquiry not linked to a Feature for {{PLOT_NUMBER}}) then the value "undefined" will be passed instead.

Custom Form Licensing

Access to Custom Forms is licensed according to the number of Custom Forms being used.

Any number of Custom Forms may be configured, but the number of concurrent 'Enabled' Custom Forms will be limited by your licence.

Please contact your Confirm account manager to arrange licensing for the Custom Forms.

Contractor Folder Access Settings

Contractor Folder Access

The Contractor Folder Access screen can be used to restrict access to files/folders for Contractor users in the Confirm OnDemand environment.

Contractors

Use the Contractor list to select the Contractor for which you would like to see/update folder access.

Folder Access

Selecting 'Full' on the Folder Access toggle will give unlimited full access to all files and folders.

Selecting 'Restricted' will mean that the Folder White List is used to decide which folders a Contractor user will have access to. If the Folder White List is empty, users for the selected Contractor will have no access to Confirm OnDemand files/folders.

Folder White List

List here all of the folders to which users for the selected Contractor will have access. Note that, where a folder has been added to the white list, users will also have access to any child folders.

Product Integrations

Product Integration enables user to open integrated products within the Confirm web interface.

Adding External Products

To add an external product, customers are required to create a Brightly Customer Support ticket with the following details:

- Product Name: Displayed to the user when selecting a product to open.
- Product Description: Displayed to the user when viewing more information about a product.
- Product URL: The sub-URL for the product to open, e.g /Assets/ComplexAsset/{{FEATURE_KEY}}.
- Workflows: The module in Confirm Web where this product will be displayed.

URL Placeholders

- {{ENQUIRY_NUMBER}} : Enquiry Number for an enquiry. Available for Enquiry workflow.
- {{JOB_NUMBER}} : Job Number for a job. Available for Job workflow.
- {{DEFECT_NUMBER}} : Defect Number for a defect. Available for Defect workflow.
- {{FEATURE_KEY}} : Feature key in a feature. Available for Asset workflow.
- {{SITE_CODE}} : Code for the current feature site. Available for Asset workflow.
- {{PLOT_NUMBER}} : Plot Number for the current feature. Available for Asset workflow.
- {{CENTRAL_ASSET_ID}} : Central Asset Id for the current entity's Feature.
- {{LATITUDE}} : Latitude for the current feature. Available for ALL workflows.
- {{LONGITUDE}} : Longitude for the current feature. Available for ALL workflows.

For example: www.product.com/{{SITE_CODE}}/{{PLOT_NUMBER}}

Example: https://map.vionice.io/data

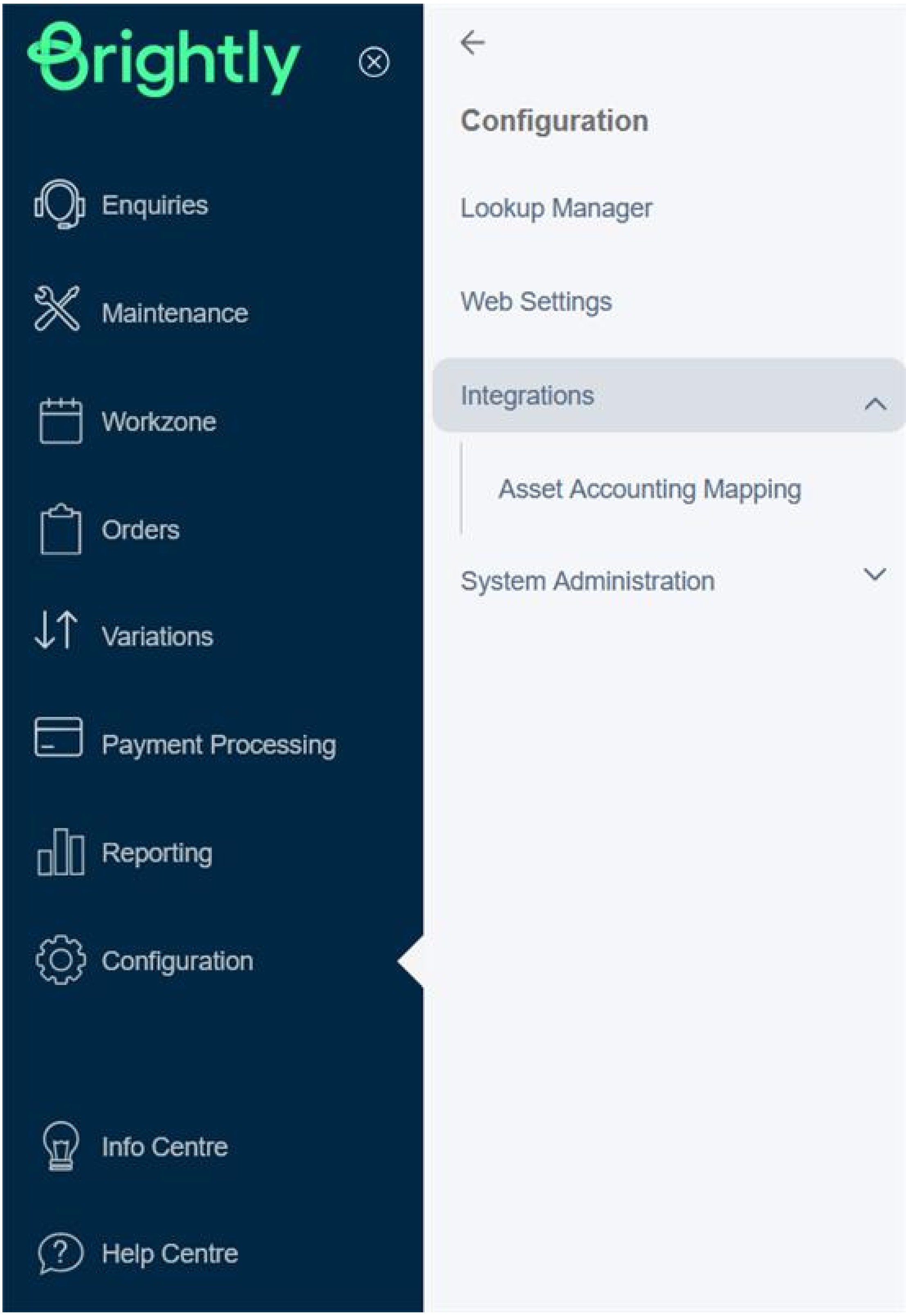
Integrations

Asset Accounting Mapping

Introduction

Confirm has a new Accounting and Valuation module that provides a complete Financial Asset Register to flexibly manage Asset portfolios, delivers improved transparency and insights. It enables improved financial reporting and regulatory compliance. To use this module Asset Accounting needs to be configured.

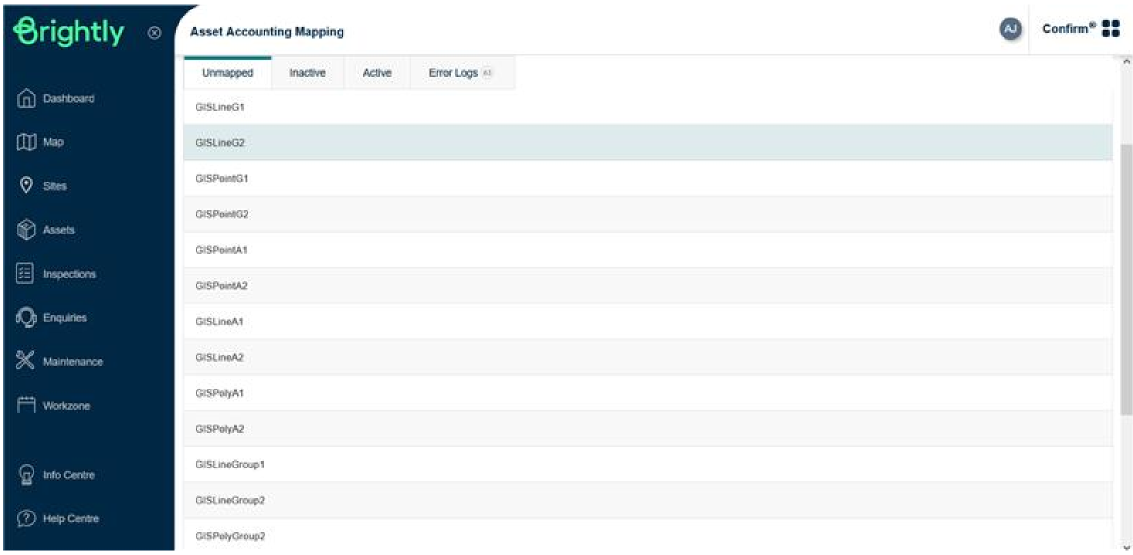
Access to this functionality begins with configuring User Security settings through the Asset Accounting Setting (Security) option.



Note: The Asset Accounting Mapping option will only be available if it's been configured for you tenant. If the option is not available, please contact your Account Manager for further support.

Mapping Tabs

The Asset Accounting Mapping User interface is launched to map a Feature Group in Confirm to Asset Category in the Financial Asset Register (FAR).

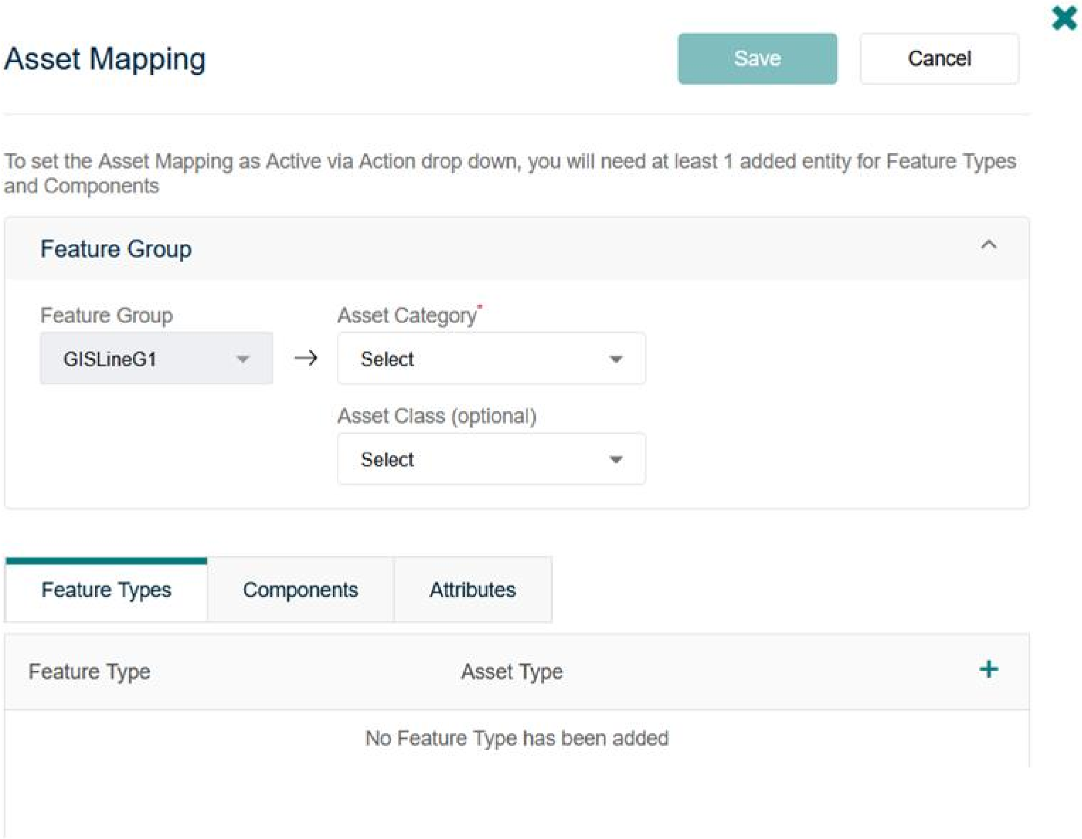


The interface is split into the following four tabs:

- **Unmapped**: Shows all Feature Groups in Confirm which have not been mapped to an Asset Category in the Financial Asset Register. Assets within this Feature Group are not currently being synchronised to the Financial Asset Register, therefore will not be available for Accounting & Valuation purposes.
- **Inactive:** Shows all Feature Groups which have mapping configuration supplied to integrate with the Financial Asset Register, but the mapping is currently 'Inactive'. Updates to Assets within this Feature Group are not currently being synchronised to the Financial Asset Register. Inactive mappings can be made 'Active' via the Action button.
- **Active:** Shows all Feature Groups which have a mapping configuration supplied and are currently being synchronised with the Financial Asset Register. All new Assets, or changes to existing Assets will be replicated to the Financial Asset Register for these Feature Groups.
- **Error Logs:** Will show any known errors which have occurred where data from Confirm was not synchronised to the Financial Asset Register.

Asset Mapping Interface

New Feature Group mappings can be created from the 'Unmapped' tab, or edits to existing mappings can be made from the 'Inactive' tab. Once selecting a Feature Group, the 'Asset Mapping' screen will be displayed.



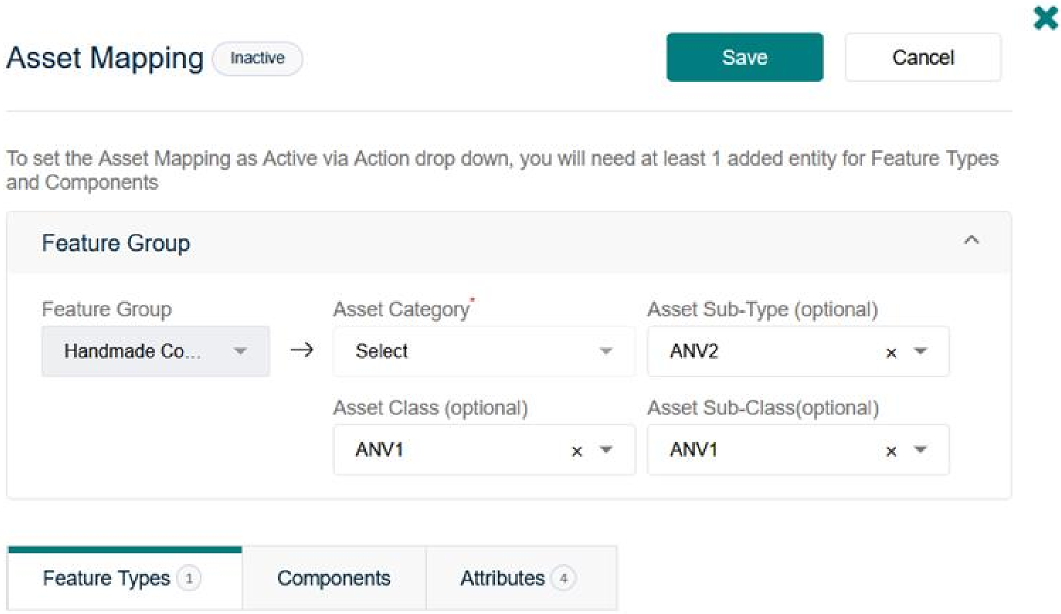
Feature Group mapping

When creating a new mapping authorised users can link the selected Confirm Feature Group with a single Asset Category in the Financial Asset Register.

On mapping an Asset Category, the Asset Sub-Type field will become available, which can be mapped to available Attributes for the Confirm Feature Group. Likewise, on mapping an Asset Class, the Asset Sub-Class field will become available for mapping. Mapping these fields ensure that the Financial Asset Register has the correct data available for grouping and reporting.

Note: Once this link between a Confirm Feature Group and a Financial Asset Register Asset Category is saved and activated, the link cannot be changed. i.e. that Feature Group cannot be remapped to different Asset category.

This relationship between Feature Group and Asset Category will become read-only after it has been established. For information, different Feature Groups can be mapped to same Asset category.



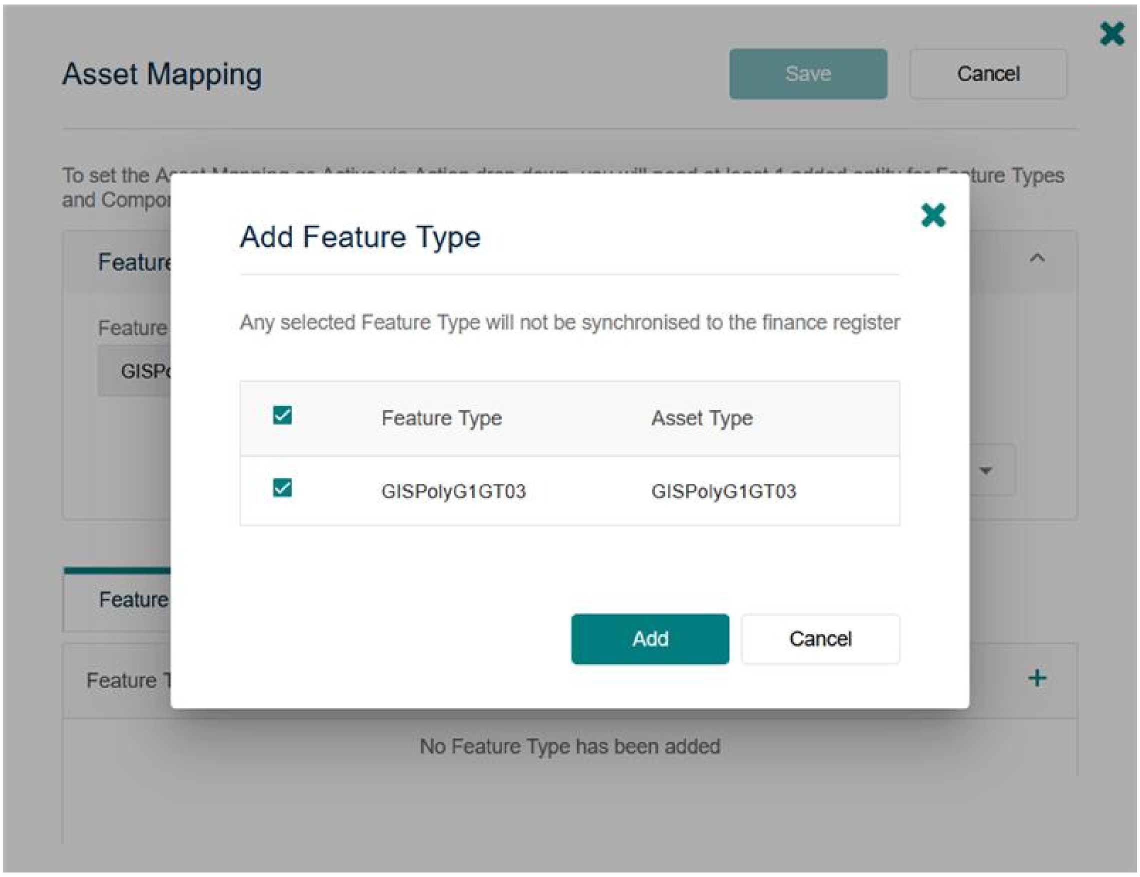
After mapping the Feature Group, the following tabs are available for further mapping: -

- Feature Types - Controls which Assets are synced to the Financial Asset Register.
- Components - Allows you to model an Asset with multiple components.
- Attributes - Enables syncing of Asset data into the Financial Asset Register to support reporting.

Feature Type

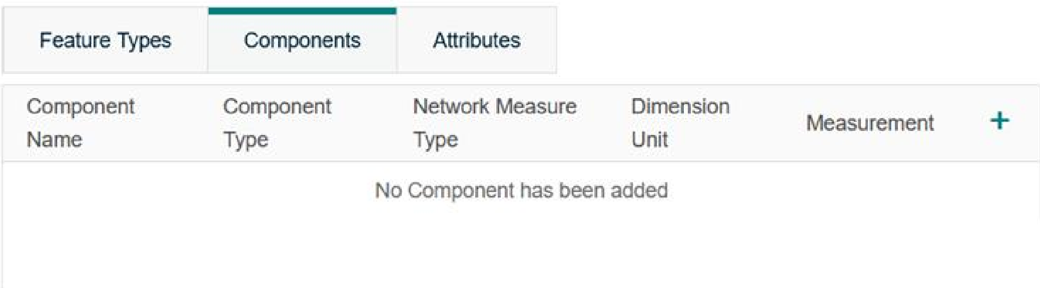
Not all Feature Types in Confirm may require a corresponding Asset to be created in the financial Asset Register. Non-financial Assets in Confirm can be omitted if no Asset Accounting practices are required to be undertaken.

To support this requirement, the user will have the option to map which Confirm Feature Types within a mapped Feature Group will be created in Financial Asset Register. If selected, Feature Type value will be stored as Asset Type in Financial Asset Register.



Components

Components are used for recording dimensions, service criteria (e.g. condition), valuations, and performing accounting transactions in the Financial Asset Register. Components can be added using the add (+) button or edit existing Components by clicking on the pencil icon

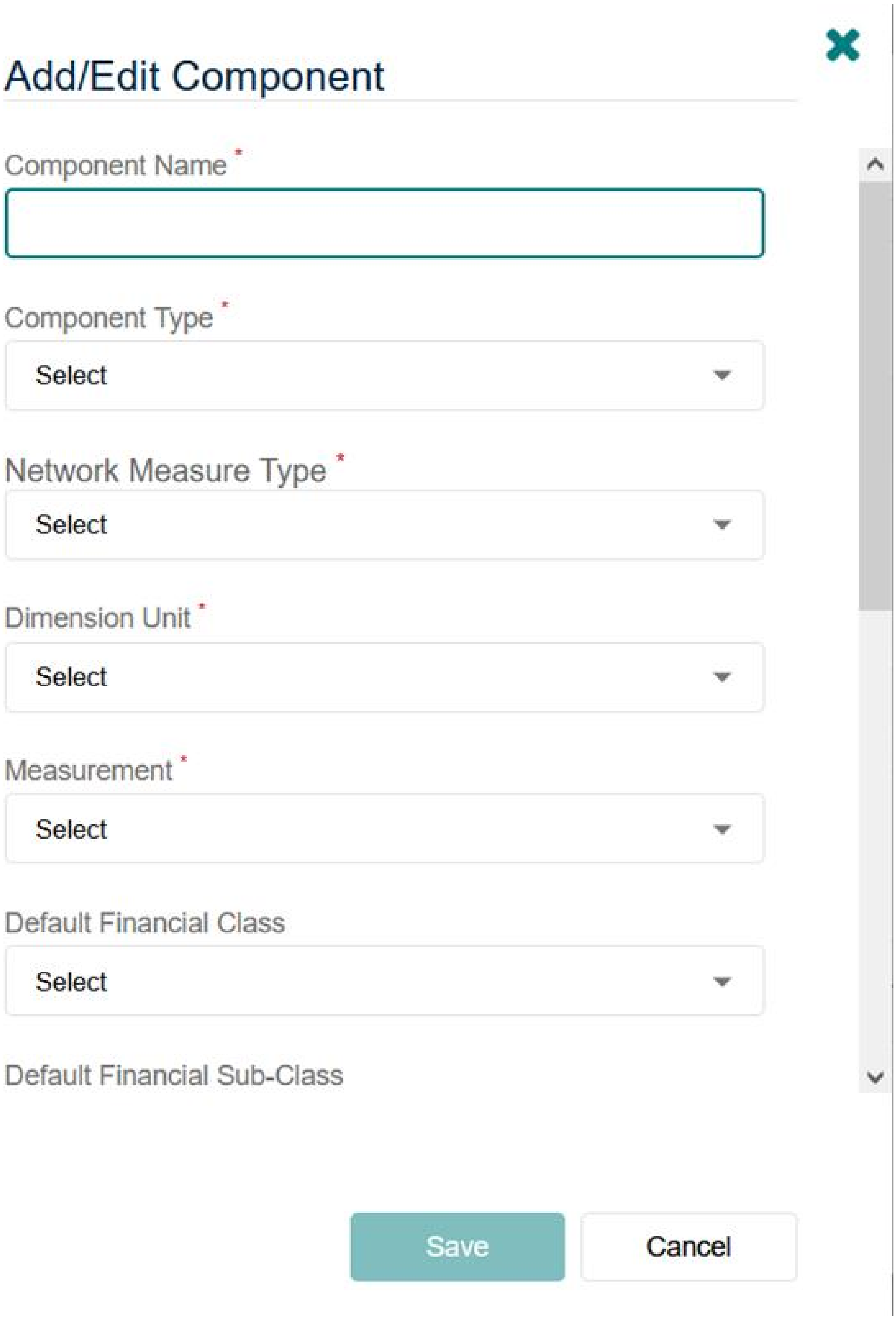


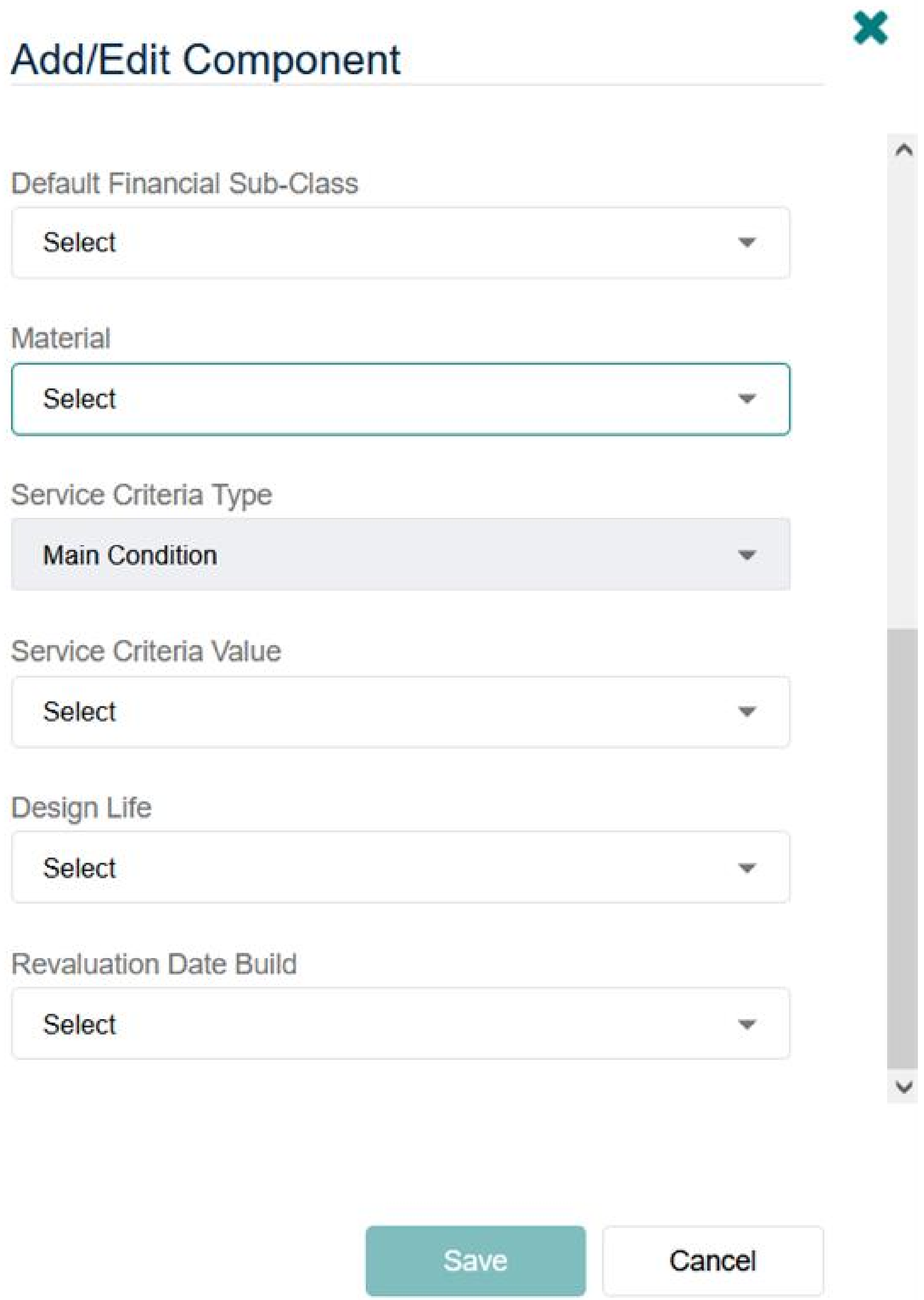
Following fields can be configured and mapped at the component level-

- Component Name*: Unique Component name within the mapping.
- Component Type*: Select the Component Type from the drop-down. The available options are determined by the parent Asset's category in Financial Asset Register.
- Network Measure Type*: A drop-down field to select the Network Measure Type, as per available options determined by the parent Asset's category and component type in Financial Asset Register.
- Dimension Unit*: A drop-down field to select the Unit, determined by network measure type in Financial Asset Register.

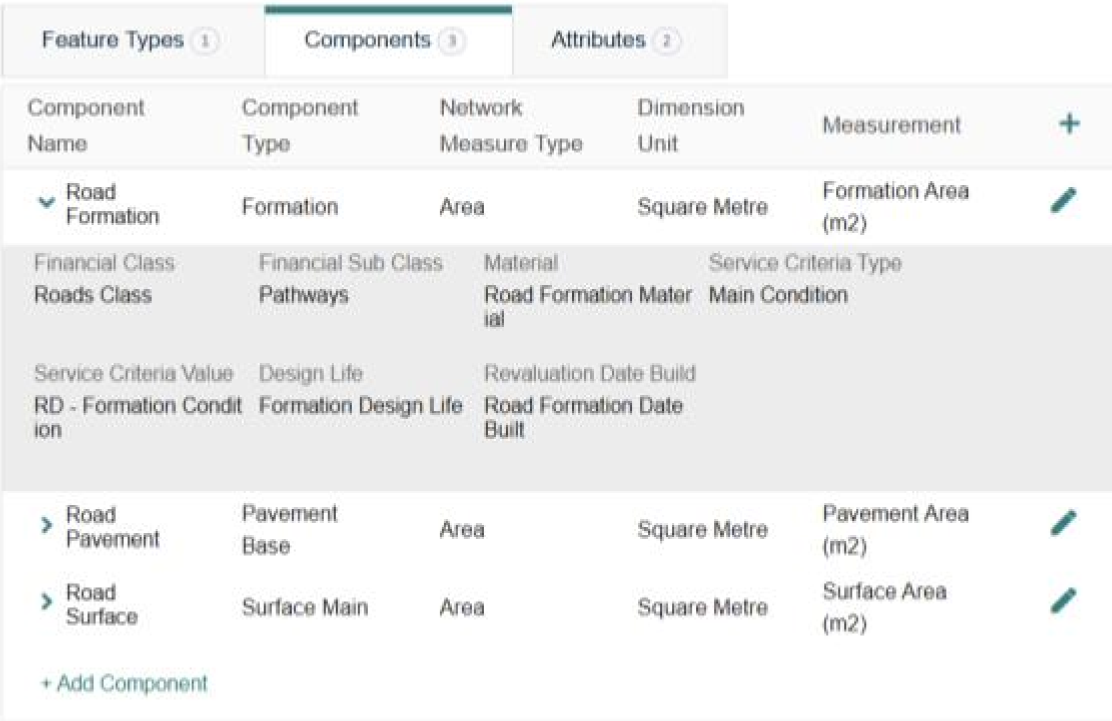
- Measurement*: A drop-down field to map numeric field attribute from Confirm. It defines the primary measurement related to the Asset (such as quantity, length etc.).
- Default Financial Class: A drop-down field to set default financial class available as per Financial Asset Register (which can be later updated in Financial Asset Register as per business need).
- Default Financial Sub-Class: Corresponding default financial class can be selected from the drop down.
- Material: A drop-down field to map relevant picklist attribute from Confirm. Material Type is used to categorize the type of material that makes up an Asset Component. ·
- Service Criteria Type: Service criteria refer to the condition of the Asset/Component. It is always saved as Main Condition in Financial Asset Register. ·
- Service Criteria Value: A drop-down field to map observation type Attribute from Confirm.
- Design Life: A drop-down field to map numeric attribute from Confirm.
- Revaluation Date Built: A drop-down field to map date field from Confirm.

Note: Fields such as Component Name, Component Type, Network Measure Type, Dimension Unit, and Measurement are marked with an asterisk (*) to indicate they are mandatory.


Add/Edit Component
Component Name *
Component Type *
Select
Network Measure Type *
Select
Dimension Unit *
Select
Measurement *
Select
Default Financial Class
Select
Default Financial Sub-Class
Save
Cancel



On saving Component, it can be edited, deleted or more Components can be added as required.

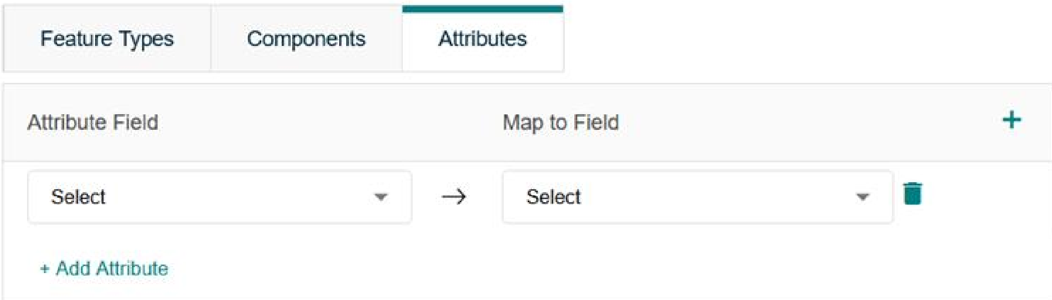


Note:
- The **Component Name** must be unique where multiple component mappings are created. The User can create multiple Component mappings for the same **Component Type**, but the name must be unique.
- **Once the mapping has been saved and activated, the Component Type cannot be deleted**.

Attributes

Users can add Attributes as required or update/delete existing Attribute mappings. Attributes provide ability to select which Attributes are configured for the selected Feature Group in Confirm to be mapped to a corresponding field in Financial Asset Register.

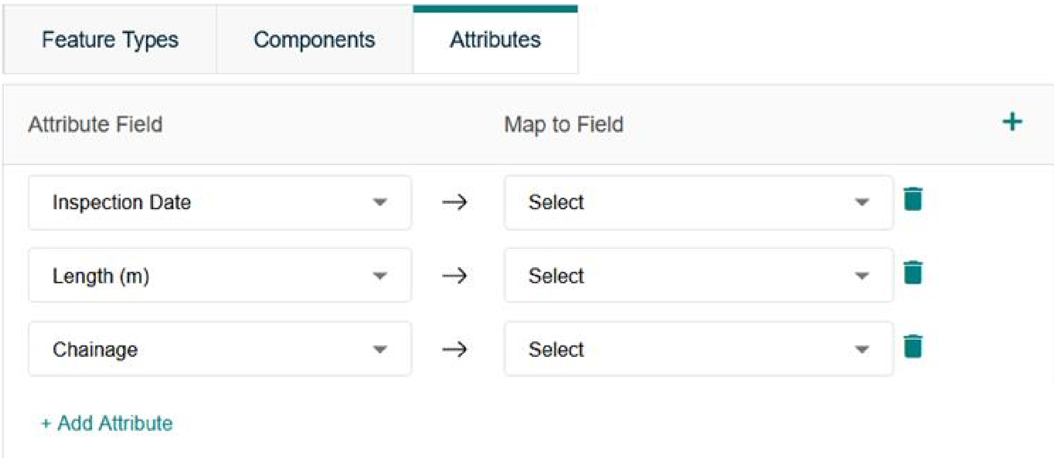
The Attribute Field on the left shows a list of Attributes available for the Feature Group in Confirm. The Map to Field on the right shows list of Attributes available for the Asset Category in Financial Asset Register.



Mapping only allows Attributes to be linked with a matching data type. For example, if Attribute field is measurement type in Confirm, then it can be mapped to numeric type Attribute in Financial Asset Register. Likewise, picklist type Attribute in Confirm (or observation type in component mapping) can be mapped to text type Attribute in Financial Asset Register. Similarly date type fields.

This ensures that Attributes with non-matching data types are not linked. For example, numeric field is not mapped to date type or picklist Attribute.

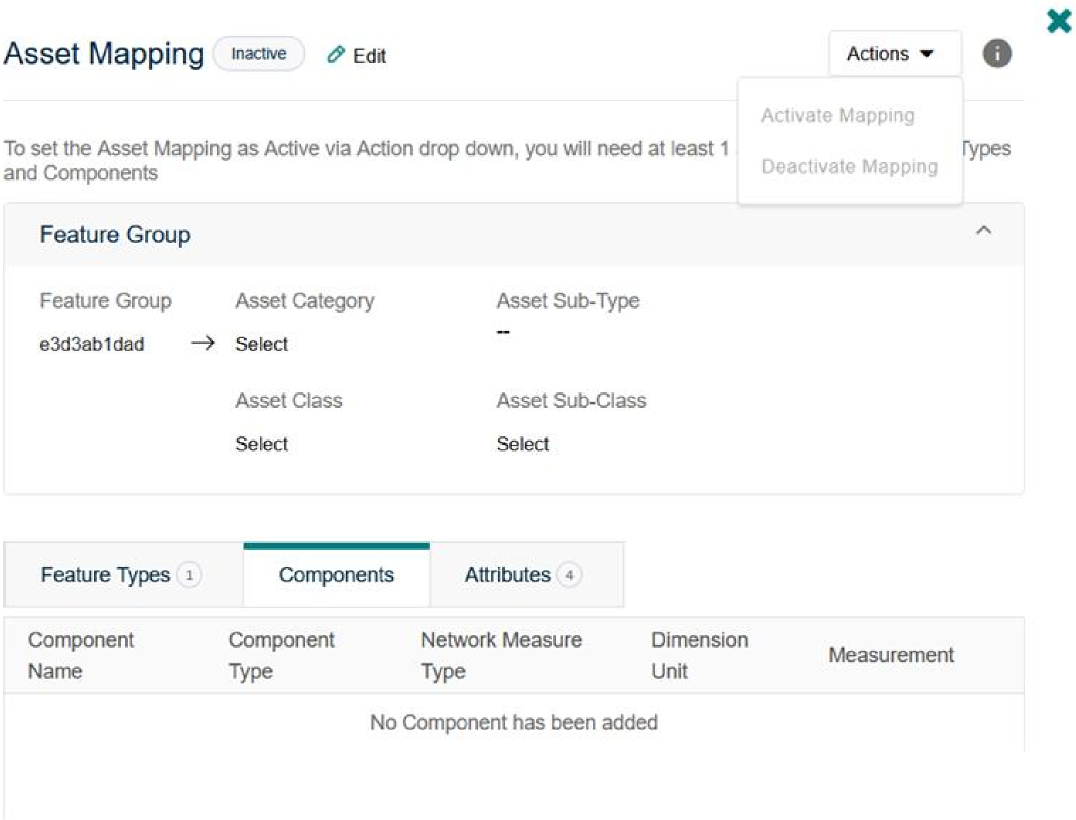
Hence, Attributes to the right (Financial Asset Register) will show different list depending on the type of Attribute selected from the left (Confirm).



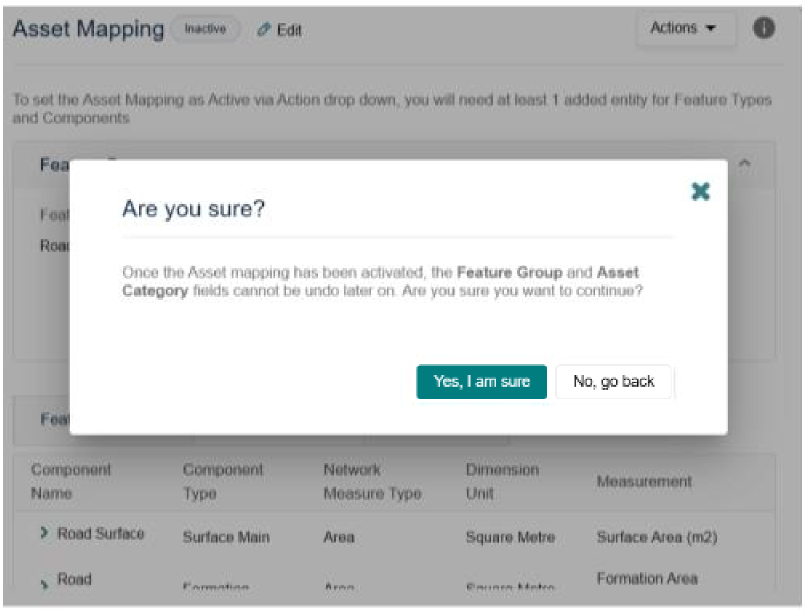
Active and Deactivate Mapping

The default status for any new mapping would be **Inactive**. When the user is satisfied that the mapping is complete, a button is presented which will mark the mapping as **Activate Mapping**.

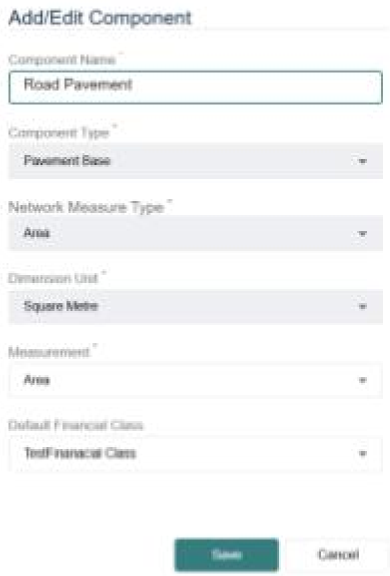
To **Activate** the mapping, at least one entity is mapped for each Feature Type and Component. The ‘Attribute' mapping is optional.



Once a mapping is activated, Feature Group cannot be remapped to a different Asset Category. This relationship between Feature Group and Asset Category will become read-only after it has been activated. For information, different Feature Groups can be mapped to same Asset Category.



Additionally, once mapping is activated, component fields including Component Type, Network Measurement Type and Dimension Unit will become read-only

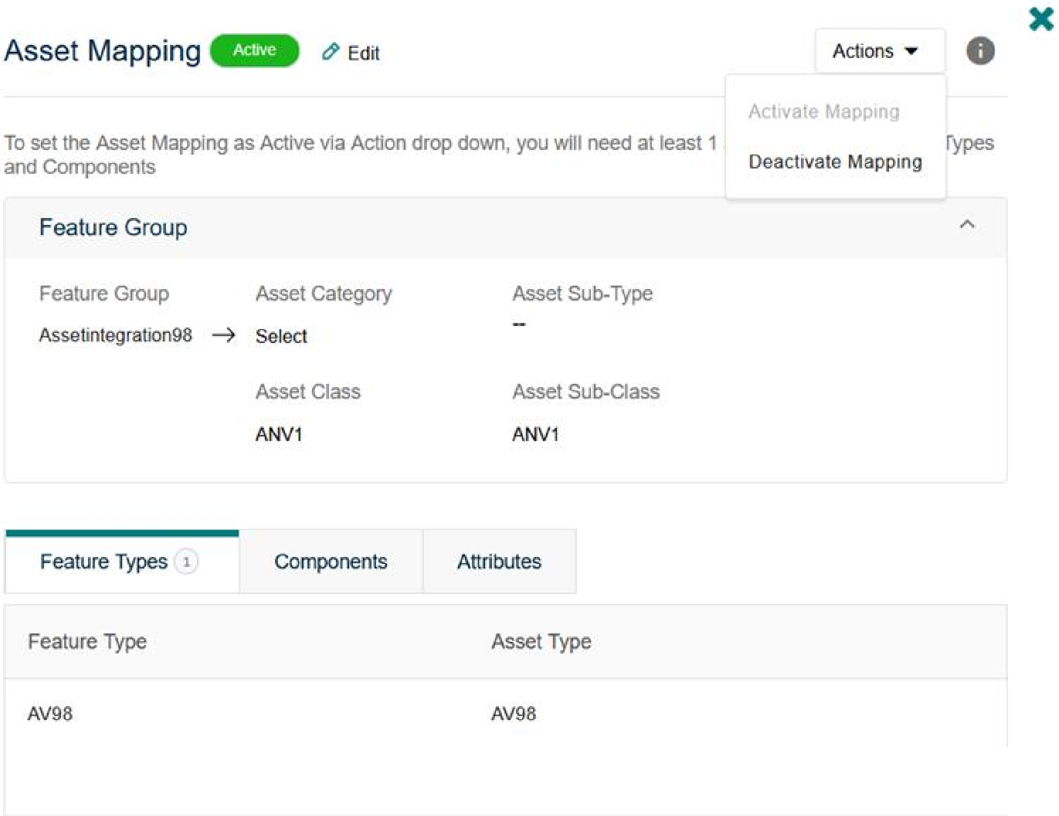


Mapping Status

Feature Group Mappings, once created, will be either in an Active or Deactivated status. User can change this status at any time via the 'Actions' drop-down menu. In order to change the mapping settings for an Active Feature Group Mapping, User must first make it 'Inactive' to apply the changes.

Note: Every time a mapping is activated (from deactivated status), the system will sync all the Asset record for the mapped Feature type from Confirm to Financial Asset Register. So, it's important to deactivate/activate the mapping only if its required (for example, if need additional Attribute data or new Component). Else it will unnecessarily synchronise data and potentially impact software performance.

When mapping is deactivated (i.e. Inactive), Asset records for the mapping is ignored by the solution; resulting in no Asset transactions between Confirm and Financial Asset Register.



End Date

If an Asset is End-dated in Confirm, a specific workflow in the Financial Asset Register is triggered.

A scheduler in Financial Asset Register runs automatically every day at midnight. For any Asset that has a past End-date, the scheduler will mark the Asset/Components as Decommissioned. Additionally, users can perform bulk operations in Financial Asset Register to change the Asset status to Disposed (for Assets/Components which have link in mapping and are in decommissioned status).

