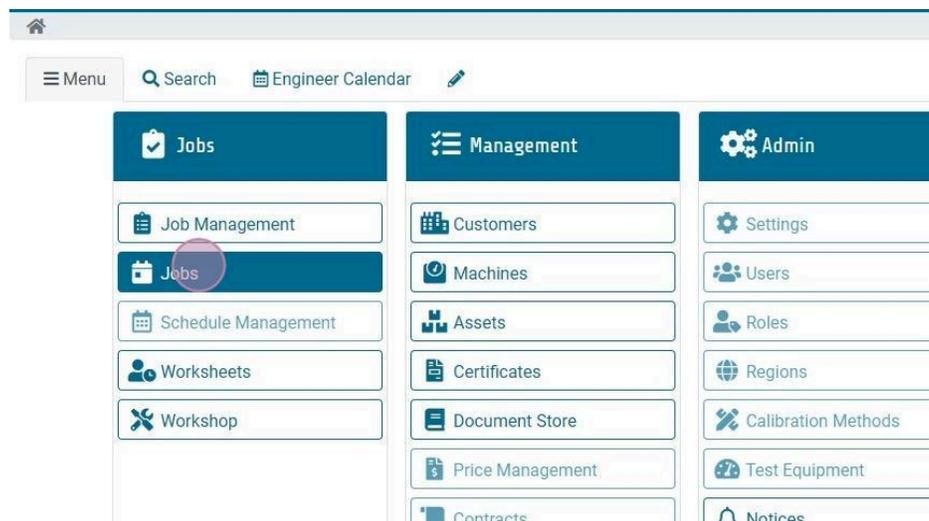


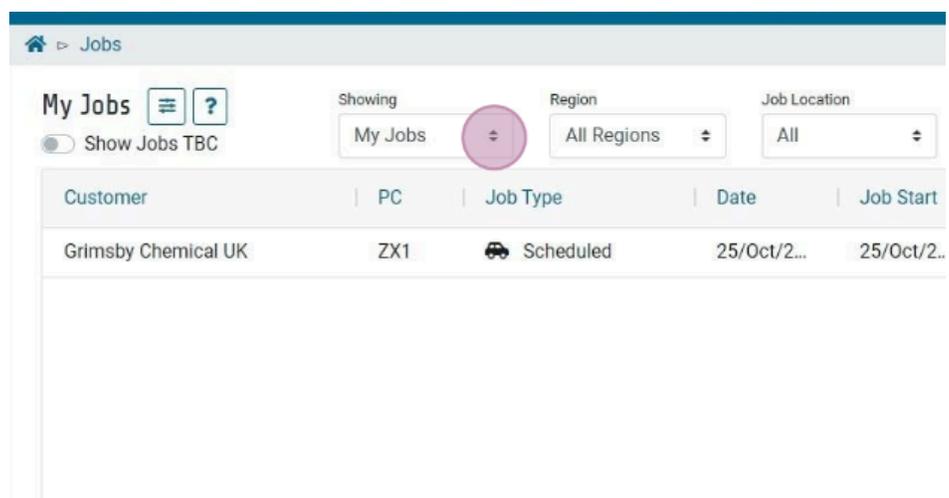


Completing a Job - Engineer's Guide (in Jobs V2)

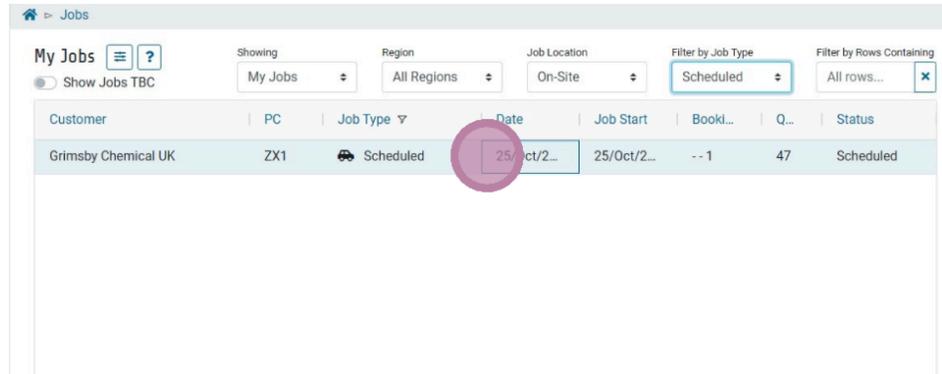
1. From the Dashboard, Click "Jobs"



