

LCC Property Contractor Portal

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Login

Access to the Property Contractor Portal is through the [iSupplier Portal](#) on the Lancashire County Council website.

- Enter your Oracle username and password. Your username is normally the email address you used when registering for the iSupplier Portal.
- Click the **Login** button.

From/Type	Subject	Sent	Due
Supplier User Registration Workflow Version 2	mailencrypt_Supplier_Collaboration_Network: Confirmation of Registration	16-Mar-2016	

- Click the **LCC Property Contractor Portal** link.

- Enter your username and password. Your username will be the same in both Oracle and the Contractor Portal.
- Click the **Submit** button to be taken to the LCC Property Contractor Portal Home Page.

The screenshot shows the Lancashire County Council web portal. At the top, there is a navigation menu with options: Home, Property, Finance, Help Calls, Inspection, Assessment, Help, and Admin. Below the menu, there is a 'View' dropdown with options: Work by Week, Work by Month, and Documents. A 'Recent Items' section lists two items: INT00000095 and INT00000093. The main content area is titled 'Records Due (by Month)' and features a 'Show Filter' button. Below this is a calendar for February 2016. The calendar grid shows days from Monday to Sunday. Some dates are highlighted in yellow: the 23rd, 29th, and 7th. The 23rd is labeled 'INT0000000', the 29th is labeled 'INT0000000', and the 7th is labeled 'INT0000000'. At the bottom right of the calendar area, there is a link: 'My Open Inspections'.

- From here you can access your instructions, inspections and invoices.

Passwords

- Keep your password confidential;
- Passwords are case sensitive for additional security, so if you enter your password for the first time in lower case (i.e. no capital letters), you will always have to enter it in lower case;
- Passwords must be a minimum of 9 characters;
- Passwords must contain at least one letter and at least one number;
- Passwords should not contain the username;
- To make a strong password, you should use a mixture of upper-case and lower-case letters, numbers, punctuation marks and symbols.

Forgotten Password / First Time Log In

- This procedure is used to set your password the first time you log in and also if you forget your password.

The screenshot shows a login form titled 'Login Details'. It contains three input fields: 'Site Group' with the value 'lancashirecc', 'Username', and 'Password'. Below the fields are two buttons: 'Submit' and 'Forgotten Password'.

- Click the forgotten password link underneath the login.

- Enter your username (normally your email address at the time of registration).
- Click the **Submit** button.
- A temporary password link will now be sent to your registered email address.

Password Reset

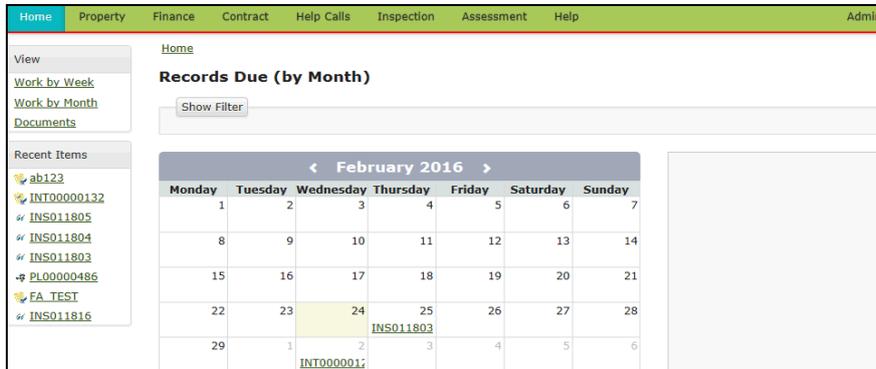
To reset your password, complete this form: <https://pams.train.ad.lancscn.net/password/reset/aH06E0PBpkMsRuiXQCHZn3fSthvq1TTg>.

- Click the link in the Forgotten Password email.

- You will be taken to a screen where you must enter and confirm your new password.
 - This password will then be used to log into the Contractor portal and is separate to your Oracle password and LCC Secure Web Mail password.
- Click the **Submit** button.
- Your password has now been changed and you are taken to the login screen.
- Log in using your username and the password you have just created.
- If you are having difficulty resetting your password, please contact the iSupplier helpline on 01772 534966 (option 4).