Any Asset having End date as today's date or Future date, status of corresponding Assets/Components in Financial Asset Register will be changed only after End date has passed current date.

If any Asset is re-activated, the Financial Asset Register Asset will be marked as Active, but components need to be marked as Active by the user in Financial Asset Register, except those which are Disposed.

Error Management

Error management interface provides visibility to User on errors and a mechanism to resolve the errors (via automatic or manual re-sync)

Primarily, the following three types of errors are observed:

- Authorisation Error: If any Asset record sync has failed due to authorization error like API credentials invalid.
- Tenant system down: If any sync has failed due to Tenant system being unavailable (for example: Confirm or Assetic).
- Validation Error: If an Asset sync has failed due to validation issue (for example: required lookup value is not available in Financial Asset Register).

Retry mechanism: If an Asset sync has failed, system provides capability to retry the sync.

- Auto retry: For error types ‘Tenant system down’ or ‘Validation Error’, the system will auto retry the records multiple times.
- Manual retry: On clicking this button, error types ‘Tenant system down’, or ‘Authorisation Error’, are synced by the system.

If an Asset record is synced successfully(for example: after retrying), the error record for the Asset is removed from the Error Log tab.

Unmapped | Inactive | Active | Error Logs 63 | Manual Retry

Date/Time	Error Type	Impacted Asset(s)	Message
25/04/2025 03:21 PM	Validation Error	1242043	{"1":"The combination of Financial Class and Financial Sub Class is invalid."}. Please review the asset 1242043 and try again.
25/04/2025 02:13 PM	Validation Error	1242016	{"Message":"Database operation was not successful.; Unexpected error occurred."}. Please review the asset 1242016 and try again.
25/04/2025 02:13 PM	Validation Error	1242017	{"Message":"Database operation was not successful.; Unexpected error occurred."}. Please review the asset 1242017 and try again.
25/04/2025 02:13 PM	Validation Error	1242015	{"Message":"Database operation was not successful.; Unexpected error occurred."}. Please review the asset 1242015 and try again.
25/04/2025 02:13 PM	Validation Error	1242003	{"Message":"Database operation was not successful.; Unexpected error occurred."}. Please review the asset 1242003 and try again.
25/04/2025 02:13 PM	Validation Error	1242005	{"Message":"Database operation was not successful.; Unexpected error occurred."}. Please review the asset 1242005 and try again.
25/04/2025 02:13 PM	Validation Error	1242014	{"Message":"Database operation was not successful.; Unexpected error occurred."}. Please review the asset 1242014 and try again.
25/04/2025 02:13 PM	Validation Error	1242006	{"Message":"Database operation was not successful.; Unexpected error occurred."}. Please review the asset 1242006 and try again.
25/04/2025 02:13 PM	Validation Error	1242004	{"Message":"Database operation was not successful.; Unexpected error occurred."}. Please review the asset 1242004 and try again.
25/04/2025 02:13 PM	Validation Error	1242002	{"Message":"Database operation was not successful.; Unexpected error occurred."}. Please review the asset 1242002 and try again.
25/04/2025 10:48 AM	Validation Error	1242007	{"1":"The combination of Financial Class and Financial Sub Class is invalid."}. Please review the asset 1242007 and try again.

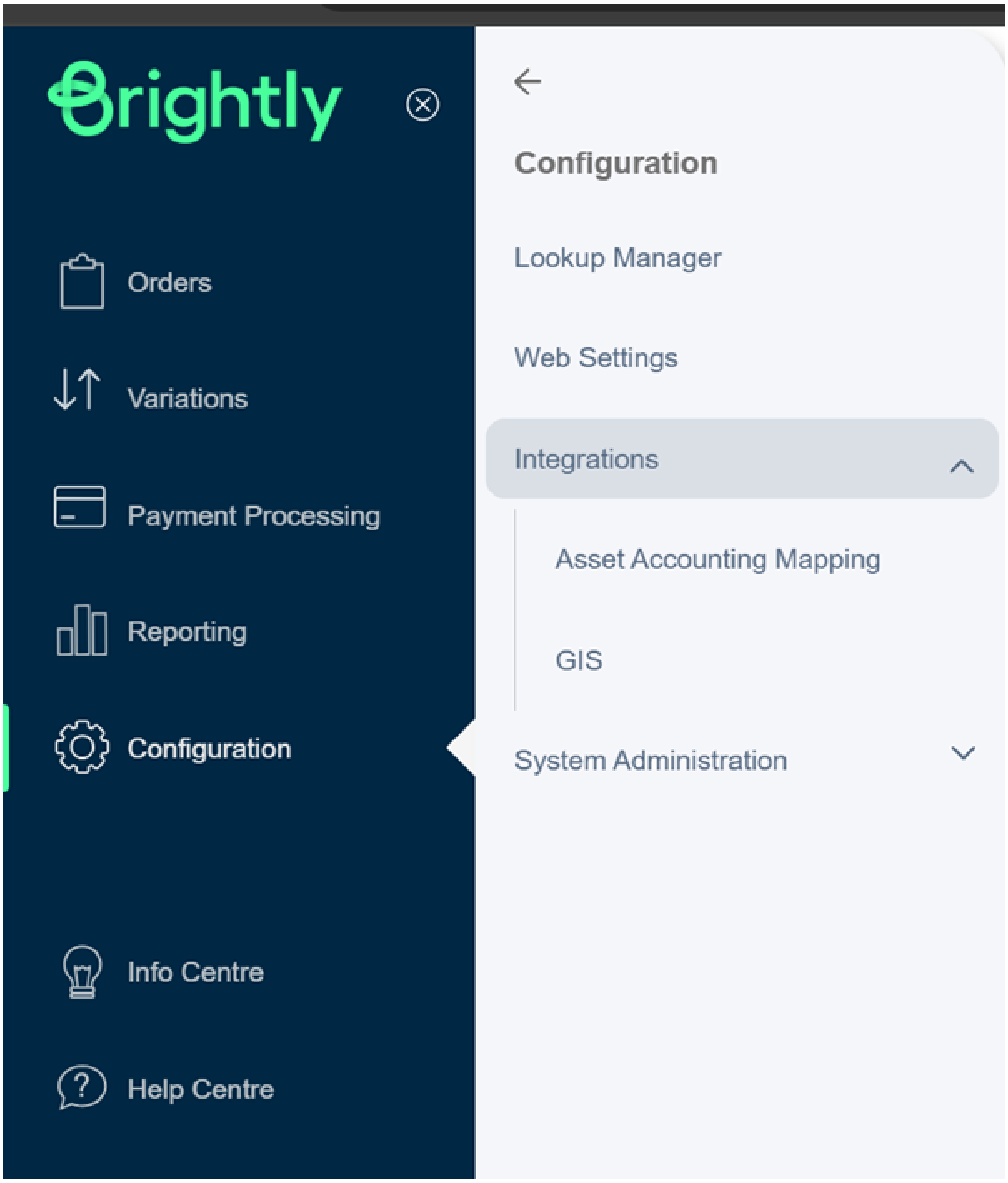
Unsupported Features

- **Asset Split & Merge:** The workflow currently is not supported. While splitting an Asset in Confirm will lead to the End-dating (decommission) of the original Asset and the creation of new Assets, this is subject to existing validations in the Financial Asset Register where the split may be limited if financial records exist. Additionally, there is no merge workflow in Financial Asset Register.
- **Delete Assets:** It is advised that Asset deletion is disabled in Confirm to ensure that audit records and financial history are maintained. If required, User can End Date the Asset in Confirm that will trigger corresponding Asset decommission workflow in Financial Asset Register.

GIS

Confirm GIS Integration

GIS Integration functionality is available under Configurations -> Integrations -> GIS.



Solution Overview

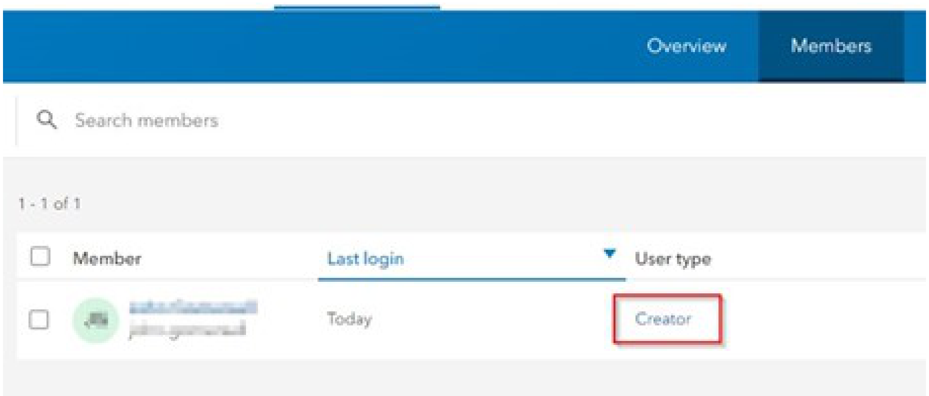
The Confirm-ESRI integration enables seamless two-way Asset (Feature) mapping synchronization between Confirm and ESRI ArcGIS. This ensures that Asset data remain consistent across both platforms, reducing manual updates and enhancing operational efficiency. However, this utility is not intended for onboarding customer asset data from ESRI to Confirm. Users must ensure their asset data exists in both systems before the initial bulk data sync. After that, any new assets added or updated in ESRI will sync with Confirm accordingly.

Configuring ArcGIS & Confirm for 2-way Sync

Only certain types of layers in ArcGIS are suitable for 2-way sync. This page explains how the layers need to be configured.

User must have Edit Privileges

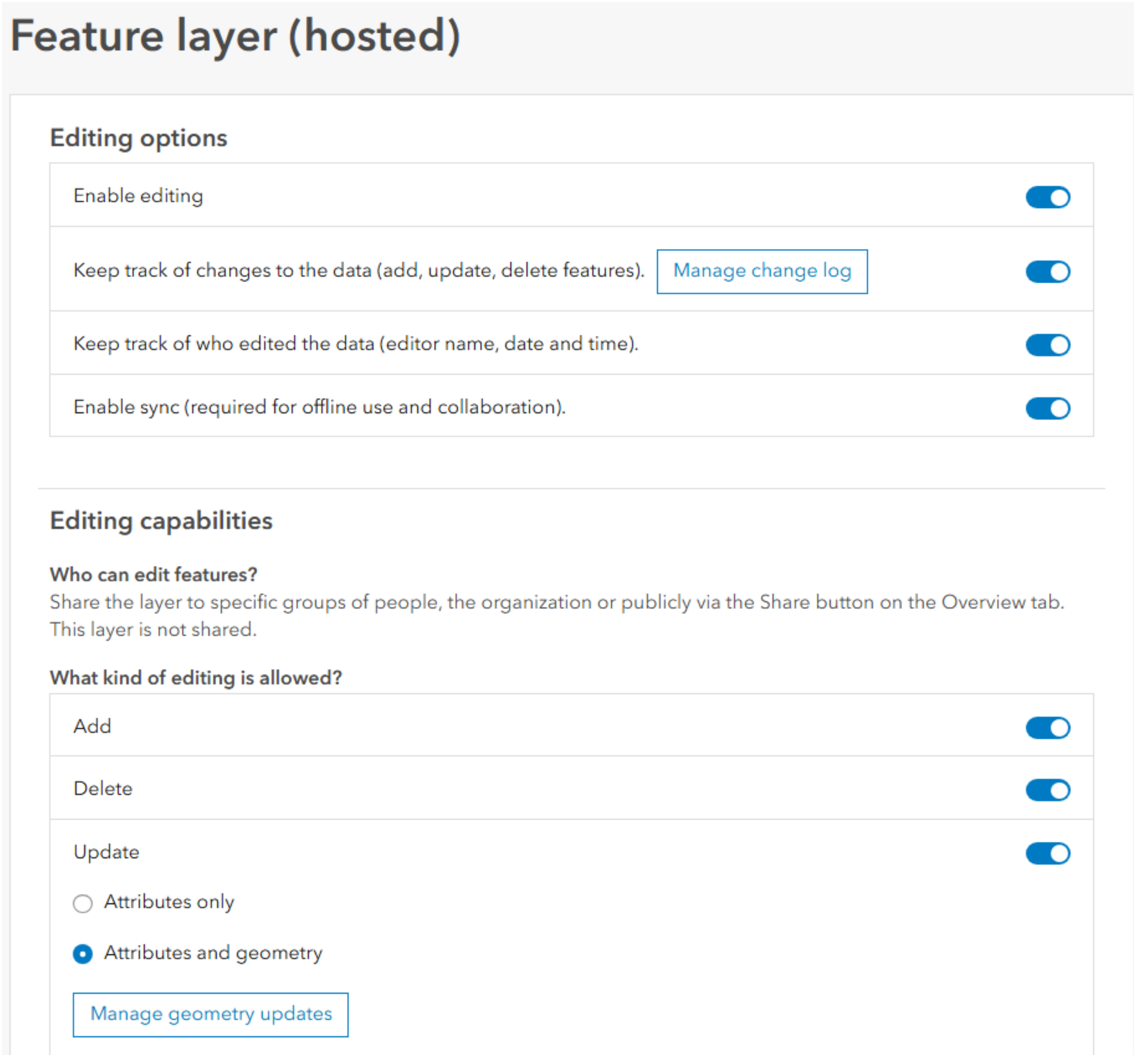
The ArcGIS user configured for 2-way sync must have permission to edit data. For this to happen they must have a suitable ArcGIS User Type, e.g. Creator, Editor. Mobile Worker, etc. This User should not be a normal Named User in ArcGIS, but a specific user created for system-to-system communication, referred to in the Esri Product-Specific Terms of Use as a “Service Login” (relevant section is 23.b at the time of writing).



If you use custom Roles, then the user must also have permission to Edit Features.

Layer must be Editable

Any Layers to be configured for 2-way sync must be exposed as Feature Services, not just Mapping Services. The Feature Service must be configured to support Update and must support Global Ids. Global Ids are automatically added for layers that support Sync. The service must also record when each Feature was last updated so that we can just fetch changes. This is enabled with the "Keep track of who edited the data"option.



Ensure that any existing Feature Service is not shared with the public or other unauthorized users before allowing updates. If necessary, a Feature View Layer can be created for users that do not need edit capabilities.

For Non- Versioned Database. Setting should include:

- editFieldsInfo.editDateField should have a value
- SupportsApplyEditsWithGlobalIds to be true

For Versioned Database with Traditional (Branching) versioning strategy. Setting should include:

- editFieldsInfo.editDateField is present
- isDataVersioned is true
- isDataBranchVersioned is false

These settings are visible in the Feature layer's metadata.

User must have access to the Feature Service

If the Feature Service is owned by the Service Login, then we will automatically have sufficient access. If the Feature Service is owned by a different user, our Service Login will need to be granted access to the Feature Service using the ArcGIS Sharing tools. Please take care to ensure that this editable Feature Service is not inadvertently shared with the public our unauthorized users in your organization.

URL for configuration

When you go to set up the connection for 2-way sync you will need to supply a URL that we can use to connect to ArcGIS. This can be obtained by scrolling to the bottom of the Overview page for the Layer and copying the URL to the clipboard:

When you go to set up the connection for 2-way sync you will need to supply a URL that we can use to connect to ArcGIS. This can be obtained by scrolling to the bottom of the Overview page for the Layer and copying the URL to the clipboard:

The URL might look something like this:

https://services1.arcgis.com/2AtcsBKgvgO5BlAP/arcgis/rest/services/Grit_Bins/FeatureServer

When entering the URL for the Connection in the two-way sync screen, enter everything up to /arcgis/rest, e.g.

Configuring Confirm

To enable the GIS 2-Way Sync feature, you must first activate it at the tenant level. After activation, the GIS Mapping setting option will appear on the user security screen in Enterprise for all users within the tenant. Any user who needs to use the GIS service must check the checkbox to access the GIS mapping screen on web.

One connection is needed for each ArcGIS instance that Confirm will communicate with, so there will typically only be one of these. The Connection URL is the root URL for accessing ArcGIS services. This will typically be something like:

https://services1.arcgis.com/.../arcgis/rest

The ArcGIS user must have permission to edit all the layers to be configured.

Operation

To begin synchronisation a Layer from ArcGIS needs to be associated with a Feature Group in Confirm. Once this has been done then the individual fields from Confirm can be mapped to their corresponding field in the ArcGIS Layer.

As a minimum the Site Code, Feature Type Code & Central Asset ID fields must be mapped as these are mandatory when creating new Feature records in Confirm. Additionally, if any Feature in Confirm has mandatory attributes, then those Attributes will be marked as mandatory during the field mapping.

If Confirm Assets already exist in the ArcGIS layer, then it is also advisable to map the Central Asset Id field to ArcGIS. If a match is found, then the 2-way sync will link the corresponding Asset and Feature together rather than creating a new Feature.

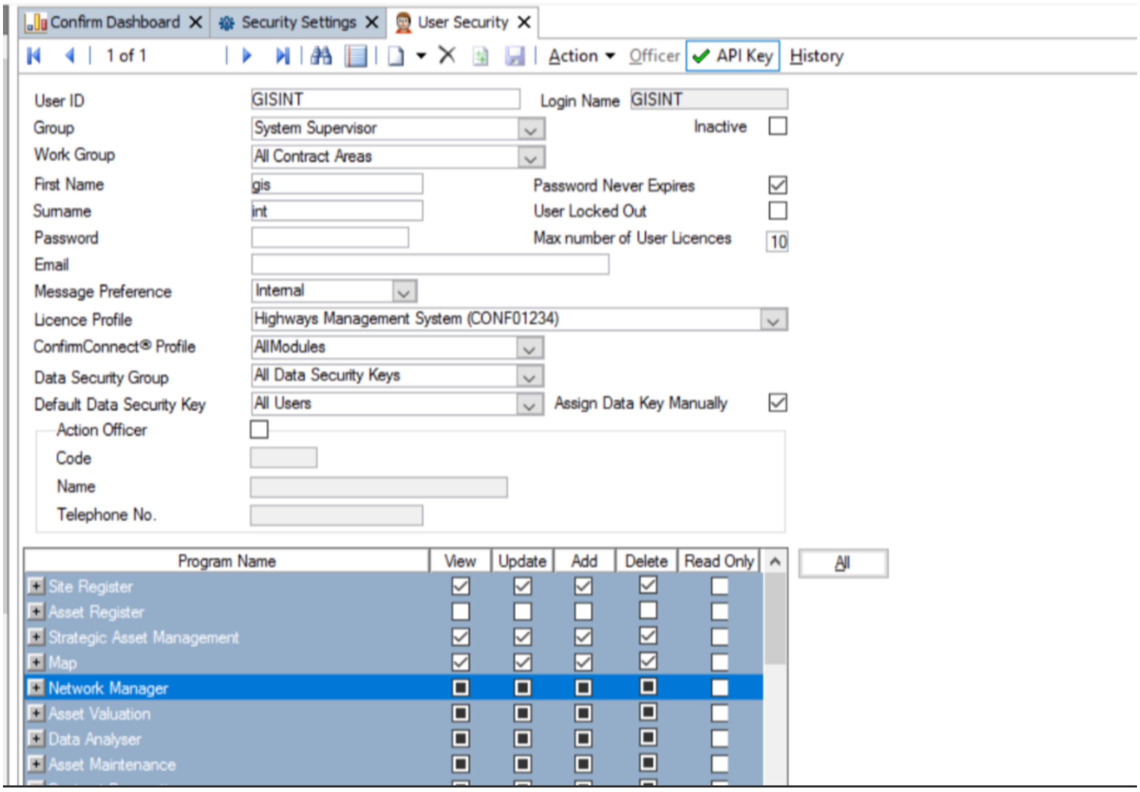
Synchronization runs approximately every 2 minutes. Updates are done incrementally.

Configuring 2-way sync between Confirm-ESRI using Spatial-MFE

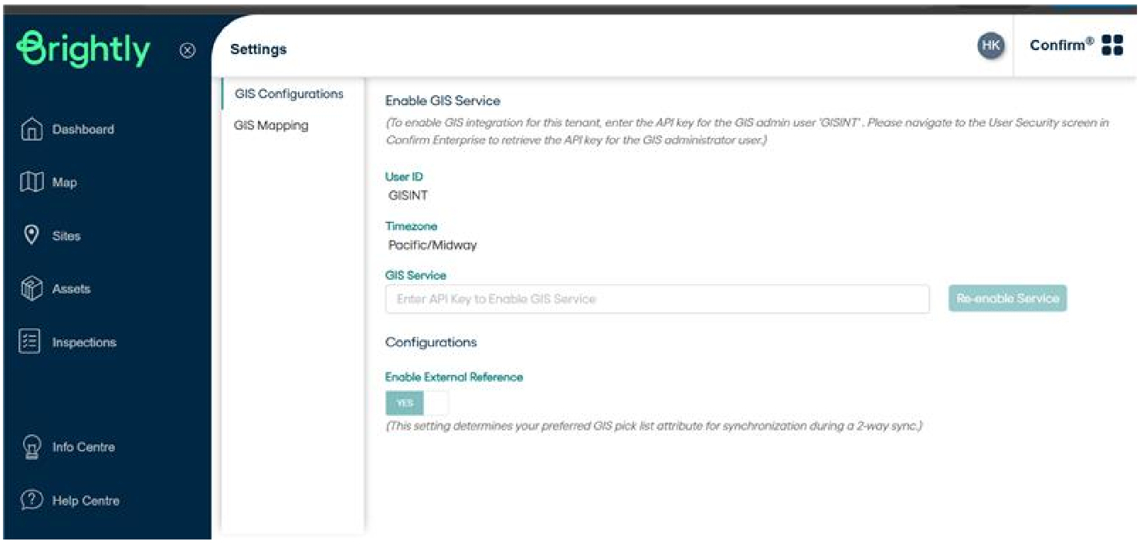
Enabling Tenant

To enable GIS integration for a Confirm tenant, a dedicated user account named GISINT must be created. This account is set up like any other admin user in Confirm Enterprise, with full access to all Confirm features. The DevOps team will create the GISINT user during the onboarding process.

Note: Please note that this account is solely for enabling the GIS service—nothing else.



After the account is created, retrieve the API key for the GISINT user, store it securely, and enter it in the “Enable service” field under GIS Configurations in Confirm Web.



Each user who needs access to GIS 2-Way Integration mappings must have the appropriate permissions. After the tenant is enabled for GIS integration,any individual requiring access to the GIS service must have the(GIS Mapping setting)enabled under Confirm User security screen >>System Administration>>System configuration

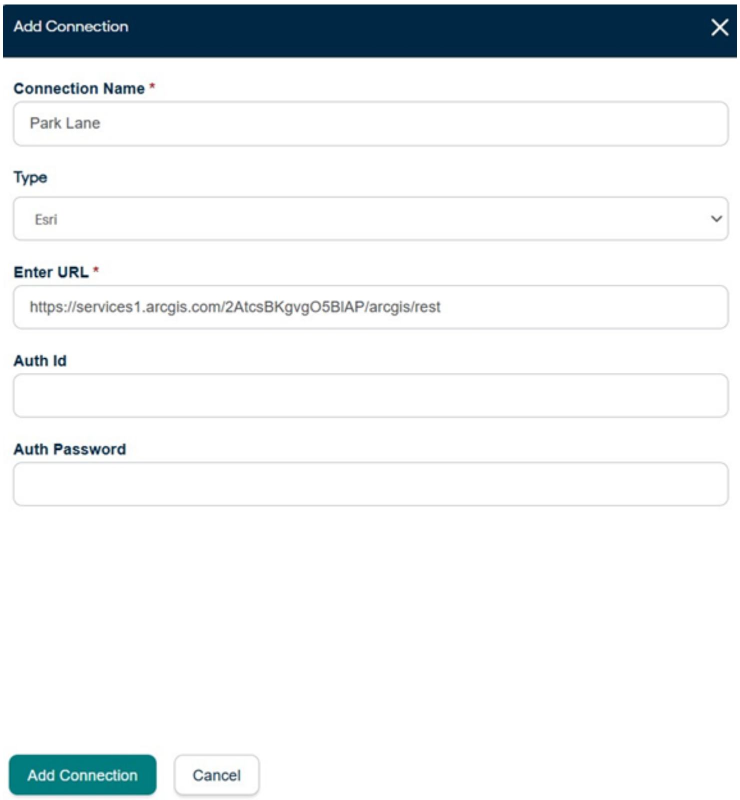
Program Name	View	Update	Add	Delete
Mail Merge Manager	☑	☑	☑	☑
Import Transformations	☑	☑	☑	☑
Finance Year	☑	☑	☑	☑
Comment Library	☑	☑	☑	☑
Document Links System Settings	☑	☑	☑	☑
Import Anything System Settings	☑	☑	☑	☑
Terminology System Settings	☑	☑	☑	☑
Web Lookups Administrator (Security)	☑	☑	☑	☑
Open Confirm Web in ConfirmConnect® (Security)		☑		
Asset Accounting Setting (Security)		☑		
GIS Mapping Setting (Security)		☑		

Spatial Frontend Main Screen

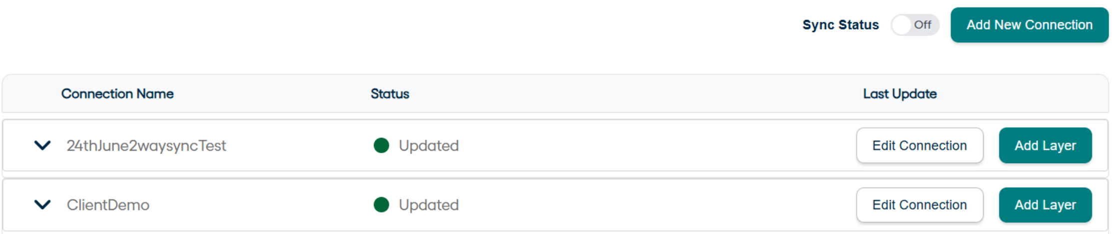
Adding Connection with ESRI

To start with 2-way sync, user will need to create a connection. To do so, they can click on "Add Connection"on top right of the screen.

- Fill in all the fields as per requirement
- Give a connection name
- For connection with ESRI, connection type selected should be *esri*
- Enter the URL for ArcGIS
- To create authenticated connections, enter username and password
- To create unauthenticated connections, username and password can be skipped
- Finally click on Add Connection present on the bottom of the screen

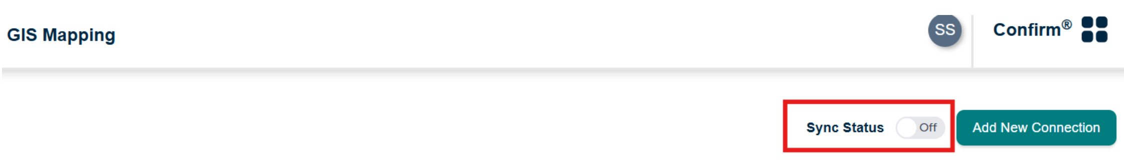


Once the connection is created, it is available on dashboard like shown below

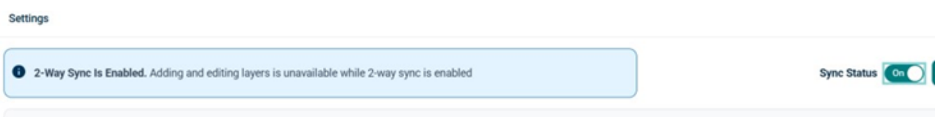


Adding Layers

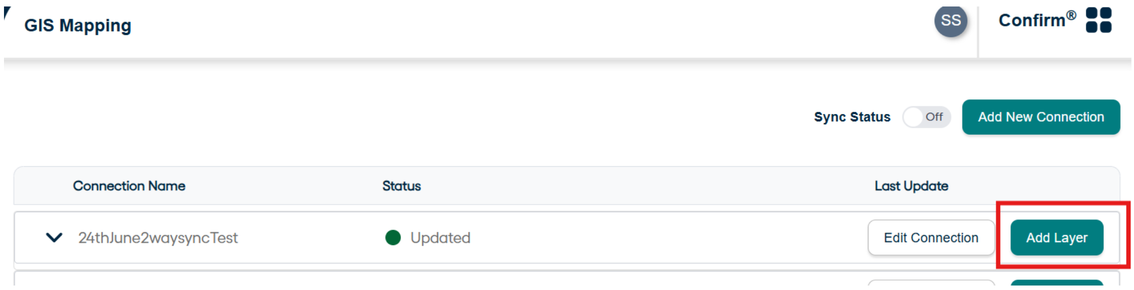
Adding and Editing Layers is only possible if the sync button is in off state. To start and stop the sync process, we have a sync status on/off button which can be used. e.g below.



So, you will be getting a notice that this is not permitted.

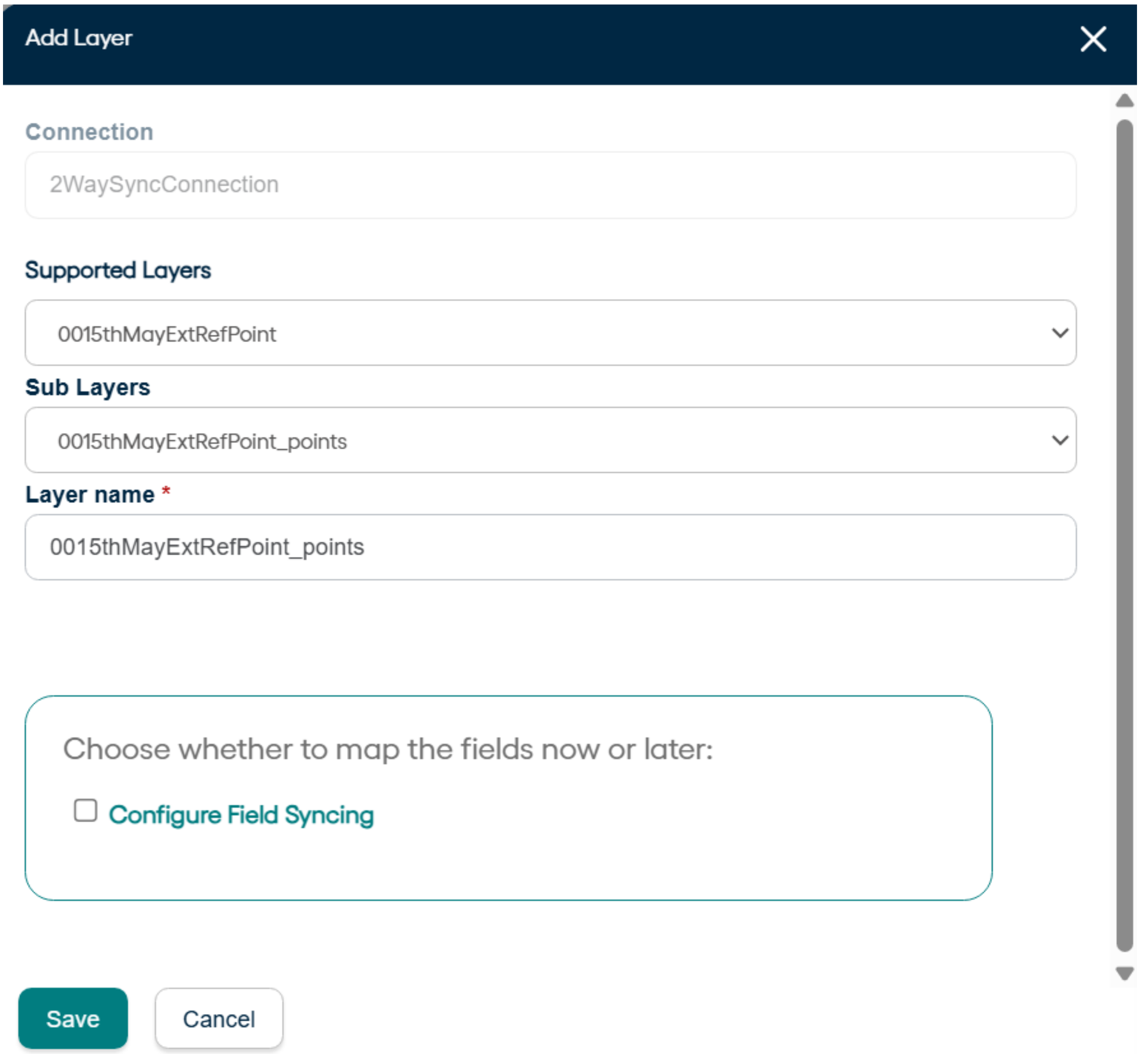


Begin adding layers by clicking on Add Layer button present in the tab for one's respective connection. In this case, it will be the button in front of Connection_2waysync.



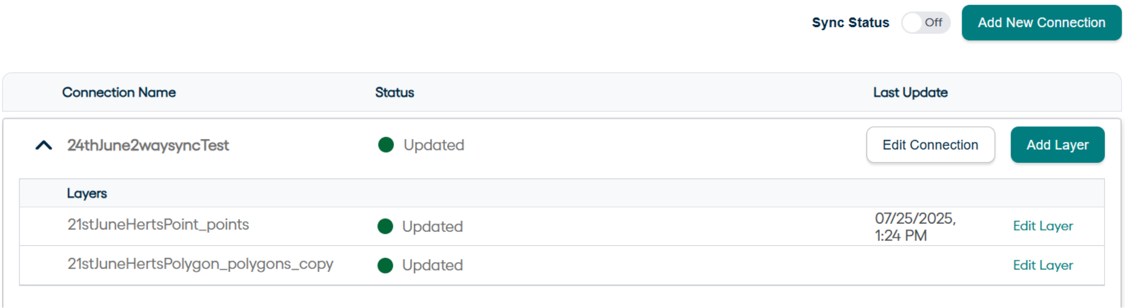
Wait for Supported Layers to load. The supported Layers are populated using the /rest/services endpoint of ESRI. Based on the information provided while creating connection, the respective layers are fetched from ESRI.

User can select any layer from dropdown.



Layer name is populated by default based on the name of supported layers. User can edit the name to suit their needs.

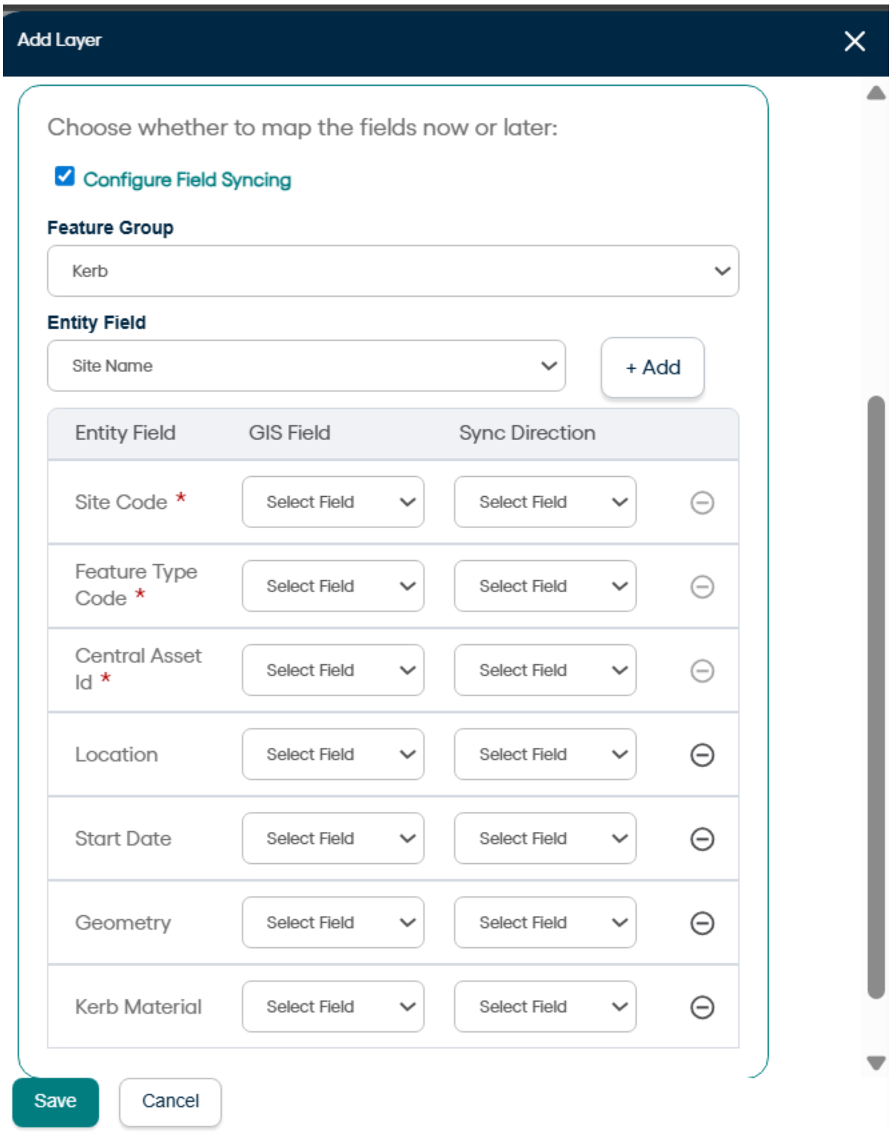
Click on Save after all editing is done. The saved layer can be accessed by clicking on dropdown of connection under which it was created.



Entity Field Mappings

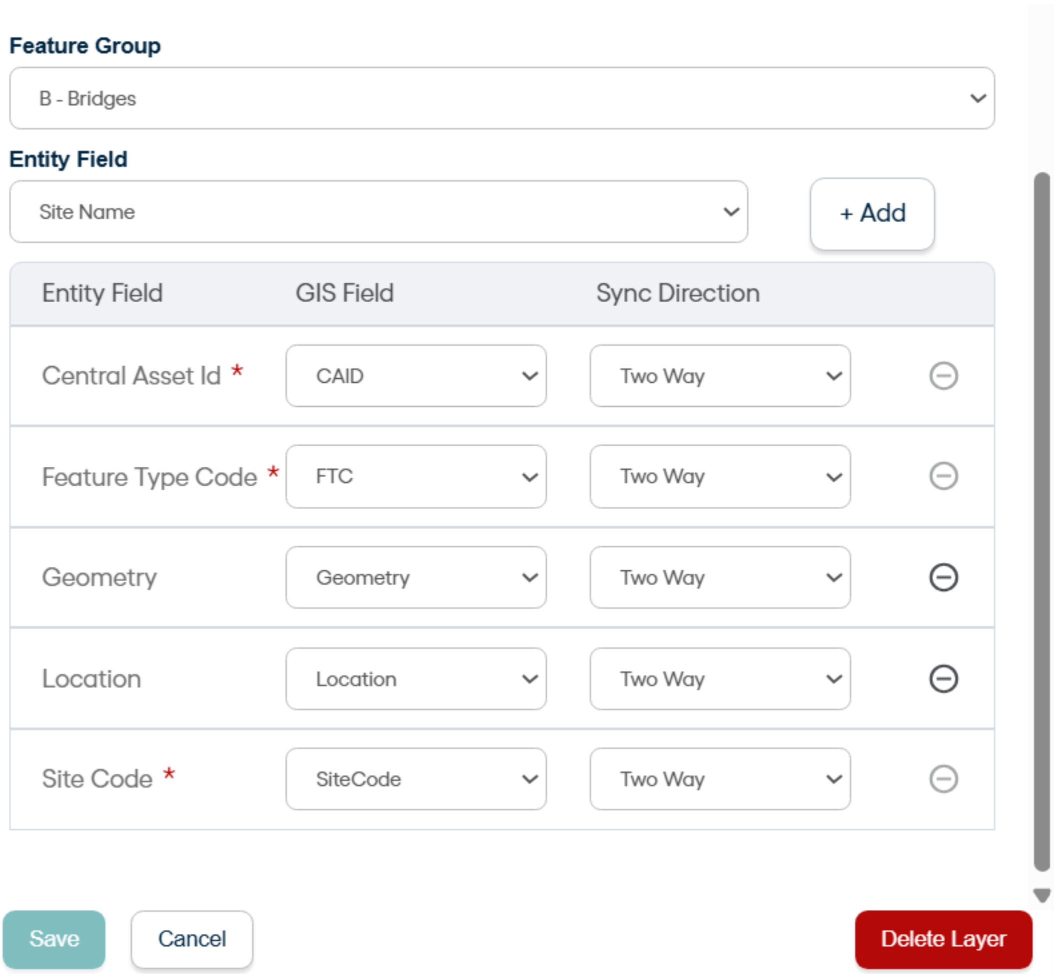
Connection and Layers are created now. The next step for 2-way sync is to do entity field mappings.

User can now click on add Field mappings while adding a Layer or can decide to map fields later while Editing Layer available.Select the Feature Group from the dropdown.



Once the Feature group is selected, entity fields are made available to the user to be selected from dropdown. The mandatory fields are pre-selected and displayed by default.

The user can select only one field at a time from Entity field dropdown. Select a field and click on Add. User can add several entity mappings one by one. Now select the relevant field (from Esri side) in GIS Field column and decide the sync direction.



Do it for all the selected fields and click on save. This will trigger the sync in the direction mentioned for each field.

Note: If any changes are made in ESRI or Confirm in the fields mapped during entity mapping, the changes will get reflected on the other app if 2 Way Sync was selected in sync direction. If only GIS to App or App to GIS were selected, then changes will be reflected in that direction.

Standard Recommendations

Standard Recommendations

To ensure optimal performance and data integrity, the following recommendations are advised:

- This Integration is not intended for onboarding customer asset data from ESRI to Confirm. Users must ensure their asset data exists in both systems before the initial sync. After that, any new assets added or updated in ESRI will sync with Confirm accordingly.

- Post sync process, map visuals may differ due to difference of base layers in Confirm (Bing Maps) and ESRI. Asset locations are accurately synchronized, but surrounding geographical features may appear differently.

To ensure optimal performance and data integrity, the following recommendations are advised:

Category	Do's	Don'ts
Initial Synchronization Process	• Ensure complete field mapping is created between Confirm and GIS fields when adding a new layer. • Expect the initial sync to take time depending on asset volume. • Allow the system to perform incremental sync every 2 minutes to keep data updated. • Refer to the Last Update Date for the last successful sync.	• Do not interrupt the initial sync process, as it may cause incomplete data transfer. • Do not assume sync failures if there is a delay; check the Last Update Date. • Avoid frequent full resyncs, as they may cause unnecessary system load.
ESRI Feature Layer Configuration	• If a change in layer (Versioned to Non-versioned or vice versa), create a new Feature layer and enable sync for it.	• Do not change Feature Layers from versioned to un-versioned (or vice versa) during sync/post sync process, as this may break synchronization.
Geometry Synchronization	• Select a Geometry field in the mapping list for both Confirm and GIS to enable geometry sync. • Ensure sync direction is correctly set in Entity field mapping. • If sync GIS to App: Updates from ESRI should reflect in Confirm. No geometry updates should occur in ESRI from Confirm. • If sync App to GIS: Updates from Confirm should reflect in ESRI. No geometry updates will occur in Confirm from ESRI. • 2-way: ESRI and Confirm geometry will be in sync.	• Do not expect geometry to be automatically included without explicit mapping.
Conflict Resolution for Sync	• Ensure that Confirm takes precedence in conflict scenarios for two-way sync.	• Do not modify or remove field mappings after the sync process has started, as it may lead to data inconsistencies.
Geometry Compatibility	• Align each Feature Group in Confirm with a single geometry type (point, line,	• Do not attempt to sync a feature

Category	Do’s	Don’ts
	or polygon) to prevent sync issues with ESRI. • If a feature group contains multiple geometry types, split them into separate groups before syncing.	group with multiple geometry types to a single ESRI layer. • Do not encourage asset geometry deletion, as it may lead to data integrity issues.
Feature Attribute Editability & Sync Direction	• If a Feature attribute in Confirm is not editable, understand that sync direction will be one-way (App to GIS) by default. • If a Feature attribute in ESRI is not editable, understand that sync direction will be one-way (GIS to App) by default.	• Do not assume that all attributes will allow two-way sync.
End Date Behaviour	• Confirm does not support setting an End Date during new asset creation. Newly created assets won’t have one by default. • If sync direction for End Date is 2-way or App to GIS, ESRI will default End Date to 01-01-3000, which Confirm interprets as default for active records. • Ensure End Date is always greater than the Start Date for asset records.	•
Field Mapping & Data Types	• Verify & add all field mappings before starting sync to avoid inconsistencies. • While mapping fields on GIS Field mapping screen, only choose fields of the same data type. • Verify the data type of fields before mapping to prevent errors.	• Do not map fields of incompatible data types (e.g., Integer to String).
Field Mapping & Data Types	• Verify & add all field mappings before starting sync to avoid inconsistencies. • While mapping fields on GIS Field mapping screen, only choose fields of the same data type. • Verify the data type of fields before mapping to prevent errors.	• Do not map fields of incompatible data types (e.g., Integer to String).
Bulk Update for Picklist Attributes in ESRI	• Use code values in SQL queries when performing bulk updates on picklist fields. • When manually updating, select appropriate labels that exist in both systems.	• Do not use incorrect formats during bulk updates, as it may cause picklist errors.
Picklist Mapping in ESRI	• Create picklists in ESRI with both a key (label) and value (code).	• Do not manually enter inconsistent picklist values—it may cause mapping issues.