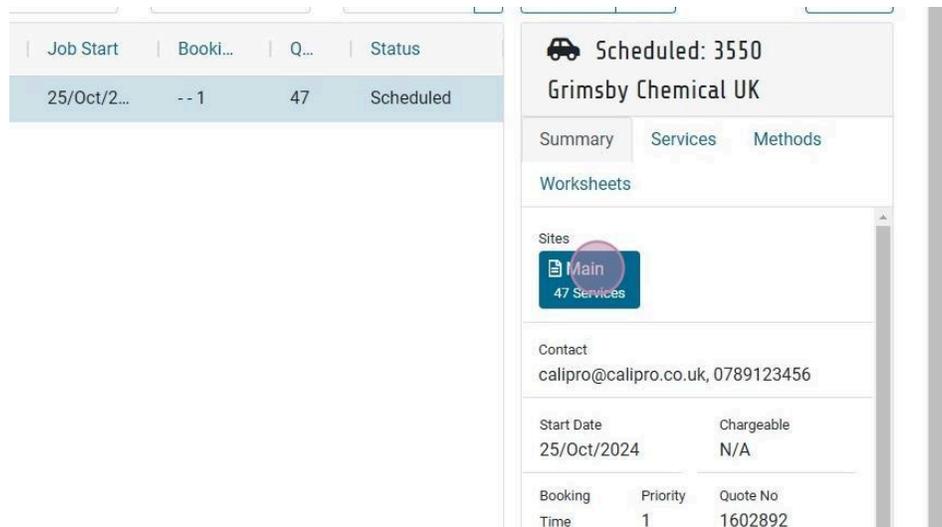
2. Filter the list by selecting from the "Showing", "All Regions", "Job Location" and "Job Type" drop-downs. Once chosen filters will be remembered and so should only need to be set once.



- Click on the selected customer.



- Click on "Sites" to open the Site Report. This is also available from the Summary Tab within the Job Sheet.



- Check the report, make any necessary changes and click "Update" to save.

Site Report for Grimsby Chemical UK (Main)

Address: Primary Site Lane, Some Industrial Estate, Demoville, Leics, ZX1 1AA. Last Review Date: _____, Last Reviewer: _____

As Found Readings Required?
 Adjustment Prior to Calibration?
 Recalibration Date on Stickers?

Induction Required?
 Parking
 Mechanical Aid Available?

