

**LoHAC**

**Certification Report Specification**

**Version 0.2**

**19th December 2012**

# Document Control

## Author(s)

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## Document History

| **Version** | **Revision Date** | **Summary of Changes** |
| --- | --- | --- |
| 0.1 | 06/12/2012 | First draft issued for comment |
| 0.2 | 19/12/2012 | Document updated further to comments received from TfL |

**Approvals** This document requires the following approvals.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Electronic Signature | Title | Date of Issue | Version |
| Chris Spong |  | Project Manager | 19/12/2012 | 0.2 |
| John Cook |  | Senior User | 19/12/2012 | 0.2 |

**TfL Quality Review** – TfL are required to quality review this document.

## Reference Documents

None

# Report Title: Application Review

**Type of Report**

WOWT report

**Target Audience**

This Work Tray will be mainly used by TfL Budget Owners, Works Order Instructors and the TfL Commercial team.

**Purpose of the Work Tray**

The purpose of the work tray is to list all applications for payment which have been submitted and therefore is awaiting review either by the Budget Owners or the TfL Commercial team.

**Conditions**

* Invoice Status (Flexible Attribute - WOR\_CHAR\_ATTRIB110) = ‘Awaiting Review’ **or** ‘Approved – Awaiting Commercial Review’ **or** ‘Rejected – Awaiting Commercial Review’

REV, APPCOMM, REJCOMM

* Limit by defined ‘Road Groups’

**Graph Display**

X axis: Number of days since the Invoice Status (flexible attribute) field was last updated

Y axis: Number of works orders matching the criteria

**Work Tray Display**

The following columns should be displayed within the Work Tray in this priority order:

1. Works Order Number
2. Map button
3. Document button
4. Invoice Status
5. Invoice Status Comments
6. Works Order Description
7. Previous Claim amount (value from the previously loaded works invoice file)
8. New Claim amount (value from the latest loaded WI file)
9. Claim Comments
10. Budget Description
11. BOQ’s (displayed in a pop up screen – please see the existing Works Order to Instruct work tray as an example as to how this should be displayed)
12. Correct area of work and quantities (WOR\_CHAR\_ATTRIB115 flexible attribute field)
13. Quality of Work OK (WOR\_CHAR\_ATTRIB116 flexible attribute field)
14. Correct BOQ/Uplifts (WOR\_CHAR\_ATTRIB70 flexible attribute field)
15. Before / After Photo’s Present (WOR\_CHAR\_ATTRIB113 flexible attribute field)
16. Certification Comments (WOR\_CHAR\_ATTRIB114 flexible attribute field)

**Interactive functions**

1. When the user clicks the Works Order number then this should open the Navigator screen within NAMS, pre-populated with the information for that works order.
2. When the user clicks the Map button then a map should be displayed in a pop up screen. The works order should be depicted as a line and any defects associated to that works order displayed on the map as points.
3. When the user clicks the Document button then any documents associated to that works order, works order line, defect which are attached to that works order, enquiry which is attached to that works order etc is displayed in a pop up window.
4. The user should be able to update the following flexible attribute fields directly within the work tray:
   1. Invoice Status: Pick List using the INVOICE\_STATUS domain as defined within NAMS

**Questions for Bentley: is it possible to filter the values which are displayed within this list depending upon which stack in the bar chart the user clicks on and their user role i.e. a non commercial user can only update works orders where the invoice status flexible attribute field is populated with Rejected Awaiting Commercial Review or Approved Awaiting Commercial Review?**

* 1. Invoice Status Comments: VARCHAR field with a maximum of 500 characters
  2. Correct area of work and quantities: Pick List using the CORRECT\_QUANT domain as defined within NAMS
  3. Quality of Work OK: Pick List using the QUALITY\_OK domain as defined within NAMS
  4. Correct BOQ/Uplifts: Pick List using the CORRECT\_BOQ domain as defined within NAMS
  5. Certification Comments: VARCHAR field with a maximum of 500 characters

# Report Title: Application Status

**Type of Report**

Report POD

**Target Audience**

This Work Tray will be mainly used by the LoHAC Contractor users to review the status of an payment applications submitted.

**Purpose of the Work Tray**

The purpose of the work tray is to list all applications for payment along with their status i.e. approved, rejected etc.

**Conditions**

* Invoice Status (Flexible Attribute - WOR\_CHAR\_ATTRIB110) = ‘Approved’ **or** ‘Rejected’ **or** ‘Awaiting Review’
* Limit by defined ‘Road Groups’

**Graph Display**

X axis: Number of days since the Invoice Status (flexible attribute) field was last updated

Y axis: Number of works orders matching the criteria

**Work Tray Display**

The following columns should be displayed within the Work Tray in this priority order:

1. Works Order Number
2. Map button
3. Document button
4. Invoice Status
5. Invoice Status Comments
6. Works Order Description
7. Previous Claim amount (value from the previously loaded works invoice file)
8. New Claim amount (value from the latest loaded WI file)
9. Claim Comments
10. Budget Description
11. BOQ’s (displayed in a pop up screen – please see the existing Works Order to Instruct work tray as an example as to how this should be displayed)
12. Correct area of work and quantities (WOR\_CHAR\_ATTRIB115 flexible attribute field)
13. Quality of Work OK (WOR\_CHAR\_ATTRIB116 flexible attribute field)
14. Correct BOQ/Uplifts (WOR\_CHAR\_ATTRIB70 flexible attribute field)
15. Before / After Photo’s Present (WOR\_CHAR\_ATTRIB113 flexible attribute field)
16. Certification Comments (WOR\_CHAR\_ATTRIB114 flexible attribute field)
17. Reviewed By (name of the user who updated the Invoice Status flexible attribute field to Approved or Rejected)

**Interactive functions**

1. When the user clicks the Works Order number then this should open the Navigator screen within NAMS, pre-populated with the information for that works order.
2. When the user clicks the Map button then a map should be displayed in a pop up screen. The works order should be depicted as a line and any defects associated to that works order displayed on the map as points.
3. When the user clicks the Document button then any documents associated to that works order, works order line, defect which are attached to that works order, enquiry which is attached to that works order etc is displayed in a pop up window.