Category	Do’s	Don’ts
CAID Handling	• Always provide a CAID in ESRI when syncing data to Confirm. • Ensure CAIDs are consistent between Confirm and ESRI. • Be aware that new CAIDs will be created in Confirm if values differ. • Ensure CAIDs are uniquely assigned in ESRI. • Understand that if no CAID is given, Confirm generates one, but ESRI will not display it.	• Do not alter CAIDs on either system after sync. • Do not leave CAID blank in ESRI when pushing data to Confirm. • Avoid editing CAIDs in both systems to maintain data integrity.
Feature Field Terminology	• Use standard Confirm terminology when mapping fields in entity field mapping.	• Do not use inconsistent terminology—only standard names are valid in mapping.
Feature Group Sync	• Understand that sync occurs at the Feature Group level, including all child Feature Type Codes (FTCs).	• Do not assume only specific FTCs will sync independently.
Time Zone Settings	• Ensure the tenant has a time zone setting in Confirm (e.g., America/New_York). • All date-type fields will convert according to tenant’s time zone.	• Do not leave time zone settings blank—it will interrupt sync.
Feature Configuration Considerations	• Ensure seed numbers for FTC, CAID, and Feature Group are populated to avoid sync failures.	• Do not allow seed number ranges to exhaust—sync will fail. • Do not include spaces in prefix, suffix, or middle of FTC, CAID, or Site Code—it interrupts sync.
Asset Deletion from ESRI	• Follow proper asset lifecycle practice by updating End Date instead of deleting.	• Do not delete assets directly—it may compromise data integrity.
Progress Bar Behaviour	• Understand that if no data exists in either system, progress bar will still show. • Progress bar is visible only during initial sync. • Ensure updates exist before expecting "Last Updated" date to change.	• Do not assume the progress bar is stuck—verify data presence in both systems. • Do not expect "Last Updated" to change if no updates occurred.

Category	Do’s	Don’ts
Attribute Field Length	• Configure ESRI field length during field creation to match or exceed Confirm's 2000 character limit for strings. • Ensure integer/double values from ESRI meet Confirm field limits. • Validate data size compatibility before syncing. • Ensure synced data truncates correctly per system limits.	• Do not send numeric values exceeding Confirm’s supported limit—may cause **Arithmetic Overflow errors.**
Invalid HTML Tags	• Use plain text for all text attributes.	• Avoid using angle brackets (< or >) or HTML tags—they may interrupt sync.

Confirm GIS layer control

Confirm GIS Layer Control Integration

The Confirm Web Map interface allows users to visualize spatial data using various GIS layers. You can integrate:

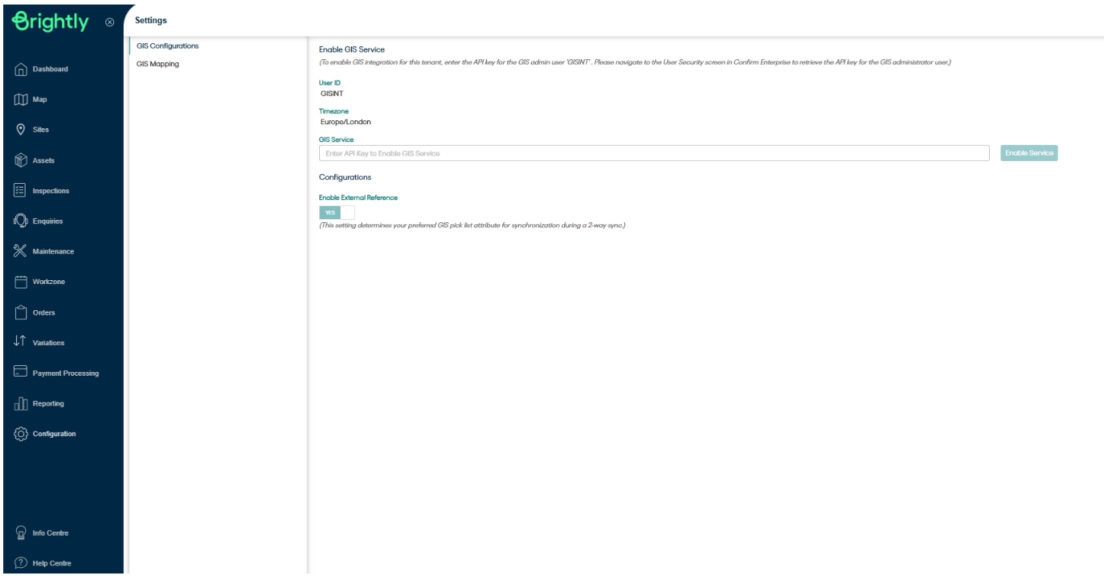
- ESRI Feature Layers: Standard GIS layers from ESRI services.
- Confirm GraphQL Layers: Custom layers created using Confirm’s GraphQL queries.

This functionality enhances spatial analysis, improves decision-making, and enables dynamic data visualization directly on the map.

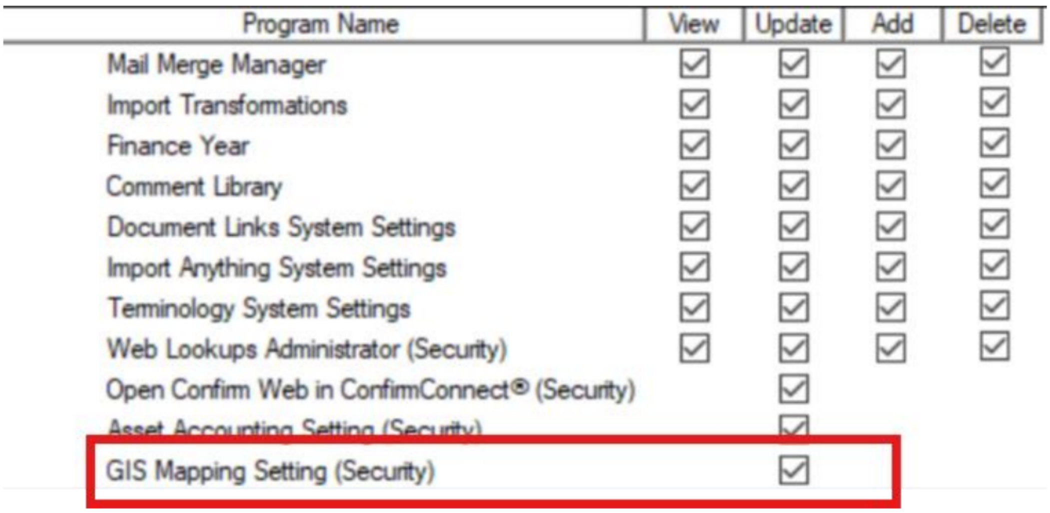
How to Enable Confirm GraphQL Layer Control

Enabling Tenant

To enable GIS layer control integration for Confirm tenant, enter the API key for the GIS admin user GISINT. Please navigate to the User Security screen in Confirm Enterprise to retrieve the API key for the GIS administrator user.



Once the tenant is enabled for GIS integration, the user needs to enable the security setting (GIS Mapping setting under Confirm User Security screen >> System Administration >> System configuration) to access the GIS mapping screen in Confirm Web interface.

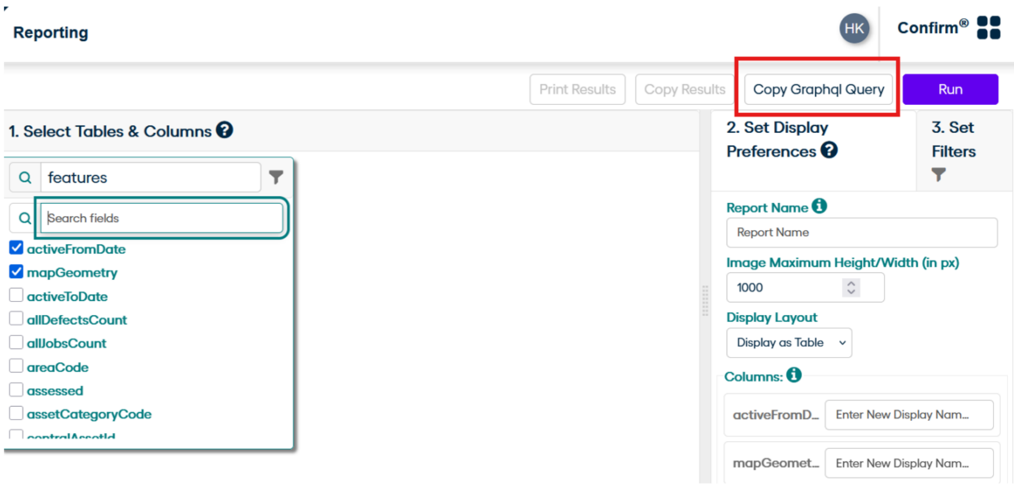


Program Name	View	Update	Add	Delete
Mail Merge Manager	✓	✓	✓	✓
Import Transformations	✓	✓	✓	✓
Finance Year	✓	✓	✓	✓
Comment Library	✓	✓	✓	✓
Document Links System Settings	✓	✓	✓	✓
Import Anything System Settings	✓	✓	✓	✓
Terminology System Settings	✓	✓	✓	✓
Web Lookups Administrator (Security)	✓	✓	✓	✓
Open Confirm Web in ConfirmConnect® (Security)		✓		
Asset Accounting Setting (Security)		✓		
GIS Mapping Setting (Security)		✓		

How to Add GraphQL Layers in Layer Control Component

Step 1: Request Data via Reporting

Navigate to the Reporting section in Confirm. Use the UI to request the data you need. Once the data is displayed, click the *Copy GraphQL* button. A message will appear: *Copied to Clipboard* - this confirms your query is ready to use.



Step 2: Open GIS Mapping and Add a New Connection

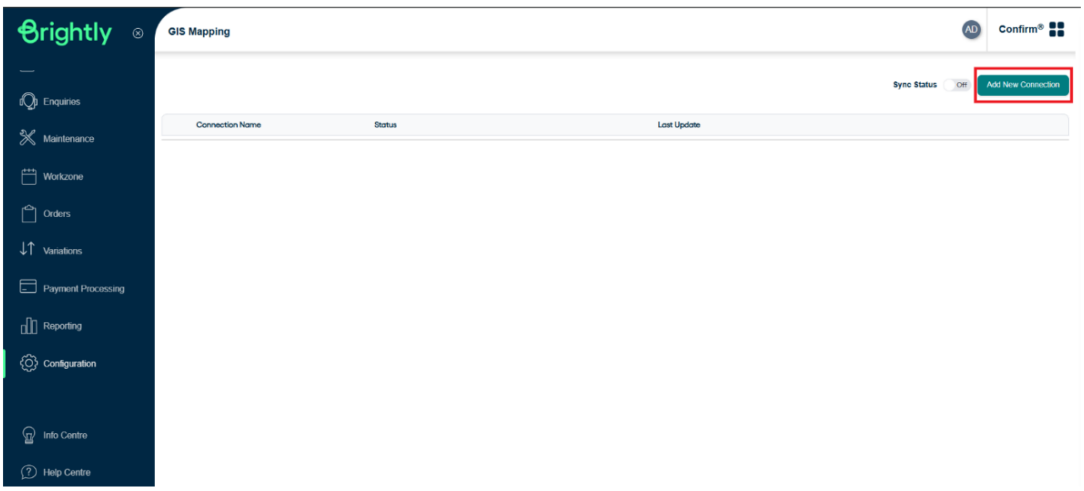
Go to the GIS Mapping screen and click on *Add Connection*. Fill in the following details:

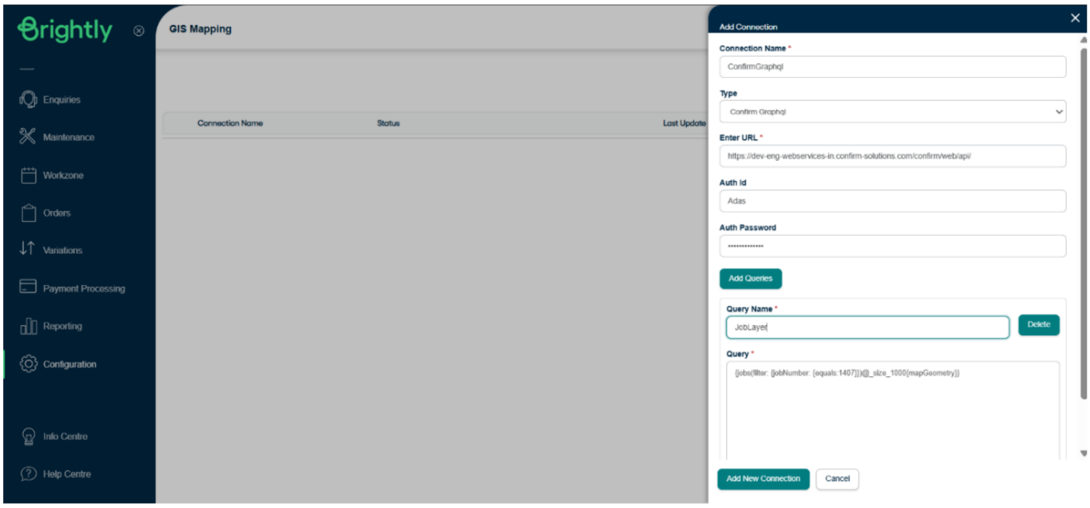
- **Connection Name:** Choose a name for your connection. This is a one-time setup.
- **Type:** Select *Confirm GraphQL* from the dropdown (options include Esri and Confirm GraphQL).
- **URL:** Enter the Confirm API URL in this format: https://{DomainName}/confirm/web/api/
- **Auth ID:** Your Confirm login username.
- **Auth Password:** Your Confirm login password.

This functionality enhances spatial analysis, improves decision-making, and enables dynamic data visualization directly on the map.

Note: The {DomainName} should match the domain shown in your browser address bar.

Note: These credentials will be validated against the URL you provided.

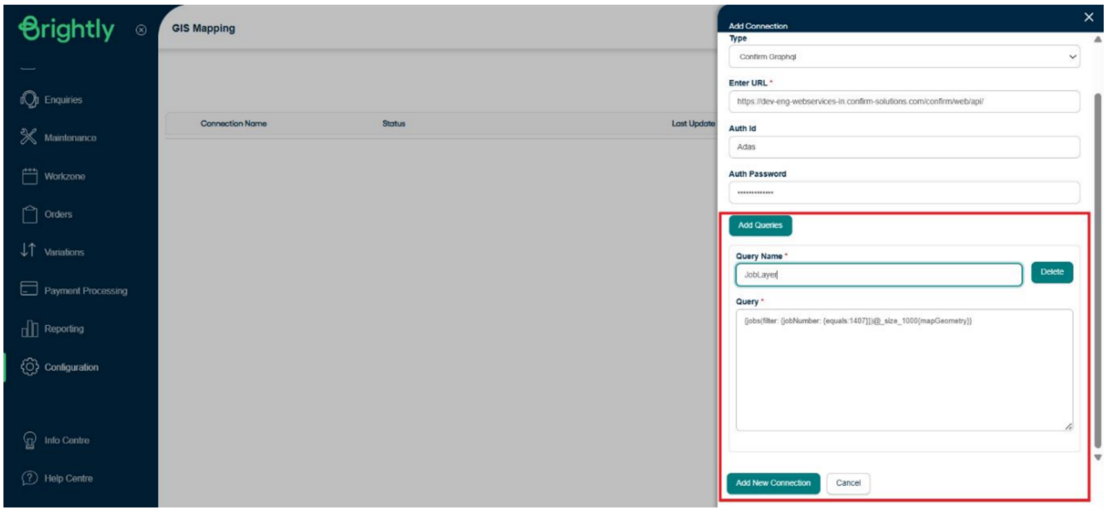




Step 3: Add GraphQL Queries

Click on *Add Queries* to include multiple layers under the same connection. For each query:

- **Query Name:** This will be the name of the layer shown to users.
- **Query:** Paste the GraphQL query copied earlier. Ensure the query includes the mandatory column *mapGeometry*.
- Use filters to improve performance and speed of data retrieval.
- Supported Entities via GraphQL query: **Jobs, Enquiries, Defects, Sites, Features**.

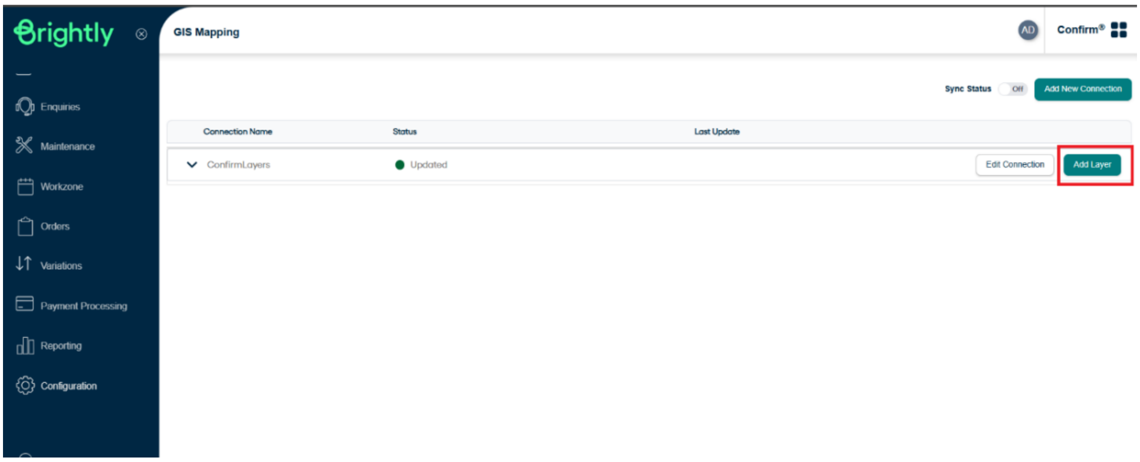


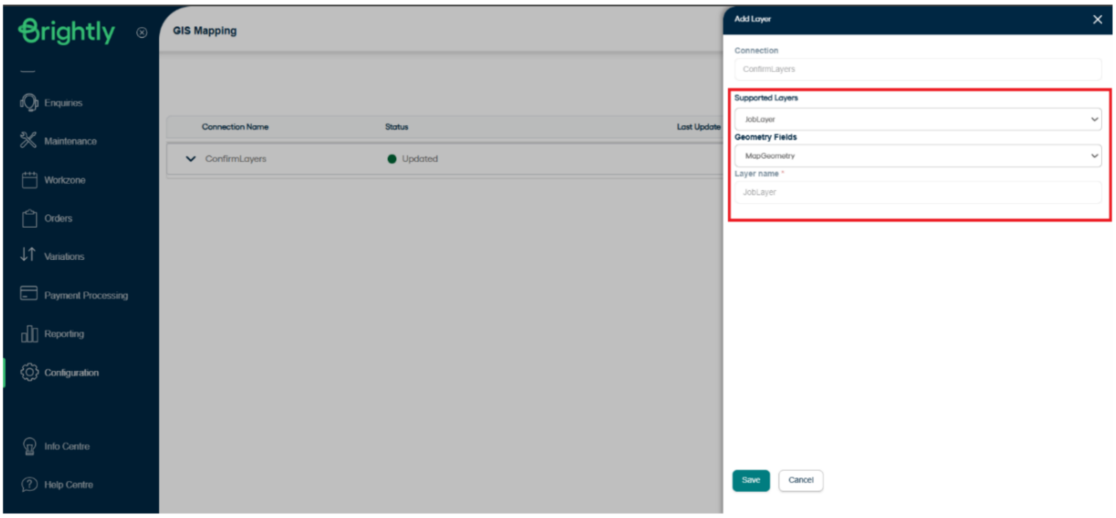
Step 4: Add Layers

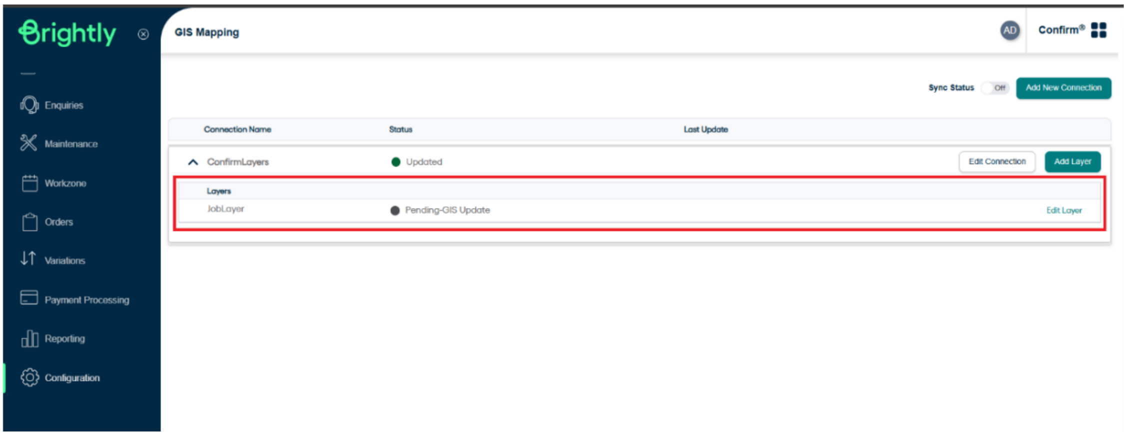
Click on *Add Layer*. Select from the Supported Layers (those added in the previous step).

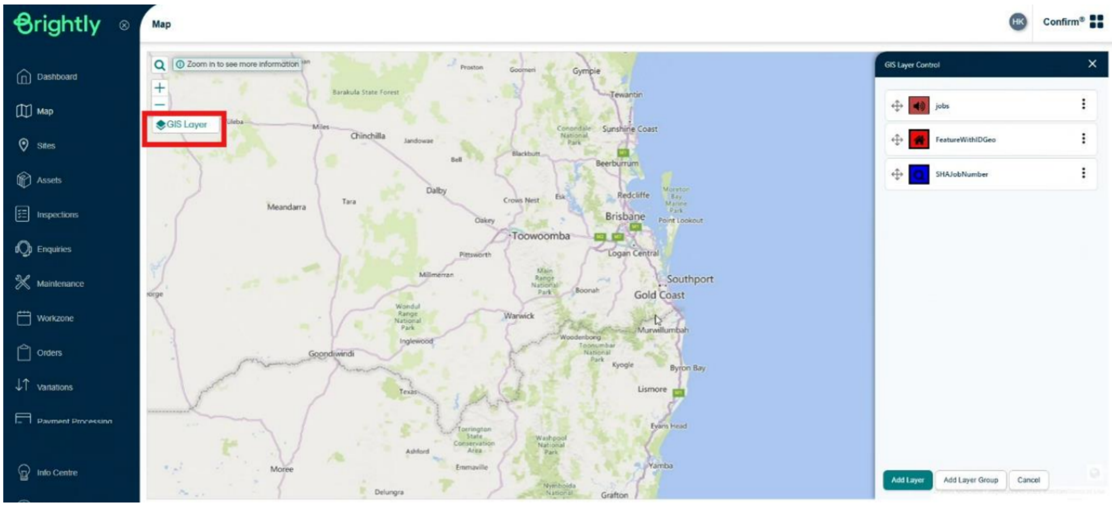
Choose the Geometry Field - this should always be *mapGeometry*.

Click Save. Your configured layer will now be visible on the dashboard.


Brightly
GIS Mapping
AD
Confirm®
Enquiries
Maintenance
Workzone
Orders
Variations
Payment Processing
Reporting
Configuration
Sync Status
Off
Add New Connection
Connection Name
Status
Last Update
ConfirmLayers
Updated
Edit Connection
Add Layer


Brightly
GIS Mapping
Enquiries
Maintenance
Workzone
Orders
Variations
Payment Processing
Reporting
Configuration
Info Centre
Help Centre
Connection Name
Status
Last Update
ConfirmLayers
Updated
Add Layer
Connection
ConfirmLayers
Supported Layers
JobLayer
Geometry Fields
MapGeometry
Layer name *
JobLayer
Save
Cancel


Brightly
GIS Mapping
AD
Confirm®
Enquiries
Maintenance
Workzone
Orders
Variations
Payment Processing
Reporting
Configuration
Sync Status
Off
Add New Connection
Connection Name
Status
Last Update
ConfirmLayers
Updated
Edit Connection
Add Layer
Layers
JobLayer
Pending-GIS Update
Edit Layer



Standard Recommendations

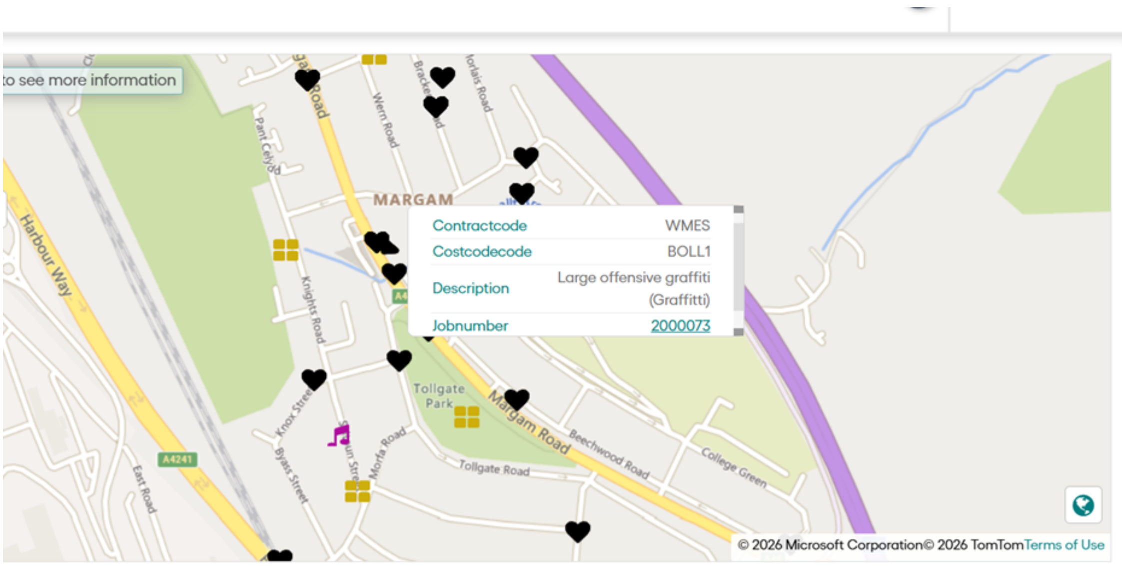
Use Geometry Syntax Consistently: Always include the geometry column using the syntax *intersects: ${geometry}* This ensures accurate spatial filtering and proper rendering of map features.

Optimize Queries with Filters: Apply relevant filters within your GraphQL queries to enhance performance and reduce data load times. This is especially important when working with large datasets.

Avoid Conflicts with ESRI Feature Layers: Do not add ESRI Feature Layers that are already configured for ESRI two-way synchronization. Including these may interfere with rendering and refreshing behaviour in the Confirm Web map component

GIS Pop Up Information

User can now see additional information in the icon popup and can navigate to the desired location if necessary.



What3Words

Solution Overview

Confirm – What3Words integration allows user to quickly identify the area where a particular asset/site is located. This helps in reducing their time to schedule repairs rather than spending it on identifying the location.

To activate the use of What3Words search in Maps the user needs to:

- Purchase a plan on What3Words website which is suitable for their organization and get the API key.
- Select the security setting named ‘What3Words (Security)’ present under User Management -> Program Rights -> System Administration -> System Configuration.
- Add the API key in the ‘What3Words API Key’ page under ‘Integrations’ in Confirm Web.
- Toggle ‘Activate What3Words’ to ‘YES’.

After following the above steps, User should be able to see What3Words Search icon in the Maps in Confirm Web.

System Administration

User Management

User Management Search

The users can search for a User using User ID, Login Name, First Name, Surname and Email in the text filter provided at the top of the screen.

To search using multiple criteria, include a <space> between each word.

The list of User(s) matching the search criteria will be displayed below the search box. The list displays up to 100 Users that match the search criteria on a single page.

The list can be further filtered based on whether the User(s) are 'Active/Inactive' by selecting an option from the Status drop down next to the search box.

Filters

The Filters button allows for advanced filtering of User(s) by any of the following fields Under General Filter:

- Group
- Work Group
- Licence Profile
- ConfirmConnect® Profile

In Addition to Above Filters. User can also check which users have Confirm Enterprise access by toggling “Confirm Enterprise Access” Filter under User Settings in Filters.

Batch

User(s) searched or filtered from the User Search Screen can be selected to execute enabling/disabling of User’s access to Confirm Enterprise by clicking on the following options under the batch button.

Enable Confirm Enterprise: Access to Confirm Enterprise is enabled for the selected Users.

Disable Confirm Enterprise: Access to Confirm Enterprise is disabled for the selected Users.

By default access to Confirm Enterprise is enabled for all Users.

User Management Screen

User Details

This card shows the details of the User to view, create or update their record in Confirm. Each User of Confirm must be created as a User.They must be given a User ID and Password. Confirm can be set to track Users, and Action Officers may be linked to Users.

Users can share rights by belonging in the same Groups and Work Groups. Although Users inherit the program rights from the Security Group, these program rights can be edited for individual Users.

Users may also have their rights determined by Data Security Groups and Data Security Keys. A User's rights for using ConfirmConnect® modules will be determined on the basis of the Confirm-Connect® Profile selected on this screen.

User ID

The User ID that the User will supply when logging into Confirm. Up to 320 alphanumeric characters.

Login Name

Login Name of the User that is shown in Confirm. Up to 10 alphanumeric characters.

Group

Select a Security Group from the drop-down list. On click of Save button, a message will appear asking whether you wish to copy the privileges from the specified group. Click -

- **Yes -** User inherits the ConfirmConnect® profile and program rights from the Security Group(these will appear at the bottom of the form).
- **No** - Leaves the program rights unchanged. In this case the program rights can be individually set for this User.
- **X** - Cancels the save action.

Inactive

If a User will no longer be using Confirm, this toggle is turned on to hide their account by default on screens and lookups when a User field is displayed.

Selecting 'Inactive' will automatically set the 'User Locked Out' setting to prevent the User from logging in to Confirm again.

If the User is linked to an Action Officer, selecting the 'Inactive' toggle will automatically set the 'Inactive' flag on that linked Action Officer.

Auth0 Sync

When a User is created or updated with a valid email address as the User ID, they will be created in Auth0 if the tenant has been migrated to Auth0. The Auth0 sync option is selected when the Auth0 User creation or update is successful.

'Auth0 Sync flag' will not be Selected for contractor Users.

Work Group

Select a Work Group from the drop-down list.

First Name / Surname

These fields are used to enter the full name of the User. Up to 20 characters are allowed in each field.

Password

Enter a password to 128 alphanumeric characters. A minimum may be set in Security Settings

Note:

- Active Directory password rules take precedence if the User has an Active Directory account.
- The Password field is disabled for Single Sign On Users.

Disable Password Expiry

This is selected to override the "Password Maximum Age" set in Security Settings. In this way, this User can be exempt from a requirement to change their password every so many days.

Note: If no Maximum Password Age is set in the Security Settings, then the 'Disable Password Expiry' toggle has no function.

User Locked Out

This box is selected when the User has been locked out as a result of repeated login attempts. If a User is locked out they will see a message telling them they have been locked out, and advising them to contact the System Administrator.

To allow the User back into Confirm, select “User Locked Out” to “OFF” in their User record and save the change.

Max Number Of User Licences

Enter a number to set the maximum number of licences a User can consume at any one time. For each licence, User can log on to the Confirm Client and Confirm Web interface simultaneously.

Setting this to zero will set no limit.

Email

Enter an email address. This can be the internal address - or the full internet address. The address is used with the Message Transfer Agents, where the appropriate modules are active.

Message Preference

This field configures how the Task Processor will send Alert messages to this User. The field is only available if one or more of the Alerts modules is present. Select from one of the following values:

- None - No Alert messages will be sent to this User.
- Email - Alert messages for this User will be sent to their Email address.
- Internal - Alert messages for this User will be viewable within Confirm via the Internal Messages screen.
- Both - Alert messages for this User will be sent via email and also viewable on the Internal Messages screen.

Licence Profile

Set the Licence Details (System Registration Details) that will be used for this User. This will determine which modules the User has access to.

Note: If a Licence Override has been specified on the Database Settings screen, this Licence Profile entry will be ignored.

ConfirmConnect® Profile

Set a ConfirmConnect® Profile for this User. This will grant the rights for accessing ConfirmConnect® modules for this User.

Data Security Group

Set a Data Security Group for this User. This will default to the Work Group Data Security Group but can be changed.

Default Data Security Key

The Default Data Security Key that will be assigned to all new records that require Data Security Key fields, created by this User.

Assign Data Key Manually

Set to indicate if the User can view and alter the Data Security Key for a new or existing record that the User has rights to.

Action Officer

Action Officers can be created directly from the User screen. Irrespective of User Security, a Contractor User is not able to add a new User. They are also not able to see any User except themselves in the User Security screen. When Active Directory Users are managed in Confirm, updates to Users will also cause updates in Active Directory.The Action Officer card has the following fields:

Code

Enter a unique Code for the Action Officer.

Name

This will default to the First Name and Last Name of the User record but can be changed.

Telephone Number

Enter a Telephone Number for the Action Officer.

User Management Screen - Buttons

Action

The Action button provides the following options.

Reset Dashboard

This button will reset the selected User's Dashboard setting, so that the Dashboard will not load automatically when that User opens Confirm.

This can be used if problems with the User's Dashboard cause difficulties when loading Confirm. This button does not permanently block the Dashboard, it only resets the User's auto-loading Dashboard setting.

Reset Workzone

This button will reset the selected User's preferences in ConfirmWorkzone®.

This can be used if a User's preferences result in a very large volume of data being retrieved, causing difficulties logging into ConfirmWorkzone.

The next time the User logs into ConfirmWorkzone® they will be prompted to specify preferences just as if they were logging in for the first time.

Generate API Key

Select the menu option to generate/regenerate the API Key that can be used to authenticate a Web API request, using 'Basic' HTTP Authentication. Authenticating with an API key will not use a license.

The API Key, along with the User ID, are supplied in the Web API request itself instead of having a separate authenticate request beforehand.

Delete User

In order to delete a User from Confirm all child records within all database assets need to be deleted. The 'Delete User' menu can be used to remove these child records (such as settings) from the current database asset for the currently selected User record.

Note: If any non-child references exist within the current database asset such as Job Status Logs, the User cannot be deleted.

This option is only enabled if the current User has 'Delete' privileges for the User screen.

Create

The Create button provides the following options.

New

The New menu will be available if the Current User has User Security permission to Add Users.

Click on the New menu option to create a new User. It will open a New User on a separate screen.

Copy

The Copy menu will be available if the Current User has User Security permission to Add Users.

Click on the Copy menu to copy the existing program rights to a new User on a separate screen.

User Reset

User Reset

The User Reset allows you to view all the users currently logged in, and to log out users. This would normally be done when 'rogue' users are in the list, i.e. users who logged out incorrectly, and still appear in the list even though they are not in Confirm. Their presence in the list may be preventing other, legitimate users from logging into Confirm on the grounds that all the user licences have been used up.

The active licence and the User currently logged in will be highlighted with a (You).

Delete Icon

Clicking on the bin icon next to each row will terminate that user session, freeing up available licences. If a user session is terminated while the user is still signed in, the user will receive a forced sign out event.

Refresh Button

Clicking on the refresh button refreshes the User Sessions displayed.

Remove All Button

Clicking on the Remove All button terminates all user sessions under the active licence of the current user, except the current user’s session, thereby freeing up the number of available licences.

ConfirmConnect® Registration

Device and Module Summary

This utility enables an administrator to view all registered ConfirmConnect devices and additional information such as device status and module usage so that sign in issues can be resolved efficiently.

The screen provides summary information on the Devices Used (Lists how many devices have been registered followed by how many in total can be registered at any one time). The subsequent boxes list how many module licenses have been used followed by the total number of concurrent licenses for each module type (Enquiry/Condition Survey/Asset Survey/Jobs and Street Works).

When a ConfirmConnect® device signs in successfully for the first time it is registered within Confirm. When a user attempts to sign in, their ConfirmConnect® profile is checked and the required modules are requested. If the required modules are available they are assigned accordingly, if not the sign in process is cancelled and an error message is returned. This will result in the device appearing on the device registration record table.

Device Registration Record

Each device is represented by a row in the main table. The table can be ordered by any of the columns by clicking on the column header. To display full details for a device in the Device Registration Details panel click on the expand button in its row in the main table.

The description field can be edited for each device and assist in device identification.

Refresh Button

Clicking on the refresh button refreshes the Device Module Summary and Device Registration Record panels.

Delete Icon

Clicking on the bin icon next to each row will delete the registration record for that particular device record, releasing the device license. Should a device be deleted while it is still signed in, the user will receive a forced sign out event when they next attempt a transfer.

Note: A forced sign out event will remove any draft and completed work, which has not been transferred, from the device.

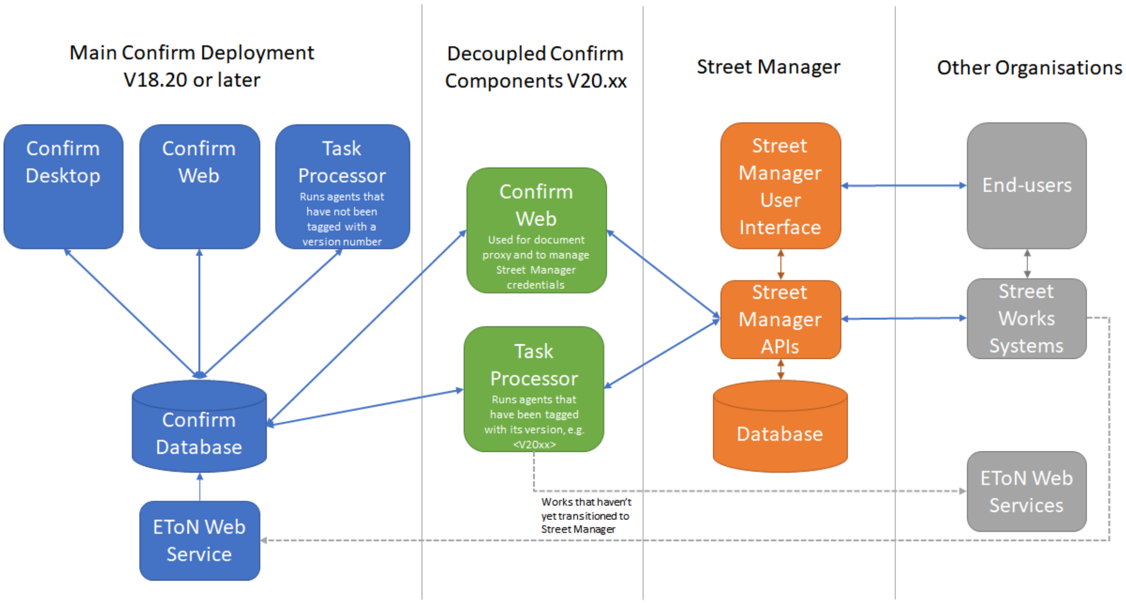
In the event that there are no remaining device licenses available when logging in to ConfirmConnect® with a new device, an attempt will be made to free up an unused license. This is defined as the device holding the oldest license that has been logged out for more than 2 days.

Confirm interface with Street Manager

Introduction

Confirm integrates with Street Manager for all Street Works functionality. As such, it is not required for Confirm users to use the Street Manager interface to plan, execute and coordinate works and associated permits.

To make it easier for customers to apply upgrades, all of the Confirm components required to support the Street Manager integration are being provided in a decoupled form, so that they can be installed alongside your existing Confirm deployment without having to upgrade the entire system. The decoupled Confirm components are able to work alongside Confirm systems at a version of 18.20 or later. The diagram below depicts the various system components:



Decoupled Task Processor

The decoupled Task Processor performs the main task of integration with Street Manager, namely sending and receiving Street Works notifications. The decoupled Task Processor takes over the role performed by the Street Works Transfer Agent.

Once the decoupled Task Processor has been installed, it is activated by "tagging" the 'Street Works Transfer' Agent in the Scheduled Tasks screen with the version number of the decoupled Task Processor, e.g. "<V21.20>". The act of tagging the scheduled task ensures that the "main" Task Processor no longer runs this task, allowing the decoupled Task Processor to take over.

Decoupled Confirm Web

Some additional settings are required in order to interface with Street Manager, mostly the Street Manager API credentials that Confirm uses. The Street Manager Settings section has been added to the Web Settings screen to configure these settings in the Confirm Web Interface of Confirm which can also be run in decoupled mode.

Confirm Web is also used to provide a "proxy" service which allows Confirm users to view Street Manager documents without having to log into the Street Manager system.

Any changes to the Street Manager API for the existing integration with Confirm will be incorporated and provided as upgrades to the decoupled components.

Release Notes for version v26.00a.AM

Supports Street Manager V6 API

Confirm now supports Street Manager V6 API and V5 API version support will be deprecated soon.

Due to breaking change in V6 API, we are defaulting - 'Others can collaborate on Work' - 'No' and 'Reason for non collaboration' - 'No reason provided'

Create single Non-compliance for Inspections on multiple Trenches

When a Street Works Notice contains multiple Sites (Trenches) and an Inspection is marked Failed in ConfirmConnect, the system automatically creates a separate Inspection record in Confirm Enterprise for each individual Site. These Inspection records will appear in the History of the Street Works Notice for clear visibility.

All failure reasons (Inspection Items) from the multiple Sites are then combined into a single consolidated Inspection for export. As a result, only one Non-Compliance is generated for the entire group of failed Sites, rather than creating multiple separate records.

This single Non-Compliance is then imported back into Confirm and is automatically linked to each of the associated failed Inspections. This ensures consistent tracking and prevents duplication.

If an Inspection is marked as Passed, no Non-Compliance is created.

Delete Expired Programmed Inspections

To keep our records accurate and up-to-date, the system automatically performs a cleanup of expired Programmed Inspections on every Street Works Agent run.

An inspection is considered "expired" and will be deleted if both of these conditions are met:

- If 'To Date' (Inspection's Scheduled end date) is in the past.
- If 'Delete Flag' is set to 'True', indicating it's marked for removal.

Expired Sampled Inspections won't be deleted even if 'Delete when expired' is ticked.

Getting Started

This section of the document describes setting up the Confirm Street Manager interface.

Step 1 - Get the Street Manager API credentials

Street Manager API access is required to interact with Street Manager from Confirm. You will need a set of generic email IDs to be set up to access the Street Manager system which you can then use in Confirm. Please contact the DfT to obtain an administrative account which will allow you to create the necessary users in each environment.

If you want a generic email addresses on the Confirm on-demand domain as Street Manager API access email IDs, you may use following format when creating the accounts in Street Manager:

- Promoter email address, use the format <confirmcouncil>-promoter@ondemand.confirm.co.uk replacing <confirmcouncil> with your council name.
- Authority email address, use the format <confirmcouncil>-authority@ondemand.confirm.co.uk replacing <confirmcouncil> with your council name.

Please let us know at confirm.support@brightlysoftware.com when you have created the users so that we can forward the activation emails to you. You can use the same email address for Sandbox and Production but they are different "accounts" in Street Manager so should be given different passwords.

You will initially receive a temporary password for the user ID created which you need to change to permanent. Also, your admin user in the Street Manager will need to give all Confirm user accounts the API role. We recommend that an API user to not have a UI role in Street Manager.

You need to ensure that the Promoter API user has access to all of the relevant Workstreams that corresponds with your promoter districts in Confirm. To do this log in as your admin user and select Organisation Users. The select the Promoter API user. Click Manage against their user permissions. We recommend you select all on the Workstream and 'Confirm access'.

Step 2 - Install the Decoupled Confirm Task Processor and Confirm Web beta environment

All the On-demand clients have been set up to use the decoupled Task Processor and Confirm Web beta environment for Development and Production (not Test). We recommend that Development is linked to the Street Manager Sandbox environment and Production to Production.

You will need to access the Confirm web beta environment for Street Manager interface- specific configurations. The On-demand URLs for the Confirm Web beta environments are unique for each customer and look like this:

- Development: https://beta-development-webservices.ondemand.confirm.co.uk/confirm/web/app/?tenant=<Your Profile Name>#/settings
- Production: https://beta-production-webservices.ondemand.confirm.co.uk/confirm/web/app/?tenant=<Your Profile Name>#/settings

Replace "<Your Profile Name>" with your usual profile name, e.g. "Authority Name - Development" without any leading or trailing spaces. Please contact Confirm support team if you are unsure of your Confirm web beta URLs for development and production.

The On-premise clients need to follow the Installation (For On-Premise clients) section of the document to install the decoupled Task Processor and Confirm Web beta environment.

Step 3 - Configuring the Confirm Street Manager interface

Following Street Manager Settings in the Web Settings screen need to be configured

- Street Manager URL - Refer to **https://department-for-transport-streetmanager.github.io/street-manager-docs/api-documentation/** and Current Release section for sandbox and production URLs which could change. The current URLs are:
  - Sandbox: **https://api.sandbox.manage-roadworks.service.gov.uk**/
  - Production: **https://api.manage-roadworks.service.gov.uk**/
- Document Proxy URL - The URL to the Confirm Web beta that supports the Street Manager document proxy service. Ensure this ends with a trailing slash. For On-demand these URLs are as follows:

- Development: **https://beta-development-webservices.ondemand.confirm.co.uk/confirm/web/**
- Production: **https://beta-production-webservices.ondemand.confirm.co.uk/confirm/web/**

- Street Works Web Interface URL - The URL to the Confirm Web beta which is used for launching Street Works. Usually this would be same as 'Document Proxy URL'.
- Legislation URL - The URL is of DfT legislation which contains the latest charges for unreasonably prolonged occupation of the Highway. Current URL as per Street Manager is as below.
  - URL: **https://www.legislation.gov.uk/uksi/2012/2272/regulation/4/made**
- Email Address (for role 'Promoter') - the API access key of a Promoter user for accessing the Street Manager APIs. Required when Confirm is used as Promoter system and for self Promoted works.
- Password (for role 'Promoter') - the API secret of a Promoter user for accessing the Street Manager APIs. Required when Confirm is used as Promoter system and for self Promoted works.
- Email Address (for role 'Highway Authority') - the API access key of an Authority user for accessing the Street Manager APIs. Required when Confirm is used as Authority system.
- Password (for role 'Highway Authority') - the API secret of an Authority user for accessing the Street Manager APIs. Required when Confirm is used as Authority system.