PPE Requirements: _____

Site Restrictions: _____

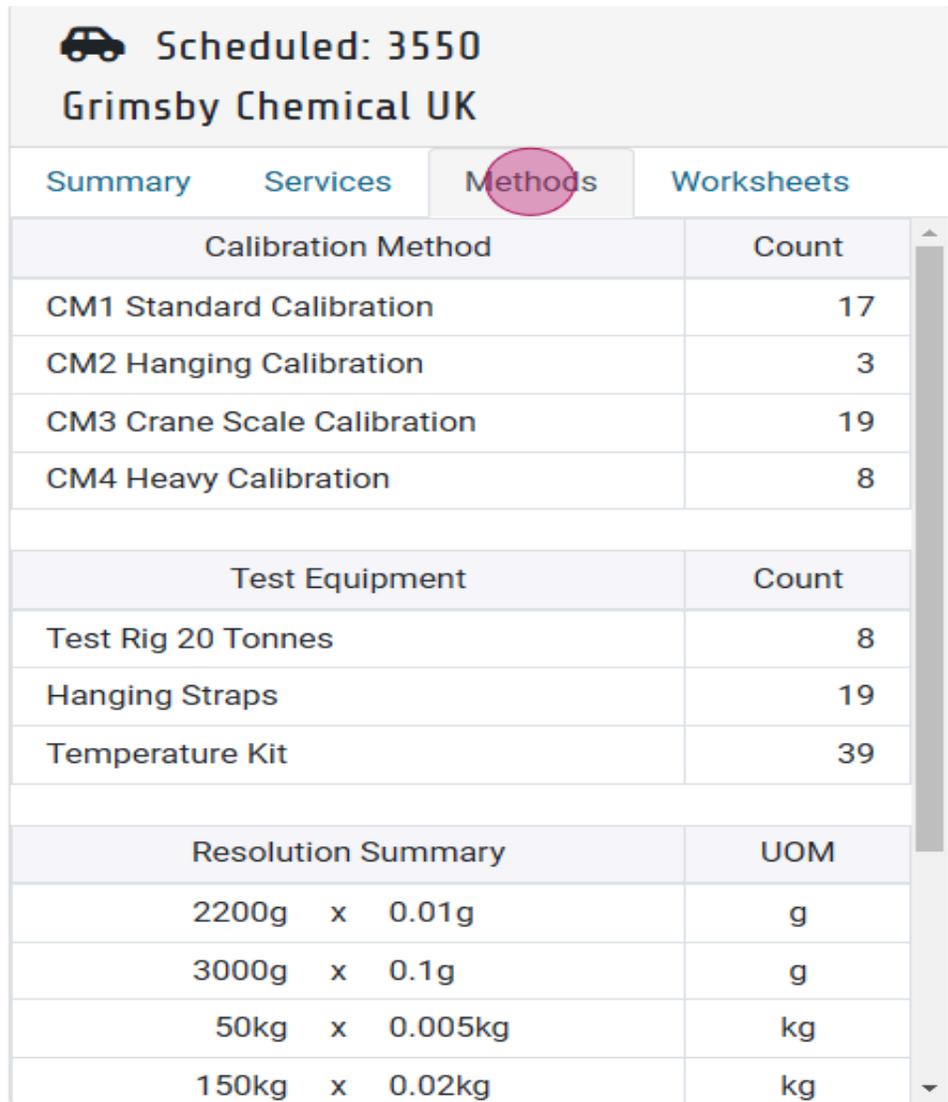
Access Time Restrictions: _____

Notes: _____

Review Conducted

6. Click "Methods"

This will show you the different methods and test equipment required.



Scheduled: 3550
Grimsby Chemical UK

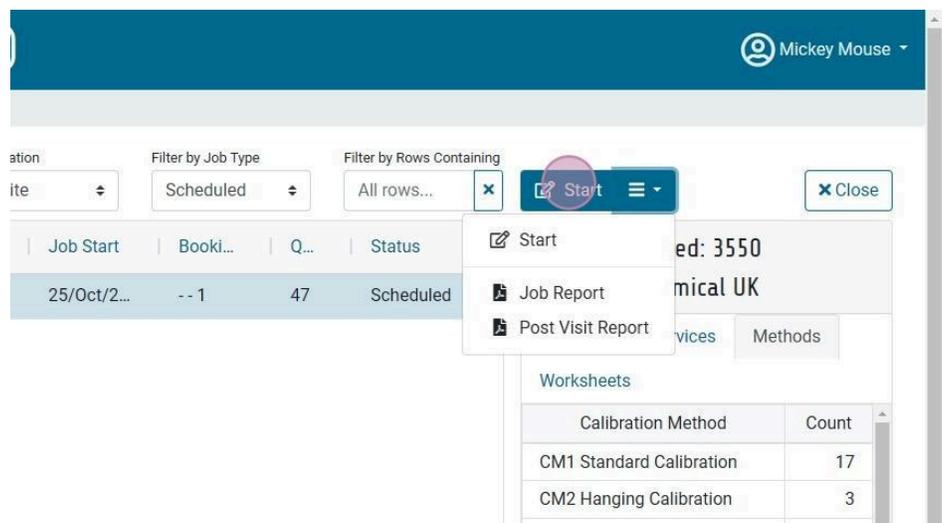
Summary Services **Methods** Worksheets

Calibration Method	Count
CM1 Standard Calibration	17
CM2 Hanging Calibration	3
CM3 Crane Scale Calibration	19
CM4 Heavy Calibration	8

Test Equipment	Count
Test Rig 20 Tonnes	8
Hanging Straps	19
Temperature Kit	39

Resolution Summary	UOM
2200g x 0.01g	g
3000g x 0.1g	g
50kg x 0.005kg	kg
150kg x 0.02kg	kg

7. Click "Start"



Mickey Mouse

Filter by Job Type: Scheduled

Filter by Rows Containing: All rows...