General Navigation

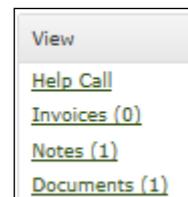
- On logging into the Contractor Portal you will be taken to the Home Page.



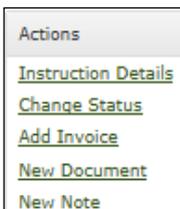
- Modules are displayed at the top of the screen.
- Four menus may be displayed in the sidebar on the left of the screen. The menu options are determined by the current record.

View Menu

The View menu in the sidebar on the left of the screen provides a link to screens or documents, associated with the record or screen currently being viewed. The following number (in brackets) identifies the number of records or documents available.



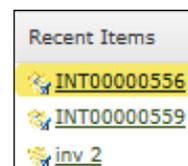
Actions Menu



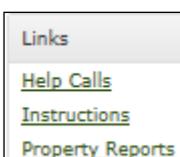
The Actions menu in the sidebar on the left of the screen allows you to carry out an action for the current record. For example, you may add a Note or a New Document

Recent Items

Recent Items in the sidebar on the left of the screen allows you to return to a screen or document you have accessed recently.



Links



The Links menu in the sidebar on the left of the screen contains useful links to other screens.

Once you have carried out a search, the options meeting the search criteria will be displayed below.

Action	Type	Code	Description	Site	Priority	Owner	Due Date
Overdue Records List							

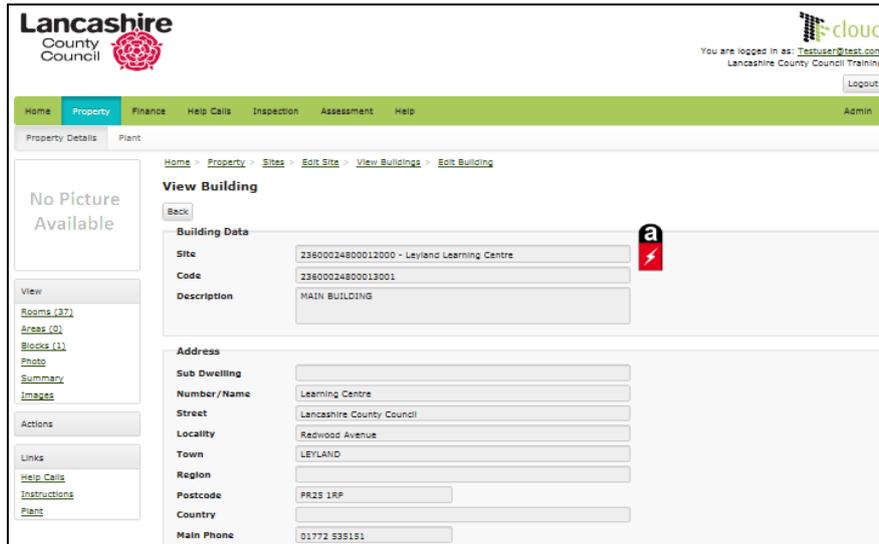
- Click on one of the headings to reorder the search results by that category. An arrow will identify the header and the order (e.g. ascending ↑). Click on the heading to reorder (e.g. descending ↓)
- The number of items found in the search will be identified; 12 items will normally be shown on each screen. Change the number of items displayed using the drop down list. The maximum number of items which can be selected is 72.
- Click on Next or Prev to go to the next or previous screen, or click on the screen number.

The screenshot shows the Lancashire County Council web application interface. At the top, there is a navigation menu with options like Home, Property, Finance, Contract, Help Calls, Inspection, Assessment, Help, and Admin. A sidebar on the left contains 'View' options (Work by Week, Work by Month, Documents) and 'Recent Items' with various codes and descriptions. The main content area features a calendar for February 2016, with a 'Show Filter' button above it. Below the calendar, there is a section for 'My Open Inspections'. At the bottom of the screenshot, an 'Overdue Records List' table is displayed, showing details for three overdue records.