Step 4 - Activating the Confirm Street Manager interface through the decoupled Task Processor

The decoupled Task Processor performs the main task of integration with Street Manager, namely sending and receiving Street Works notifications. The decoupled Task Process takes over the role performed by the Street Works Transfer Agent.

Once the decoupled Task Processor has been installed, it is activated by "tagging" the 'Street Works Transfer' Agent in the Scheduled Tasks screen with the version number of the decoupled Task Processor, e.g. "<V21.20>". The act of tagging the scheduled task ensures that your "main" task processor no longer runs this task, allowing the decoupled task Processor to take over.

Note that the first time the new agent runs it will make the necessary lookup table changes as described in the various Field Mapping sections, so please ensure that you have familiarised yourself and relevant users with these changes in a development environment before activating the new Task Processor in production.

On-premise customers need to ensure that the Task Processor procedure patching has been completed, as described in the installation section, before tagging the agent.

General Principles

Street Manager Recipient

A new organisation with a code of "STWRKS" will be created which will represent Street Manager. When a works is sent or received from Street Manager the "STWRKS" recipient will be added to the works (if not already). Once a works has been sent or received via Street Manager then all subsequent notifications for that works will be sent via Street Manager and EToN notifications will stop being sent.

A new works will be automatically sent to Street Manager if the "STWRKS" organisation is added as a recipient. New works will also automatically be sent to Street Manager if both the Promoter and Authority are included in the list of Street Manager Organisations system setting.

Street Manager API access email IDs

The email IDs used for accessing the Street Manager API's from Confirm should not be used to access the Street Manager system through the Street Manager user interface. The Confirm system uses these email IDs to identify the Confirm generated transactions in the Street Manager system and any transactions in the Street Manager system created using these email IDs will not be pulled back to the Confirm system.

Batches and Diagnostics

Batches will continue to be used to audit transfers to and from Street Manager. However, there are no XML file equivalents for Street Manager so the Batch File Name will be recorded. The Task Processor log file can be configured to show detailed information about individual API calls made to Street Manager for diagnostic purposes.

Error Handling

If Confirm is not able to contact the Street Manager API, there is a problem with authentication or Street Manager indicates that an internal error has occurred then Confirm will keep trying the current notice till the time it is successfully sent. Note that the Street Works Initiation System Settings > Notification Retries settings based limitation will be applied to only EToN based transfers.

If Confirm obtains an error back from Street Manager that indicates that Street Manager will not accept the data from Confirm (e.g. invalid USRN), then the notice will be flagged as unsent allowing the data to be corrected in Confirm and re-sent.

If there is more than one pending notice to be sent to Street Manager and a data error occurs on a notice that is not the most recent notice then the failing notice will be flagged as "Do not send" and Confirm will attempt to send the next notice.

If there is an error with importing a notice from Street Manager such that a record cannot be created in Confirm then the System Supervisor will be emailed with the error details. Confirm will attempt to re-import the notice the next time the works is updated in Street Manager.

If condition text or any comment exceeds the character limit of confirm while importing the notice from Street Manager, then the System Supervisor will be emailed with the original values and the work header number. The truncated text will be available in Confirm with

'...More in SM' text.

Lifecycle Validation

There are some instances where Street Manager enforces more stringent validation than was expected under EToN. Please feel free to lobby the DfT if you feel this difference could cause operational issues. Examples include:

1. Changing the USRN for a Works

Street Manager does not allow the USRN to be altered or corrected at any point once a works has been created. The only way to change the USRN is to create a completely new works (you can't even change the USRN if you create a new permit on an existing works).

Confirm allows the USRN to be changed on a number of notices, e.g. Permit Application after a PAA, Works Data Variation, etc. but these changes will not be reflected in Street Manager.

2. Modification Request on Immediate Works

Street Manager has formalised the practice of not allowing Modification Requests to be sent in response to an Immediate Permit Application, and will reject this notice if sent from Confirm in this scenario. If you do not want to refuse the Immediate Permit but would like some small changes to be made then you should grant the permit and then submit an Authority Imposed Variation.

3. Works Data Variation after Works Stop

Street Manager does not permit Variations / Error Corrections after the works has stopped. The only way to achieve this is to revert the Works Stop, submit the Variation and re-submit the Works Stop.

Lookup Table Matching

For EToN, matching to Confirm lookup tables was mostly done based on the DfT reference fields on the lookup. In some cases, however, Street Manager adds more options than EToN supported, but during transition we still need any new options to be supported under EToN. Where new options are to be supported these will be added into Confirm with DfT references that most closely match the EToN equivalent. New options that have been added to support Street Manager will typically be matched based on the lookup table entry Code / Number in Confirm. The exception is Permit Condition Types which don't have a Code, in which case a partial match on Name will be attempted. If multiple matches are found using a DfT reference or Name then the first item will be selected based on the order that the items are typically presented in Confirm, e.g. by name or display order.

Missing Data

Given that Street Manager will be the official "system of record" for Street Works, data from Street Manager will be downloaded in Confirm in any way possible.

This includes automatically creating missing organisations. For example, if a new works prefix is received from Street Manager then a new Organisation with a matching DfT Ref 2 will be created in Confirm using the contact details from the Street Manager "Workstream".

Confirm will also create new Workstreams in Street Manager where necessary.

If an unrecognised USRN is received from Street Manager then the works will be recorded against the Provisional Street in Confirm as currently happens with EToN.

Document Links

When documents are received from Street Manager a Document Link record will be created with a URL in the Document Location that will launch the document stored in Street Manager. The document will not be downloaded to the local Confirm system. The URL itself does not include the document file name, so this will be included in the Document Notes in Confirm. If the document relates to a specific Permit then the Permit reference will also be appended to the document link notes. Street Manager documents are actually viewed via a "proxy" service built on Confirm Web, which allows documents from Street Manager to be viewed from Confirm without having to log into Street Manager. You will need to install the latest version of Confirm Web to use this Proxy service, but this can be done in "beta" mode so a new version of Confirm Web can be installed that works with your current Confirm database. Note that the 'Received' flag will still be set to 'No' as changing this to 'Yes' for documents received from Street Manager will need a Confirm database change and will be considered in future.

If a notification is created in Confirm and there are outstanding published documents (with the ORG_PREFIX prefix or "[Public]" in the document notes) that haven't previously been sent to Street Manager, then these documents will first be uploaded to Street Manager before sending the notification. The Document Location for uploaded documents will not be altered, so will still point to Confirm's local copy of the document. However, the URL that links to the copy of the document in Street Manager will be appended to the Document Description in Confirm.

Documents will not be sent to Street Manager if they contain "[Private]" in the Document Notes.

Street Manager allows documents to be attached to Permit applications and Permit changes and also to be generally uploaded against the Works. However, there is a current issue in Street Manager where it is not possible to see documents that were uploaded as part of a Permit change. For this reason we are currently uploading all documents from Confirm against the Works as a whole, rather than against individual Permit applications or changes. We will review this once the issue is resolved in Street Manager.

Street Manager does not allow specific Document Notes to be added, so the document notes associated with any published documents will not appear in Street Manager.

Note for on-premise customers: When the Street Manager agent uploads documents to Street Manager it must obtain them via the published URL, so you will need to make sure that the Street Manager Agent can access these URLs. The Agent will currently only support uploading documents that are published at HTTP or HTTPS locations.

Works Reference Special Characters

In EToN, works references are allowed to contain letters, numbers and forward slash "/" and hyphen "-" characters. Under street manager forward slashes are not allowed but underscores "_" are allowed.

When transitioning legacy works from EToN to Street Manager (e.g. as a result of a Cat C inspection) we will need to replace any forward slashes in the works reference with underscores so that Street Manager will accept the works reference. We perform the replacement "on-the-fly", so keep the works reference the same in Confirm (with slashes) so that the original works reference in Confirm is preserved for audit purposes. This that means that what you see in Confirm won't be consistent with what is seen in Street Manager, so a works reference like ABC/123-A in Confirm would be ABC_123-A in Street Manager. We would advise that slash and underscore characters are avoided where possible on new works.

Transition

Inspections, Defective Apparatus and FPNs logged on EToN notices will be sent to Street Manager using the "historic works" mechanism.

For works that are Promoted from within Confirm (where the Organisation Notice Initiation flag is checked), notifications for any new Phase will automatically be sent to Street Manager.

Launching Street Manager from Confirm

A document link is created for each Works in Confirm with a URL that will launch the Street Manager for that Works when Confirm interacts with the Street Manager the first time for that Works. Users would need to log into Street Manager using their own credentials in order to follow this URLs.

Noticing

Street Manager does not support noticing but there are a number of scenarios where Permits are not applicable, e.g. in Private Streets or where the Permit scheme only applies to certain Streets.

If a PAA / Permit application is received from Street Manager against a Street that only supports Noticing then the application will be linked to the "Dummy" Permit Scheme specified on the Street Works Notice Default System Settings.

If a non-Permit Notices are entered into Confirm these will be translated to notifications that Street Manager will accept, as follows:

- We will send and receive S54, S55 and S57 notices as PAAs and PAs in Street Manager.
- Error corrections and revised duration estimates will be converted to permit changes.
- Any directions entered into Confirm will be translated into Works Comments in Street Manager with a suitable preamble.
- If any S54, S55 or S57 noticing FPNs are generated after the transition to Street Manager then these will be sent via email, even if the user requested to send them via EToN.

Performance Based Inspection

Street Works inspections are changing from an annual 30% sampling size to a performance-based approach. This comes into effect on the 1st of April 2023. The system responsible for generating and storing inspection sample figures, targets and for generating sample inspections is changing. This will now be done in Street Manager. Confirm users are requested to send their pending Inspections to Street Manager prior to 1st of April. Once these are generated then we will import them into Confirm using Street Works Task Processor agent.

Confirm now supports actions to 'Generate Samples', 'Start Quarter', 'End Quarter' and 'Import Samples' from Sample Inspection Target screen.

Supported Actions

The following table outlines the Confirm action or process, the corresponding action in Street Manager and the status of the integration.

Table 1: Street Works

Confirm Action	Street Manager Action	Status	Notes
New Planned Street Works (Forward Planning)	Raise a Forward Plan	Available	
(Forward Planning Information) Planned Works	Progress forward plan to PAA	Available	
New Planned Street Works	Apply for works	Available	
New Immediate Street Works	Apply for works	Available	

Confirm Action	Street Manager Action	Status	Notes
Permit Application	Progress PAA to PA	Available	
Grant PAA	Assessment decision > Grant	Available	
Under Assessment	Assessment decision > Under Assessment	Available	
Grant Permit	Assessment decision > Grant	Available	
Grant with Duration Challenge	Assessment decision > Grant	Available	
Refuse Permit/PAA/Variation	Assessment decision > Refuse	Available	
Modification Request	Assessment decision > Modification request	Available	
Modified Application	Request a change	Available	
Works Data Variation	Request a change	Available	
Duration Variation Application	Request a change	Available	
Duration Challenge Non-Acceptance		Out of scope	Will be sent as a Promoter response. (Applicable for EToN Works only)
Cancellation	Cancel permit application	Available	
Actual Start Date	Log works start	Available	
Revert Actual Start	Revert works start	Available	
Duration Challenge		Out of Scope	Applicable for EToN Works only.
Authority Imposed Variation	Impose a change	Available	
Duration Challenge Responses	Duration Challenge Non Acceptance	Available	Duration Challenge Non Acceptance Response will be imported as Notice.
	Duration Challenge Acceptance	Available	Duration Challenge Acceptance Response will be imported as Notice.
	Reasonable Period End Date Changed	Available	Reasonable Period End Date Changed will be imported as Notice.
	Reasonable Period End Date Not Changed	Available	Reasonable Period End Date Not Changed will be imported as Notice.

Confirm Action	Street Manager Action	Status	Notes
	Duration Challenge Promoter Accept	Available	Duration Challenge Promoter Accept Response will be imported as Notice.
	Duration Challenge Promoter Not Accept	Available	Duration Challenge Promoter Not Accept Response will be imported as Notice.
Revoke Permit	Revoke permit	Available	
Works Stop	Log works stop. Was an excavation required? > Change	Available	(Out of scope) Don't currently change the excavation status if this is edited on the Works Stop.
Revert Work Stop	Revert works stop	Available	
Error Correction	Request a change, Excavation carried out updated, Inspection unit logged	Available	Note Street Manager does not allow changes after the works has stopped so this notification could cause errors.
Registration of Reinstatement	Add a reinstatement, Final site registered	Available	Earlier not exporting/ importing subsume, but now supporting this action.
New Planned Phase	Apply for new permit	Available	
New Immediate Phase	Apply for new permit	Available	
Temporary Traffic Signal Application & Response		Out of scope	Not in scope for Street Manager. Applicable for EToN Works only.
Document Links	Add a file	Available	
Works Comments	Added	Available	
Traffic Management	Update Current Traffic Management	Available	Update the Current Traffic Management and it will be sent to Street Manager. Imported as Notice.
Ancillary Details	Ancillary Information	Available	Add the Ancillary Information and it will be sent to Street Manager. Imported as Comment.
Inspection Response	Inspection Details and Response	Available	View Inspection Details and respond to each Inspection and it will be sent to Street Manager. Imported as Notice.
Lane Rental	Lane Rental Assessment or charge	Available	Add or update Lane Rental Assessment and it will be sent to Street Manager. Imported as Notice.

Table 2: Inspection

Confirm Action	Street Manager Action	Status	Notes
New Inspection	Add an Inspection Add inspection to historical works	Available	Note that some historic works may not have valid coordinates, but these are mandatory in Street Manager. Ensure that coordinates are specified on the inspection if this is the case.
	Promoter Responses (Accept/Dispute)	Available	Promoter Responses will be imported as Notice.
	Authority Response (Promoter Accepts Failed Inspection)	Available	Authority Response will be imported as Notice.
	Authority Response (Acknowledge (Auto))	Available	Acknowledge (Auto) will be imported as Notice.
Investigatory Inspection	Investigatory Inspection	Available	Street Manager started supporting Investigatory Inspection. New Categories will be available in Confirm. Existing Investigatory Categories with be used for EToN only.
Programmed Inspection	Sampled Inspection	Available	Sampled Inspections will be generated in Street Manager. Our Task Processor will import them as Programmed Inspection from Street Manager once daily.
Cancel/Abort Inspection	Withdraw Inspection	Available	Updating/Withdrawing an Inspection in Confirm client will withdraw the existing Inspection and create a new Inspection with updated information in Street Manager.

Table 3: Street Works Licences

Confirm Action	Street Manager Action	Status	Notes
New Street Works Licence	Add activity to the map	Available	Note that the actual works carried out under a licence would be logged as normal works. Currently only planning to export Section 50s to Street Manager, not import

Table 4: Defective Apparatus

Confirm Action	Street Manager Action	Status	Notes
New Defective Apparatus + Apparatus Inspection	Issue Section 81	Available	A Section 81 record will only be created in Street Manager when the Apparatus Inspection is recorded in Confirm
Defective Apparatus (issue to new promoter)	Reassign Section 81 to another organisation	Available	The Section 81 will be reassigned to the new organisation along with the Inspection.
Cancellation	Cancel Section 81	Available	
Promoter Comment	Acknowledge	Available	Import only.
Defective Apparatus Non-Acceptance	Rejected	Available	
Defective Apparatus Acceptance	Accepted	Available	Note a linked works will not be created
Works Stop Completion of Non-notifiable Phase	Mark S81 as fixed	Available	On import, the Defective Apparatus works status will be set to 'Completed'. An extra works history entry will be added with a new Notice Type of 'Defective Apparatus Acceptance Fixed'. This new Notice Type is similar to "Defective Apparatus Acceptance" having code "202A". On export the Section 81 will be marked as Fixed when the linked works is completed

Table 5: Non-notifiable Works

Confirm Action	Street Manager Action	Status	Notes
New Registration of Non-Notifiable Works	Add reinstatement of non-notifiable works	Available	

Table 6: Unattributable Works

Confirm Action	Street Manager Action	Status	Notes
New Unattributable Works	Issue 'Section 81 or Unattributed works'	Available	

Confirm Action	Street Manager Action	Status	Notes
Unattributable Works (issue to new promoter)	Cancel 'Section 81 or Unattributed works' and Issue 'Section 81 or Unattributed works'	Available	The previous 'Section 81 or Unattributed works' will be cancelled and a new one created as Street Manager doesn't allow the promoter to be changed
Cancellation	Cancel 'Section 81 or Unattributed works'	Available	
Promoter Comment	Acknowledge	Available	
Unattributable Works Non-Acceptance	Rejected	Available	
Unattributable Works Acceptance	Accepted	Available	Note a linked works will not be created
Works Stop Completion of Non-notifiable Phase	Mark S81 as fixed	Available	On import, the Unattributable Works status will be set to 'Completed'. An extra works history entry will be added with a new Notice Type of 'Unattributable Works Fixed'. This new Notice Type is similar to "Unattributable Works Acceptance" having code "2002". On export the Section 81 will be marked as Fixed when the linked works is completed

Table 7: Offences and Penalties

Confirm Action	Street Manager Action	Status	Notes
Offence > Create FPN	Issue an FPN Issue FPN to historical works	Available	Only FPNs will be sent to Street Manager, not candidate Offences.
Offence > Actions	FPN action	Available	Accept, Dispute, Cancellation (withdraw) and Paid statuses will be exported from Confirm.

Table 8: Designations

Confirm Action	Street Manager Action	Status	Notes
Site > Designations > S58 Restriction	Add activity to the map/Section 58	Available	Recorded as Section 58 in Street Manager
Site > Designations > S58A Restriction	Add activity to the map/Section 58	Available	Will be recorded as Section 58 with the designation name in the description

Table 9: Events and Diversions

Confirm Action	Street Manager Action	Status	Notes
New Event Diversions	Add activity to the map	Available	
Edit Event	Change activity detail	Available	
(Event) Cancellation	Cancel activity	Available	

Non-Permit Notices

Street Manager currently only supports permitting. Permit applications made in Street Manager that are made on Noticing Streets will be attached to the "Dummy" Permit Scheme. The following Notices will be translated to equivalent Street Manager notifications on export:

Confirm Action	Street Manager Action	Status	Notes
New Planned Street Works New Immediate Street Works	Apply for works	Available	
Confirmation	Progress PAA to PA	Available	
Revised Duration Estimate	Request a change	Available	
Error Correction	Request a change	Available	Note cannot be used after Works Stop
Directions on Timing	Add a comment	Available	
Direction on Placing Apparatus	Add a comment	Available	
Undue Delay Direction	Add a comment	Available	Deadline will be included in the comment text

(Planned) If any S54, S55 or S57 noticing FPNs are generated after the transition to Street Manager then these will be sent via email, even if the user requested to send them via EToN.

Table 10: Section 74 Overrun Warning

Confirm Action	Street Manager Action	Status	Notes
New Inspection	Issue Section 74 overrun warning	Available	Creating an Occupancy Inspection with Section 74 Items will create a Section 74 overrun warning in Street Manager along with an Occupancy Inspection
Section 74 Overrun Warnings	Section 74 overrun warning action	Available	After the initial warning is issued, rest of the actions of the work-flow can be actioned in Confirm web interface

Field Mappings

This section provides the mapping of Confirm fields with Street Manager for the supported notification types.

Actual Start

Note that Notification Comments are not sent to Street Manager.

(Out of Scope) Confirm allows works contact details to be changed on the Works Start, would have to submit a permit change to affect these in Street Manager.

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
Works started	Street Works > Start Date	Full date and time are imported	Confirm does not currently allow time to be specified on the Actual Start wizard. If the Start Date in Confirm is on the same day that the Notice was issued then the Issued Date (time) will be used. Otherwise the Start Date will be used.

Authority Imposed Variation

Street Manager allows Conditions to be specified on Authority Imposed Changes, whereas only free text was supported by EToN.

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
Conditions	Street Works > Conditions	Will be mapped to Confirm Condition Types based on matching the NCT condition code to the first 6 characters of the Permit Condition Type Name. Mandatory conditions NCT01a, NCT01b and NCT11a are ignored	Condition updates will be generated where NCT codes are used in the Variation Comments. Conditions will only be added or updated, never removed.
Condition Comments	Street Works > Conditions Text	Concatenated together. May be truncated. The text from each condition will be on a new line prefixed by the corresponding NCT code.	If a fragment of Condition text in Confirm begins with a valid NCT code then everything after the code will be attached to the relevant Condition in Street Manager.
Why do you need to change the permit details?	Street Works > Conditions > Authority Imposed Variation		Condition updates will be generated where NCT codes are used in the Variation Comments.

Cancellation

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
Reason for cancellation	Street Works > Transfer > Notification Comments	Trim the comment text to 500 characters	Street Manager will reject the notice if a Reason is not supplied. A default value of "None supplied." will be sent when there are no notification comments.

The available options in the drop down are:

- Admin error - For example, wrong NSG, Highway Authority, works type, permit type, address or duplicate permit
- Customer reasons - For example, customer cancelled, access was not granted, customer not ready, customer tradesperson not available
- Requested by Highway Authority - For example, works refused or revoked, HA imposed variation, modification request, Section58
- Private works - For example, all of the work was completed on a private property
- Clash of works on site - For example, conflict of works, another utility already working on site
- Traffic management issues - For example, TM plan not agreed, TM needed, different TM needed
- Parking issues - For example, cars parked, gang unable to park, bays not suspended
- No staff or resources - For example, gang off sick, work vehicle breakdown, lack of materials
- Higher priority works - For example, called away for higher priority works
- Weather - For example, issues caused by weather
- Further action required - For example, joint site meeting needed, correlation, asset plans missing, mark up

- None of the above cancellation reasons - give your reasons

Defective Apparatus (Section 81)

Key Differences from EToN

Under EToN a Defective Apparatus works is created and an Apparatus Inspection attached to it. In Street Manager there is no need to create an additional inspection for the Section 81 process to work. Confirm will therefore only send the Defective Apparatus details to Street Manager when both the Works and Inspection have been created, and import will automatically create a works and a corresponding Inspection.

If a Section 81 has been rejected and a Confirm user attempts to send it to another Promoter then Confirm will automatically create a new Section 81 in Street Manager. Similarly, Street Manager does not allow Section 81 details to be edited once submitted, but can be reassigned to another organisation.

Street Manager does not support linking to a Promoter's actual works on acceptance. On import of Accepted Fixed from Street Manager Confirm will simply update the Works Status in Confirm to closed. An extra works history entry will be added with a new Notice Type of 'Defective Apparatus Acceptance Fixed'. This new Notice Type is similar to "Defective Apparatus Acceptance" having code "202A".

Inspection Category

Street Manager introduces the concept of a Section 81 type. Confirm will populate this based on the Inspection Category selected. The following additional Inspection Categories (all configured for Apparatus inspections) will be added to support this:

Street Manager Section 81 Type	New Inspection Category Code	New Inspection Category Name
Tee/valve/access covers	SMTV	Apparatus - Tee/valve/access covers
Cabinet	SMCA	Apparatus - Cabinet
Marker post	SMMP	Apparatus - Marker post
Pole/post	SMPP	Apparatus - Pole/post
Overhead cables broken/low encroaching onto highway	SMOC	Apparatus - Overhead cables
Other (Specify)	IC16	(Existing lookup)

Inspection Outcome

EToN does not have a way of transmitting "HA Actioned" as part of an Apparatus inspection. To support this, two new Inspection Outcomes will be added applicable to Defective Apparatus:

New Outcome Code	New Outcome Name
O25A	Failed (Higher Risk) HA Actioned

New Outcome Code	New Outcome Name
O35A	Failed (Lower Risk) HA Actioned

These will use the same DfT references as the existing O20A and O30A outcomes but with the Authority Actioned checkbox checked.

Field Mapping

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
Works reference	Street Works > Transfer > File Name Street Works > Project Reference Street Works > Project Description Street Works > Works Ref. (Import)		
USRN	Street Works > Street		
Location co-ordinates	Street Works > Map		Street Manager only displays it as a point.
Issuing authority	Street Works > From	This will be the first (by name) matching Authority organisation that either has interest in the street or has the same SWA Org Code	
Receiving organisation	Street Works > Promoter	This will be the first (by name) non-dead Organisation that has the same SWA Org Code	
Location area	Street Works > Location	Appended to Location	Extracted from the location text if supplied in brackets, e.g. a location text of "o/s 45 (Footway and verge)" would set the Footway and Verge checkboxes in Street Manager. If no suitable text is found in brackets then defaults to Carriageway.
Location description	Street Works > Location Street Works > Description (Export)	Location populated on import	Both appended together on export

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
Inspection date	Inspection > Inspected		
Type	Inspection > Category Street Works > Description (Import)	See table above. If no matching lookup is found the existing Apparatus Inspection Category will be used	See table above. If the existing generic category is used then the Other (Specify) option will be set to the Works Description (possibly truncated)
Severity	Inspection > Outcome		
Made safe by HA	Inspection > Outcome > Authority Actioned	If set to yes then the appropriate Authority Actioned outcome will be selected as per the table above	
Inspector name	Inspection > Officer > Name		
Inspector contact details	Inspection > Officer > Telephone Number		
Additional details	Inspection > Comments		
	Inspection > Site Informed	Not set	Will be appended to Additional details if checked

Events and Diversions

Key Differences from EToN

Street Manager has a general facility to show "Activities on the map" (referred to as Activities going forward). A Street Manager Activity can only be linked to one USRN whereas Confirm Events and Diversions can be linked to multiple USRNs.

Street Manager automatically assigns an activity reference to the works.

Street Manager supports a number of Activity Types plus "other". For Activity Type "other" an additional activity type details must be supplied but this is not currently displayed anywhere in Street Manager. Diversions are exported as "other" activity type so Work Type is assigned to the activity type details when exported to Street Manager.

Confirm does not allow the user to flag an Event to be Sent. We are therefore proposing to send all Events and Diversion routes to Street Manager unconditionally.

Street Manager does not allow the geometry of an existing Activity to be changed. In this scenario Confirm will close the current activity (cancel it) and create a new one to cater for these changes.

There are no plans to import Events / Diversions from Street Manager.

Field Mapping

Street Manager Field	Confirm Field	Notes (When exporting from Confirm to Street Manager)
USRN	Street Works > Streets	Only the first Street will be exported
Event or activity foot-print	Street Works > Map	Event - Educational Shows: The Academies Show brings together over 3,000 attendees and 200 leading education suppliers for a...
Activity name or licence reference number	Street Works > Works Type Street Works > Description	Appended together. Note, may be truncated by Street Manager, e.g: Event - Educational Shows: The Academies Show brings together over 3,000 attendees and 200 leading education suppliers for a...
Activity type	Street Works > Works Type	If the Works Type name matches a standard Street Manager Activity Type, otherwise "Event" for Events and "Other" for Diversions and the Works Type Name will be specified in the "Briefly describe the nature of your event or licensed activity" field.
Contact organisation/name	Street Works > Contacts > Owner Name	May be truncated by Street Manager.
Contact details	Street Works > Contacts > Owner (remaining details)	May be truncated by Street Manager.
Start date	Street Works > Start Date	
End date	Street Works > Estimated End Date	
Activity location	Street Works > Location	Extracted from the location text if supplied in brackets, e.g. a location text of "o/s 45 (Footway and verge)" would set the Footway and Verge checkboxes in Street Manager. If no suitable text is found in brackets then defaults to Carriageway.
Activity location description	Street Works > Location	May be truncated by Street Manager.
Traffic management type	Street Works > Traffic Man.	
Collaborative working	-	Set to "No"
Additional information	Street Works > Transfer > Notice Comments	May be truncated by Street Manager.
Reference	Street Works > Transfer > File Name	Activity Reference generated by Street Manager will be written back to Confirm

FPNs

Key Differences from EToN

EToN supported Issuing and Withdrawing (Cancelling) FPNs. Street Manager introduces some addition actions. For promoters:

- Accept
- Dispute

For authorities:

- Mark FPN as paid

These new actions will be supported when importing and exporting FPNs into Confirm. In the case of "Mark FPN as paid" this will update the Offence Status to "Resolved". For the promoter responses, the FPN status will be updated and the promoter's reason will be appended to the Offence Notes.

The new actions are now supported when exporting from Confirm to Street Manager.

Field Mapping

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
FPN offence code	Offence Type > External Reference		Offence Types with External Reference 1, 2, 3, and 4, relating to S54, S55 and S57 offences, will not be exported to SM. An error will be logged in Confirm.
Location	Offence > Location (Import)		The Location displayed in Street Manager is derived from the works so cannot be set when creating an FPN.
Offence date	Offence > Offence Date		
Offence details	Offence > Description Offence > Location (Export)		Location and Description will be appended together on export.
Authorised officer name	Penalty > Action Officer	Offence Type > Representation Officer	
Officer contact details	Action Officer > Telephone Number	Will be added to the Offence > Notes	
Officer address	Organisation > Address	Not imported	Will be set to "Not provided" if the Authority Organisation Address is blank
How payment can be made	Organisation > Fixed Penalty Notice Payment	Not imported	"Card payment" will be included if either the Web Site URL or Credit Card Contact Number are specified.

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
			"Cheque" will be included if any of the Cheque fields are populated "Bank transfer" will be included if any of the BACS details are populated or if none of the FPN Payment fields are populated. "Cash" will never be included.
Contact for representations	Street Manager System Settings > FPN Contact for Representations	Not imported	Will be set to "Not provided" if there is no Setting
Contact address for representations	Street Manager System Settings > FPN Contact Address for Representations	Not imported	Will be set to "Not provided" if there is no Setting
Attach photo evidence	Offence > Document Links		
Withdraw FPN > Additional details	Offence> Notes		
Mark FPN as paid > Was a discount applied	Penalty > Amount Paid	If discount was applied then Amount Paid will be set to the Discounted Amount for the Penalty, otherwise will be set to the Full Amount	If Amount Paid is less than the Full Amount, then exported as Paid with Discount. Otherwise exported as paid.
Accept > Additional details	Offence > Notes Status	Imported and update the Status. Reason is appended in notes field.	Yes exported to Street Manager
Dispute > Reason for dispute	Offence > Notes Status	Imported and update the Status. Reason is appended in notes field.	Yes exported to Street Manager

Forward Planning Information

Key Differences from EToN

Street Manager allows forward planning information notices to be created only for major works, whereas EToN allowed them for other work types as well.

Once a forward planning information notice is cancelled in Street Manager, a new forward planning information notice cannot be created on the same works. In fact, no other action is allowed on the works and the works also gets cancelled.

Street Manager does not allow creation of permits on top of forward planning information notices. The only allowed action is to progress it to a PAA.

Field Mapping

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
Works reference number	Street Works > Reference		Not exported to Street Manager
Works area (View on Map)	Street Works > Map > Easting / Northing		Note these aren't mandatory in Confirm but Street Manager will reject the notification so this will have to be corrected and re-sent if not initially supplied
USRN	Site > Code	If only 7 digits then will attempt a match with and without a leading zero. USRN with Road category 2 is not supported. TBA - what to do about it? TBA create street on the fly if doesn't exist	Leading zeros will be stripped. If street is not found in Street Manager then notification won't be sent.
Primary Notice Authority (Works apply to)	Street Works > Street Auth	Will search for interests with type of "Highway Authority" or "Permit Authority" that has an Organisation with an External Ref 1 equal to the SWA code of the Primary Notice Authority. If no matches found will use the first live Organisation with a Highway/Permit Authority Interest, sorting by Organisation Name. TBA. If none found will create one on the fly.	External Ref 1 from the Street Auth Organisation
Interested Parties	Street Works > Contacts > Recipients	Will be coped from the USRN as these are not supplied by the Street Manager API	Not supplied - derived automatically by Street Manager
Designations impacted by works	Street Works > Location > Designations	All the distinct designation types returned from Street Manager are pulled. The full details of the designation, e.g. location, are ignored	These are retrieved from Street Manager API for the USRN and compared with the street designation types from Confirm. Only the applicable designations are pushed.
Location area	Does not exist	Appended to the Location text	Values - Footway, Carriageway, Verge, Cycleway, Footpath • Currently defaulted to 'Carriageway'
Location description	Street Works > Location		

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
Primary contact	Street Works > Contacts > Owner > Name	If truncated, no email will be sent.	Derived by Street Manager
Primary contact number	Street Works > Contacts > Owner > Phone		Derived by Street Manager
	Street Works > Contacts > Owner > Address	Populated from the Organisation Contact details stored in Confirm	Derived by Street Manager
Workstream	Street Works > From	Not used. Confirm Promoter Organisation is determined by matching the first 5 characters of the Works reference against DfT Ref 2 of live Organisations.	Last 3 digits of Dft Ref 2 from the Promoter Organisation
	Street Works > Contacts > Agent > Name		Ignored
	Street Works > Contacts > Agent > Phone		Ignored
	Street Works > Contacts > Agent > Address		Ignored
Project reference number	Street Works > Project Reference		
Proposed start date	Street Works > Start Date		
Proposed end date	Street Works > Estimated End Date		
Works category	Street Works > Works Type		Street Manager currently treats all works with Forward planning notices as Major. This has been raised with the Street Manager team and there are no immediate plans to change this.
Description of work	Street Works > Description		
	Street Works > Excavation Type		Ignored.
Required traffic management type	Street Works > Traffic Man.		

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
	Street Works > Footway Closure		Ignored
	Street Works > Collaboration		Ignored
Additional details	Street Works > Transfer > Notice Comments		
Additional files	Street Works > Document links	Street Manager documents will be added as URLs to Confirm	

Grant / Refuse / Modification Request

Key Differences from EToN

Street Manager introduces Refusal reasons. We will map these onto Notice Types that have a DfT Reference "Refuse PAA/Permit/Variation" that contain the Reason for refusal code in the Notice Type name.

Modification Requests from Street Manager do not currently allow revised Permit Conditions to be proposed. When sending Modification Requests from Confirm we will combine all of the proposed Condition changes into a single text field.

EToN allows a Grant to be issued even after a Permit Application is Deemed, but Street Manager does not allow Grant to be issued for a Deemed application.

"Under Assessment" can be done on a Permit Application. This indicates review status of a Permit. Grant/ Refuse/ Modification Request/ Grant with Duration Challenge can be performed after Under Assessment on a Permit Application.

In EToN a Grant, Refuse or Modification Request (Permit decision) applies to all of the Applications, Modifications or Variations received up until that point, whereas in Street Manager a decision is recorded against the specific Permit or Change. When exporting a Permit decision to Street Manager, Confirm will only apply the decision to Permits or Changes that had already been downloaded into Confirm at the time the Permit decision was logged in Confirm (to avoid Granting something that the Confirm user hasn't seen yet).

Another complex scenario relates to how Street Manager deals with proposed changes to permits that haven't been granted yet... If a Promoter submits a Permit application to Street Manager but then requests a change before the original Permit has been Granted then the change details will be incorporated into the main Permit application and effectively granted when the permit is granted. The following scenario is therefore possible:

1. Promoter applies for Permit in Street Manager which is loaded into Confirm
2. Confirm user reviews and Grants the permit
3. In the meantime the Promoter submits a permit change in Street Manager
4. The Confirm Street Manager Agent attempts to export the permit grant to street manager...

In this scenario the permit should not be granted because the user did not see the change entered at step 3. The proposed behaviour is that the Grant will not be logged in Street Manager and will be overwritten by the Permit change from street manager (so in Confirm it will look like the Grant never happened). The user can then Grant the permit with the change in Confirm and re-send this to Street Manager.

Refusal reasons and notice types

Refusal reason codes can be specified from Confirm in two ways:

1. By incorporating the relevant "RC" code in the Notice Comments for the Refusal
2. By changing the notice type to one of the new Notice Types introduced below

The following Notice Types will be added to map to Street Manager Reasons for refusal. All with have their Dft Ref. set to "Refuse PAA/Permit/Variation".

The existing standard "Refuse Permit / PAA / Variation" Notice type will be used to represent "RC50 - Other (General)" unless the Notification Comment includes one or more valid "RC" codes.

Notice Type Code	Notice Type Name
RC10	Refuse: Missing Information (General)
RC11	Refuse: Condition Not Provided/Not
RC12	Refuse: TM Not Received
RC20	Refuse: Incorrect Details on Permit (General)
RC21	Refuse: Incorrect Primary Recipient
RC22	Refuse: Location issues
RC23	Refuse: Conflicting Information
RC30	Refuse: Co-ordination Issues (General)
RC31	Refuse: Clash of Works
RC32	Refuse: Timing of Works
RC33	Refuse: Collaboration/Coordination
RC40	Refuse: Lack of Approval (General)
RC41	Refuse: Incorrect TM
RC42	Refuse: Early Start Agreement
RC43	Refuse: S.58 Restriction
RC44	Refuse: Duration

Street Manager may also automatically cancel a proposed change if this is not granted before the works stop. In this scenario Confirm will generate an Refusal Notice for the cancellation using a new Notice Type Code of "RCCR" - "Street Manager Cancelled Change Request".

Duration Challenges

Under EToN the Duration Challenge notice is separate from the Grant notice, whereas Street Manager combines these into a single "Grant with duration challenge" permit change decision.

Notice Type Code	Notice Type Name
161D	Grant with Duration Challenge

Field Mapping

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
Assessment decision	Street Works > Permit Status		
Permit fee discount	Street Works > Conditions > Discount		
Reason for refusal	Street Works > Notice Type > Code Street Works > Transfer > Notice comments	If a Notice Type cannot be found with a Code matching the refusal reason then the refusal reason text will be prepended to the Notice Comments. If more than one Reason code is supplied then the second and subsequent Reasons will be prepended to the Notice Comments.	The refusal codes will be populated from valid "RC" codes found in the Notice Comments and/or the Notice Type specified. If the Confirm Notice Type Code is not a valid refusal code and no "RC" codes are found in the Notice Comments, then "RC50 Other (General)" will be supplied.
Refusal details Modification request details Grant with duration challenge > Details	Street Works > Transfer > Notice comments		For Modification Requests, if the selected Conditions or Condition Text has been changed then the details of the change will be appended to the Modification request details. For refusals, if there are no notice comments, refusal details will be defaulted to 'None supplied.'
Reasonable period end date	Street Works > Reasonable Period		

Inspection Results

Key Differences from EToN

Editing Inspections

At the moment Street Manager doesn't allow an Inspection to be edited after it has been logged, although it can be withdrawn, whereas EToN had the ability to update an Inspection, for example if an agreement was made after the joint site visit.

At the moment editing and re-sending an inspection from Client will cancel the current inspection in Street Manager and create a new inspection with updated details.

Inspection Type and Category

Street Manager defines inspections at a high level as five different types: Live Site, Reinstatement, Non-compliance follow-up, Section 81 and Investigatory. These are sub-divided into categories which are similar to those in EToN. As for EToN, the category determines what outcomes are valid.

Inspection Categories in Confirm will be mapped to Inspection types and categories in Street Manager according to the DfT references. Inspection Categories with no DfT references or combinations not listed (e.g. "All Categories" and "Non Categorised Inspections") will not be sent to Street Manager.

Dft Ref. 1	Dft Ref. 2	Confirm Inspection Category Name	Inspection Type	Inspection Category
9	Any	Category A	Live site	Category A
10	Any	Category B	Reinstatement	Category B
11	Any	Category C	Reinstatement	Category C
14	Any	Occupancy	Live site	Site occupancy
15	Any	Permit Conditions	Live site	Conditions
16	Any	Apparatus	Section 81	Section 81
Any	2	Defect Follow Up	Non compliance follow up	Follow up
Any	4	Defect Follow Up Completion	Non compliance follow up	Follow up completion
Any	6	Defect Joint Inspection	Non compliance follow up	Joint site visit
Any	5	Third Party Report	See note below	Third party
	7	Routine	See note below	Routine
13	7	Routine- Live site	Live site	Routine
13	7	Routine- Reinstatement	Reinstatement	Routine
16	Any	Unattributed Works - Live site	Unattributed works - Live site	
16	Any	Unattributed Works - Completed	Unattributed Works - Completed	
13	3	Investigatory - Core sample	Investigatory	Core sample
13	3	Investigatory - Skid resistance	Investigatory	Skid resistance
13	3	Investigatory - Texture depth	Investigatory	Texture depth
13	3	Investigatory - Surface regularity	Investigatory	Surface regularity
13	3	Investigatory - Trial hole	Investigatory	Trial hole

Note that for DfT Ref. 2 values of 5 (Third party) and 7 (Routine) the Inspection Items will be queried to determine if it is a "Live site" or "Reinstatement" inspection based on the DfT Ref. of the Item's associated Inspection Group. If the Inspection is created with the Item Groups having the DfT Reference of 3 then it will be classed as "Reinstatement", otherwise it will be classed as "Live site". If a mix of items are included then two inspections, one of each type, will be created.

Note: For the users, who does not see any Inspection group linked to these two new categories are requested to add the relevant Inspection groups accordingly. For an instance, add Backfill and Sign and Guarding Inspection group to 'Routine - Live site(SMRL)' and Reinstatement inspection group to 'Routine - Reinstatement(SMRR)' Inspection categories.

As part of new Inspection Sampling process, Non-sampled Category B and C inspections will now be exported as Routine Inspections. Sampled/Non-sampled Category A inspections will still be exported to Street Manager as Category A.

The street Manager treats only Category A, B, and C inspections for Performance based Inspection sampling process. They will not consider the Non-sampled Category B and C inspections created from Confirm for their sampling process. Post April 2023 any other Category B and C inspection will not be allowed on the works. So those Inspections will need to be input as Routine Inspections. To make it consistent with the Street Manager, Confirm will now export Non sampled Category B and C Inspections to Street Manager as Routine Inspections. Sampled Category B and C inspections will be exported as Category B and C respectively to Street Manager.

Note: For old non-sampled category B and C inspection in Confirm, that have been already exported to Street Manager as Category B and C inspections will be re-exported to Street Manager as Routine Inspections. These old Non Sampled Category B and C Inspections will be then withdrawn at the Street Manager interface and will be replaced by Routine Inspections.

Note: Street Manager do not accepts Category A/B/C inspections if there is already a similar category inspection present in the permit. These inspection are also not accepted if it is beyond the set target. These will now be sent as Routine inspections.

Inspection Outcomes

Street Manager allows different Inspection outcomes depending on the Inspection category. The following tables show how the outcome is derived from the Confirm Inspection Outcome:

Street Manager Fields			Direction	Confirm Fields			
Inspection outcome	**Live site**	**Were the non compliant issues fixed? Made safe by HA?**		**DfT Ref. 1**	**Dft Ref. 2**	**Authority Actioned**	**Usual Inspection Outcome Name**
Category A, B & C, Third party, Routine, Follow up, Follow up completion and Investigatory							
Passed				1			Passed
Failed - high	Yes	No		2	1		Failed - Higher - SLG
	Yes	Yes		2	5		Failed - Higher - HA Actioned
	No			2	3		Failed - Higher - Reinstatement
Failed - low	Yes	No		3	2		Failed - Lower - SLG
	Yes	Yes		3	5		Failed - Lower - HA Actioned

Street Manager Fields			Direction	Confirm Fields			
Inspection outcome	**Live site**	**Were the non compliant issues fixed? Made safe by HA?**		**DfT Ref. 1**	**Dft Ref. 2**	**Authority Actioned**	**Usual Inspection Outcome Name**
	No			3	4		Failed - Lower - Reinstatement
Unable to complete inspection				4			Abortive
Joint site visit							
Further inspections required			Export	2 or 3	Any		Any Failed outcome
			Import	3	5		Failed - Lower - HA Actioned
Agreed site compliance				1			Passed
Unable to complete inspection				4			Abortive
Apparatus							
Passed				1			Passed
Failed - high		Not required		2		No	Failed (Higher Risk/Dangerous)
		Yes		2		Yes	Failed (Higher Risk) HA Actioned
Failed - low		Not required		3		No	Failed (Lower Risk) HA Actioned
		Yes		3		Yes	Failed (Lower Risk/Non Dangerous)
Unable to complete inspection				4			Abortive
Site occupancy							
Works stopped - Apparatus remaining				8			8 - Works Stopped - Apparatus Remaining
Works in progress - No carriageway incursion				7			7 - Works in progress – No c-way incursion
Works in progress				6			6 - Works in progress
Works stopped				5			5 - Works Stopped
Unable to complete inspection				4			4 - Abortive

Street Manager Fields			Direction	Confirm Fields			
Inspection outcome	**Live site**	**Were the non compliant issues fixed? Made safe by HA?**		**DfT Ref. 1**	**Dft Ref. 2**	**Authority Actioned**	**Usual Inspection Outcome Name**
Conditions							
Passed				1			1 - (Passed)
Non compliant (with conditions)				9			9 - Non-Compliant (with Conditions)
Unable to complete inspection				4			4 - Abortive

Inspection Items

Inspection Items don't exist in Street Manager but have been replaced with Non compliance areas which do overlap with Inspection Items to some extent but also have some significant changes such that a one-to-one mapping is not possible. The following approach is proposed to aid transition:

- New Inspection Items types will be added to Confirm for Non compliance areas that do not have corresponding Inspection Items. These Inspection Items will have DfT references that correspond to the most suitable EToN equivalent, e.g. "Signing Lighting & Guarding - Cyclist provision" will be mapped to EtoN Inspection Item "7. Sign Light and Guard Other".
- Inspection Item types that do not have a one-to-one corresponding Non compliance area will be moved into the "No longer used" Inspection Group
- This will allow inspectors to start using the new Inspection Items whilst ensuring that these can still be transmitted over EToN if required
- Note that new Inspection Items will have numbers in the 100 range to avoid clashes with any custom items users have created. The Street Manager adapter will initially be hard-coded to work with these Item Numbers, so if users add their own Inspection Items these will not be sent to Street Manager

EToN allows multiple sites to be specified on a Reinstatement inspection whereas in Street Manager there is only the option to optionally specify the Site number against Non compliance areas. If multiple sites are recorded on a Confirm Inspection (multiple Inspections with linked Sites) then a separate Street Manager inspection will be created for each Site, so there will always be one Street Manager inspection for every Inspection exported from Confirm.