Start

Job Start	Booki...	Q...	Status
25/Oct/2...	-- 1	47	Scheduled

ed: 3550
Grimsby Chemical UK

Services Methods

Worksheets

Calibration Method	Count
CM1 Standard Calibration	17
CM2 Hanging Calibration	3

8. Update the "Induction", "Job Start Time", "Duration" and "Travel" fields

Work being completed.

Job Sheet Date: < 29/11/2024 > Fri 29/Nov/2024

Induction: Not Required **Attended**

Job Start Time: 15:49

Job Duration: 00:00

Travel: --:--

9. Click "Select Date & Update" to save.

Cancel **Select Date & Update**

Service Only (Oc...	Service Only	Incomplete
Service Only (Oc...	Service Only	Incomplete
Service Only (Oc...	Service Only	Incomplete

10. Click on the service you wish to complete..

cheduled Grimsby Chemical UK Started

chedules

Filter by Action: All Filter by Service Added: All Filter by Rows Containing: Filter...

Set Action

Schedule	Service	Action	Action Detail	History
Service Only (Oc...	Service Only	Incomplete	Service Only	Action Incomplete
Service Only (Oc...	Service Only	Incomplete	Workshop	
Service Only (Oc...	Service Only	Incomplete	Parts Used	
Service Only (Oc...	Service Only	Incomplete	Notes / Parts Required	
Service Only (Oc...	Service Only	Incomplete		

11. Click the smart button. The action here will depend on the type of service. Where no Certificate is created "Set Action" will be the default. But any kind of Certificate will be a "New Cert". The adjoined menu contains all available options and the button is the most likely based on the status.

If the service can't be completed then "Set Action" would be chosen from the dropdown and an appropriate action/reason entered as to why it wasn't.

Customer: Primary Site
Job Status: Started

Filter by Action: All | Filter by Service Added: All | Filter by Rows Containing: Filter...

Schedule	Service	Action	Action Detail	History
Service Only (Oc...	Service Only	Incomplete	Service	Action
Service Only (Oc...	Service Only	Incomplete	Service Only	Incomplete
Service Only (Oc...	Service Only	Incomplete	Workshop	
Service Only (Oc...	Service Only	Incomplete	Parts Used	

12. Select the relevant option from the "Action" drop-down list.

26/Apr/2025 | Active

Notes (Internal Only)

Action: Complete | Action Date: Fri 29/Nov/2024 | Asset Status (Update): Active

Parts Used: Part Description

13. Check the “Asset Status” is correct. If necessary, use the drop-down list to change it.

TIP!

A screenshot of a software interface showing the 'Asset Status' dropdown menu. The menu is open, displaying options: 'Active' (highlighted in blue), 'Unable to Locate', 'Decommissioned', and 'Workshop'. The current status is 'Active'. A pink circle highlights the dropdown arrow. The background shows a form with fields for 'Action Date' (Fri 29/Nov/2024) and 'Parts Used'.

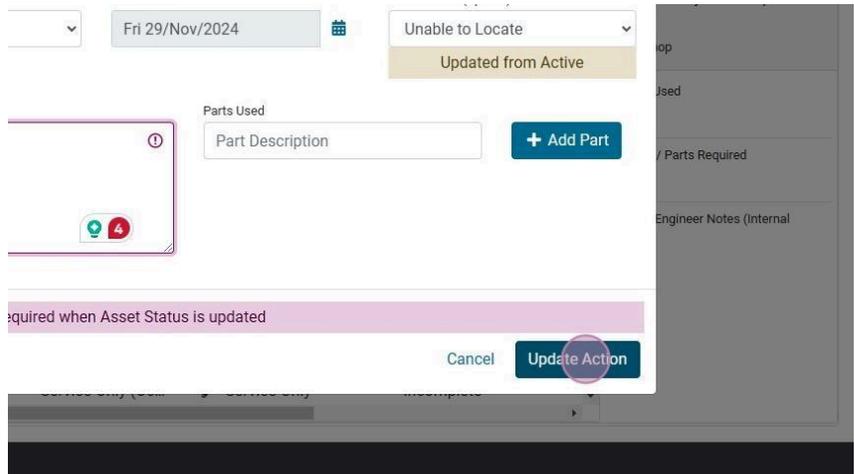
Some actions will result in the “Asset Status” being automatically populated. Eg. an action of “Not Found” will result in an asset status of “Unable to Locate”