Action	Type	Code	Description	Site	Priority	Owner	Due Date
Edit	Instructions	INT00000129	front door not working properly	23650200000012000 - SKELMERSDALE BRANCH LIBRARY	Test	Contractor	01/01/2016
Edit	Instructions	INT00000130	ACC - Accidental Damage Broken window in room 2	23450285000012000 - INGOL BRANCH LIBRARY	Test	Contractor	09/12/2015
Edit	Instructions	INT00000131	Plasterwork falling off	23150034090052000 - BURNLEY CAMPUS LIBRARY	Test	Contractor	27/11/2015

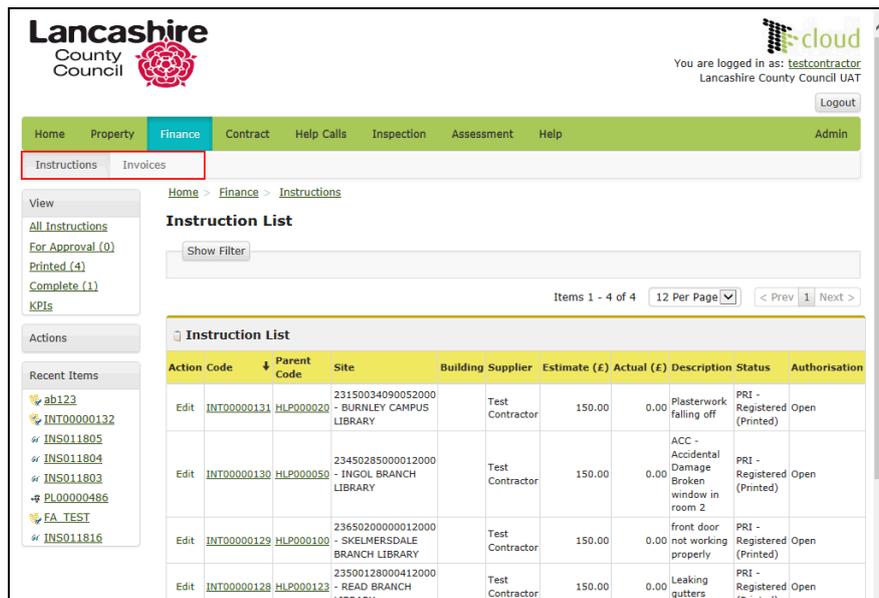
Home: contains a calendar which shows all work allocated to your organisation that is due in a given period.

- The bottom of the screen shows overdue inspections and instructions.
- Click the Edit or the Code to be taken to the record.



Property: contains all LCC establishments. An Instruction or Inspection will include a link to a property, or alternatively, use the filter to search for a property.

- View buildings or rooms within the property by clicking on the relevant link in the View menu on the left of the screen.



Finance: includes all your work instructions and invoices.

- Instructions sub menu lists your open instructions.
 - Click on the Edit or the Code link to be taken to the relevant instruction.
 - This will give details of the work required, the target completion date and the site at which the work is to be carried out.
 - Alternatively, click the Show Filter button to search for a specific instruction, or set of instructions.

- Click on the relevant link in the View menu (on the left of the screen) for further options.
- Click the Invoices sub menu to view your invoices.

The screenshot shows the 'Invoice List' page in the Lancashire County Council system. The navigation bar includes Home, Property, Finance, Help Calls, Inspection, Assessment, and Help. The 'Finance' menu is active, and the 'Invoices' sub-menu is selected. The page title is 'Invoice List'. Below the title, there is a 'Show Filter' button and a pagination control showing 'Items 1 - 2 of 2' and '12 Per Page'. The main table is titled 'Invoice List (Filtered)' and contains the following data:

Action	Invoice No	Tax Date	Supplier	Net	VAT	Gross	Credit Note	Status	Authorisation
Edit	inv_2	16/06/2016	Test Supplier	2,431.35	486.27	2,917.62	N	REG - Registered	Open
Edit	inv_1	15/06/2016	Test Supplier	152.25	30.45	182.70	N	APP - Approved	Approved