Conversely, when inspections are imported into Confirm a separate Inspection will be created for every Site referenced in the Non compliance areas.

The following existing inspection items will be mapped directly to Street Manager non-compliance areas. Items that do not have a direct mapping will be moved to the "No Longer Used" Inspection Group:

Existing Dft Reference and Name	Street Manager Non-compliance area
1 Signing and Guarding (Signs)	Signing Lighting & Guarding - Signage
2 Signing and Guarding Distance	Signing Lighting & Guarding - Distance(s)
3 Signing and Guarding Safety Zone	Signing Lighting & Guarding - Safety zone
4 Signing and Guarding Barriers	Signing Lighting & Guarding - Barriers
5 Signing and Guarding Traffic Control	Signing Lighting & Guarding - Traffic control

Existing Dft Reference and Name	Street Manager Non-compliance area
6 Signing and Guarding Pedestrian Control	Signing Lighting & Guarding - Pedestrian provision
7 Sign Light and Guard Other	No Longer Used
8 Excavation	No Longer Used
9 Backfill Apparatus Surround	Excavation, Backfill & Reinstatement - Equipment
10 Backfill Material	Excavation, Backfill & Reinstatement - Materials
11 Backfill Compaction	Excavation, Backfill & Reinstatement - Compaction
12 Backfill Sub-Base	No Longer Used
13 Backfill Base (Roadbase)	No Longer Used
14 Backfill Binder Course (Basecourse)	No Longer Used
15 Backfill Surface Course (Wearing Course)	No Longer Used
16 Backfill Other	No Longer Used
17 Reinstatement Edge Depression	Performance - Edge depression
18 Reinstatement Edge Cracking	Performance - Interface cracking
19 Reinstatement Trips	No Longer Used
20 Reinstatement Surface Depression	Performance - Depression
21 Reinstatement Crowning	Performance - Crowning
22 Reinstatement Texture Depth	Performance - Texture depth
23 Reinstatement Surface Regularity	No Longer Used
24 Reinstatement Other	No Longer Used
25 Structure	No Longer Used
26 As Laid Profile	Performance - As laid profile
27 Profile and Structure Other	No Longer Used
28 Signs Equipment Type	No Longer Used
29 Barriers Equipment Type	No Longer Used
30 Traffic Control Equipment Type	No Longer Used
31 Pedestrian Control Equipment Type	No Longer Used
32 Qualified Operative	Signing Lighting & Guarding - Operative qualification

The following Street Manager non-compliance areas will be added as new Inspection Items. DfT References will be assigned so that these new Items can start being used whilst still working with EToN:

Existing Dft Reference and Name	Street Manager Non-compliance area	Existing Dft Reference and Name	Street Manager Non-compliance area
Signing Lighting & Guarding - Cyclist provision	7 Sign Light and Guard Other	SLG - Cyclist provision	101
Excavation, Backfill & Reinstatement - Storage of materials	10 Backfill Material	Excavation - Storage of materials	113
Excavation, Backfill & Reinstatement - Construction layers	12 Backfill Sub-Base	Backfill - Construction layers	111
Quality - Saw cutting	24 Reinstatement Other	Quality - Saw cutting	126
Quality - Acute angles	24 Reinstatement Other	Quality - Acute angles	121
Quality - Verge	24 Reinstatement Other	Quality - Verge	127
Quality - Anti-skid	24 Reinstatement Other	Quality - Anti-skid	122
Quality - Fixed features	24 Reinstatement Other	Quality - Fixed features	123
Quality - Modular	24 Reinstatement Other	Quality - Modular	124
Quality - Proximity	24 Reinstatement Other	Quality - Proximity	125
Quality - Damage to surround area	24 Reinstatement Other	Quality - Damage to surround area	128
Materials - Incorrect	24 Reinstatement Other	Materials - Incorrect	133
Materials - Damaged	24 Reinstatement Other	Materials - Damaged	131
Materials - Edge sealant	24 Reinstatement Other	Materials - Edge sealant	132
Materials - Over-banding	24 Reinstatement Other	Materials - Over-banding	136
Materials - Road markings	24 Reinstatement Other	Materials - Road markings	137
Materials - Infill/Pointing	24 Reinstatement Other	Materials - Infill/Pointing	134
Materials - Ironwork/Apparatus	24 Reinstatement Other	Materials - Ironwork/Apparatus	135
Performance - Breaking out/fretting	24 Reinstatement Other	Performance - Breaking out/fretting	141

The following inspection items will be mapped directly to Street Manager non-compliance areas for Occupancy/Section 74:

Dft Reference and Name	Street Manager Non-compliance area
74 More than 5 SLG items left on site	More than 5 SLG items left on site
74 5 or less SLG items left on site	5 or less SLG items left on site
74 Open excavation	Open excavation
74 Spoil left on site	Spoil left on site
74 Missing road markings	Missing road markings
74 Missing street apparatus	Missing Street Apparatus, Street Treatments or High Friction Surfaces

Dft Reference and Name	Street Manager Non-compliance area
74 Active traffic management	Active traffic management

The following inspection items will be mapped directly to Street Manager non-compliance areas for Investigatory:

Dft Reference and Name	Street Manager Non-compliance area
60 Investigatory - Air void	Investigatory - Air void
60 Investigatory - Material Type	Investigatory - Material Type
60 Investigatory - Layer Depth	Investigatory - Layer Depth
60 Investigatory - Contamination	Investigatory - Contamination
60 Investigatory - Other	Investigatory - Other

Inspection Response

Authority and Promoter can respond to all the inspections other than Permit Conditions, Occupancy, Defect Joint and Investigatory.

If any Inspection that had not been responded by promoter for 10 working days, it will be Auto Acknowledged from Street Manager and imported in Confirm as a Notice Type 'Inspection Auto Acknowledged'.

On an Auto Acknowledged Inspection, Promoter can further respond as 'Dispute Inspection' or 'Accept Inspection' and after Promoter response, Authority can also further respond as 'Promoter accepts failed inspection'.

Field Mapping

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
Inspection type	Inspection > Category	See section above	See section above
Inspection category	Inspection > Category	See section above	See section above
Inspection date	Inspection > Inspected		
Inspection start time	Inspection > Inspected		
Inspection outcome	Inspection > Outcome	See section above	See section above
Made safe by HA	Inspection > Outcome > Authority Actioned	See section above	See section above
Outcome details	Inspection > Comments		Outcome details can only be supplied for "Unable to complete inspection" and "Non-

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
	Inspection > Outcome > Name		compliant (with Conditions) outcomes. For all other outcomes the Inspection Comments will be appended to the Additional comments. If Comments are not supplied but the Outcome details are mandatory then the Inspection Outcome name will be used
Non compliance areas	Inspection > Items		See section above. Only failed items are recorded. Note that Street Manager does not allow Non compliant areas (Inspection Items) to be recorded for Joint site visit inspections, so any items recorded in Confirm will not be passed to Street Manager.
Non compliance area > Site(s)	Inspection > Site No.	If there are no Non compliance areas, or none reference any Site, then the Inspection will be created against the primary Site (Site 1). If multiple Sites are referenced then an Inspection will be created for each Site with all details (apart from the Inspection Items) being identical. Any Inspection Items that do not mention a Site will be included on all generated Inspections	Will only be set for Reinstatement inspection types.
Non compliance area > Details	Inspection > Items > Notes		If no Notes have been entered on the Item the Inspection > Defect Notes will be used
Inspector name	Inspection > Officer > Name (export) Inspection > Inspection Notes (import)	The Inspection Notes will be populated with the Inspector name. The Officer will be set to the system default.	
Non compliant issues fixed	Inspection > Outcome Inspection > Defect Notes (import)	Used to determine whether HA Actioned Outcome is used. If yes will also be appended to the Defect Notes	If Inspection Outcome > Authority Actioned is checked then set to "Yes, by inspector", otherwise set to "No"
Has the promoter been contacted?	Inspection > Logged Call		

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
Call contact	Inspection > Inspection Notes (import)	Appended to the Inspection Notes	Note this isn't strictly correct as the contact should be the promoter contact, but using the authority contact in the absence of an alternative field
Call reference number	Inspection > Inspection Notes (import)	Appended to the Inspection Notes	Not populated
Call summary	Inspection > Logged call date (export) Inspection > Inspection Notes (import)	Appended to the Inspection Notes	
Additional comments	Inspection > Defect Notes Inspection > Comments	Inspection Comments in Confirm will be populated where the Inspection Category does not allow Defect Notes to be entered (Apparatus, Occupancy and Permit Condition inspections). On withdraw of inspection, comment added at withdraw details will be added here.	Inspection Comments will be appended to the Additional comments where the Outcome does not allow Outcome details to be supplied. On Cancellation of Inspection the text added here is available at work details in Street Manager.
Reinspection	Inspection > Schedule a follow up inspection	Ignored	Not set
Reinspection date	Inspection > Follow up Inspection > From	Ignored	Not set
Reinspection type	Inspection > Follow up Inspection > Category	Ignored	Not set
Attach photo evidence	Inspection > Document Links		
Works promoter	Inspection > Organisation	The promoter for the Works	Automatically populated by Street Manager
Highway authority	Inspection > Inspected by	The Highway Authority for the Works	Automatically populated by Street Manager
	Inspection > Inspection No.	The next sequential number for the Site being inspected	Not implemented
	Inspection > Inspection Units	Set to 1	Not implemented

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
	Inspection > Sampled	Will be checked for Category A, B and C inspections, otherwise will be unchecked	Not implemented
	Inspection > Linked Site	Not set	Not implemented
	Inspection > Group No.	The next sequential number for the Works	Not implemented
	Inspection > Unattributable	Will be checked for Apparatus inspections	Not implemented
	Inspection > Inadequacy	Defaulted from the Inspection Outcome	Not implemented
	Inspection > Easting	Not set	Not implemented
	Inspection > Northing	Not set	Not implemented
	Inspection > Defect Notification No.	Not set	Not implemented
	Inspection > Defect No.	Not set	Not implemented
	Inspection > Site Informed	Unchecked	Not implemented

PAAs, Permit Applications, Modifications and Variations

Key Differences from EToN

Street Manager treats PAAs and Permits both as "Permits". The Street Manager Work Category indicates whether a "Permit" is a PAA or a Permit Application.

Changes are not permitted to PAAs, the previous PAA must be cancelled and a new PAA submitted to make any changes. Confirm will automatically cancel any outstanding PAA in Street Manager when submitting a revised PAA.

Under EToN, major works that were not Asset Activity (e.g. Remedial or Interim to Permanent) did not require a PAA, but in Street Manager a PAA is required. Conversely, at the moment Street Manager does not allow a PAA to be created if a previous permit exists on the works. The latter is acknowledged as a bug with Street Manager plan to address, but in the meantime Confirm will behave as follows:

- When exporting a Permit Application for non-Asset Activity works, if Confirm detects that Street Manager has created a PAA for the works then Confirm will immediately send a Permit Application on the same reference
- When exporting a PAA to Street Manager, if Confirm detects that Street Manager has created a Permit Application (e.g. on a second Asset Activity phase) then Confirm will update the original notice in Confirm to be a Permit Application
- When importing a PAA or Permit application from Street Manager, Confirm will set the notice type to correspond with what Street Manager supplied and will ignore the existing EToN rules

Changes to Permit applications (Modified Applications, Works Data Variations and Duration Variation Applications) are referred to as Permit Changes or Change requests.

Note: Change reasons (Notification Comments) are mandatory in Street Manager. If none is specified then Confirm will default this to "None specified" on export.

Permit Condition

Street Manager uses the National Condition Types for Permit Conditions rather than the high-level condition "groupings" that were used by EToN. SQL is provided to add these extra Condition Types in Confirm. Each Condition Type will have a DfT Ref. set to the appropriate EToN value to allow you transition to the new Condition Types while still using EToN.

The old Condition Types in Confirm will be flagged as dead so that they don't clutter up the Permit Application process, with the exception of Condition Types 3 (Out of hours work) and 13 (Local) for which there are no Street Manager equivalent conditions. These latter condition types can be flagged as dead once EToN is no longer valid.

Note that the Permit Condition Type lookup management screen in Confirm does not currently cope with multiple conditions having the same DfT Ref, so until a Confirm desktop upgrade is available any additional changes to Condition Types will need to be made via SQL. Please contact the Confirm support team for assistance with this if required.

Permit Changes

Once a Permit has been granted, Street Manager only allows one change (variation) to be processed at a time, however EToN allows multiple variations to be submitted with a Grant / Refuse covering all previous changes. This means that if you apply for a Variation from Confirm and then attempt to apply for another Variation before the first has been Granted, Refused or Deemed, then the second Variation will be rejected by Street Manager. The Street Manager Agent to "look ahead" whenever it is processing a Variation and if there are subsequent Variations to be processed submit them all to Street Manager as a single change.

For works in progress, EToN uses Works Data Variations for all changes other than duration and a Duration Variation Application to change the duration. In Street Manager a single permit change can change all aspects of the works. Therefore, when importing changes into Confirm that change both the duration of the works and other data (e.g. traffic management) we will create two notices in Confirm, a Works Data Variation and a Duration Variation Application.

Street Manager does not currently support Error Correction notices which are used to make corrections after the works has completed. (TBA) we could support exporting Error Corrections from Confirm by Reverting the Works Stop, issuing a Works Data Variation and re-issuing the Works Stop.

Field Mapping

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
Works reference number	Street Works > Reference		
Permit reference	Not applicable	Ignored	
Works area (View on Map)	Street Works > Map > Easting / Northing		Note these aren't mandatory in Confirm but Street Manager will reject the notification so this will have to be corrected and re-sent if not initially supplied

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
USRN	Site > Code	If only 7 digits then will attempt a match with and without a leading zero.	Leading zeros will be stripped. If street is not found in Street Manager then notification won't be sent.
Primary Notice Authority (Works apply to)	Street Works > Street Auth	Will search for interests with type of "Highway Authority" or "Permit Authority" that has an Organisation with an External Ref 1 equal to the SWA code of the Primary Notice Authority. Priority will be given to Permit Authority interests. If no matches found will use the first live Organisation with a Highway/Permit Authority Interest, sorting by Organisation Name. See below for Private Streets.	External Ref 1 from the Street Auth Organisation
Road type	Street Works > Street Auth	If the Road type in Street Manager is "Private Street - No definition information held by Street Authority" then Confirm will prioritise Private Street Interests when determining the Street Authority from the Street Interests	Will be set to "Private Street - No definition information held by Street Authority" if the Street Authority is a Private Street Manager. Otherwise will default from the USRN.
Interested Parties	Street Works > Contacts > Recipients	Will be coped from the USRN as these are not supplied by the Street Manager API	Not supplied - derived automatically by Street Manager
Designations impacted by works	Street Works > Location > Designations	All the distinct designation types returned from Street Manager are pulled. The full details of the designation, e.g. location, are ignored	These are retrieved from Street Manager API for the USRN and compared with the street designation types from Confirm. Only the applicable designations are pushed.
Location area	Street Works > Location	Appended to the Location text	Extracted from the location text if supplied in brackets, e.g. a location text of "o/s 45 (Footway and verge)" would set the Footway and Verge checkboxes in Street Manager. If no suitable text is found in brackets then defaults to Carriageway.
Location description	Street Works > Location		
Primary contact	Street Works > Contacts > Owner > Name	If truncated, no email will be sent.	Derived by Street Manager

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
Primary contact number	Street Works > Contacts > Owner > Phone		Derived by Street Manager
	Street Works > Contacts > Owner > Address	Populated from the Organisation Contact details stored in Confirm	Derived by Street Manager
Workstream	Street Works > From	Not used. Confirm Promoter Organisation is determined by matching the first 5 characters of the Works reference against DfT Ref 2 of live Organisations.	Last 3 digits of Dft Ref 2 from the Promoter Organisation
Secondary contact	Street Works > Contacts > Agent > Name		If Agent Name not specified uses Owner name or otherwise the main contact name from the Promoter Organisation
Secondary contact number	Street Works > Contacts > Agent > Phone		As above if not specified
Secondary contact email	Street Works > Contacts > Agent > Address	Will be prepended to the Organisation's Contact contact address from Confirm	First line of the address.
Project reference number	Street Works > Project Reference		
Works type	Street Works > Works Type	Not used. Work Type is derived from Works category	Set to "Immediate" if Street Work Type > Priority is Urgent, otherwise set to "Planned"
Is a TTRO required	Street Works > Location> add text {ttro}	PAA created	Add text (ttro) in Location textbox for TTRO Application.
Proposed start date and time	Street Works > Start Date		For immediate works, it is determined from the Actual Start Date.
Proposed end date and time	Street Works > Estimated End Date		
Reasonable period end date	Street Works > Reasonable Period	Derived. Note that Confirm displays the later of the Reasonable Period (based on the agreed duration of the works) and the Prescribed Period (2 days). Street Manager does not take the Prescribed Period into account when displaying this date so could be earlier than the date displayed in Confirm for works that take less than 2 working days.	Derived. See note on left.

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
Works category	Street Works > Works Type	HS2 Highway works are imported as Major Permits	Derived by Street Manager
Works duration	Street Works > Duration	Derived	Derived
Early start pre-approval	Street Works > Agreements	If true then Agreement with DfT Ref of 5 will be added	If Agreement present with DfT ref 5 or Agreement contact name or reference is set then True else False.
Pre-approved by	Street Works > Agreements > Contact		
Pre-approval details	Street Works > Agreements > Reference Street Works > Agreements > Date	Invalid reference characters will be replaced with dashes "-" and may be truncated. Will also be added to Added to Street Works > Transfer > Notifice Comments Agreement Date is set to the date of the notice	Agreement Reference and Date appended together
Reason for requesting an early start	Does not exist	Added to Street Works > Transfer > Notifice Comments	If the works require early start agreement but no Agreement has been specified then the Notice Comments will be used. If an early start is needed but no early start agreement or reason is supplied then this will be set to "None specified"
Activity type	Street Works > Phase Type	Phase Type will be set as appropriate for the following activity types: Permanent reinstatement Remedial works Core sampling And will be set to "Asset Activity" for all others.	If the Phase Type in Confirm is "Asset Activity" then the Promoter Organisation's Interest will be examined. If the Interest Name contains the exact wording of one of the Activity Type options in Street Manager we will use this Activity Type. If not, then if the Promoter Organisation Interest DfT reference is "Highway Authority (Works Promoter)" then "Highways Improvement Works" will be used, otherwise “Utility Asset Works” will be used. If the Phase Type is not "Asset Activity" then the Activity type that matches the Phase Type will be used.
Description of work	Street Works > Description		

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
Excavation required	Street Works > Excavation Type	Excavation Type with Dft Ref of 18 if the received value is True. Otherwise Excavation Type with Dft Ref of 12. Note that Works Data Variations do not allow Excavation Type to be updated while works are in progress but if the change is agreed this will be picked up on Works Stop import.	Set to True if Excavation Type Dft Ref is between 14-18 else set to False.
Was an excavation carried out?	Street Works > Excavation Type	If this has been changed to "No" in Street Manager then the Excavation Type in Confirm will be updated using the above rules on receipt of the Works Stop	Will be set to "No" on export of the Works Stop if the Excavation Type changes from a "with excavation" type to a "no excavation" type. Note this cannot be changed from "No" to "Yes" - to do this a change must be requested via Street Manager
Required traffic management type	Street Works > Traffic Man.		
Footway closure	Street Works > Footway Closure Street Works > Description	Set if either of the "Yes" options are supplied. The specific option details will also be appended to the Works Description	If the Confirm Footway Closure option is not selected then the Street Manager option will be set to "No". If the Confirm option is set as Yes,pedestrian walkway will be provided then the Street Manager option will be set to "Yes, pedestrian walkway will be provided". Otherwise it will be set to "Yes,alternative route will be provided"
Is lane rental applicable	Does not exist	Ignored	Set to false
Is traffic management plan required	Does not exist	Ignored	Set to false
Attached traffic management plan	Street Works > Document Links	TBA Add as a document link. Description prefixed with Traffic Management Plan and Permit Id. Document Location is URL to Street Manager file	Not supplied. Documents are uploaded separately
Notifying environmental health	Street Works > Outside Working Hours		

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
Is collaborative involved	Street Works > Collaboration	"Sharing traffic management only" is mapped to "Works involving other collaboration"	
Collaboration details	Does not exist	Added to Street Works > Transfer > Notice comments	Set to name of collaboration type
Works reference number of collaborative works	Does not exist	Added to Street Works > Transfer > Notice comments	Not set
Others can collaborate on Work	Does not exist	No	No
Reason for non-collaboration	Does not exist	No reason provided	No reason provided
Can collaborate on Work additional details	Does not exist		
Conditions	Street Works > Conditions	Will be mapped to Confirm Condition Types based on matching the NCT condition code to the first 6 characters of the Permit Condition Type Name. Mandatory conditions NCT01a, NCT01b and NCT11a are ignored	Will send all conditions where the first 6 characters of the condition name match one of the allowed values in Street Manager. SQL is provided to add these. Note that mandatory conditions are not needed.
Condition Comments	Street Works > Conditions Text	Concatenated together. May be truncated. The text from each condition will be on a new line prefixed by the corresponding NCT code.	Added to the Comments of the first non-mandatory condition. If a fragment of Condition text in Confirm begins with a valid NCT code then everything after the code will be attached to the relevant Condition in Street Manager.
Additional permit details	Street Works > Transfer > Notice Comments Street Works > Agreements (Export)		If Agreements other than early start are specified then details of these agreements will be appended to the Additional permit details.
Additional files	Street Works > Document links	Street Manager documents will be added as URLs to Confirm	
Reason for changes (only on change requests)	Street Works > Transfer > Notice Comments	Will be the first line of the Notification Comments where other fields are also added to Notification Comments	If Agreements other than early start are specified then details of these agreements will be appended to the Reason for changes.

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
	Street Works > Agreements (Export)		Will default to "None specified" if blank.

Reinstatements

Key Differences from EToN

Confirm has Sites / Trenches about which there can be multiple Registration Notices. This is essentially similar to Street Manager which has Reinstatement sites which shows details of each registration of that site, e.g. Interim and then Permanent. However, Street Manager doesn't allow updates to multiple Sites to be grouped together, so each individual update to a Site shows as a separate transaction in the Street Manager works history. When Confirm imports Site Reinstatements from Street Manager it will attempt to consolidate all of the individual Site updates onto a single registration notice. However, if more than one notice may be generated in Confirm if the Sites are still being updated in Street Manager when the Street Manager Agent runs.

Street Manager has removed the need to specify the Construction Method for Interim Reinstatements and does not currently support the concept of Abandoned Sites. Subsumed, Combined or Abandoned sites will be exported as Excavation with L0.01m x W0.01m x D0.01m, if only one site Combined or Subsumed.

Note: Street Manager has added functionality to update the Final Site Registered and Inspection Unit Logged outside the Registration notice. Final Site Registered is imported as Full Registration notice where as Inspection Unit Logged is imported as an Error Correction notice.

Field Mapping

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
Reinstatement type	Street Works > Sites > Status	Bar holes, Core holes and Pole testing map directly to the corresponding Site Status. For Excavation works the Reinstatement state (below) is used to determine Interim or Permanent. If the Activity Type of the current works is Remedial then the Confirm Site Status will be set to the Remedial Status that resets the Guarantee period (under discussion with SM about how remedial reinstatements that don't reset the guarantee period are handled).	Inverse of that described on the left
Site location description	Street Works > Sites > Location		

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
Site location area	Street Works > Sites > Position	Street Manager allows multiple Site location areas to be specified whereas Confirm only supports one Position per Site. If multiple Site Location areas are supplied by Street Manager then only one will be stored in Confirm, selecting the first one that appears in order of Carriageway, Cycleway, Footway, Footpath, Verge. All of them also to be appended to the Location text.	
Site location coordinates	Street Works > Sites > Map		If the geometry of the reinstatement stored in Confirm is a Line then this will be the first point of the line. If it is a region/polygon then this will be the bottom left corner of the geometry's bounding box
Secondary site coordinates	Street Works > Sites > Map	If these are supplied Confirm will draw the reinstatement as a line between the two pairs of coordinates	If the reinstatement is stored as a point in Confirm then this will not be supplied. If the geometry of the reinstatement stored in Confirm is a Line then this will be the last point of the line. If it is a region/polygon then this will be the top right corner of the geometry's bounding box
Length	Street Works > Sites > Length		
Width	Street Works > Sites > Width		
Depth	Street Works > Sites > Depth Street Works > Sites > Status	Will be mapped to the range that applies (up to 1.5 meters or over 1.5 meters). Actual value will be appended to the Location. If the Depth is zero we will assume that the site is Abandoned if the site has not had a previous Interim or Permanent registration, or Subsumed if it was previously registered.	Up to 1.5m will be sent as 1.5m, over will be sent as 1.6m. For Abandoned, Subsumed and Combined sites the depth will be set to 0 TBA we could allow additional Depths to be added in Confirm, say in increments of 0.1m and then match based on these.
Number of holes (Bar holes, Core holes and Pole testing only)	Not available	Will be appended to the Location text	Will default to 1
Reinstatement date	Street Works > Sites > Date	Interim, Permanent and Guarantee date will be populated as	

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
		appropriate depending on the status	
Reinstatement state	Street Works > Sites > Status	Sets the Interim / Permanent sub-status for Excavation Reinstatement types Remedial reinstatements will always reset the guarantee period	
Do you want to add photo evidence?	Street Works > Document Links	Document Links are attached to the Works. The Site number of the Site a photo relates to will be added to the Document Notes	If any Document Links have been added to the Works prior to sending the Registration then these will be associated with Works, not the individual sites
Are you registering the final site?	Street Works > Notice Type	If yes then the Registration (Full) Notice Type will be used, otherwise the Registration (Partial) Notice Type will be used.	Based on the Notice Type as described on the left
What is the total amount of inspection units?	Street Works > Inspection Units		
Not implemented	Street Works > Sites > Construction Method	Will be set to the Construction Method that has a DfT Ref. of 4 (Not applicable)	Ignored
Subsume site > Subsume reason	Street Works > Sites > Location	Will be appended in Location text.	

Registration of Non-notifiable Works

Key Differences from EToN

Street Manager doesn't allow updates to multiple Sites to be grouped together on a single notice, so each individual update to a Site shows as a separate transaction in the Street Manager works history. When Confirm imports Reinstatements from Street Manager it will attempt to consolidate all of the individual Site updates onto a single registration notice. However, if more than one notice may be generated in Confirm if the Sites are still being updated in Street Manager when the Street Manager Agent runs.

Street Manager allows new applications to be made on top of a non-notifiable works, whereas Confirm does not allow this. Confirm will import new applications made on top of a non-notifiable works.

Field Mapping

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
Location co-ordinates	Street Works > Map > Easting / Northing		Note these aren't mandatory in Confirm but Street Manager will reject the notification so this will have to be corrected and re-sent if not initially supplied
USRN	Site > Code	If only 7 digits then will attempt a match with and without a leading zero.	Leading zeros will be stripped. If street is not found in Street Manager then notification won't be sent.
Submitting application to	Street Works > Street Auth	Will search for interests with type of "Highway Authority" or "Permit Authority" that has an Organisation with an External Ref 1 equal to the SWA code of the Primary Notice Authority. If no matches found will use the first live Organisation with a Highway/Permit Authority Interest, sorting by Organisation Name.	External Ref 1 from the Street Auth Organisation
Workstream	Street Works > From	Not used. Confirm Promoter Organisation is determined by matching the first 5 characters of the Works reference against DfT Ref 2 of live Organisations.	Last 3 digits of Dft Ref 2 from the Promoter Organisation
Works reference number	Street Works > Reference		
Reinstatement type	Street Works > Sites > Status		
Site location description	Street Works > Sites > Location Street Works > Transfer > Notice Comments (export)		If Notice Comments have been entered these will be appended to the Site location description of the first site
Site location area	Street Works > Sites > Position	Street Manager allows multiple Site location areas to be specified whereas Confirm only supports one Position per Site. If multiple Site Location areas are supplied by Street Manager then only one will be stored in Confirm, selecting the first one that appears in order of Carriageway, Cycleway, Footway, Footpath, Verge. All of them	

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
		also to be appended to the Location text.	
Site location coordinates	Street Works > Sites > Map		If the geometry of the reinstatement stored in Confirm is a Line then this will be the first point of the line. If it is a region/polygon then this will be the bottom left corner of the geometry's bounding box
Secondary site coordinates	Street Works > Sites > Map	If these are supplied Confirm will draw the reinstatement as a line between the two pairs of coordinates	If the reinstatement is stored as a point in Confirm then this will not be supplied. If the geometry of the reinstatement stored in Confirm is a Line then this will be the last point of the line. If it is a region/polygon then this will be the top right corner of the geometry's bounding box
Number of holes	Not available	Will be appended to the Location text	Will default to 1
Reinstatement date	Street Works > Sites > Date	Interim, Permanent and Guarantee date will be populated as appropriate depending on the status	
Reinstatement state	Street Works > Sites > Status	Sets the Interim / Permanent sub-status for Excavation Reinstatement types Remedial reinstatements will always reset the guarantee period	
Do you want to add photo evidence?	Street Works > Document Links	Document Links are attached to the Works. The Site number of the Site a photo relates to will be added to the Document Notes	If any Document Links have been added to the Works prior to sending the Registration then these will be associated with Works, not the individual sites
Total number of inspection units	Street Works > Inspection Units		

Revert Actual Start / Works Stop

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
Reason for reverting the works	Street Works > Transfer > Notification Comments	Trim the comment text to 500 characters	

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
	Street Works > Agreements Street Works > Agreements > Contact Street Works > Agreements > Reference Street Works > Agreements > Date	Not populated	Agreement Type, Agreement Contact, Date and Reference will be appended to the revert reason

Revoke Permit

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
Reason for revoking the permit	Street Works > Transfer > Notification Comments		A General comment with the reason for revoke is sent to Street Manager after the Revoke notice
Not currently implemented	Street Works > Conditions > Revoked Permit - Deadline	Not Set	Will be appended to Reason for revoke if date is present in Confirm

Section 74 Overrun Warning

Section 74 allows highway authorities to charge undertakers if street works are unreasonably prolonged.

Creating an Occupancy Inspection with Section 74 Items will create a Section 74 overrun warning in Street Manager along with an Occupancy Inspection. If an occupancy inspection was already exported and items were added later, then fields like comments and notes have to be updated, and the inspection status has to be set to re-export in order to issue a Section 74 overrun warning in Street Manager.

After the initial warning is issued, rest of the actions of the work-flow can be actioned in Confirm web interface. Every time there is an action performed from the Confirm Web interface, the Section 74 Comment Type will be appended on the Street Works Notice in Confirm Client. The action button appearing on the Section 74 Overrun Warning issue on the Confirm Street Works web interface will list the next set of actions based on API user access set in the Street Manager system setting screen in the Confirm Web Settings interface.

For Detailed Section 74 workflow click here

Below are set of Section 74 actions that can be done from Confirm web interface.

Table 11: Section 74 Overrun Warning Actions

Actions	Available for	Notes
Warning issued	Highway Authority	Status initiated when Highway Authority begins the process of initiating a Section 74 Overrun Warning on a Permit
Dispute overrun warning	Promoter	Status change when Promoter is not in agreement with the details or issuing of Section 74 Warning
Overrun Warning Disputed	Highway Authority	Status change when Highway Authority acknowledges the disputed warning
Withdraw overrun warning	Highway Authority	Status change when Highway Authority withdraws the warning that was issued
Received overrun warning	Promoter	Status change indicating the warning has been acknowledged by Promoter
Site visited works closed	Promoter	Status change by Promoter confirming the site highlighted in the warning is now clear
Overrun charges ended	Highway Authority	Status change when Highway Authority has verified that the site detailed in the permit is now clear. No longer breaching Section 74
Draft Invoice Issued	Highway Authority	Status change when Highway Authority has ended the overrun charge. API users with Admin roles will only be able to view details such as Days Overrun, Proposed Charges, Invoice reference, and Additional details.
Received draft invoice	Promoter	Status change indicating the draft invoice has been acknowledged by Promoter
Reviewing draft invoice	Promoter	Status change indicating the details of the draft invoice is being reviewed by Promoter
Charge reviewed	Promoter	Status change indicating the draft invoice has been reviewed with the final amount and details agreed by the Promoter and HA
Mark as Resolved	Highway Authority	Status change when Highway Authority and Promoter have agreed the final invoice amount after negotiation offline. API users with Admin roles will only be able to view details such as Days Overrun, Final Agreed Amount, Invoice reference, and Additional details.

Below is the field mapping of section 74 warning issued.

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
Linked to permit	Street Works > Works Reference		Works reference
Location area	Street Works > Location	Not Set	Extracted from the location text if supplied in brackets, e.g. a location text of "o/s 45 (Footway and verge)" would set the Footway and Verge checkboxes in Street Manager. If no suitable text is found in brackets then defaults to Carriageway
Location description	Street Works > Location	Not Set	
Inspection date and time	Inspection> Inspected	Not Set	Inspected date of Occupancy Inspection
Overrun warning reason	Inspection> Items		Section 74 items selected while creating Occupancy Inspection.
Overrun warning details	Inspection> Comments		If comment is available then use it else outcome name
Officer Name	Inspection> Officer		
Officer contact details	Action Officer> Telephone Number		
Schedule a follow up inspection?	Inspection> Schedule a follow up inspection		Not Supported in v22.1 version of Confirm
Attach files	Inspection> Document link		Now supported and attachments are visible under Section 74 overrun warnings.

Section 58 Restrictions

Key Differences from EToN

Street Manager supports full geometry for Restrictions, Confirm now supports full geometry and user can see the geometry using the map button. Start and End coordinates can also be seen in the user interface.

There are currently three mechanisms for registering S58 restrictions in Street Manager:

1. As an Authority user, using "Section 58 - restricted works". (Preferred approach)
2. As an Authority user, using "Add activity to map". (Support existing)
3. As a Promoter using, "Apply for works" with an Activity type of "Section 58"

The advice from the Street Manager team is that using Section 58 is the preferred approach now onward. Activities on the map is still supported so that the existing Activities will not become redundant till they are active.

Section 58 now supports different states like Proposed, In Force, Complete and Cancelled. Map activities were not allowing the recording of the fact that a restriction is In Force or support S58A restrictions. Section 58 reference or Activity reference is automatically generated by Street Manager.

Export logic of Section 58

It looks for a valid Section 58 reference number in the designation ('S58-' in works ref or street work batch Filename), if we find it that means a section 58 is already exported to Street Manager and the designation is for update. If instead we find a valid activity reference number ('ARN-') then it means Activity is already imported from Street Manager and the designation is for update . If we do not get either of 'S58-' and 'ARN-' then it read details from designation and create a new Section 58 in Street Manager.

Note: Only the designation status and proposed start date can be updated for section 58. Section 58 is imported once a day. For increasing or decreasing its frequency a request should be raised to us.

Site Designations Field Mapping to Map Activities

If existing Designations were to be mapped to map activities then the following field conversions would be proposed:

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
Activity reference / Section 58	Site > Designation > Comments (export) Site > Designation > Works Ref (import)	The "ARN"/"S58" number generated by Street Manager will be stored in the Works Reference.	The Activity reference /Section 58 reference generated by Street Manager will be appended to the Comments on Export. On import, 'Works Ref.' will store these references.
	Site > Designation > Organisation (import)	The Organisation will be determined from the SWA Org code for the Activity/Section 58, which can be seen in the first 4 digits of the Activity reference.	
Activity name	Site > Designation > Designation Site > Designation > Works Ref	If the name contains the phrase "in force" then the appropriate In Force designation type will be used, otherwise the Proposed designation type will be used. If the phrase "58A" then the appropriate Section 58A designation type will be used, otherwise a Section 58 designation type will be used. If the Works Ref of an existing EToN designation on the Street is found within the Activity name text or Activity Reference text then the existing designation will be replaced with the new information from Street Manager. Otherwise a new designation will be created (in that case	The Designation name will be used, e.g. "S58 Restriction In Force" followed by the works reference in brackets.

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
		Activity Reference will be used as Works Ref for the designation). The Works Ref of the existing EToN designation will be appended to the comments. Activity name will be appended to the Description	
Contact organisation/name	Site > Designation > Organisation (export) Site > Designation > Comments (import)	Will be appended to the Comments	The Organisation name will be supplied
Contact details	Organisation > Contact (export) Site > Designation > Comments (import)	Will be appended to the Comments.	The contact phone number and email address will be exported
Proposed Start date	Site > Designation > Effect From		
Restriction Duration	Site > Designation > Effect To	Site > Designation > Effect To will be populated after added Restriction Duration to the Site > Designation > Effect From	If difference between To & From is between 1 - 180 days than it is 'Six Months'. If the difference is between 180 - 365 than it is '1 Year'. If the difference is between 1 year - 2 year than it is '2 Years' and if the difference is between 2 Years - 3 Years then it will be 3 years.
Extent of restriction	Site > Designation > Applicable To		
Section 58 location	Location (Export) Site > Designation > Comments (import)	If not Carriageway will be appended to the Comments	Extracted from the location text if supplied in brackets, e.g. a location text of "o/s 45 (Footway and verge)" would set the Footway and Verge checkboxes in Street Manager. If no suitable text is found in brackets then defaults to Carriageway.
Additional information	Description	If set to yes then "Made safe by HA" will be appended to the Description	Set to "Not Required"
Section 58 in Map / Event or activity footprint	Start / End Easting & Northing	For Points the start and end will be the point location.	If Applicable to Whole then will send as a polygon that is a 4m buffer around the Street geometry held in Street Manager.

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
		For Lines the first and last point of the line will be imported. For Polygons the two points on the Polygon that are furthest away from each other will be used. For Confirm DB v20.2 and above, the full geometry will be imported in the Confirm system.	If this results in multiple polygons the polygon with the largest area will be used. If the Applicability is Partial then will export a straight line between the Start and End point. For Confirm DB v20.2 and above, if the Applicability is Partial then will export the full geometry as available in Confirm.
Cancelled reason	Will be appended to the Comments		Set from comments
	Period	Everyday	

Street Works (Section 50) Licences

Key Differences from EToN

Street Manager has a general facility to show "Activities on the map" (referred to as Activities going forward).

Street Manager automatically assigns an activity reference to the licences.

Street Manager supports a number of Activity Types plus "other". For Other an additional description can be provided but this is not currently displayed anywhere so we won't be using this until Street Manager resolve this issue.

Street Manager does not allow the geometry of an existing Activity to be changed. Confirm will therefore close the current activity (cancel it) and create a new one to cater for these changes.

There is no plans to import Licences into Confirm from Street Manager.

Field Mapping

Street Manager Field	Confirm Field	Notes (When exporting from Confirm to Street Manager)
USRN	Street Works > Streets	
Event or activity footprint	Street Works > Map	
Activity name or licence reference number	Street Works > Notice Type	Appended together. Note, may be truncated by Street Manager, e.g:
	Street Works > Description	Cellar Works: New excavation for cellar (ABC1234)
	Street Works > Works Ref.	
Activity type	Street Works > Notice Type	If the Notice Type name matches a standard Street Manager Activity Type, otherwise "Section 50"

Street Manager Field	Confirm Field	Notes (When exporting from Confirm to Street Manager)
Contact organisation/name	Street Works > Contacts > Owner Name	May be truncated by Street Manager.
Contact details	Street Works > Contacts > Owner (remaining details)	Appended together. May be truncated by Street Manager.
Start date	Street Works > Start Date	
End date	Street Works > Estimated End Date	
Activity location	Street Works > Location	Extracted from the location text if supplied in brackets, e.g. a location text of "o/s 45 (Footway and verge)" would set the Footway and Verge checkboxes in Street Manager. If no suitable text is found in brackets then defaults to Carriageway.
Activity location description	Street Works > Location	May be truncated by Street Manager.
Traffic management type	Street Works > Traffic Man.	Note can't be entered in Confirm - defaults from the Street Works Notice Defaults System Settings
Collaborative working	-	Set to "No"
Additional information	Street Works > Contacts > Agent Street Works > Project Description Street Works > Project Reference Street Works > Transfer > Notice Comments	Appended together, e.g.: Agent: Agent Name, Address Line1, Address Line2, AG3 ANT, 012345678910 Project: Major cellar renovations in Birdlip Estate (PROJ123-A) Early start agreed with Street Works Team May be truncated by Street Manager.
Reference	Street Works > Transfer > File Name	Activity Reference generated by Street Manager will be written back to Confirm

Unattributable Works ("Section 81 or Unattributed works")

Street Manager now supports Unattributable works. In Street Manager, Unattributable works is created under Section 81 notices based on the selection of Section 81 types. If the Section 81 type selected is 'Unattributed works - Live site' or 'Unattributed works - Completed' then it will be called Unattributable works else Defective Apparatus.

In confirm user needs to create an 'Unattributed works' and on top of it an Inspections of category 'Unattributed works - Live site' or 'Unattributed works - Completed'.

Confirm will import a Section 81 record as Unattributable Works if the Section 81 type is selected as either 'Unattributable works- Live site' or 'Unattributable works- Completed'. An Inspection of corresponding type will also be created on import of it.

Field Mapping

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
Works reference	Street Works > Transfer > File Name Street Works > Project Reference Street Works > Project Description Street Works > Works Ref. (Import)		
USRN	Street Works > Street		
Location co-ordinates	Street Works > Map		Street Manager only displays it as a point.
Issuing authority	Street Works > From	This will be the first (by name) matching Authority organisation that either has interest in the street or has the same SWA Org Code	
Receiving organisation	Street Works > Promoter	This will be the first (by name) non-dead Organisation that has the same SWA Org Code	
Location area	Street Works > Location	Appended to Location	Extracted from the location text if supplied in brackets, e.g. a location text of "o/s 45 (Footway and verge)" would set the Footway and Verge checkboxes in Street Manager. If no suitable text is found in brackets then defaults to Carriageway.
Location description	Street Works > Location		
Inspection date	Inspection > Inspected		
Type	Inspection > Category	"Unattributable" works along with corresponding Inspection will be imported	Set to 'Unattributed works - Live site' or 'Unattributed works - Completed'
Inspector name	Inspection > Officer > Name	Inspection > Officer	Inspection > Officer
Inspector contact details	Inspection > Officer > Telephone Number		

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
Additional details	Street Works > Description		

Works Comments

Key Differences from EToN

Confirm models Works Comments, Informal Overrun Warnings and FPN Comments as Street Works Comments whereas Street Manager has a general concept of Comments with a Topic.

EToN already supports the concept of General, Overrun Warning and FPN comments but Street Manager also introduces two new Topics of "Inspection" and "Section 74". Two new Comment Types will be added to cover these new topics and Confirm will match them based on the Comment Type Code. For the topics that already exist, Confirm will match based on the DfT Ref. Street Manager has also removed the "Duration Challenge Nonacceptance" comment type. If this notice is logged in Confirm it will be sent to Street Manager under the "Section 74" topic, but the reverse will not apply and "Section 74" comments received from Street Manger will map to a new Comment Type. The following table summarises the changes:.

Street Manager Topic	Existing or New	Confirm Comment Type Code	Confirm Comment Type Name	Confirm Comment Type DfT Ref.	Notes
General	Existing	C15	EToN 4: Works Comments	EToN 4: Works Comments	Confirm will match based on the Dft Ref.
Overrun Warning	Existing	C14	EToN 4: Informal Overrun Warning	EToN 4: Informal Overrun Warning	Confirm will match based on the Dft Ref.
FPN	Existing	C22	EToN 4: FPN Comments	EToN 4: FPN Comments	Confirm will match based on the Dft Ref.
Inspection	New	CINS	Inspection	EToN 4: Works Comments	Confirm will match on Code
Duration Challenge Non-Acceptance	Existing	C13	EToN 4: Duration Challenge Non-Acceptance	EToN 4: Duration Challenge Non-acceptance	Mapping for export from Confirm to Street Manager only
Section 74	New	CS740	Section 74: Warning Issued	EToN 4: Works Comments	Confirm will match on Code
Section 74	New	CS741	Section 74: Received Overrun Warning	EToN 4: Works Comments	Confirm will match on Code
Section 74	New	CS742	Section 74: Site Visited Works Closed	EToN 4: Works Comments	Confirm will match on Code

Street Manager Topic	Existing or New	Confirm Comment Type Code	Confirm Comment Type Name	Confirm Comment Type DfT Ref.	Notes
Section 74	New	CS743	Section 74: Overrun Charges Ended	EToN 4: Works Comments	Confirm will match on Code
Section 74	New	CS744	Section 74: Withdraw Overrun Warning	EToN 4: Works Comments	Confirm will match on Code
Section 74	New	CS745	Section 74: Draft Invoice Issued	EToN 4: Works Comments	Confirm will match on Code
Section 74	New	CS746	Section 74: Received Draft Invoice	EToN 4: Works Comments	Confirm will match on Code
Section 74	New	CS747	Section 74: Reviewing Draft Invoice	EToN 4: Works Comments	Confirm will match on Code
Section 74	New	CS748	Section 74: Charge Reviewed	EToN 4: Works Comments	Confirm will match on Code
Section 74	New	CS749	Section 74: Mark as Resolved	EToN 4: Works Comments	Confirm will match on Code
Section 74	New	CS750	Section 74: Overrun Warning Disputed	EToN 4: Works Comments	Confirm will match on Code

Field Mapping

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
Topic	Street Works Comment > Comment Type	Inspection and Section 74 topics will be matched to the new Codes, other Topics will be matched by DfT reference. **Note:** Street Manager does not currently provide access to the Comment Topic via the APIs so all imported comments are being treated as "General" Comments until this is resolved	If the Comment Type is one of the new ones then the Code will be used to determine the Topic, otherwise the Dft Ref. will be used. If there are multiple matches when matching on DfT Ref then the first match will be used when sorting alphabetically by Comment Type Name.
Comment	Street Works Comment > Text	The comment text will be all of the Details that are displayed in the Works history. The Username who logged the comments will also be appended	For Duration Challenge Non-Acceptance this will be prefixed with the Comment Type Name
Date and Time	Street Works Comment > Issued		Note if a comment is edited and resent a new comment will be added in Street Manager
	Street Works Comment >	If the Highways Authority for the Works is flagged as an Initiator	We will use the API user (Authority or Promoter) that corres-

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
	Comment From	in Confirm and the Promoter is not then it is assumed the comment came from the Promoter. Otherwise the Highway Authority organisation will be used. The person who made the comment can be determined from the Username logged in the Text	ponds to whether the comment came from the Promoter or Highway Authority. The Authority API user will be used for Interested party comments.