A screenshot of the same software interface, but the 'Asset Status' dropdown menu is now set to 'Unable to Locate'. A yellow tooltip message 'Updated from Active' is visible below the dropdown. A pink circle highlights the dropdown arrow. The background shows the same form with 'Action Date' and 'Parts Used' fields.

14. Insert a comment into the “Action Notes” field. This is mandatory when the Asset Status has been changed from the default of ‘Active’.

A screenshot of the software interface showing the 'Action Notes' field. The field is empty and has a pink circle highlighting it. A pink tooltip message 'Notes are required when Asset Status' is visible at the bottom. The background shows the 'Service' dropdown set to 'Service Only', the 'Action' dropdown set to 'Not Found', and the 'Action Date' field set to 'Fri 29/Nov/2024'.

15. Click "Update Action"

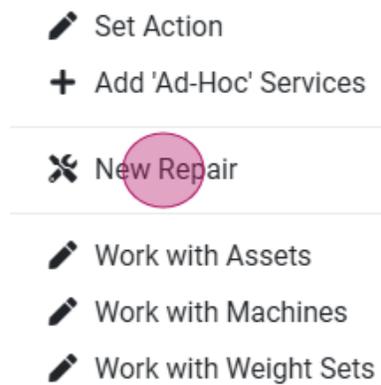


TIP!

When an asset requires repair, either in a workshop or returning to the site once parts are available, click on the smart button to the right of "Set Action"



1. Select "New Repair"



2. Complete the relevant fields on the Repair sheet.

Create Repair ✕

Asset Dini Argeo DGT 201-1	Serial No 28822FFB	Customer Ref 607983	Internal Ref
Location & Area Warehouse	Next Calib Date 24/Apr/2025	Asset Status (Current) Active	

Asset Engineer Notes (Internal Only)

Workshop Reference: 00-1615

Repair Type: Workshop On-Site

Service on Job: Service Only

Asset Status (Updated): Active

Reason for Repair: One line reason for repair

Initial Assessment Notes

COSHH Information

Additional Items: Lead Pan Computer Lead Printer Power Pack Other

Cancel Create Repair

3. Click on “Create Repair” to save

16. Once you have completed all tasks for the day, click on “End Day”. The job can then be continued the next day. Once there are no incomplete services left on the job, complete the “Job Duration” and “Travel” time fields. Then click on “Complete Job”

Close Job Sheet - End Day ✕

Confirm times and complete notes for the work completed on this day.

Engineer: Mickey Mouse

Job Sheet Date: < 03/12/2024 > Tue 3/Dec/2024

Job Status: Incomplete Complete

Linked Engineers: +

Induction: Not Required Attended

Job Start Time: 12:33

Job Duration: 14:00

Travel: 01:00

Job Sheet Notes

Worksheet Notes: Job ID: 3690; Job Sheet;

Cancel Complete Job

17. The job sheet will open.

Complete Job 3690

Service	Status	Total	Added
Service Only	Complete	2	0
Service Only	Not Found	1	0
Service Only	On-Site Repair	1	0
Total			

Worksheet Allocation	Duration
Job Schedule	14:00
Travel	01:00
Total	

Customer: Mickey Mouse, Start Date: 03/Dec/2024, Engineers: Mickey Mouse, Job Notes: (Internal Only)

Sign-Off

Contact Name: Contact Email:

Sign-Off Comments:

By typing the Contact Name below, I assert that I have reviewed the Post Visit Report and the Job is Complete. I confirm the details are correct and any discrepancies have been corrected, or noted in the comments.

Electronic Signature:

The Job will be Completed for ALL engineers and only accessible from Job Manage after midnight.

Cancel **Complete Job**

Once the customer has been debriefed the engineer can record their comments. The job can now be closed by clicking on “Complete Job”.

18. For further support please contact our helpdesk via support@calipro.co.uk