Work Stop

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
Works stopped	Street Works > Actual End Date	End date and time will be added to notice comments	If the Issue Date is on the same day as the Actual End Date then the Issue Time will be provided. Otherwise the time will be set to 23:59 **Note:** Latest version of Confirm client allows time to be specified along with date.
Was an excavation carried out?	Street Works > Excavation Type	Works in Confirm will be updated with the current value from Street Manager if this has been changed	Will be set to "No" on export of the Works Stop if the Excavation Type changes from a "with excavation" type to a "no excavation" type. Note this cannot be changed from "No" to "Yes" - to do this a change must be requested via Street Manager

Organisations / Workstreams

Key Differences from EToN

Organisations in Street Manager are the same as for EToN and equivalent to Organisation Groups in Confirm. Street Manager Workstreams replace EToN Operational Districts and are equivalent to Confirm Organisations.

Confirm will automatically create an Organisation and Organisation Group if necessary if a notice is received from Street Manager from a promoter with an unknown Organisation / Workstream.

Confirm will also create new Workstreams in Street Manager where necessary.

Note that Street Manager permits a workstream prefix of "000" which is not valid under EToN rules and can prevent the existing Confirm client application from allowing new notices to be created. To work around this, a district number of 0001 (three zeros) is created for the Confirm Organisation that corresponds to the Street Manager Organisation's "000" workstream. This means the DfT Ref

2 in Confirm might be something like "AB0001". Note that the DfT Ref 2 would appear as "AB000" in the Organisation screen as it is truncated, but will appear as AB0001 in the Reference on the Street Works screen.

Field Mapping

Organisation Group

Street Manager Field	Confirm Field	Notes (When importing into Confirm from Street Manager)	Notes (When exporting from Confirm to Street Manager)
Organisation Profile > Organisation reference	Organisation Group > Code		Not exported to Street Manager
Organisation Profile > Organisation name	Organisation Group > Name		Not exported to Street Manager

Organisation

Street Manager Field	Confirm Field	Notes when importing into Confirm from Street Manager	Notes when exporting from Confirm to Street Manager
Organisation Profile > Organisation reference	Organisation > Additional > DfT Ref 1		Not exported
Workstreams > Prefix	Organisation > Additional > DfT Ref 2	First two characters are the organisation 2 letter code (not displayed in Street Manager). See above note regarding handling of Workstream 000.	Set to last 3 digits of the DFT Ref2 in Confirm, when Confirm creates Workstream in Street Manager.
	Organisation > Code	This is made by concatenating the Organisation reference and Workstream prefix	
Workstreams > Workstream name	Organisation > Name	This is prefixed with the Organisation name	Set to Organisation DFT Ref 2 code in Confirm, when Confirm creates Workstream in Street Manager.
Workstream > Workstream description	Organisation > Address	Set to Flat/Sub-Bldg field of Address in Confirm	First 500 characters of Address are exported.
Workstream > Contact name	Organisation > Contact > Surname	Will be set to "Unknown" if blank in Street Manager	
Workstream > Contact number	Organisation > Contact > Phone	Will be set to "Unknown" if blank in Street Manager	

Street Manager Field	Confirm Field	Notes when importing into Confirm from Street Manager	Notes when exporting from Confirm to Street Manager
Workstream > Contact email	Organisation > Contact > Email		
Organisation Profile > Address line 1	Organisation > Address > Address		Not exported to Street Manager
Organisation Profile > Address line 2	Organisation > Address > Street Name		Not exported to Street Manager
Organisation Profile > Locality	Organisation > Address > Locality		Not exported to Street Manager
Organisation Profile > Town	Organisation > Address > Town		Not exported to Street Manager
Organisation Profile > Postcode	Organisation > Address > Post Code		Not exported to Street Manager
Organisation Profile > Email	Organisation > Contact > Email	The Organisation profile Email only used if the Workstream Email is blank	Not exported to Street Manager
Organisation Profile > Phone number	Organisation > Contact > Phone 2		Not exported to Street Manager

Performance Based Inspection

Inspection Sampling

Street Works Inspections are changing from an Annual 30% sampling size to a Performance-Based Approach. This comes into effect on the 1st of April 2023. The system responsible for generating and storing Inspection sample figures, targets and for generating Sample Inspections is changing. This will now be done in Street Manager. Confirm Users are requested to send their pending Inspections to Street Manager prior to 1st of April.

Configuration required:
Promoter setup and Target:

Authority Street Manager’s Admin access Users are required to setup their Promoters in the Street Manager Interface. Only the HA Admin can add, edit and remove Promoters from the Performance Based Inspections list as well as view, set and update their quarterly Targets.

Note: Any number of Promoters can be added in the Street Manager but the number of Works selected for Sample Inspections, at any single time, is limited to 4000.

Note: The Performance Based Inspection screen in Confirmweb can be used to understand how your Organisation is progressing against Inspection Targets.

Generating Sample Inspections:

To start generating samples, HA user must start a quarter and add Promoters that are to be part of the process in the Street Manager Interface.

Once this activity is performed in the Street Manager, User can use Confirmweb Interface to generate Sample Inspections in the Street Manager. Sample generation is a process requested by HA Admin User.

For more information about setting Promoters, updating Sample Inspection Target and generating Sample Inspections in the Street Manager, please refer the link - https://department-for-transport-streetmanager.github.io/street-manager-docs/articles/business-rules-version-1-43.html#18-sample-inspections

Performance Based Inspection sampling process - Start and End Quarter

Now there is an ability for Users to Start and End Quarter for their Performance based Inspection process via Confirm.

A new Start or End Quarter option is available on Sample Inspection Target screen in Confirm. Start and End Quarter option will be available only for HA Admin Users.

User can start the Quarter on the first day of the Quarter. Once the Quarter is started all the expired Sample Inspections will be removed from Confirm.

On Starting Quarter , Start Quarter button disappears and End Quarter button will appear. End Quarter button will be in disabled mode till the end date of the Quarter is reached.

Note: Update or Add access to Start or End Quarter is required to enable the Start Quarter or End Quarter button.

Importing Sample Inspections

Confirm Task processor service will be used to import the generated Sample Inspections into Confirm. The process will start once in a day, but may take some time to fully complete.

Users can also import Sampled Inspections from the Street Manager on an ad hoc basis using the 'Import Sample Inspections' option in the Confirmweb. Imported Sampled Inspections will be assigned to the relevant Action officer based upon the Inspection Route and available quota for Inspection.

Note: Only those Inspectors are assigned that currently undertake Street Works Inspections, have a Street Works Route and have a number of Inspections configured.

Sampled Inspections that does not find any suitable Action officer, will be defaulted to a “Default Action officer” during Import into Confirm. This Default Action officer is a configurable setting in the Street Manager System Settings screen in Confirmweb.

You are are advised to change this default officer or make sure that the work group of this Default Action officer is in sync with their other Street works Inspectors work group.

Imported Sampled Inspection can be viewed in the Programmed Inspection screen in Confirm. Sampled Inspection reference will be specified under the Notes field. For more information on field mapping for Performance Based Inspection, please refer the Mapping Document.

Any new addition to the Sampled Inspections in the Street Manager, will be imported into Confirm and a new entry will be made in the Programmed Inspection screen in Confirm.

Any updates to the existing Sampled Inspections in the Street Manager, will also be imported into Confirm and an existing Programmed Inspection will be overridden accordingly in Confirm.

Any expiration to the existing Sampled Inspections in the Street Manager, will also be imported into Confirm and an existing Programmed Inspection will be deleted accordingly in Confirm.

Note: Programmed Inspection screen and Inspection Sampling Utility will no longer be able to generate Sampled B and C Inspections because these Sampled Inspections will now be generated in the Street Manager.

Note: All the Sampled Inspections imported from the Street Manager into Confirm will have the “Sampled” flag ticked. In addition, the notes field will also be disabled for Imported Sampled Inspections in the Programmed Inspection screen in Confirm.

Once, Sampled Inspections are Imported into Confirm, Actual inspections can be performed using the Confirm Enterprise and Confirm Connect as usual. There is no change in the Actual Inspection workflow in Confirm. Once User creates an Actual Inspection in Confirm, they can send it to Street Manager as usual.

Post April 2023, Street Manager will reject any additional Category A, B and C Inspections that exceeds their Target for the Quarter for a Promoter. In that case, Confirm User would get an error and Confirm will resend this as Routine Inspection.

In addition, only 1 Category B or C Inspection will be allowed on a Work. Street Manager will reject any additional Category B or C Inspection on a Work and Confirm will then resend this as Routine Inspection.

Field Mapping

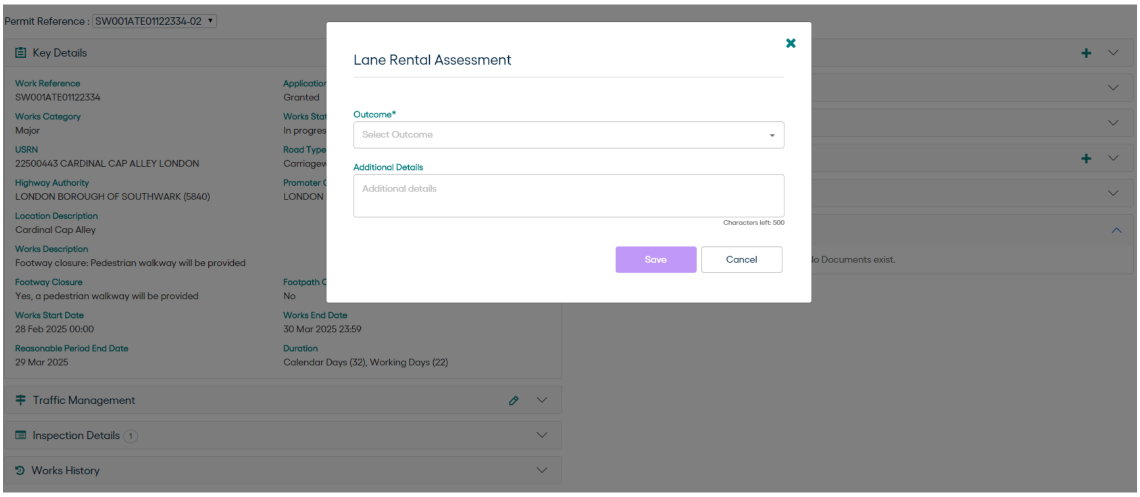
Programmed/ Sampled Inspection

Street Manager Field	Confirm Field	Notes when importing into Confirm from Street Manager	Notes when exporting from Confirm to Street Manager
Promoter	Organisation	Sets the Promoter Organisation of the Work	
Works Reference	Works Ref.	Sets the incoming value	
	Site No.	Sets based on the trench selected while getting the From and To date	
Inspection category	Category	Sets the incoming value	
	From	Sets based on category	
	To	Sets based on category	
	Notes	Sets to Imported from Street Manager along with reference and sites etc	
	Originating Defect No.	By default sets to Null	
	Sampled	All the importing records is sampled	
	Delete when expired	By default sets to 'N'	
	Printed	By default sets to 'N'	

Lane Rental Assessment

Lane Rental details within Confirm Enterprise can be viewed, added and updated like in Street Manager. From the Action menu navigate to 'Lane Rental Assessment' section.

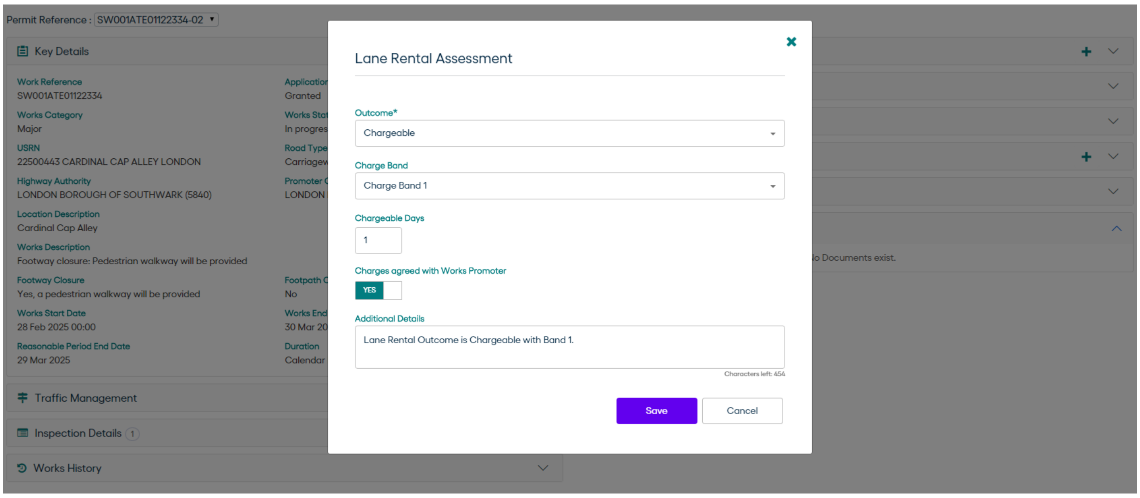
Clicking the Add icon at the top of the 'Lane Rental Assessment' section opens a Pop-up to add Lane Rental details.



Lane Rental details contains 'Outcome' as mandatory and 'Additional Details' as optional field.

Lane Rental Outcome could be Chargeable, Potentially chargeable, Charges waived, Exempt or Charges not applicable to Works.

If Outcome as Chargeable selected, multiple other optional fields can be populated as Charge Band (1,2,3,4,5), Chargeable Days, Charges agreed with Works Promoter.



Further Lane Rental is phase dependent i.e. Different permit phase has different Lane Rentals.

Lane Rental updated automatically in Street Manager when added or updated from Confirm and imported from Street Manager as a Notice Type in Confirm Enterprise after running the Street Works Transfer Agent.

A Lane Rental Assessment or charge may be added on any Permit at any time.

Note: Authority can add and update Lane Rental details. Promoter can only view details of Lane Rental Assessment.

Inspection Responses

Confirm now supports the new Inspection responses available for Promoter and Authority after the introduction of Non Compliance in Street Manager.

User can navigate to 'Inspection/NC Response' section from the Action menu available on any Permit.

On each Inspection where the Outcome of the Inspection is 'Failed' , Promoter User can respond either as 'Disputed' or as 'Accepted' with reason provided or 'Joint site meeting needed' by clicking on the 'reply' icon.

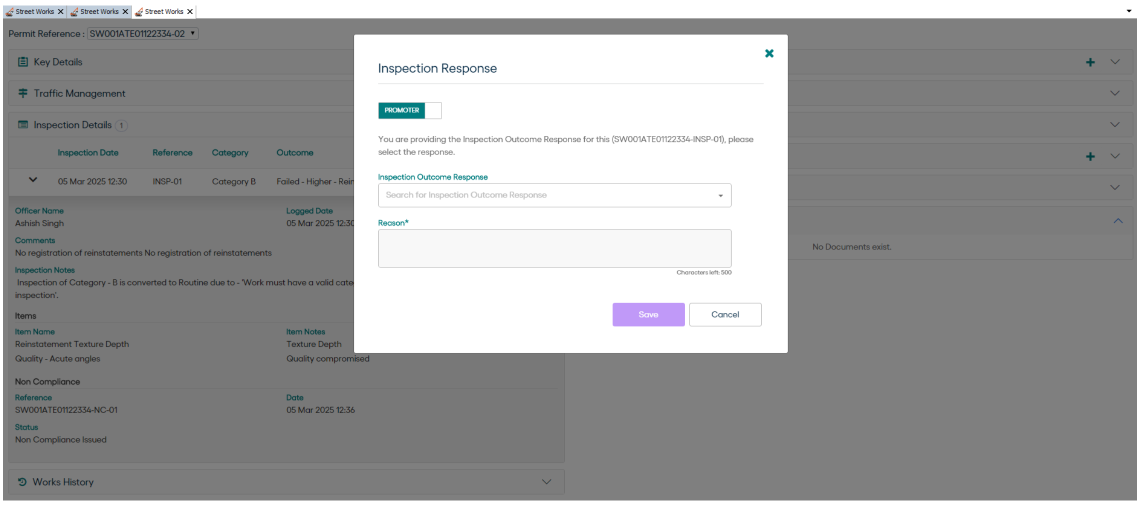
On the Inspection where the Promoter has responded , Highway Authority User can respond to it with responses available.

1. If Promoter accepts the Inspection, no further response available for Authority.
2. If Promoter dispute the Inspection,'Promoter accepts failed inspection','Reviewing dispute','No agreement' available for Authority.
3. If Promoter respond with 'Joint site meeting needed', 'Promoter accepts failed inspection' is available for Authority.

Note:
1. In case the Outcome is Passed, Unable to complete Inspection or the Category is Site Occupancy, Condition, Non compliance follow up Joint site visit then the 'reply' icon is not displayed.
2. If Promoter or Authority respond with any of the responses available, that response is no longer available for Authority or Promoter.

Once the Response is sent, the Response status will be displayed in the 'Response Status' field and 'reply' icon would disappear if no further action required on the Inspection. On expanding the Inspection details further, Promoter or Highway Authority Response details will be displayed.

In case of self Promoter Organisation, a toggle button is available in the Inspection response pop-up where Promoter User can select the 'Promoter' so that Promoter responses are available and Authority User can select the 'Authority' so that Authority responses are available.



Promoter response

Response	Intent and consequences
Accept Inspection	Promoter agrees with the outcome
Dispute Inspection	Promoter does not agree with the outcome and
Joint site meeting needed	Promoter neither agrees nor disagrees with the outcome. Decision will be made after a joint site meeting

Highway Authority response

Response	Intent and consequences
Promoter accepts failed inspection	Highway Authority and the Promoter agreed, outside of Street Manager, that the inspection outcome was indeed valid.
Reviewing dispute	Highway Authority is reviewing the dispute raised by the promoter.
No agreement	Highway Authority does not agree with the dispute raised by the promoter.
Withdraw inspection	Highway Authority decided to withdraw the inspection.

Inspection Non Compliance

Non Compliance:

Failed Inspections creates a non compliance (with a unique reference) in Street Manager. Whenever an Inspection is issued by Highway Authority and it reaches to Street Manager, it decides if a Non Compliance can be created. Thereby imported to Confirm as Notice Type 'Non Compliance Issued'.

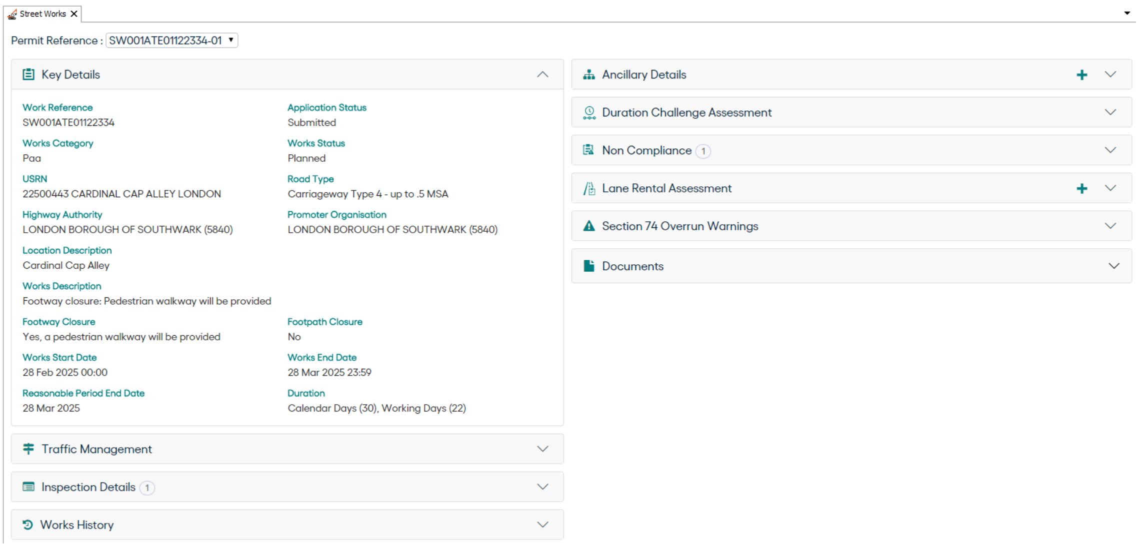
Note: In case of Works having multiple trenches, failed inspection creates only one non-compliance and link the same non-compliance reference with rest of the failed inspections.

Non compliance Response can be further addressed through the 'Inspection/NC Response' Action button on the permit, which triggers a workflow between the Promoter and the Authority.

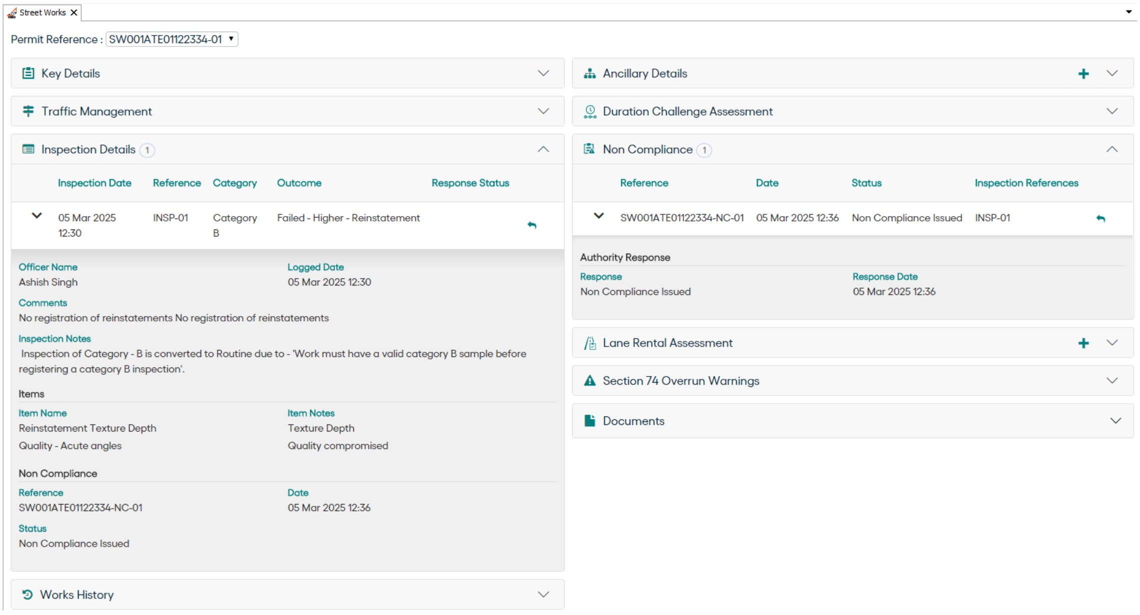
An existing Non Compliance can be linked to new Inspections and also to a phase within the Permit.

User Interface:

On clicking the 'Inspection/NC response' Action button, a new tab opens up with multiple sections to add/update:

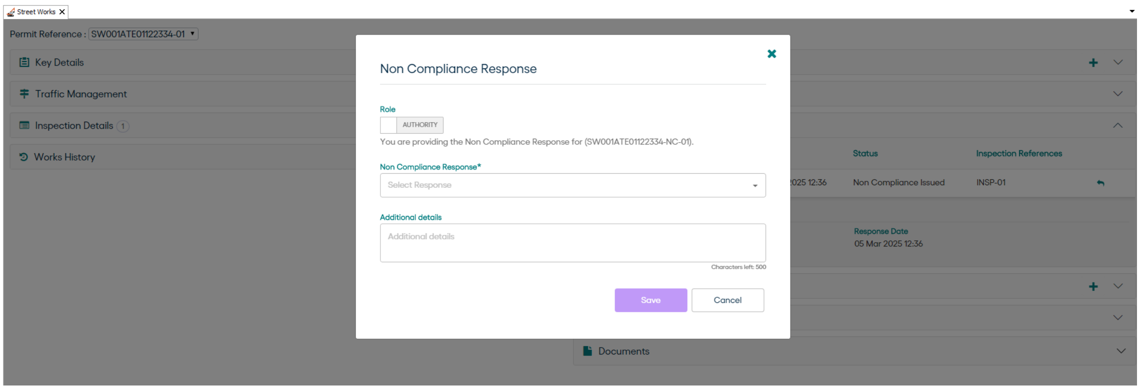


On expanding the 'Non Compliance' section, Non Compliance details displayed as in image below followed by Non Compliance details updated in Inspection Details section too.



Non Compliance Responses

User can further respond as a Promoter or Authority on a Non Compliance by clicking on response icon.



If User is logged as Promoter and Authority both then a toggle between Role is present on Non Compliance Response Modal window. If logged as only one then no toggling between Role would be present.

Non Compliance can be further responded after filling up the required details in Non Compliance Modal window.

Authority and Promoter Non Compliance responses could be as following:

Authority Response
Suggest Joint Site Meeting
Non Compliance Withdrawn
Accept Promoter's suggested date and time

Promoter Response
Suggest Joint Site Meeting
Works Completed, Ready For Re-Inspection

Promoter Response
Accept HA's suggested date and time
Joint Site Meeting Not Needed

If a Non Compliance is statused as 'Non Compliance Withdrawn', 'Works Completed and Passed' and 'Works Completed, Ready For Re-Inspection' then it can not be further responded i.e. Response icon would no longer be available for that Non Compliance.

Ancillary Details

General information:

Ancillary information can be added after a permit is submitted and while works are being carried out. In case the ancillary information may impact the permit approval by a Highway Authority (HA), it is recommended:

- to make a mention, as part of additional information, about the intention to add Ancillary Information before submitting the permit.
- to add Ancillary Information immediately after submission.
- to add a comment to the Permit, that all relevant Ancillary Information have been added.

Ancillary information apply only to a permit to which they were added and will not impact or carry over to any other past or future Permit within the works record. Ancillary Information will appear on a map along with the Permit they were added to. To notify Highway Authority about upcoming changes to Ancillary Information, that are yet to happen, NCT03 condition should be used instead.

Removal:

Ancillary Information can be indicated as “removed” when they are no longer relevant or factually accurate.

- They remain visible as part of the permit details.
- They no longer appear on the map.

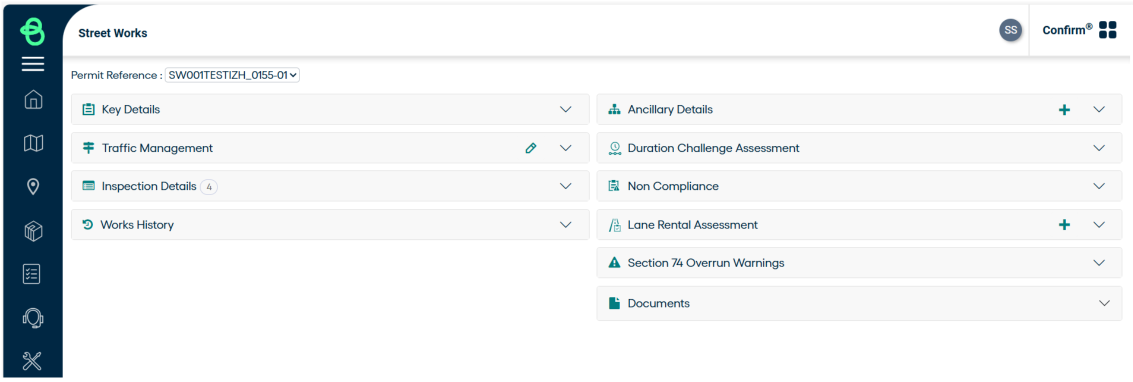
Validation and limits:

The following limits apply to an individually Permit (A Permit does not influence other Permits within works record):

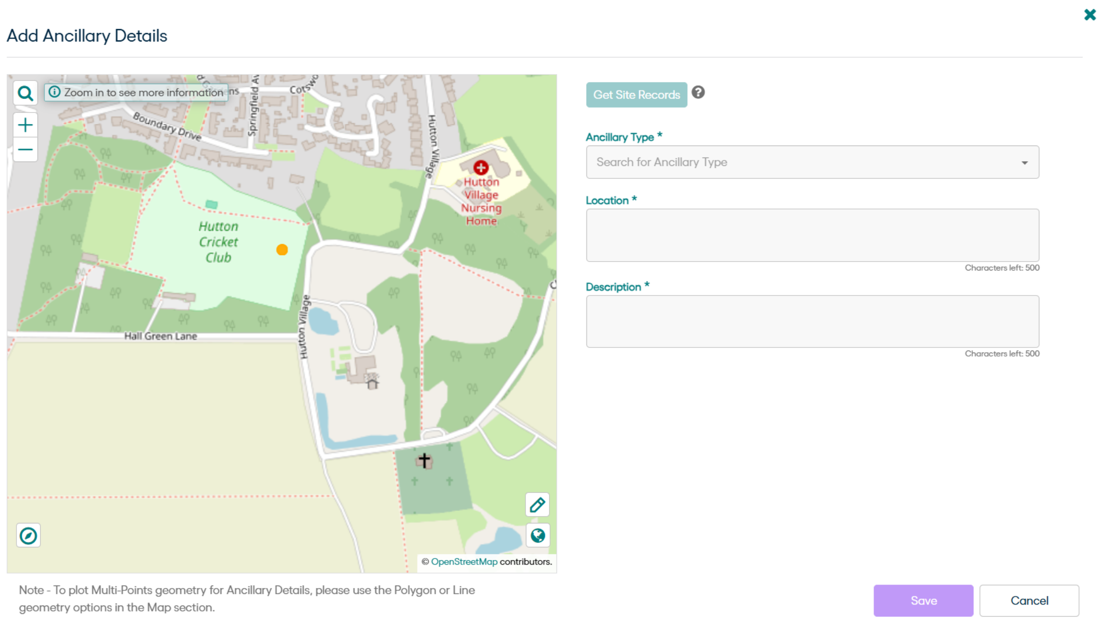
- Ability to add upto 20 Ancillary Information items - including removed items.
- Ability to add upto 10 points per individual Ancillary Information entry.
- Ability to choose from up to 100 USRNs, when adding Ancillary Information.
- Ability to save up to 25 USRNs, when adding Ancillary Information.

User Interface:

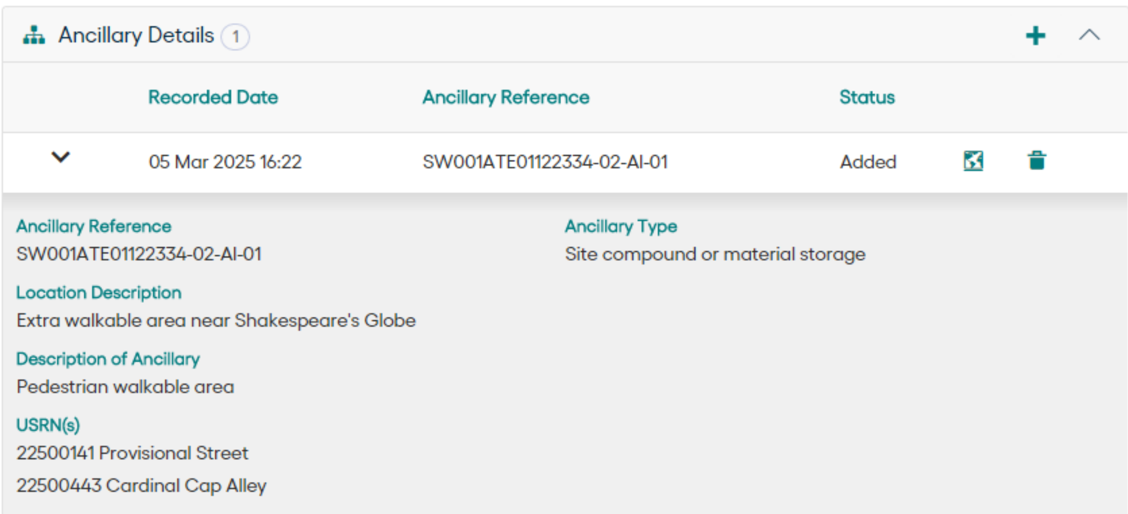
On clicking the Ancillary Detail Action button, a new browser will open up, which have Ancillary section. :



On Clicking (+) icon in the Ancillary Details section, will open a Modal window to fill the details and save the Ancillary. Draw the area in the map and click on the 'Get Site Records' button to get the Sites in the plotted region. Fill the details and save.



After filling up details in Modal window, Ancillary details are update and displayed when a record is expanded.



Ancillary Record can be removed using Bin button and can be viewed on map using Map button on the right of Ancillary record status.

Current Traffic Management

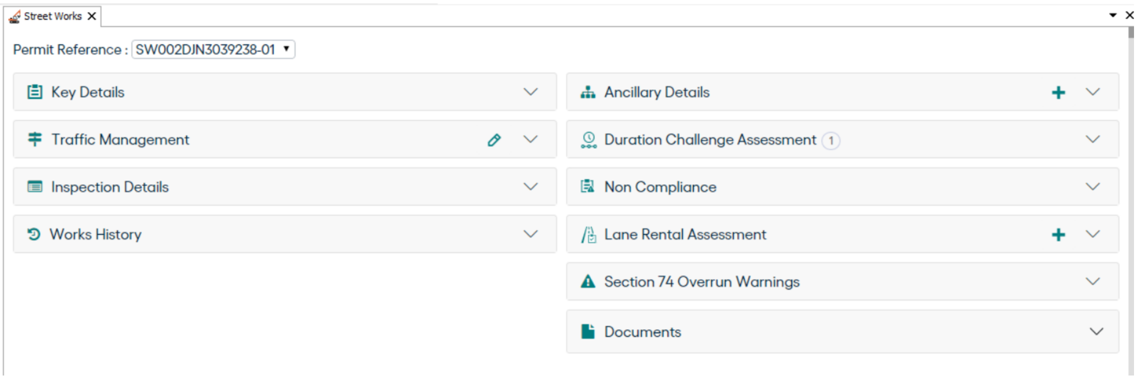
Changes to traffic management:

Type of Traffic Management currently present on the work site can be entered as part of the Permit Application.

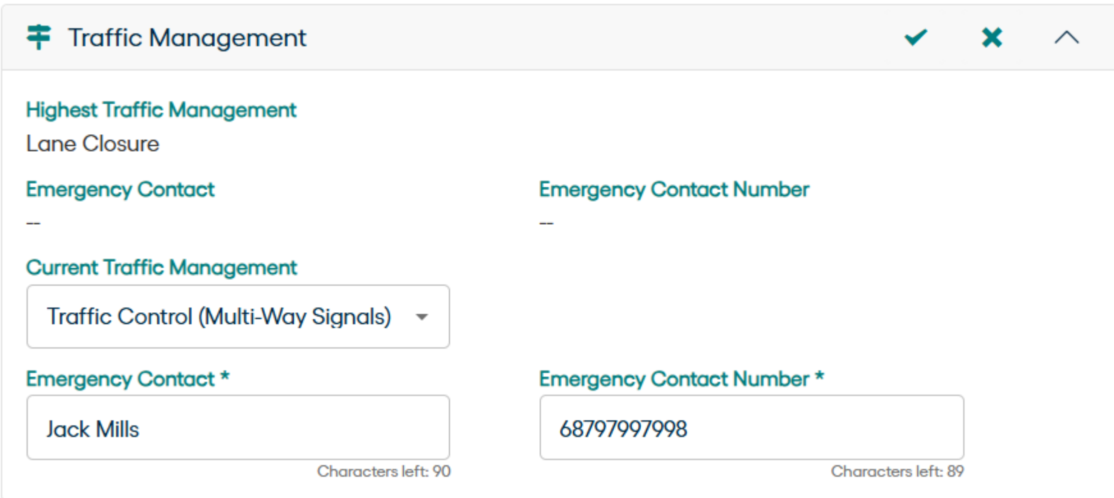
- This is for information purposes only, and needs to be agreed with the Highway Authority prior to entry into Street Manager, therefore does not require a Permit Variation (Change Request).
- To notify Highway Authority about upcoming changes to Traffic Management, that are yet to happen, NCT09d condition should be used instead. Current Traffic Management allows all the types available when submitting new Permit Application or Change Request, along with additional information that some of the Traffic Management option require.

User Interface:

On clicking the Traffic Management Action button, a new tab opens up with multiple sections to add/update:



On Clicking the pencil icon will allow user to update the Current Traffic Management. Select the desired Traffic Management from the drop down list.



Note: For Current Traffic Management as Traffic Control (Multi-Way Signals) and Traffic Control (Two-Way Signals), Emergency Contact and Emergency Contact Number is enabled and a mandatory field.

Duration Challenge

Duration Challenge:

- Highway Authorities can add a Duration Challenge to Change Requests submitted by the Promoter and also on permits for Immediate Works.
- A Reasonable period end date and reason for the Duration Challenge must be provided when adding a duration challenge.
- Reasonable period end date can not be set past the end date, in other words, Highway Authority can not extend the Reasonable period, only shorten it.

Responding to a Duration Challenge:

When a Promoter receives a Duration Challenge they have the following response options:

- Accept the Duration Challenge meaning they accept the new Reasonable period date provided by the Highway Authority.
- Duration Challenge not accepted meaning the Promoter does not agree with the details of the of the Duration Challenge.

By responding to Duration Challenge and accepting the ‘Reasonable period end date’ this will not update the ‘Granted permit end date’.

Non-Acceptance of a Duration Challenge:

When a Promoter does not accept a Duration Challenge the Highway Authority have the option to update the Reasonable period end date. The Highway Authority can choose an alternative date.

If the Highway Authority chooses not to propose a new ‘Reasonable period end date’ they can provide details on this decision.

The Promoter can respond with one of the following options:

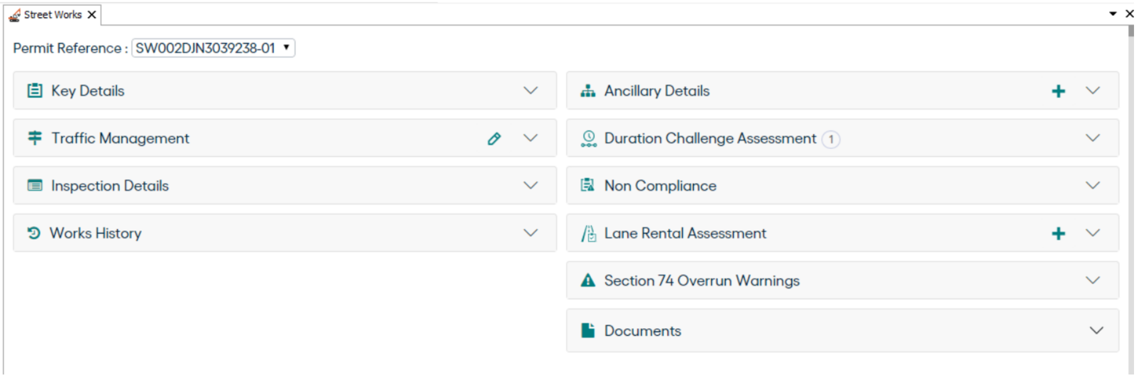
- Accepted: Promoter accepts the current Reasonable end date provided by the Highway Authority.
- Not accepted: Works will continue to Granted permit end date.

Following a Duration Challenge Non-acceptance process, there is no requirement for a Change Request to be sent to change the Permit end date, to match the Reasonable Period end date.

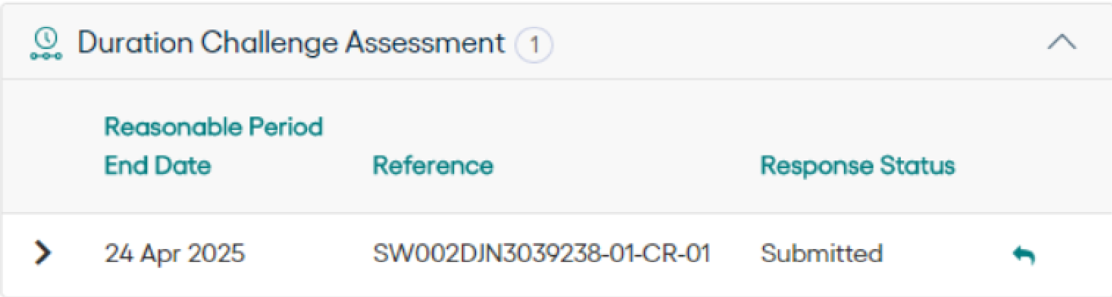
Promoters should ensure that all involved with the Work are aware of the Reasonable period end date.

User Interface:

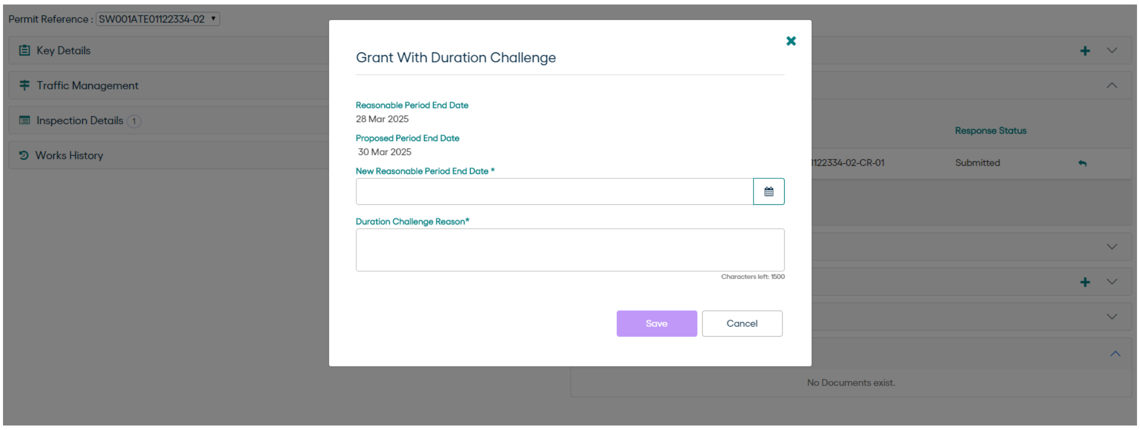
On clicking the 'Grant With Duration Challenge' Action button, a new tab opens up with multiple sections to add/update:



On expanding the 'Duration Challenge Assessment' section, further details of Duration Challenge is displayed.



A Duration Challenge can be further responded by Authority by clicking on the Response icon to provide a 'New Reasonable Period End Date' with its Reason on Grant with Duration Challenge Modal window.



API Notification

Notices from Street Manager will be imported using new Task Processor agent using the capabilities of API Notification service offered by Street Manager:

The API Notifications provided by Street Manager, allows integrators to receive near real-time updates whenever events occur on a work record.

Any eligible event triggers a notification that includes details about the event, such as Work Start, Permit Submitted, Inspection Outcome Accepted, Section 74 Warning Issued, etc. Once the System Administrator subscribes to the API Notifications from Street Works in Confirm, notifications will be delivered much faster, offering a smoother and more enhanced user experience.

Note: Street Manager suggested to use the API Notification to import notices from Street Manager for day to day Works.

Requirements

- Verify that the Street Works Service is properly configured in IIS.
- Verify that the Street Manager Notification Agent is properly configured in Task Processor.
- Verify the Subscribe/ Unsubscribe button is available in the Confirm Web Setting screen. If not available then go to the User Security screen and add permission to see these buttons.

Private Street

Submitting a notice:

Permit Application can be submitted by Promoters, only on USRNs that are fully or partially private.

When USRN is indicated as having sections that are both private and public, one can choose to submit a permit or a notice.

Notice does not need to be assessed, or acknowledged, by Highway Authority. It is submitted for information purposes only.

Private Street Notice works records, due to the nature of those works, lack certain features (Inspections, Reinstatement) present in Works records containing Permit Applications (raised on public roads). There is no requirement to log work start, stop or register reinstatement, and no inspections would be logged there by Highway Authority.

Note: There were Permit Applications raised before the dedicated Private Street Notice was introduced. Those will remain as Permits, there are no plans to migrate or otherwise process those, at this time.

Private Streets reference number

Each Private Street Notice will be assigned it’s own reference number, numbered independently of the permit applications.

Works statuses

Private Street notices can have a status of:

- Issued
- Cancelled

Cancelling works

When the works have been cancelled, or the notice itself was found to be inaccurate, it can be cancelled by the Promoter, at any time.

Area of Special Interest

Material Classifications:

Confirm now supports Material Classification like Street Manager. Material Classifications can be created in Confirm and exported to Street Manager. Material Classifications created in Street Manager will be imported to Confirm using Street Works Task Processor agent.

Material Classifications can be of these types:

- Hazardous
- Non Hazardous

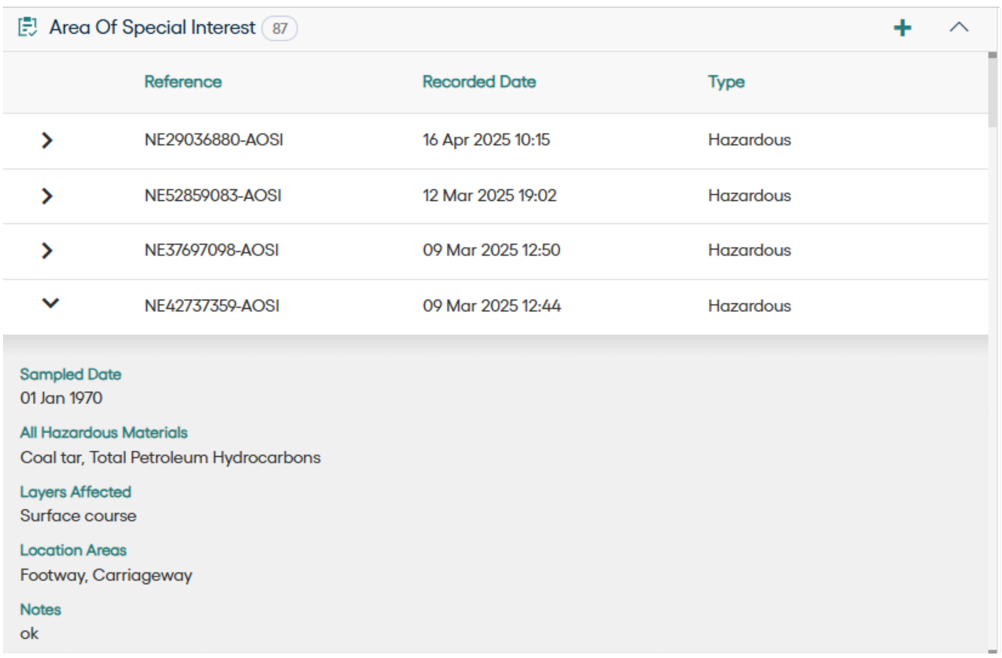
Note: Material Classifications is known as Area of Special Interests in Confirm.

Area of Special Interest (AOSI) List Items:

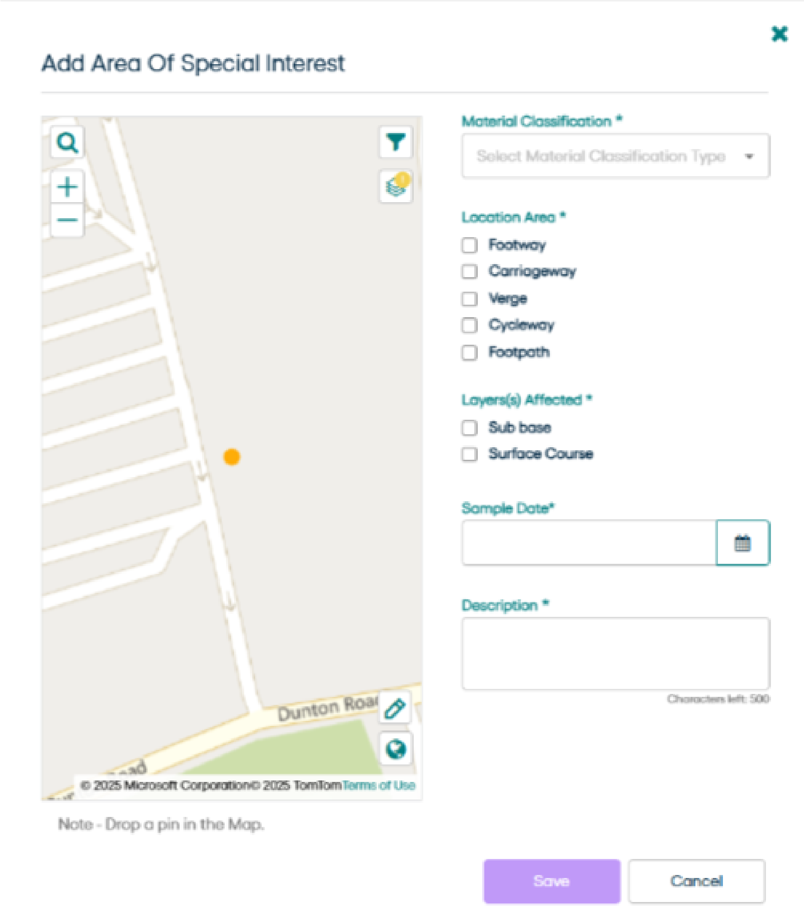
On the Site page, an AOSI list will be displayed in rows, each containing the following information: Reference, Recorded Date and Type.

When a row is expanded (as shown in the snapshot below), the following additional details will be visible:

- Sampled Date
- All Hazardous Materials
- Layers Affected
- Location Areas
- Notes



Click on + icon on AOSI section header to add a new AOSI.



The AOSI entry screen contains the following entities.

Field Name	Field Type	Description	Example Entries
USRN (Unique Street Reference Number)	Number	A unique identifier for the street or location within the street network.	12345
Material Classification	combo box	Select the material classification type used for the street or surface.	Hazardous/Non Hazardous
Hazardous Material Types	Check boxes	Select the material type used for the street or surface. **Note:** Hazardous Material Types are available for only Hazardous Material Classification.	Coal Tar, Total Petroleum hydrocarbons , pH , Heavy Metal,Asbestos , Other

Location Area	Check Box	Specify the location area or zone where the material classification is applied	Footway, Carriageway, Verge, Cycleway, Footpath
Layer Affected	Check Box	Specify which layer of the street is affected or where the material is applied.	Base Layer, Sub-Base Layer
Sample Date	Date Picker	The date the material sample was collected or tested.	15/08/2024
Description	Text Box	A more detailed explanation or additional notes regarding the material, its application, or properties.	Material shows excellent performance in high-traffic areas

Note: The AOSI (Area of Special Interests) detail can be found under the AOSI Section on ConfirmWeb Site Screen.

Installation (For On-premise clients)

The Street Manager interface is provided as part of Street Works Transfer agent in Confirm. This is provided through the Task Processor in a decoupled mode which means the Task Processor for the Street Works Transfer agent can be installed and upgraded without the need of upgrading main Confirm. It is backward compatible with Confirm v18.2.

Location

The installer is available for download **here**.

Installation

The installer setup.exe needs to be installed from the \Task Processor directory from the Street Manager package in the 'Run as administrator' mode. This instance of the Task Processor needs to be installed on a separate machine from main Task Processor as two instances of Task processor cannot work on one machine. For installation details, you may refer to Confirm Task Processor documentation, and 'setup' section therein.

If you have been using earlier versions of Street Manager interface through the StreetManager-Agent.zip folder files,you need to stop the old Windows scheduled task.

The database config (cfg) file for the Task Processor are located under the registry location **HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\Confirm\Task Processor**. The key name is CfgFilePath.

The ConfirmWebBeta.exe needs to be installed this in the same way as Confirm Web would normally be installed, as described in the "Installing, Configuring and Upgrading the Confirm web interface" section in the Confirm help. The Confirm Web Beta service can be installed side-by-side on the same server as a normal Confirm Web installation, but we would recommend that it is installed on a different server.

Document Proxy Service

To be able to view Street Manager files from Confirm without having to log into Street Manager, a "proxy" service is required which is installed as part of Confirm Web beta.

Database Changes

In order to prevent the main Task Processor from running tagged Tasks the Task Processor stored procedures must be updated in the database as follows:

For Oracle database:

1. Go to Task Processor folder under Program Files (x86)\Confirm
2. Login to the database with non-central schema e.g. HIGHWAYS/CONFIRM.
3. Open StreetManagerTaskProcessorPatchOracle.sql from "StreetManagerAgent\Resources" folder and copy the content to a query window.
4. Run the query
5. Setup is complete.

For SQL Server database:A DBA can follow similar steps for a SQL database by using Street-ManagerTaskProcessorPatchSQL.sql instead of StreetManagerTaskProcessorPatchOracle.sql in step #3.

Testing Connectivity

You can verify connectivity with Street Manager and check your credentials are working from a PowerShell prompt, by creating the following function:

```
function Test-StreetManagerCredentials {
    Param (
        $Username,
        $Password,
        [Switch] $Production
    )

    if ($Production) {
        $Url = "https://api.manage-roadworks.service.gov.uk/v2"
    } else {
       $Url = "https://api.sandbox.manage-roadworks.service.gov.uk/v2"

    }
    (New-Object System.Net.WebClient).Proxy.Credentials = [Sys-
tem.Net.CredentialCache]::DefaultNetworkCredentials
    [Net.ServicePointManager]::SecurityProtocol = [Net.SecurityProto-
colType]::Tls12
    try {
        $authenticateResponse = (Invoke-RestMethod -Method POST -Uri
"$Url/work/authenticate" -Body @{"emailAddress" = $Username; "password"
 = $Password})
    } catch {
        return $_.Exception
    }
    $idToken = $authenticateResponse.idToken

    $headers = @{
        'Content-Type' = 'application/json'
```

```
        'Token' = $idToken
    }
    try{
        $res = (Invoke-RestMethod -Method GET -Uri
"$Url/work/works/junk" -Headers $headers)
    }
    catch {
        $status = $_.Exception.Response.StatusCode.value__
        if($status -eq 401){
            return 'Not API credentials'
        }
        if($status -eq 404){
            return 'Valid API credentials'
        }
        return $_.Exception
    }
}
```

You can then call this, supplying your user name and password in single quotes, e.g.

```
Test-StreetManagerCredentials 'username@test.com' 'password'
```

This will test Sandbox by default. To test production add the -Production switch, e.g.

```
Test-StreetManagerCredentials 'username@test.com' 'password' -Production
```

If the user is valid then "Valid API credentials" will be returned, If the user is valid but not configured with API access then the error "Not API credentials" will be returned.

A "401 Unauthorised" error indicates that either the Username or password is incorrect. Any other errors indicate connectivity issues accessing the Street Manager services which may be caused by local proxy servers or firewalls.

Logging settings

The tenant logging settings for the Confirm Street Manager interface are located in the Confirm Task Processor Settings screen. The beta Task Processor for Confirm Street manager interface share these settings and append <Decoupled Task Processor version> prefix like <V21.20_> to the log file name. So for a Task Processor log file path of D:\Logs\TaskProcessor.log, the Street Manager interface creates D:\Logs\V21.20_TaskProcessor.log log file.

The Provider log settings for the beta Task Processor are specified under the 'HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Confirm\Task Processor' key for log file path.

Lookup Tables

A number of changes to Confirm lookup tables are required to support the interface with Street Manager. When the decoupled Street Works Transfer agent runs, it automatically updates the required lookup in the Confirm database. These lookup are refreshed automatically on every upgrade of Confirm Street Manager software.

Note: The Confirm system uses first 6 characters of the new Conditions entered in the 'Name' of 'Permit Condition Type' lookup when sending condition code to Street Manager. It is recommended not to change the name of the new permit condition types.

Upgrades

An upgrade to the Confirm Street Manager interface will require an upgrade of the decoupled Task Processor and Confirm Web beta. Also, the version tag against the Notes section of the Street Works Transfer agent in the Scheduled Task screen need to be updated in Confirm, e.g from V21.12 to V21.20.

Switch off the Decoupled Task Processor

In order to switch off the decoupled Task Processor and execute the Street Works Transfer agent as per the main Confirm version, remove the Task Processor version tag from the Notes section of Street Works Transfer agent in the Scheduled Task screen. This will prevent the decoupled Task Processor from running the Street Manager Works Transfer agent.

Troubleshooting

The following tables document common errors observed when exchanging information with Street Manager, what may have caused the error and possible ways to fix the issue.

Notices

Errors that occurred during notice export can be seen on the Transfer Issues section of the Street Works > Transfer tab.

* Note that in a number of cases additional notices may need to be manually added into Street Manager to bring Street Manager and Confirm in-sync with one-another. These changes will be imported into Confirm which may result in some Ignored notices.

Error Message	Cause	How to Fix
A HA can only imposed changes on a granted permit	Have attempted to issue an Authority Imposed Variation on a permit that has not yet been granted in Street Manager	Check the transfer status of the previous Grant sent from Confirm to ensure that was sent to Street Manager. Make any manual corrections necessary in Street Manager*.
A highway authority officer can only grant/refuse permits that have not already been granted, refused, revoked or cancelled. Permit has no pending changes	Permit may have already deemed in Street Manager due to changes in deeming rules	No action required. Unsent Grant/Refuse in Confirm will be overwritten with the next notice received from Street Manager
A highway authority officer can only request a permit modification on permits with a status of submitted.	Modification Requests are only valid where there is no current permit. **Note:** Only one Modification Request can be raised on a Permit Application.	Refuse the most recent change from Street Manager with reasons. The promoter will still have their previously granted / deemed permit.

Error Message	Cause	How to Fix
A PAA can not be altered	Street Manager currently treats the first application for all Major works as a PAA, even if the works are not asset activity, which can cause notices to become out of sync with Confirm.	Grant the PAA in Street Manager and re-send the Modified Application from Confirm which will be treated like a Permit Application in Street Manager.
A permit modification can only be requested on permits with a work category of standard, minor, major or hs2_highway	Modification requests cannot be sent in response to Immediate Permits	Either refuse the permit or issue an Authority Imposed Variation
A planner can only alter permits with a status of granted. An active alteration already exists for this permit record	Once a Variation has been sent for an existing permit then this must be granted, refused or deemed before a subsequent variation can be sent	Wait for the previous variation to be granted
A planner can only cancel permits with a status of submitted	Street Manager is out of sync with Confirm	Compare the Street Manager history with the Confirm history to determine where the notices went out of sync and make corrections in Street Manager*
A Promoter or HA imposed change can not be assessed	It is possible that the permit has already been granted in Street Manager	Compare the Street Manager history with the Confirm history to determine where the notices went out of sync and make corrections in Street Manager*
Access restricted	The promoter does not have access to the necessary workstream for the works	Check that the Confirm Promoter API user has access to the workstream for the works (3rd to 5th digit of the works reference)
Additional change ... added since grant	Confirm has detected that a further change has been logged in Street Manager since the version that was reviewed and Granted in Confirm	Review the most recent changes to the Permit and re-assess
Bad Request. additional_comments is required	Notice comments must be supplied when refusing or revoking permits	Add comments and re-send
Bad Request. Date must be in the future	Forward planning notices cannot be submitted retrospectively	Re-plan the works and send a Forward Planning or PAA as appropriate
Bad Request. pending_change_details is required	A Modification Request has been sent without any proposed changes	Add necessary changes to the Notification comments and re-send
Bad Request. The maximum duration for proposed works allowed is 5 years. Please make sure your timings fall within	Self explanatory	Double-check the dates on the works

Error Message	Cause	How to Fix
the permitted range.		
Cannot add a reinstatement as the work status is not in progress, completed or non-notifiable	Works start may not have transferred to Street Manager	Check Street Manager history and add a works start if necessary*
Coordinates are mandatory	Self explanatory	May need to run an Error Correction wizard to add coordinates to a legacy works
Forbidden	Some characters in a descriptive field are deemed as suspicious by Street Manager. This is determined by a Street Manager security algorithm, so it is not possible to give a simple list of words / characters to avoid.	Check log files and contact technical support
Forward plans can only be sent for major works to Street Manager.	Street Manager does not allow Forward Plans for other works categories	Send a normal permit application when due
No changes have been made to the permit	A variation of some kind has been sent with no relevant changes. Note this can also occur with Authority Imposed Variations where no valid NCT codes are included in the Notice Comments.	Use Compare with latest in the Confirm history to investigate. For Authority Imposed Variations Street Manager only allows Conditions to be imposed and these must be prefixed by valid NCT codes in the text entered into Confirm. Ensure that NCT codes do not contain spaces and that leading zeros are included where appropriate, e.g. "NCT04b"
No Street Manager Authority credentials found for Organisation	Attempting to perform an authority action for an organisation where no Authority credentials are configured	Check that the DfT Ref 1 of the Street Authority Organisation for the Permit is set correctly
No Street Manager Promoter credentials found for Organisation ...	Attempting to perform an promoter action for an organisation where no Promoter credentials are configured. Confirm currently does not support Contractor credentials. **Note:** For contractors, please use Promoter credentials instead.	Check that the DfT Ref 1 of the Woks Promoter Organisation for the Permit is set correctly
Not found	Not able to find the referenced works in Street Manager	Check log files for the earliest mentions of this works reference and contact technical support
permit_status must be submitted, granted or permit_modification_request in order to update the actual_start_date	Street Manager may have treated the first application from Confirm as a PAA	Create and Grant a Permit application in Street Manager and re-submit the actual start notice

Error Message	Cause	How to Fix
Street Manager notification not implemented for: E42700	Street Manager does not currently support Temporary Traffic Signal applications	Agree a suitable alternative application process with the Highway Authority
Work has no active permit	Permit / variation may have already deemed in Street Manager	Check permit status in Street Manager
You can't add a reinstatement unless an excavation has been carried out	Requires excavation flag in Street Manager is not checked	Revert the works stop (if required) and create a change in Street Manager to enable the excavation. When this is granted re-submit the works stop and the registration.
Exported to Street Manager: Waiting for the Actual Inspection to be created	Defective Apparatus details (Section 81s) are only sent to Street Manager when the inspection is exported.	See the inspections section to check if the Inspection has exported
Cannot vary a closed Permit.	Street Manager does not allow a permit to be varied after the Works Stop	Revert the Works Stop, submit the Variation, wait for it to be Granted and re-submit the Works Stop
Only PAA can be raised after a forward planning information.	Street Manager does not allow Forward Planning notices to be used on anything other than major works	Re-run the Planned Works wizard and force the notice type to Major so that a PAA is generated.
"Unknown object type: sw_header..." message when trying to create the next notice	If the first two notices for a works have been created in quick succession but the first notice fails due to some error then both notices have their send flag un-ticked. Confirm is then not able to determine what the logical next notice should be.	To avoid this issue, ensure that the previous notice has been been sent before sending follow-up notices. If this issue occurs the Confirm team can provide SQL to flag the first notice as "notionally" sent which then allows a Modified Application to be sent to correct the original error.
Duration Challenge is not valid in this scenario	If a Duration Challenge is sent independently from the Grant or is not valid in the scenario then the Confirm Duration Challenge notice will not send and will have this transfer warning	Please see the field mapping section on Granting with a Duration Challenge and refer to the Street Manager business rules on when this is allowed.
Bad Request. reasonable_period_end_date must be on or after the original reasonable_period_end_date and before the proposed_end_date	If a Grant with Duration Challenge is created in Confirm for any Variation notice but the reasonable period is not as per the rules set by Street Manager then only Grant is sent individually and Duration Challenge is marked unsent with transfer warning as - '*Duration Challenge is not valid in this scenario*'.	Please see the field mapping section on Granting with a Duration Challenge and refer to the Street Manager business rules on when this is allowed.
Bad Request. emergency_contact_name should not be empty. emergency_contact_number	If Emergency Name and Emergency Phone are blank for 'Traffic Control (Multi-Way Signals)' or 'Traffic Control (Two-Way Signals)' in Web Settings then permit is not exported with a transfer warning.	Update Emergency Name and Emergency Phone for 'Traffic Control (Multi-Way Signals)' or 'Traffic Control (Two-Way Signals)' in Confirm Web Settings.

Error Message	Cause	How to Fix
should not be empty		

Errors that occurred during notice import will be received via email. Once the cause of the error is resolved you can prompt Confirm to re-import the data by making any change to the works, e.g. adding a works comment.

Error Message	Cause	How to Fix
A site status with an external ref of E4Depth4 / 8 could not be found	If a depth of zero is received from Street Manager then the DfT Ref on your Confirm Site Status codes is used to flag the site as abandoned or subsumed. This error indicates that these DfT Refs. have not been set	The "Subsumed" site status (typically with a code of "SUBS") should have a DfT Ref. of "E4Depth4" and your "Abandoned" Site Status (typically with a code of "S08") should have a DfT ref. of "8".
Object reference not set to an instance of an object. (Number of possible causes)	Legacy works has a Works Comment that was never exported (has no Batch Number)	Contact Confirm team for SQL to delete the unsent comments
	Original works was imported as a Confirmation notice due to a previous bug	Ask the promoter to cancel the current works and re-submit the permit application
Works not found in Confirm	Unable to import a follow-up notice due to a previous failure	Determine the cause of the failure to import the original notice
Not found party/organisations/.../workstreams/...	The works reference does not match the normal pattern. On importing a works into Confirm for an organisation we do not recognise we assume that the 3rd to 5th digit of the works reference correspond to the workstream in street manager. If the works reference is badly formed then this cannot be found and we can't import the permit	Ask the promoter to re-submit the works using a valid works reference
Site wasn't found in Confirm. Usrn ... not found and no provisional street configured	USRN was not found in Confirm.	Check the status of the Gazetteer in Confirm and ensure that a Provisional Street is set up on the Street Works System Settings screen
Street Works Notice ... truncated to ... characters. Original value: ...	Some fields in Confirm cannot hold the full length of text that could be sent from Street Manager	Be aware of the truncation when reviewing the works
Unsent notice in Confirm is overwritten by any incoming notice.	Since the notice is unsent (draft mode) so any notice on top of it overwrites it.	In Transfer tab's Transfer Warnings field, we store some of the information of overwritten notice for future use.

Works Comments

Errors that occurred during comment export can be seen by clicking on the Send To button and selecting the Street Manager recipient.

Error Message	Cause	How to Fix
Not found	Attempting to send a works comment against a works that does not exist in Street Manager	If the comment relates to a Defective Apparatus notice then re-send the original apparatus inspection. If the comment relates to a works that you did not promote then either ask the promoter to transition the works to Street Manager or log an historic inspection on the works to re-create the historic works in Street Manager. The comment will re-send on the run after the works was created in Street Manager.

Inspections

Inspection errors can be viewed by clicking the Batch button on the inspection toolbar. To re-send an inspection untick and re-tick the Send Inspection checkbox, Save the inspection and respond "Yes" to the prompt to send an update for the Primary Inspection.

Error Message	Cause	How to Fix
Bad Request. failure_reason_details is required	1. Failed inspection item does not have any notes and there are no Defect notes 2. Confirm will automatically remove any items that are not applicable to the inspection category before sending to Street Manager. For example, Backfill inspection items are not allowed on a Defect Follow-up inspection	1. Add notes to the item or Defect Notes and re-send the inspection 2. Go through the process of logging the inspection in Street Manager to determine the allowed inspection items for the category (no need to save the inspection) and ensure that only these items are used. It is advisable to update your Inspection Categories in Confirm to remove Inspection Groups that are not valid for Street Manager
Inspection category: ... does not map to a valid Street Manager inspection category.	Inspection category cannot be sent to Street Manager	Check DfT references on Inspection Categories in Confirm against the field mapping tables in this document. **Note:** Street Manager does not support Investigatory (core sample) inspections. Use Third-party or Routine instead
Inspection Outcome: Passed/Abortive does not map to a valid Street Manager Section81 Severity. No Street Manager Promoter creden-	Sending a second inspection on a Defective Apparatus that was previously sent over EToN	The only workaround at present is to re-raise the Defective Apparatus under a different reference (and untick the send flag of any pending inspections / notices under the old reference)

Error Message	Cause	How to Fix
tials found for Organisation ...		
'officer_contact_details' is required	No phone number has been specified for the Inspecting officer	Add a suitable phone number or email address to "Telephone Number" field of the Inspecting Action Officer
"To be processed". No error or batch number	Inspections are only sent from organisations you initiate for to organisations that have the EToN Export flag checked. Note that for Defective Apparatus and Unattributable works the "to" organisation is the inspecting authority	Check the EToN Export flag for the recipient. Note before changing this contact the Confirm team to obtain SQL to check for legacy inspections that might also get exported if this flag is changed
Request failed with status code 404	Can occur if an historic inspection is against a USRN that is no longer valid in Street Manager	Correct the USRN on the parent works using a suitable notice, e.g. Error Correction or Defective Apparatus, and then re-send the inspection.
'works_coordinates' is required	Can occur if an historic inspection is against a works that did not have original coordinates	Ensure that an Easting and Northing are specified on the Inspection and re-send it.
Investigatory does not map to a valid Street Manager inspection category.	Can occur if 'Investigatory' Category is selected instead of new Investigatory Categories to export to Street Manager.	Use the new Investigatory Categories intended for exporting Inspection to Street Manager.

Errors that occurred during inspection import will be received via email. Once the cause of the error is resolved you can prompt Confirm to re-import the data by making any change to the works, e.g. adding a works comment.

Error Message	Cause	How to Fix
cannot insert NULL into actual_inspection.officer_code The INSERT statement conflicted with the FOREIGN KEY constraint "act_inspection_fk1_officer"	All received inspections are logged against the Inspection Officer set on the Inspection Import System Settings screen	Ensure that the setting is populated with a valid Action Officer
Cannot perform atomic update as objects previous state was not supplied	This can happen if the next inspection number for a works (managed internally) gets out of sync	Obtain SQL to fix this from the Confirm team

FPNs

FPN errors can seen in the Notes on the Offence tab or can be viewed by clicking the Issue / Withdraw Batch button.

Note that FPNs that have failed to send will still show with a status of "Penalty Sent Queue". Once corrections have been made you will need to click Resend from the Actions menu.

Error Message	Cause	How to Fix
Offence Type: An offence under s.... does not map to a valid Street Manager Offence Code.	Street Manager does not support Notice offences	Re-send the FPN via email or post
'officer_contact_details' is required	No phone number has been specified for the Penalty Action Officer Officer	Add a suitable phone number or email address to "Telephone Number" field of the Action Officer specified on the Penalty tab
Cannot read property 'length' of undefined	This can occur if no withdrawal reason is supplied	Add a reason to the Offence Notes and resend the Withdrawal.
'works_coordinates' is required	Can occur if an historic FPN is against a EToN works that did not have original coordinates	Log a Received ("paper") error correction notice on the works to set its coordinates and then re-export the FPN

Street Works ConfirmWeb

Errors that occurred while performing some Actions from Street Works ConfirmWeb screen.

Error Message	Cause	How to Fix
Maximum 10 Ancillary coordinate can be added on the Map section.	If user plot more than 10 coordinates on the Map, they will get an Error pop-up on the Modal Window.	User has to replot the Ancillary coordinates on the Map Section.
Maximum 20 Ancillary records can be added on the Permit Application.	If user add more than 20 Ancillary records on the Permit Application, they will get an Error pop-up.	Only 20 Ancillary records are allowed to be added on the Permit Application
Failed to process the request.	When Street Manager service is unavailable.	Try reloading the page once the service is available.
Joint site meeting date must occur today or in the future.	Joint Site meeting can't be done in past.	Update date time in today or future.
'Must be between 1 and 1000' while updating Chargeable Days in Lane Rental Assessment modal window	Chargeable days can't be more than 1000 for Chargeable Days in Lane Rental Assessment modal window.	Update Chargeable days between 1 and 1000.
Reasonable period end date must be between the original reasonable period end	Reasonable period end date not updated between the original reasonable period end date and proposed end dates.	Update Reasonable period end date between the original reasonable period end date and proposed end dates.

Error Message	Cause	How to Fix
date and proposed end dates while updating New Reasonable Period End Date in Duration Challenge Response Modal window.		

Release History

Release Notes for version v25.20a.AM

TTRO Option added in Wizard and Import from Street Manager

The TTRO (Temporary Traffic Regulation Order) feature is now accessible in Confirm's Permit Application, using Yes/No checkbox selection during the creation of application process.

This functionality is exclusively available for Planned Permits and is not accessible for Immediate Permits, EToN Works, or Private Street Notices.

When users select "Yes" for the TTRO option, the system automatically generates a PAA, streamlining the application workflow.

Both export and import of TTRO applications is supported.

Note: The TTRO (Temporary Traffic Regulation Order) functionality is now available in WorkZone through the Confirm Permit Application using Job form. To use this feature, open the Job form, navigate to the Street Works tab, and select the TTRO checkbox to indicate that a Temporary Traffic Regulation Order is required. This selection will be included in the Permit Application submitted to Confirm.

Release Notes for version v25.10a.AM

Permit Cancellation

Confirm now supports new Cancellation reasons for cancelling a Permit as present in Street Manager.

Inspection Non Compliance

Failed Inspections creates a non compliance (with a unique reference) in Street Manager and is now getting imported to Confirm as Notice Type 'Non Compliance Issued'.

Non compliance Response can be further addressed through the 'Inspection/NC Response' Action button on the permit, which triggers a workflow between the Promoter and the Authority.

Note: For more details **Non Compliance**

Area of Special Interests (Material Classifications)

Confirm now supports the full functionality of Material Classifications as in Street Manager. User can create it in Confirm and export it to Street Manager and vice versa. The Material Classification created in Street Manager is imported using Task Processor.

Note: For more details **Material Classifications**

Color Distinction for Street Works in Confirm Connect

The color for 'In-Progress' street works in the Confirm Connect WGoH map section has been updated to purple. This change helps differentiate between Proposed Street Works and In-progress Street Works, allowing users to easily identify the different stages of the Permits in the Map section.

API Notification

The API Notifications provided by Street Manager, allows integrators to receive near real-time updates whenever events occur on a work record.

Any eligible event triggers a notification that includes details about the event, such as Work Start, Permit Submitted, Inspection Outcome Accepted, Section 74 Warning Issued, etc. Once the System Administrator subscribes to the API Notifications from Street Works in Confirm, notifications will be delivered much faster, offering a smoother and more enhanced user experience.

Release Notes for version v25.00a.AM

Marking Comment as Read

It is now possible to mark the status of Comments as ‘Read’ by the Users in Confirm.

A new action ‘Mark as Read’ to mark the status of Comments as Read is available on the Comment screen.

As soon as the Comment is read ‘Read By’ field gets updated with the Username who has marked the status as read and ‘Read Time’ with the date and time when the comment is being read.

‘Mark as Read’ Action will be enabled till the Comment is read.

Note: Only users from the Organisation that received the Comment will be able to mark the Comment as read. If user from same Organization tries to mark Comment as read, then a pop up will appear with a message.

Street Manager V5 API

Confirm now supports Street Manager V5 API and V4 API version support will be deprecated soon.

Lane Rental Assessment

User can now view, add and update Lane Rental details within Confirm Enterprise like in Street Manager. Navigate to 'Lane Rental Assessment' section from the Action menu.

A lane Rental Assessment can be added or updated on any Permit at any time.

Lane Rental Assessment would be updated automatically in Street Manager when added or updated from Confirm and imported from Street Manager as a Notice Type in Confirm Enterprise after running the Street Works Transfer Agent.

Note: Authority can add and update Lane Rental details. Promoter can only view details of Lane Rental Assessment.

Under Assessment on a Permit

A new Application status as 'Under Assessment' can be performed on a Permit Application. This indicates the review status of a Permit Applications.

Inspection Responses

Confirm now supports the new Inspection responses available for Promoter and Authority after the introduction of Non Compliance in Street Manager.

User can navigate to 'Inspection Response' section from the Action menu available on any Permit.

On each Inspection where the Outcome of the Inspection is 'Failed' , Promoter User can respond either as 'Disputed' or as 'Accepted' with reason provided or 'Joint site meeting needed' by clicking on the 'reply' icon.

On the Inspection where the Promoter has responded , Highway Authority User can respond to it with responses available.

1. If Promoter accepts the Inspection, no further response available for Authority.
2. If Promoter dispute the Inspection,'Promoter accepts failed inspection','Reviewing dispute','No agreement'.
3. If Promoter respond with 'Joint site meeting needed', 'Promoter accepts failed inspection'.

Note:
1. In case the Outcome is Passed, Unable to complete Inspection or the Category is Site Occupancy, Condition, Non compliance follow up Joint site visit then the 'reply' icon is not displayed.
2. If Promoter or Authority respond with any of the responses available, that response is no longer available for Authority or Promoter.

Once the Response is sent, the Response status will be displayed in the 'Response Status' field and 'reply' icon would disappear if no further action required on the Inspection. On expanding the Inspection details further, Promoter or Highway Authority Response details will be displayed.

In case of self Promoter organisation a toggle button is available in the Inspection response popup where Promoter User can select the 'Promoter' so that Promoter responses are available and Authority User can select the 'Authority' so that Authority responses are available.

Release Notes for version v24.10a.AM

Support for Auto Deemed Grant Permit

If any Permit that had not been granted by Authority within response period time, it will be Auto Deemed from Street Manager and imported in Confirm as a Notice Type.

Following new Notice Types are introduced: -

1. Grant PAA – Deemed

2. Grant Permit – Deemed
3. Grant Permit Variation- Deemed

Note: On these Granted -Deemed Notices, the 'Grant' action will not be available any further.

Footway Closure and Close Footpath/Parking Restrictions (EToN) Options

Now a dropdown is available for Footway Closure with options from which user can select the value and set.

1. Yes, a pedestrian walkway will be provided
2. Yes, an alternative route will be provided
3. No

Also a dropdown is available for Close Footpath/Parking Restrictions (EToN) with options -

1. Yes, TTRO has been discussed with HA
2. No

Duration Challenge Responses Workflow

Highway Authorities can add a duration challenge on permits for Immediate Works using the plus (+) icon available on the Duration Challenge Assessment section.

Duration Challenge can also be added on Change Requests submitted by the Promoter using the Response icon available.

A reasonable period end date and reason for the duration challenge must be provided when adding a duration challenge.

Responding to a Duration Challenge

When a Promoter receives a duration challenge, they can respond using the Response icon, a pop up will appear with options:

1. Accept the duration challenge meaning they accept the new reasonable period date provided by the Highway Authority. Once the duration challenge is accepted the response icon will disappear and it will be imported into Confirm as Notice Type – 'Duration Challenge Acceptance'.
2. Duration Challenge not accepted meaning the Promoter does not agree with the details of the duration challenge. When the duration challenge is not accepted by the promoter it will be imported into Confirm as Notice Type – 'Duration Challenge Non Acceptance'.

By responding to duration challenge and accepting the 'reasonable period end date' this will not update the 'granted permit end date'.

Non-Acceptance of a Duration Challenge

When a Promoter does not accept a duration challenge the Highway Authority have the option to update the reasonable period end date. The Highway Authority can choose an alternative date.

If the Highway Authority chooses not to propose a new 'reasonable period end date' they can provide details on this decision.

The Promoter can respond with one of the following options:

1. Accepted: Promoter accepts the current reasonable end date provided by the Highway Authority.
2. Not accepted: Works will continue to granted permit end date.

Following a Duration Challenge Non-acceptance process, there is no requirement for a Change Request to be sent to change the Permit end date, to match the Reasonable Period end date.

Duration Challenge Non-acceptance responses will be imported into Confirm from Street Manager as:

1. Reasonable Period End Date Changed
2. Reasonable Period End Date Not Changed
3. Duration Challenge Promoter Non Accept
4. Duration Challenge Promoter Accept

Note: There will be no impact to existing functionality for EToN. New changes will only be applicable on Works created post the release. No impact on Historic Works.

Making Confirm Enterprise Actions In Sync with Street Manager

1. Confirm no longer allows an Assessor to send a Modification Request in response to Immediate Permits.
2. FPN Delivery method for Street Manager Works is updated to Street Manager. For EToN Works, Delivery method remained same.
3. Informal Overrun warning and Temporary Traffic Signal Application are now available for EToN Works only.
4. Promoter Change Request updated from Variation Application to Modified Application for Street Manager Works.
5. Response 'Modification Request' for Variation is not available in Actions for Street Manager Works. No impact on EToN Works.
6. Now, Modification Request can be created once a permit phase for Street Manager Works. After any assessment done for a permit, Modification Request cannot be further created.
7. Modified Application cannot be sent again if Modified Application (without assessment) is available on a Granted Permit.

Support for adding multiple Location options in Confirm

Displays all the Location Area Type as checkboxes i.e., Footway, Carriageway, Verge, Cycleway, Footpath. All are unticked by default.

Note: Location Area is a mandatory field for Street Manager Permits.

For ConfirmWorkzone , if no checkbox is selected and permit is created then Carriageway is ticked by default on Work details page of Permit in Confirm and if checkbox is selected and permit is created then selected options are ticked on Work details page of Permit in Confirm.

For Unattributable Works, Defective Apparatus and Connect - Carriageway is ticked by default.

For EToN works, no Location Area checkbox is ticked by default.

For Forward Planning Information Notice, no Location Area checkbox is ticked by default, and are disabled.

Support for Private Street Works in Confirm

There is a new Private Street Wizard available under the Street Works Module that allows a new Private Street record to be created on the Street Works Register. Private Street Works Notices created in Street Manager can be imported and Notices created in Confirm can be exported to Street Manager.

Note: Private Street Permit Application can be submitted by Promoters, only on USRNs that are fully or partially private.

Release Notes for version v24.00a.AM

Auto Acknowledged Inspection

If any Inspection that had not been responded by promoter for 10 working days, it will be Auto Acknowledged from Street Manager and imported in Confirm as a Notice Type 'Inspection Auto Acknowledged'.

From Street Works, upon expanding an Inspection with Response Status as 'Auto Acknowledged', following details are present within Promoter Response section.

- Response- Inspection Auto Acknowledged
- Response Date- Time of Auto Acknowledgement
- In Additional Details field, a text message will be constantly displayed as 'Note - Inspection has exceeded 10 days with no response. Inspection has now been treated as accepted for the purpose of performance based inspections.'

Note: On an Auto Acknowledged Inspection, Promoter can further respond as 'Dispute Inspection' or 'Accept Inspection' and after Promoter response, Authority can also further respond as 'Promoter accepts failed inspection'.

Investigatory Inspection

User can Import and Export Investigatory Inspections from Confirm Enterprise. New Categories and Items for Investigatory Inspections are added in Confirm Enterprise. Inspection Category 'Investigatory' will only work for EToN Works.

Note: Response is not allowed for Investigatory Inspections

Ability to perform Accept or Dispute on FPN

Now the User can perform actions like Accept, Dispute and Withdraw an Accepted FPN from Confirm and Street Manager. New actions for Accept and Dispute are available in Actions menu on FPN screen. User can Import and Export new actions.

Note: Backward Compatibility is not supported. User needs to install both Client and Task Processor to use this functionality.

Release notes for version V23.20a.AM

Close Footpath

User can now import and export 'Close Footpath' from Street Manager and Confirm respectively.

Ancillary Details

Now the User can View, Add and Remove Ancillary Details within Confirm Enterprise like in Street Manager. User can navigate to 'Ancillary details' section from the Action menu.

From '+' sign, new Ancillary records to the Permit can be added. On the Permit Notice, opened on the Street Works form, integrated modal window will appear with Map on left and Ancillary fields on right with a button 'Get Site Records' on the top.

User must add the coordinates for Ancillary Details to the Map section. On Map, multiple Ancillaries of the same type can be drawn. Once the Ancillary coordinates are populated on the Map section, then User can select the 'Get Site Records' button. This will populate all the Site records as per the Ancillary coordinates added. Then select any Site from the list that the User wants to link with the Ancillary Details.

To draw multi-point coordinates for Ancillary Details, User can select polygon or line geometry.

Note: Maximum of 10 Ancillary coordinates can be drawn on the Map section and 20 Ancillaries in a Permit.

Ancillary Details will be automatically updated in Street Manager and will be imported from Street Manager as a comment in Confirm Enterprise after running the Street Works Agent.

Further, A new checkbox as 'Ancillary Info' is available on the Works Tab of the Permit Notice, informing Users that Ancillary Detail is present on the Permit Notice.

Note: Street Manager site will request a sign in on the first attempt if your browser has not yet signed in. Once signed in, click the button once more to go straight to the item requested.

- Add and Remove functionality of Ancillary Details is restricted to only the Promoter Organisations. Authority Organisation won’t be able to Add or Remove Ancillary Details.
- Ancillary Information checkbox will be unticked and disabled for Notices like Forward Planning, Unattributable Works, Defective Apparatus and EToN Works.

Traffic Management Details

User can now view and update Current Traffic Management within Confirm Enterprise like in Street Manager. User can navigate to 'Traffic Management' section from the Action menu. Clicking the pencil icon at the top of the Traffic Management section makes the Current Traffic Management dropdown editable.

Emergency Contact and Emergency Contact Number fields will remain disabled till any of the options 'Traffic Control(Multi-way)' or 'Traffic Control(Two-way)' is selected. Once the Current Traffic Management is updated, it will automatically be updated in Street Manager and will be imported from Street Manager as a comment in Confirm Enterprise after running the Street Works Transfer Agent. Promoters will be able to see the pencil icon and for others it will not be visible.

Note: Footway Closure and Footpath Closure can be viewed in the Key Details Panel in Street Works screen

Note: From this release onwards, Current Traffic Management will be imported as Notice type "Current Traffic Management Updated", instead of Comment type.

Inspection Details and Inspection Response

User can view the Inspection Details and respond to each Inspection present on the Permit Notice within Confirm Enterprise like in Street Manager.

User can navigate to 'Inspection Response' section from the Action menu.

On each Inspection where the Outcome of the Inspection is 'Failed' , Promoter User can respond either as 'Disputed' with reason provided or as 'Accepted' by clicking on the 'reply' icon.

On the Inspection where the Promoter has responded , Highway Authority User can respond to it with 'Promoter accepts failed Inspection' by clicking on the 'reply' icon.

Note: In case the Outcome is Passed, Abortive, New category, Cancelled or the Category is Occupancy, Defect Joint, Permit Conditions then the 'reply' icon is not displayed.

Once the Response is sent, the Response status will be displayed in the 'Response Status' field and 'reply' icon would disappear if no further action required on the Inspection. On expanding the Inspection details further, Promoter or Highway Authority Response details will be displayed.

Provision to see Multiple Phases of Permit Notice in Street Works Screen

Now the User can view details of Multiple Phases of Street Works Permit Notice.

All Phases present on Works will be listed and displayed in the dropdown and on selecting any Phase the details of that Phase will be shown.

Release notes for version V23.10e.AM

The following issues were addressed as part of this release:

1. Importing automatic Error Correction Notice after Work Stop Notice changes the Permit Status of the Works.

Release notes for version V23.10b.AM

The following issues were addressed as part of this release:

1. Registration of Reinstatement from Street Manager with Registration Date as current date was getting imported as previous date in Confirm Enterprise.
2. Sampled Inspections were not imported when there were more than 500.
3. Excavation Type was changed on importing automatic Error Correction Notice when performing Work Stop/Revert Work Stop/Updating Excavation.
4. Fix for availability of 'Inspection' action in Unattributable Works. Users were not getting option to create Inspections on Unattributable Works, due to which they were not getting exported to Street Manager.
5. When New phase was created for a cancelled Works, that Works was not appearing as overlapping Works.

Release Notes for version v23.10a.AM
Support for importing the following items:

1. Duration Challenge non-acceptance Responses (HA and Promoter)
2. Ancillary Information and support for Permit Condition NCT03
3. Current Traffic Management Updates and support for Permit Condition NCT09
4. Inspection Responses (HA and Promoter)

Note: A specific comment will be imported for specific actions from the above items.

Performance Based Inspection

Street Works inspections are changing from an annual 30% sampling size to a performance-based approach. This comes into effect on the 1st of April 2023. The system responsible for generating and storing inspection sample figures, targets and for generating sample inspections is changing. This will now be done in Street Manager.

Task Processor will import the sampled inspections once a day but can be imported ad-hoc too.

Sending Category A/B/C Inspections as Routine after Street Manager's un-acceptance

Street Manager will not accept any Category B/C Inspections if there is no Sampled Inspections of corresponding category is present in the permit. It will also not accept any Category A/B/C Inspections if the number of Sampled Inspection has already reached the target set for the Promoter.

In these two above scenarios the Inspection is exported as Routine with meaningful comments added to Additional Comments fields in Street Manager and Inspection Notes in Confirm.

Generating Defect Number when importing Failed Inspections

Defect Number gets populated in Confirm when importing Failed Inspections from Street Manager. User can create another follow up Inspections with the help of the Defect number.

The following issues were addressed as part of this release:

1. New Permits are not getting imported if Traffic Management selected is 'Temporary Obstruction 15 Minutes Delay '.
2. On resending an Inspection if the 'INSP' Reference is greater than 99, they are not getting withdrawn before being recorded into Street Manager.
3. Exporting Section 58 notice with more than 3 years gets exported as 6 months.
4. Documents attached in the Occupancy Inspection for Section 74 are exported to Section 74 only and not the Occupancy Inspection.
5. When a Permit have Section 58 Restriction In Force and it do not have any Excavation, then also it ask for related Agreements.
6. Launching a Permit to open it in Street Manager from document links screen fails if the Works Ref contains '/'.
7. Street Works Transfer agent stucks at 75% for clients configured only as Promoter for interacting with Street Manager.
8. Inspection action is made available on Un-attributable works created from Confirm Enterprise.
9. New Phase Work created on cancelled work does not appear as overlapped work.

Release notes for version V23.00f.AM

The following functionality was addressed as part of this release:

1. **Send Non-sampled Category B and C Inspections as Routine Inspections.**

   The street Manager treats only Category A, B, and C inspections for Performance based Inspection sampling process. They will not consider the Non-sampled Category B and C inspections created from Confirm for their sampling process. Post April 2023 any other Category B and C inspection will not be allowed on the works. So those Inspections will need to be input as Routine Inspections. To make it consistent with the Street Manager, Confirm will now export Non sampled Category B and C Inspections to Street Manager as Routine Inspections. Sampled Category B and C inspections will be exported as Category B and C respectively to Street Manager.

   Sampled/Non-sampled Category A inspections will still be exported to Street Manager as Category A.

   Note: For old non-sampled category B and C inspection in Confirm, that have been already exported to Street Manager as Category B and C inspections will be re-exported to

Street Manager as Routine Inspections. These old Non Sampled Category B and C Inspections will be then withdrawn at the Street Manager interface and will be replaced by Routine Inspections.

2. **New Inspection Categories for Routine Inspections**

   Confirm users can now create Routine Live site and Routine Reinstatement Inspections using these two new Inspection Categories- 'Routine - Live site(SMRL)' and 'Routine - Reinstatement(SMRR)'.

   These categories can be used to Export and Import Routine Live Site and Reinstatement Inspections to and from Street Manager.

   Note: For the users, who does not see any Inspection group linked to these two new categories are requested to add the relevant Inspection groups accordingly. For an instance, add Backfill and Sign and Guarding Inspection group to 'Routine - Live site(SMRL)' and Reinstatement inspection group to 'Routine - Reinstatement(SMRR)' Inspection categories.

The following issues were addressed as part of this release:

1. Importing an Inspection after Reinstatement from Street Manager whose Works Reference contains '-S' is not getting imported into Confirm and an error email is generated for the user.
2. Street Works Wizard was crashing for specific site when using specific CDML map layers.
3. Routine/Routine- Reinstatement was exported as Live site - Routine when outcome is Passed/Abortive.

Release notes for version V23.00d.AM.19548

The following functionality was addressed as part of this release:

1. **Tenant and User settings for Public and Private tags**

   Users can now set the document visibility in Street Works to PUBLIC or PRIVATE when attaching documents at a Tenant and User level.

   This setting has been defaulted to PRIVATE at Tenant level. User can override this setting via Confirm Web Settings -> Street Manager Settings screen.

   This setting is defaulted to NONE at User level. User can override this setting via General User Settings screen. If both the settings are populated, the user level setting will take precedence over the tenant level.

The following issues were addressed as part of this release:

1. Unable to export or import Permit and Alterations due to 'close_footpath' field being made mandatory by Street Manager.
2. Permits or variations were not getting exported due to multiple documents attached at works level on different notices. After creating a permit with attachment, a comment with attachment is created on it and then the subsequent notice with attachment was not getting exported to Street Manager.

Release notes for version V23.00a.AM.19532, 01st Nov 2022

The following functionality was addressed as part of this release:

1. **Incorporate Traffic Signal changes for allowing users to set Emergency Name and Emergency Phone on selecting specific Traffic Management**

While creating a Permit or Altering it user has the option to select the Traffic Management. With this new change, user can set 'Emergency Name' and 'Emergency Phone' in the newly added fields in the wizard.

These new fields will be enabled only when user selects the Traffic Management as 'Traffic Control (Multi-Way Signals)' or Traffic Control (Two-Way Signals)'.

Note: These new fields are added in 'Confirm Web Settings - > Street Manager Settings' for Automatic Noticing from Job and Backward Compatibility.

For Backward Compatibility, 'Emergency Name' and 'Emergency Phone' will be auto-populated as 'Not provided'. These fields can be updated from Confirm Web Settings.

2. **Supporting flow of new Reinstatement- Site Subsumed and Updating Existing Reinstatement in Registration of Reinstatement**

   Introduced an additional status support 'Site Subsumed' in Registration of Reinstatement. Now, from Confirm, the user can subsume an existing site and also update an existing reinstatement.

   Site subsumed from Street Manager can be imported in Confirm and also any update in Reinstatement from Street Manager will be updated in Confirm Client on import.

   Reinstatement status 'Site combined with another site' is exported with reason 'Site combined with another site' and state as 'Subsumed' in Street Manager.

   Note: There will be no impact to existing functionality for EToN.

3. **Ability to view documents attached with Section 74 in Confirm Web**

   User can now view attached documents with section 74 overrun warnings under document section in confirm web.

   Documents attached with Section 74 (Occupancy inspection with items) can now be exported to Street Manager from Confirm Client.

4. **Unattributable Works Support**

   User can now transfer Unattributable Works from confirm to Street manager and vice-versa.

   New inspection categories are added as "Unattributable Works- Live site" and "Unattributable Works- Completed" for Unattributable Works.

   Confirm will create a 'Section 81 or Unattributed works' record in Street Manager for Unattributable Works and a corresponding inspections to this record. (same as Defective Apparatus).

The following issues were addressed as part of this release:

1. Importing Section 58 was giving forbidden error from Street Manager. Earlier it was requesting the Street Manager for each Section 58 but now it will only request for new and updated Section 58.
2. Designations start dates was getting updated in Confirm if it has a corresponding Activity in Street Manager.
3. On importing withdraw offence from Street Manager, if the 'Authorised officer name' is more than 30 characters, then it fails to import.
4. Importing an offence from Street Manager is imported with offence date as previous date. For example if the offence date in Street Manager is 30-09-2022 then in Confirm, it is saved as 29-09-2022 23:00:00.

Release notes for version V22.20b.AM.18944, 09th Aug 2022

The following functionality was addressed as part of this release:

1. **Provision to mark the documents as Public or Private for Street Work notices, FPNs and Inspections:**

For Street Work Inspections in Connect, user can now get the option to mark them as Public or Private. If a document is marked as Public then only it will be exported to Street Manager. If the document is marked as Private then they will remain in Confirm and will not be exported to Street Manager.

For EToN Street Work Inspections and rest of the entities, the document attachment screen will not have the option of Public and Private, they will work same as it was working earlier.

The same above functionality has been incorporated in Confirm client too.

The following issues were addressed as part of this release:

1. Granting a Permit immediately after importing a 'Change in Excavation' as 'Error Correction' notice on top of a Permit is giving wrong Permit Status.
2. Importing a Promoter Change Request where only Conditions are changed, is creating a Duration Variation Application (WIP). A Work Data Variation (WIP) should be created in this case.

Release notes for version v22.21a.AM.18664 (Beta), 14th July 2022

The following issue was addressed as part of this release:

1. Section 81 notices were not exported and imported due to addition of -UW in the end of the reference by Street Manager.

Release notes for version v22.11a.AM.18664 (Beta), 25th May 2022

The following functionalities has been incorporated as part of this release:

1. **Section 58 Designation (Restriction)**: Confirm now support Section 58 work-flow. Section 58 Designation (Restrictions) created in Confirm client are now getting exported to Street Manager as Section 58. Updating a Section 58 Designation will update the Section 58 in Street Manager appropriately. Section 58 created in Street Manager can now also be imported into Confirm as Section 58 Designation (Restriction). Any update like Progress or Cancel of Section 58 in Street Manager will be updated accordingly in Confirm client on import.

The following issues were addressed as part of this release:

1. Registration of Reinstatement notice from Street Manager whose works reference contains '-S' was not getting imported.
2. Repeated emails being sent to Street Works administrator for comments created on works which are not present in Street Manager. Street Manager was returning 'Not found' error in this case.
3. Cancelling an offence immediately after it is issued, sends email to Street Works administrator on each run of Street Works Transfer agent and spamming the clients.

Release notes for version v22.10a.AM.18664, 07th March 2022

The following functionalities has been incorporated as part of this release:

1. **Section 74 Overrun Warning**: Confirm will now support Section 74 overrun warning work-flow. The user will be able to enter the inspection items against the Occupancy inspection and export them to Street Manager. This will issue a Section 74 warning to Street Manager. Section 74 issued from Street Manager can now also be imported into Confirm as Comments. Promoter and Authority work-flow from Street Manager will also be imported as Comments in Confirm. New Comment types has been added in Confirm in order to support Section 74 functionality.
2. **Confirm Street Works Web Interface**: A new Confirm Web interface for Street Works has been introduced for Section 74. Users can navigate to the Street Works Web interface direct

from Confirm Client once they have s74 Warning issued. Promoter and Authority work-flow for Section 74 can be performed using this interface.
3. **Street Manager V3 API**: Confirm now supports Street Manager V3 API and V2 API version support will be deprecated soon.
4. **Duration Challenge Non Acceptance**: Duration Challenge Non Acceptance are now exported to Street Manager. Duration Challenge Non Acceptance created in Street Manager will be imported as a Comment.

The following feedback has been incorporated as part of this release:

1. Confirm will now use 2 hours instead of 24 hours when logging late Actual Start and Work Stop Notices.
2. Validations for the Agent and Owner fields have been removed while importing Notices from Street Manager.
3. 'Logged By' user contact details of a Notice are now exported to Street Manager 'Additional information' section.

Release notes for version v21.22a.AM.18143, 12th October 2021

The following feedback has been incorporated as part of this release:

1. Updates in Street Manager to ‘Total inspection units’ are now imported into Confirm as an Error Correction Notice instead of Registration of Reinstatement Notice.

The following issues were addressed:

1. Missing 'Final site registered' event in Confirm is imported from Street Manager with wrong status and sequence number.
2. The Street Works Agent now sends only one warning message after the delay period has expired and an Inspection’s documents are still unavailable at the time of sending the Inspection.

Release notes for version v21.21a.AM.18084, 1st September 2021

The following feedback has been incorporated as part of this release:

1. Updating Inspection Unit in Street Manager can now be imported in Confirm as a Registration of Reinstatement notice.
2. Updates in Street Manager to ‘Final site registered’ are now imported into Confirm as a Registration of Reinstatement - Full Notice.
3. When importing an initial Permit from Street Manager, the ‘Notice type’ and ‘Work type’ are always taken from Street Manager.
4. Inspections that have been withdrawn are now imported from Street Manager. The Street Manager ‘Reason’ on the withdrawn Inspection is imported into the Confirm ‘Comments’ field and the ‘Outcome’ is set to “Cancelled”.
5. When an Inspection, with an Outcome Status that has been set to “Cancelled”, is exported to Street Manager, the Inspection ‘Status’ is set to “Withdrawn”, ‘Reason’ is set to “Other” and ‘Details’ is populated from the Confirm ‘Comment’.
6. Updates to an Inspection in Confirm, which were exported as a comment, now update the original Inspection to withdrawn and a new Inspection is created.

The following issues were addressed:

1. A new FPN gets issues when FPN is created in Confirm and paid in Street Manager. This happens only when works reference has '/' in Confirm.
2. The email sent to system administrator on truncating the Condition Text if it is more than the maximum characters allowed, than some meaningful informations like works reference, USRN, Authority and Promoter Organisations, Notice Type and Last Update Time is included in the email along with original text and truncated text.

Release notes for version v21.20a.AM.17809, 2nd July 2021

The following feedback has been incorporated as part of this release:

1. Sending an Inspection is delayed if all the documents are not available when the Confirm Task Processor tries to send an Inspection. If the Inspection Outcome has the 'Risk Level' set to 'Higher' then default delay time is 15 minutes else 2 hours.
2. The reason for the failure of the unsent notice can be found in the 'Transfer tab' when unsent notice is overridden by the incoming notice.
3. The length of the 'Condition Text' field has been increased to 4000 characters to match the length in Street Manager.
4. Time can be specified along with date in the Work Stop notice wizard. So, the time for the Work Stop notice is now sent to Street Manager in addition to the date.
5. Wizard and Browser will now show 'Notifying Env. Health' instead of 'Outside Working Hours' for notices meant for Street Manager.

Release notes for version v21.12a.AM.17742, 3rd May 2021

The following feedback has been incorporated as part of this release:

1. Confirm now supports launching documents using Street Manager V2 API.

Release notes for version v21.12a.AM.17711, 7th April 2021

The following feedback has been incorporated as part of this release:

1. Confirm now supports Street Manager V2 API and V1 API support has been deprecated.
2. Street Manager now supports changing Excavation Type after Work Stop. Confirm creates an Error Correction Notice on importing this action.
3. Importing Reassignment of organisation for Section 81 - defective apparatus.

Release notes for version v21.10a.AM.16667, 22nd March 2021

The following issues were addressed:

1. In some cases Historic Inspections would not export if the works had previously had coordinates but didn't have any on the most recent notice.
2. For incoming notices Directions was not getting set correctly and hence the validation warnings are not showing appropriately.
3. Documents that cannot be sent earlier are resent successfully to the Street manager, whenever a retry happens on the next notice.
4. Street Manager changed the sliding rules to be based on the selected designations on the works, not those that appear on the street.
5. When Inspection is sent on-site that doesn't yet exist in Street manger" You must provide site_ids on an inspection against a work that contains a reinstatement".
6. Late submission warning appears on importing Immediate Permit Notice after 2 hours of creation.

Release notes for version v21.01a.AM.16212, 5th November 2020

The following feedback has been incorporated as part of this release:

1. Confirm was not matching the Street Manager deemed date where a Modified Applications was received where there was no Modification Request

2. Automatically append FPN payment methods and details for representations in the offence details
3. Allow the last updated date to be edited via the settings screen to allow users to fetch older updates not transferred due to outages, etc.
4. Catering for the new "Was an excavation carried out?" field in Street Manager
5. The actual start and end date of Activities (Events, Licences and Designations) can now be stored in Street Manager even if these are in the past
6. Ensure that certain types of Inspection do not cause import errors when text is too long
7. If Confirm attempts to send a Grant With Duration Challenge to Street Manager but this is rejected then ensure that the error given by Street Manager is logged
8. Help and release notes now available online as part of Confirm Web
9. Duration Challenge notices will no longer be sent as works comments if they cannot be sent properly with the Grant
10. If a Works Comment is imported on a works where the Authority is an Initiator and the Promoter is not then we will assume that the Comment came from the Promoter (currently always defaults to the Authority)

The following issues were addressed:

1. Fix the issue where Linked Inspections are not exported.
2. Automatically reply with a standard works comment when permit applications are received on streets that are not subject to permitting or are privately managed
3. Allow follow-up Works Comments to be sent to Street Manager where Historic works have been created as the result of an Inspection or FPN
4. Transfer warnings for imported late Immediate Notices were not being logged
5. Allow inspection of historic Site numbers that haven't yet been migrated to Street Manager
6. Confirm will allow a permit to slide on a Traffic Sensitive Category 3 or 4 Street if the works themselves are not marked as Traffic Sensitive (consistent with Street Manager)
7. Ensure that duplicate FPNs are not created in Street Manager if an FPN is re-sent from Confirm for any reason
8. If a document fails to upload to Street Manager Confirm should retry the upload when the next notice / comment is sent

Release notes for version v20.22a.AM.16127, 8th September 2020

The following issue has been fixed:

1. When exporting a Permit Variation the deemed date from the original Permit was being displayed in Confirm.

Release notes for version v20.22a.AM.16104, 26th August 2020

The following feedback has been incorporated:

1. Confirm reflects Street Manager PAA rules, as follows:
   - When exporting a PAA to Street Manager, if Confirm detects that Street Manager has created a Permit Application (e.g. on a second Asset Activity phase) then Confirm will update the original notice in Confirm to be a Permit Application
   - When importing a PAA or Permit application from Street Manager, Confirm will set the notice type to correspond with what Street Manager supplied and will ignore the existing EToN rules
2. Permit Deemed date is now obtained from Street Manager
3. Refusing a Variation reverts the data in Confirm to what it was prior to the Variation application
4. If a pending change is cancelled by Street Manager, because of a Works Stop before Grant, then a record of this is imported and the permit details are reverted to the values prior to the change request

5. When a permit is Revoked from Confirm an additional works comment is created so that the revoke reason is visible in Street Manager
6. Export email error now includes Notice Type and Issue Date
7. The Street Manager reference for entities is now consistently included on Imported as well as Exported items
8. Confirm will now Import any text recorded on mandatory conditions (previously ignored). Note that a bug in Street Manager means that this text is currently ignored on export.
9. A document link is created for each Works in Confirm with a URL that will launch the Street Manager for that Works.
10. If a Grant or Refuse cannot be sent to Street Manager, e.g. because the permit has deemed, then the discount will be set to 100% and the permit status in Confirm will reflect that the permit was deemed

The following issues have been fixed:

1. If Confirm is configured with multiple sets of only promoter credentials then only data for one of the promoters would be imported into Confirm from Street Manager
2. An "Unknown coordinate type" error could occur when inspecting a Registration of Non-notifiable works that had previously been imported via EToN
3. Sending an Error Correction or Works Data Variation after a Works Stop in Confirm would start a new phase in Street Manager. Street Manager does not allow changes after works stop so these notifications are now blocked on export and will generate a transfer error.

Release notes for version v20.21a.AM.16071, 27th July 2020

The following feedback has been incorporated as part of this release:

1. Set the Location area checkboxes (Footway, Verge, etc.) in Street Manager if specified in the Works location
2. Import HS2 Highway applications
3. Include Footway closure type in the works description on import and set the walkway flag on export if the works description contains "(walkway)"
4. Set default values on Organisations created on the fly, e.g. FPN Delivery Web Service URL

The following issues were addressed:

1. Not able to import registration notices if one of the sites has a depth of 0
2. Cannot export an Authority Imposed Variation if the Permit in Street Manager has attached Files
3. Excavation type is not updated when importing changes to works in progress
4. Works are transitioning to Street Manager before the transition end date
5. Sending an Inspection or FPN to Street Manager on a works still being completed under EToN should not cause subsequent notices (such as grants) to be sent to Street Manager
6. The Works Start notice of an existing works does not always transition properly if it was followed by a variation in EToN
7. Address character limit issues on export, e.g. pending_change_details, site_name
8. Ensure changes logged after Grant are recorded in Confirm as Permit Variations rather than Modified Applications.
9. Prevent payment of an EToN FPN from triggering transition of the FPN to Street Manager
10. Ensure that re-sending an Inspection that was previously sent via EToN does not then later cause "Single-row subquery returns more than one row" errors

Release notes for version v20.21a.AM.16052, 13th July 2020

The following feedback has been integrated in Confirm functionality as part of this release:

1. Default text 'None supplied' is supplied when 'reason' is required by Street Manager but not supplied by a user in Confirm
2. Unpublished documents will now also be sent if they have "[Public]" in the Document Notes. Documents will not be sent if they contain "[Private]" in the Document Notes, even if they have been published
3. Defective Apparatus, Unattributable Works (via Defective Apparatus) , Fixed Penalty Notice and Inspections are sent to Street Manager after Transition Start Date instead after Transition End Date
4. Incoming permits on partially private streets should default to public where the Road type in Street Manager is not set to "Private Street - No definition information held by Street Authority"
5. Suppress email when truncating Owner Name on import in Confirm
6. Work Stop notice time to get populated under Notification comments on Import.

The following issues were addressed:

1. The permit created between last successful connection followed by the unsuccessful connection to Street Manager should not be missed to be picked up by the Confirm Street Works Transfer agent
2. Selected designations with a DfT reference higher than 3 were not being sent to Street Manager
3. Ignore any custom inspection items that Street Manager cannot accept. These were causing export to Street Manager to fail
4. Some Whole Street Designations geometries were not being exported to Street Manager
5. Fix issue where exporting permit with Promoter organisation without any Interest gave 'Null Reference Exception'.
6. Long text in the Address field of the Secondary contact should get truncated on Export to Street Manager
7. Imported designations should not be re-exported to Street Manager when bulk transition date is passed.
8. The Additional Comments for Street Manager field is now overall truncated to 500 chars when exporting an inspection from Confirm.
9. Error Correction and other Agreements are incorporated into the Additional information sent to Street Manager
10. Fix issue where Duration Variation Import in Confirm does not update the permit end date if time not supplied
11. Variation Comments should be updated on Duration Variation Import in Confirm
12. Section 58 dates should always be converted to and from UTC in the Street Manager interface
13. Fixed an issue where it was possible for two Task Processors to process the same task if they both found two different tasks to process at exactly the same time

Release notes for version v20.21a.AM.16024, 26th June 2020

The following issues were addressed:

1. Section 58 import was not recognising change to the date format of the Street Manager extract
2. Section 58 import was not dealing with backward compatibility correctly when loading full ASD geometry
3. Exporting an Authority Comment with an attachment could fail if the most recent works notice was from the Promoter

Release notes for version v20.21a.AM.16022, 24th June 2020

Following additional Confirm functionality is integrated with Street Manager as part of this release.

1. Defective Apparatus, Utility side.
2. FPNs on Historic Works.
3. Import and export Sec 58 co-ordinates.

4. Export and Import Registration of non-notifiable works.
5. Export Confirm Phase Types as Activity Type to Street Manager.
6. Export Unattributable works (with Defective Apparatus workaround)

The following issues were addressed:

1. For Defective Apparatus, Occupancy and Permit Condition inspections we were populating Street Manager from the disabled Defect Notes field rather than the enabled Comments field.
2. Fixed an issue where an "Object has been changed by another process" error could occur when importing Defective Apparatus updates, such as Acceptance.
3. Fixed an issue where error email and logs were generated when a permit is granted in Street Manager without Duration Challenge and imported in Confirm.
4. Permit Date and Status were not set when importing Duration Variations.
5. Fix an issue where documents were not sent to Street Manger when attached to Defective Apparatus inspection from ConfirmConnect.
6. Notice Deemed information were being erroneously transferred to Street Manager when transitioning historic works.
7. For forbidden access errors, Confirm will now stop retrying sending the notice, as manual intervention is required to fix the issue.
8. Dates were not importing correctly for Section 58 restrictions

Release notes for version v20.14a.AM.15597, 2nd June 2020

Following additional Confirm functionality is integrated with Street Manager as part of this release.

1. Updating Transfer warning generation to recognise the new, shorter time scale for providing works start and stop notices (reduced from 24 hours to 2 hours).
2. Update the deemed date logic for PAAs (now 28 calendar days rather than 1 calendar month) for PAAs interfaced with Street Manager.

The following feedback items and issues reported in previous releases have been fixed:

1. Automatically default the Outcome details from the Confirm Inspection Outcome name if no comments were entered.
2. Street Works Transfer agent should not revert EToN fixed penalty notice status from Resolved to Penalty Sent.
3. Street Works Licence Notice Type should be deduced properly during export to Street Manager.
4. The Permit scheme for an application should be determined from the Street Interests on import from Street Manager and is not always use the system default "dummy" permit scheme.
5. The Duration Challenge notice is now created in Confirm when importing a "Granted with duration challenge" permit decision from Street Manager.
6. Registrations where trenches are defined as polygons are now being exported to Street Manager.
7. Fix the issue where if one of the new Apparatus Inspection Categories is used from ConfirmConnect then the resulting works are incorrectly classified as "Unattributable works".
8. Fix the issue where if an application from Confirm is rejected by Street Manager because of a lack of early start reason (in the notice comments) it is not possible to correct this if a subsequent notice was added in Confirm before the first notice was sent. A default early start reason is now added automatically.
9. Fix the breaking changes introduced by Street Manager API where works that use the new "Works for road purposes" Activity Type in Street Manager cannot be imported into Confirm.
10. For any error emails generated on export, include the email address of the 'logged by user'.
11. Confirm was not allowing Granting of non-immediate permits to be exported to Street Manager after the Works Stop.

Release notes for version v20.13a.AM.15573, 4th May 2020

Following additional Confirm functionality is integrated with Street Manager as part of this release.

1. Defective Apparatus (Section 81), Authority side.
2. Inspection of Historic Works.
3. Importing Section 58 details.
4. Disabled the LondonWorks (Central Street Works Register) interface.

The following feedback items and issues reported in previous releases have been fixed:

1. Fix issue where inspection site details were not being exported if the site was not registered in the most recent works phase.
2. Ignore various "works created" events in Street Manager to prevent unnecessary email alerts.
3. Authority initiated inspections (Defective Apparatus and Historic Inspections) should be sent to Street Manager after Transition End date.
4. Fix issue where an new FPN is not imported if it is accepted before the agent next runs.
5. Confirm Inspection Comments should be appended to Street Manager Additional comments where Outcome details do not exist.
6. Send works to Street Manager automatically only if Transition Start Date has passed.
7. Updating the lookup SQL so that Street Manager agent flag old condition types 3 and 13 as not dead.
8. Use authority credentials in Street Manager agent to send out FPNs to Street Manager.
9. Inspections with Apparatus category should be sent to Street manager.
10. Defective apparatus and Street Works Licences now gets sent over EToN (prior to transition) when the Street Manager Agent is used.
11. Carry forward early start agreements from the PAA to the Permit Application.
12. Multiple fields sent together in a text to Street Manager now have dot(.) followed by space as a delimiter for better readability.
13. For importing data from Street Manager, Confirm now uses Authority details in preference to promoter credentials when both are available.
14. User facing error message is now displayed in Street Works transfer tab when a Notice sent to Street manager has no early start reason supplied.
15. Include user who logged notice on export error emails and Street Name, Town, Ward, Area and Contract area on import error emails.
16. Notice should get sent successfully even if it has Section 58 designation selected. In this case Designation is not sent along with Notice.
17. Fix daylight saving conversion issues for offence and reinstatement dates.
18. Improve error handling upon encountering Access Restricted issues in Street Manager.
19. Fix breaking changes to Street Manager interface from Street Manager API changes on 16th and 30th April.

Release notes for version v20.12a.AM.15542, 26th Mar 2020

Following additional Confirm functionality is integrated with Street Manager as part of this release.

1. Automatic transition of ongoing works after deadline.
2. Export Notices to Street Manager as Permits.
3. Support ongoing targeting of specific Authorities for Street Manager vs EToN post transition (to support Promoters that operate in Wales).
4. Add a "Grant with Duration Challenge" notice type so that Grants followed by Duration Challenges can be sent from Confirm without relying on the send delay.
5. Automatically extract Refusal Codes from refusal comments being sent to Street Manager.
6. Dealing with text that might be truncated on import into Confirm (e.g. Conditions). Any truncations are notified via an email alert containing the un-truncated text.
7. Export Events and Diversions from Confirm to Street Manager as activities on the map.
8. Export Section 50 Licences from Confirm to Street Manager as activities on the map.
9. Export Section 58 Restrictions Designations from Confirm to Street Manager as activities on the map.

The following issues reported in previous releases have been fixed:

1. Do not create duplicate Inspections in Street Manager when an existing Inspection is updated in Confirm.
2. Export site id as part of inspection items only if it is a reinstatement inspection and having a registration of reinstatement against the site.
3. Stop caching of Street Manager system settings in Confirm that causes Street Manager transfer errors.
4. Fix creation of Workstreams on the fly, broken by Street Manager API changes.
5. If works is created, completed and registered on the same day then the registration details of site 1 are not imported correctly.
6. Organisation Workgroup seed numbers are no longer required to import Permit Applications from Street Manager for Organisations that you Initiate for
7. Fix breaking changes to Street Manager interface from Street Manager API changes on 19th and 26th March.

Release notes for version v20.11a.AM.15514, 27th Feb 2020

Breaking change:

1. The Confirm Street Manager interface is now deployed as part of a full Task Processor installation, working in "decoupled" mode. The previous installation mechanism of extracting a zip file and using the Windows Task Scheduler is no longer supported.

Note: This decoupled instance of Task Processor needs to be installed on a separate machine from the main Task Processor as two instances of the Task processor cannot work on one machine. For installation details, you may refer to Confirm Task Processor documentation, and 'setup' section therein. If you have been using earlier versions of Street Manager interface through the StreetManagerAgent.zip folder files, you need to stop the old Windows scheduled task and use the Task Processor.

The Street Manager agent process has also been enhanced to automatically run the latest versions of the lookups SQL files the first time it runs, so there is now no need to run these manually after upgrades.

The following issues reported in previous releases have been fixed:

1. Prevent acceptable inspection items from getting exported to Street Manager.
2. Fix issue where Third Party Report and Routine Inspections that have no items or a mix of Reinstatement and SLG items are not exported.
3. Ignore items that are not configured for export, e.g. Inspections that are for internal purposes only.
4. Allow user to specify Role when entering Street Manager API credentials in Confirm Web Settings Screen.
5. Same Comments getting exported to Street Manager repeatedly.
6. Authority Imposed Variations on a Street having Designation is not being accepted by Street Manager.

Release notes for version v20.01a.AM.15076, 10th Feb 2020

Breaking change:

1. Administering the Street Manager Agent from within Confirm Scheduled Tasks screen.

Note: As essential configuration to breaking change above, upgrading the Lookup Tables as part of Street Manager agent upgrade will populate Street Manager Agent <version> in the Notes section of Street Works Transfer agent in the Scheduled task screen. Like for the current release, <v20.01> will be populated. After upgrade, the Street Works Transfer agent need to be enabled for Street Manager agent to process tasks. Suspending the Street Works Transfer agent will suspend the Street Manager agent as well.

Following additional Confirm functionality is integrated with Street Manager as part of this release.

1. FPNs export and import.
2. Exporting FPN status changes (e.g. paid) from Confirm to Street Manager.
3. Inspection import from Street Manager in to Confirm
4. Create Workstreams on-the-fly for new Promoter Districts on export from Confirm to Street Manager.
5. User Interface for configuring Street Manager URLs and credentials through Street Manager Settings screen from with Confirm Web Settings.

Following issues reported in previous releases have been fixed:

1. Enable the Street Manager agent to work through a proxy.
2. When Inspection from Confirm splits in two at the Street Manager end, only the items relevant to the inspection type in Street Manager should be added to it.

Confirm Street Manager support:

1. For any issues and queries regarding Confirm Street Manager agent, send an email to ConfirmSMsupport@pb.com

Release notes for version v20.01a.AM.15049, 13th Jan 2020

Following additional Confirm functionality is integrated with Street Manager as part of this release.

1. "Proxy" web service to allow documents in Street Manager to be viewed without the need for user to log in to Street Manager.
2. Catering for multiple authorities sharing a single Confirm system (multiple sets of Street Manager credentials).
3. Registration of Reinstatement (Import in to Confirm and export out of Confirm to Street Manager).
4. Works Reference Special Characters - Convert EToN supported '_' to Street Manager supported '/' in Works Reference and vice versa when works transferred from one system to another.
5. Allow matching of Condition Text to NCT codes by convention.
6. Authority Imposed Variations.
7. Multiple Phases.
8. Forward Planning notice.
9. Duration Challenge Non-acceptance.

Release notes for version v20.01a.AM.15031, 18th Dec 2019

Following additional Confirm functionality is integrated with Street Manager as part of this release.

1. Works Data Variations.
2. Duration Variations and Duration Challenges.
3. Refuse a PAA, Refuse a Permit, Refuse a Variation.
4. Revoke a Permit.
5. Permit Cancellation.
6. Revert Actual Start.
7. Revert Work Stop.
8. Works comments. Includes all Confirm comment types, e.g. Promoter, Authority, Interested Party and FPN comments and Informal Overrun Warnings.
9. Generation of email alerts to the agent supervisor on import and export errors.
10. Historic EToN Condition Types have been flagged as dead so they don't clutter up the wizards.

Following issues reported in previous releases have been fixed:

1. Permit export to Street Manager failing when exporting Permit without comments, where early start agreement is not required.

2. Addressing breaking changes introduced by Street Manager on the 12th December.

Release notes for version v20.01a.AM.15020, 5th Dec 2019

Following additional Confirm functionality is integrated with Street Manager as part of this release.

1. A new organisation 'STWRKS' can be added as recipient to a works, in which case the Street Manager agent will always talk to the Street Manager system for that works. Any works downloaded from Street Manager in Confirm will automatically add 'STWRKS' as recipient to that works and in Confirm.
2. Create a PAA notice. Grant it to be progressed to PA notice.
3. Modified Application in response to a Modification Request.
4. Create Modified application directly on a Permit notice.
5. New inspection items relevant to the Street Manager system.
6. Published attachments with works in Confirm are uploaded to Street Manager system.
   - Links to documents attached in Street Manager are downloaded in Confirm which user can navigate to view the attachments.

Release notes for version v19.23a.AM 14595 , Sep 10th 2019

This is the first available beta release of Confirm Street Manager agent. Following functionality is part of this release

1. Confirm Street Manager agent as a separate package, which can be installed and upgraded without need to upgrade the other Confirm components.
2. Confirm Street Manager Interface documentation, which describes the overview, supported actions, installations instructions and FAQs for the Street Manager agent.
3. New Database settings to allow storing Street Manager API credentials to access Street Manager API as a Promoter and Authority.
4. Street Manager agent capability to push notices created in Confirm to Street Manager system and pull notices created in Street Manager system in to Confirm.
5. Following Street Manager actions (notices) are integrated with Confirm Street Manager agent for data push and pull:
   - Create a standard and immediate permit notice.
   - Grant a permit notice.
   - Issue a Work Start notice.
   - Issue a Work Stop notice.
6. Following Street Manager actions (notices) are integrated with Confirm Street Manager agent for pushing data to Street Manager from Confirm:
   - Inspections

Supported Confirm versions:

Confirm v18.2 onward support the Street Manager interface.

Installing and Configuring the Confirm Street Manager Agent:

For On Demand clients:

For On Demand clients the Confirm team will install and configure the Street Manager interface. Please get in touch with the Confirm technical support team for any queries.

For On Premise clients:

Download the Street Manager adapter from http://store.pbinsight.com/promo/4989413400

Then refer to the installation and configuration section of this document to configure the Confirm Street manager interface.

Performance based Inspection Sampling

- **If a Promoter has no sample inspections assigned to them in Street Manager and we carry out an Inspection on them, will it go to Street Manager and if it does what will it go as?**

  When the Street Manager rejects these Inspections, Confirm will recognise it automatically and will resend them to Street manager as routine on the next run. Inspection comments will also be appended with the resend information.

- **Will the Confirm restrict the creation of Sampled Cat B/Cat C Inspections from the Programmed Inspection screen?**

  Programmed Inspection Screen will no longer be able to generate sampled B and C inspections.

- **If a Routine Inspection is already programmed in Confirm, will it be superseded with a Sample Inspection if Street Manger generates a Sample for the same permit?**

  Routines will not be treated as sampled in Street Manager.

  The following are the criteria for an Inspection to be included in the sample list, per category:

  1. Category A - undertaken during the progress of the Works.
  2. Due to short-term nature of category A sites, Street Manager will determine the target and track the progress towards it but will not generate samples.
  3. Inspectors are expected to select category A sites at random, with the use of API and/or in-house tools and procedures.
  4. Category A Sample inspection can be recorded once the Inspection quarter has been started and the target number set.
  5. Caution: Category A Sample inspections cannot be recorded once the target has been reached or the quarter has been stopped.
  6. Category B - Undertaken within the six months following interim or permanent reinstatement date i.e. the reinstatement date specified when added. Work records eligible for this category would be those with a reinstatement carried out less than six months ago and would expire from sampling when the latest reinstatement was six months old or greater.
  7. Category C - Undertaken within the three months preceding the end of the guarantee period for permanent reinstatement only. Work records eligible for this category would be those with a guaranteed end date coming up within the next 3 months and would expire when the end date is reached.

- **Will Confirm clear out any pre–April 2023 Sample Inspections that have not had an Inspection outcome recorded?**

  It is advisable for customers to send out all the pending Inspections before April 2023 to Street Manager. If the 'Delete on Expire' flag is checked then we are planning to delete them. But things are still in progress. Once Street Manager generates samples, all the old samples will be removed in Confirm.

- **If Cat A's are not included how are these generated? How do we add them as sampled if now the check box will be deactivated? If we are generating in Street Manager and were**

to decide to have the inspectors undertake and record their Inspections directly into Street Manager would Confirm pick that up and still be used for the reporting?

Using what's going on from Confirm Connect. Also can be done manually by creating Programmed Inspections. Street Manager will treat Cat A as sampled even if it is sampled or not.We are planning to follow the same process we were doing earlier. Our utility will do that based on the Streets, Routes assigned for the Action officers. Maximum Inspection allowed etc.

- **How is the invoicing/charging going to work if we don't have the agreements from the utilities?**

  Inspection Units must be discussed and agreed amongst Authority and Promoters before starting the quarters in the Street Manager interface.

- **Will we still be able to do additional Cat A/B/C beyond the sample numbers or will we need to select a Routine option?**

  Yes. But Street Manager will reject them after they passed their Targets and Confirm will resend them again as Routine on the next run.

- **How Performance Based Inspection Sampling process looks like in Street Manager?**

  Routines will not be treated as sampled in Street Manager.

  The following are the criteria for an Inspection to be included in the sample list, per category:

  1. Category A - undertaken during the progress of the Works.
  2. Due to short-term nature of category A sites, Street Manager will determine the target and track the progress towards it but will not generate samples.
  3. Only the HA admin can add, edit and remove Promoters from the Performance Based Inspections list, as well as view, set and update their quarterly Targets.
  4. Separate targets for A, B and C categories need to be set for a Promoter, before samples can be generated and outcomes recorded for that Promoter.
  5. Any number of Promoters can be added to the system, but the number of Works selected for Sample Inspections, at any single time, is limited to 4000.

  Example: at the start of the quarter

  A Promoter was set, with a target of 10 Cat B Inspections.

  1. Depending on the choice made by the HA admin, assuming enough eligible Works records available:
  2. Requesting up to 33% would results in 3 Sample Inspections being generated.
  3. Requesting up to 66% would results in 6 Sample Inspections being generated.
  4. Requesting up to 100% would results in 10 Sample Inspections being generated.

  Example: during the course of a quarter

  A Promoter was set, with a target of 10 Cat B Inspections.

  1. 5 Cat B Inspections have already been conducted, during the quarter, and their outcomes recorded as: “Pass”, “Fail - Low” or “Fail - High"
  2. Depending on the choice made by the HA admin, assuming enough eligible Works records available:
  3. Requesting up to 33% would results in no additional Samples.
  4. Requesting up to 66% would results in 1 Sample Inspection being generated.
  5. Requesting up to 100% would results in 5 Sample Inspections being.

  Example: at the end of the quarter

  A Promoter was set, with a target of 10 Cat B inspections.

1. 10 Cat B Inspections have already been conducted, during the quarter, and their outcomes recorded as: “Pass”, “Fail - Low” or “Fail - High”.
2. System will not generate any further Cat B Sample Inspections for that Promoter, as the target was met in full.

- **When Street Manager user interface will be switching onto the new Performance based Inspection process?**

  Street Manager will be switch to their new Interface for Performance based Inspection process on 30th March 2023. Street Manager admin users can then enter their Promoters, set their Targets and start the quarter later.

- **What will happen to the additional Category B and C that are send on a Works post April 2023?**

  Street Manager will reject those additional inspections and Confirm will resend it again as routine. Inspection comments section will be appended with the resent information.

- **Will Street Manager rejects any Category A Inspection that exceeds the Target specified for Promoter post 1st April?**

  Yes, Street Manager will reject those Inspections and Confirm will resend it again as routine. Inspection comments section will be appended with the resent information.

- **What is expected from customers on 1st April?**

  Authorities are expected to enter their Promoters and enter their Inspection units after an agreement with their Promoters, set the target and start the quarter. They can then use Confirm Inspection target screen to generate Sample Inspections and Import them into Confirm as Programmed Inspections.

Street Works - FAQ

- **What is Ancillary Information functionality**?

  Ancillary information is additional information that can be added after a Permit is submitted by the Promoter.

- **How does the Ancillary Information Work flow managed in Confirm?**

  Now the User can View, Add and Remove Ancillary Details within Confirm Enterprise like in Street Manager.User can navigate to 'Ancillary Details' section from Action menu.

- **What happens when an Ancillary Information is created / added on a Permit?**

  Once Ancillary Information is added on a Permit from Confirm, it will automatically be updated in Street Manager and imported from Street Manager as a comment in Confirm Enterprise after running the Street Works Agent.

- **Can the Ancillary Information work flow be customized to specific project requirements?**

  No, Confirm Ancillary Information work flow strictly follows the guidelines provided by the Street Manager.

- **How can Confirm stakeholders stay updated on the progress of the Ancillary Information Work flow?**

  A new check box as ‘Ancillary Info’ is available on the Works Tab of the Permit Notice, informing Users that Ancillary Detail is present on the Permit Notice.

  Further navigating from Action menu, User can see each Ancillary Information present on the Permit with its Status. History is also updated of Permit on Confirm Enterprise.

- **Can a User later add update Ancillary Information on top of already created Ancillary Information on a Permit in Confirm?**

  No, existing Ancillary Information can't be updated but new Ancillary Information can be created on a Permit.

- **How many Ancillary records can be added to a Permit Application in total?**

  A maximum of 20 Ancillary Information records can be added on a Permit Application.

- **What happens when an Ancillary record is removed in Confirm?**

  The Status of Ancillary Information record will be updated with 'Removed' and in addition Removal Date and Removal Reason will be added on the record.

- **What if the USRN selected during adding Ancillary Information does not exists in the Database and Ancillary details are added?**

  If USRN does not exist in the Database then it will take the Provisional Street set in the system for that USRN.

- **How many coordinates can be added to the Map section while adding an Ancillary record?**

  A maximum of 10 coordinates can be added to the Map section while adding an Ancillary record.

- **What is Current Traffic Management update functionality in Confirm?**

  The type of Traffic Management currently present on the Work Site can be entered as part of the Permit Application.

- **How does the Current Traffic Management update Work flow managed in Confirm?**

  User can now view and update Current Traffic Management within Confirm Enterprise like in Street Manager. User can navigate to 'Traffic Management' from Action menu. Clicking the pencil icon at the top of the Traffic Management section makes the Current Traffic Management drop-down editable.

- **Can a highest Traffic Management option be updated from Confirm?**

  Yes, a highest Traffic Management option can be updated from Confirm while creating a new phase or by Work Data Variation or by Modified Application for a Permit.

- **Can User update the Emergency Contacts of a Highest Traffic Management in Confirm?**

  Yes, Emergency Contacts of the Highest Traffic Management can be updated from Confirm while creating a new phase or by Work Data Variation or by Modified Application for a Permit, if 'Traffic Control(Multi-Way Signals)' or 'Traffic Control(Two-Way Signals)' is selected.

- **What happens when a Current Traffic Management update is triggered?**

  Once the Current Traffic Management is updated, it will automatically be updated in Street Manager and will be imported from Street Manager as a Notice in Confirm Enterprise after running the Street Works Transfer Agent.

- **How can Confirm stakeholders stay updated on the progress of the Current Traffic Management update Work flow?**

  On navigating from Action menu, the User can see Current Traffic Management present on the Permit and History is also updated of Permit on Confirm Enterprise.

- **Can a User later update Current Traffic Management update on top of already updated Current Traffic Management in Confirm while the Work is In Progress?**

  Yes, User can later update Current Traffic Management.

- **Can a User later update Current Traffic Management update on top of already updated Current Traffic Management in Confirm while the Work is Stopped or Cancelled?**

  No, User cannot update Current Traffic Management while the Work is Stopped or Cancelled or not In Progress.

- **Can a User update the Emergency Contacts for an existing or new Permit that has Traffic Management set other than 2-way or Multi ways signals?**

  No, the User cannot update the Emergency Contacts, if Traffic Management set other than 2-way or Multi ways signals.

- **How is Inspection response work flow triggered in Confirm?**

  Users can see all the Inspections and a ‘reply’ icon will be available at the end of each record. On clicking the ‘reply’ icon a pop-up screen will open with the options available for the User to select.

- **Who can respond to Inspections?**

  On each Inspection where the Outcome of the Inspection is 'Failed', Promoter User can respond either as 'Disputed' with reason provided or as 'Accepted' by clicking on the 'reply' icon. On the Inspection where the Promoter has responded, Highway Authority User can respond to it with 'Promoter accepts failed Inspection' by clicking on the 'reply' icon.

- **What is the Inspection responses work flow in Confirm?**

  User can view the Inspection Details and respond to each Inspection present on the Permit Notice within Confirm Enterprise like in Street Manager. User can navigate to 'Inspection Response' from the Action menu.

- **What are the Inspection categories that can be responded via Confirm?**

  Inspection categories that can be responded via Confirm are Category A, Category B, Category C, Third Party Report, Routine - Live site, Routine - Reinstatement, Defect Follow Up, Defect Follow Up Completion, Apparatus, Unattributed Works.

- **Can a Confirm User respond to an historic Inspection record?**

  Yes,a Confirm User respond to an historic Inspection record.

- **How a Confirm stakeholder stays updated with the inspection response work flow?**

  Once the Response is sent, the Response status will be displayed in the 'Response Status' field and 'reply' icon would disappear if no further action required on the Inspection. On expanding the Inspection details further, Promoter or Highway Authority Response details will be displayed.

- **What is the Start and End Quarter work flow in Confirm?**

  The ability of administrator Users to Start and End Quarter for their Performance based Inspection process via Confirm.

  Users can start the Quarter on or after the first day of the Quarter. Once the Quarter is started all the expired Sample Inspections will be removed from Confirm on next ‘Sample Inspection’ import. On Starting the Quarter, the Start Quarter button disappears, and the End Quarter button will appear. End Quarter button will be in disabled mode till the end date of the Quarter is reached.

- **When and where a User can see these Start and End Quarter options in Confirm?**

  A new Start or End Quarter option is available on Sample Inspection Target screen in Confirm. User can Start the Quarter on or after the first day of the Quarter and can End Quarter on last day or after the end of the Quarter. Start and End Quarter option will be available only for Users who have access to ‘Start Or End Quarter (Security)’ under User Security.

- **Are these options driven from User security?**

Update or Add access to Start or End Quarter is required to enable the Start Quarter or End Quarter button.

- **Where can I find more information or support regarding the Ancillary Information, Current Traffic updates, Inspection responses and Start and End Quarter Work flow in Confirm?**

  For more information or assistance with the Ancillary Information Work flow in Confirm, please refer the Confirm Interface with Street manager release notes help documentation along with the field mapping or reach out to the Brightly Confirm support team.