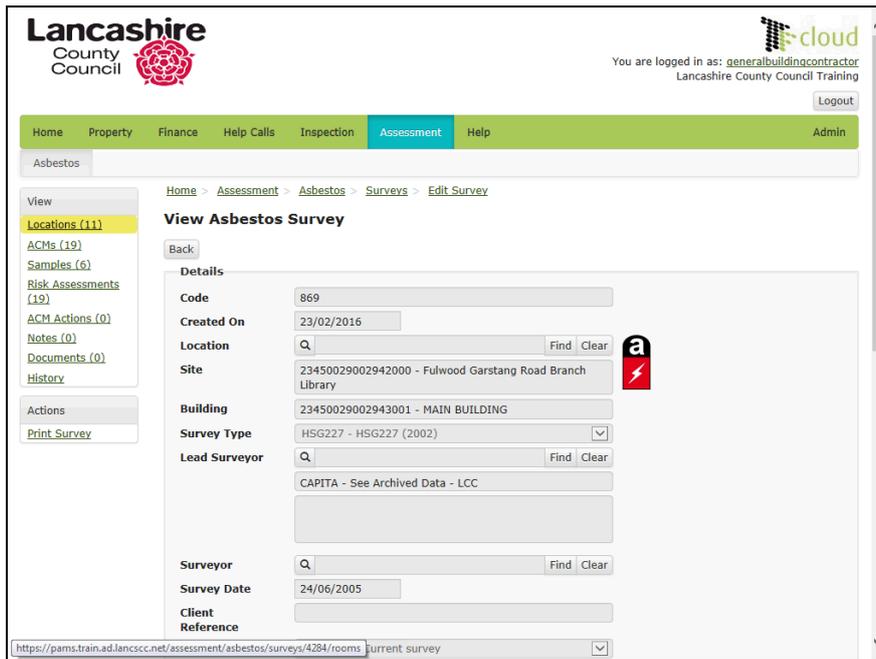
- A list of your invoices is displayed. Click on the Edit or the Invoice No link to view the details.
- When your invoice is approved for payment, the Status and Authorisation are both Approved. Go to the Oracle iSupplier Portal to view payment details.

The screenshot shows the 'Asbestos Survey List' page in the Lancashire County Council system. The navigation bar includes Home, Property, Finance, Help Calls, Inspection, Assessment, and Help. The 'Assessment' menu is active, and the 'Asbestos' sub-menu is selected. The page title is 'Asbestos Survey List'. Below the title, there is a 'Filter Data' section with various search criteria. The main table is titled 'Asbestos Survey List (Filtered)' and contains the following data:

Action	Code	Site	Building	Date	Type	Status	Reviewed	Next Review
View	869	23450029002942000 - Fulwood Garstang Road Branch Library	23450029002943001 - MAIN BUILDING	24/06/2005	HSG227	CURRENT	08/12/2015	08/12/2016

Assessment: contains information relating to asbestos.

- Search for a property to view the asbestos register.
 - **You must clear your organisation name from the Owner field to successfully search for the asbestos records.**
- Click the View or the Code link to see the full details.



- Click Print Survey in the Actions menu to view the Asbestos Report.
- Alternatively, click the relevant link in the View menu, e.g. click Locations to see where asbestos has been found or is suspected.

The Asbestos Assessment module is designed to survey properties for the presence or absence of asbestos within them. It contains a risk analysis to measure the risk to the users of a property and a method of registering samples and asbestos containing materials at the property.

- Buildings or rooms with asbestos containing materials (ACM) present (or suspected ACMs) will be identified by the asbestos warning icon.
- This icon will be displayed against all relevant records, including instructions and inspections.
- The icon is displayed against the building and all rooms within the building, even if asbestos is only found or suspected in one room.



To ensure all work is completed safely, view the asbestos details in the Assessment module to check the details and location of ACMs before any work is started.

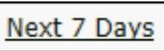
Please note; the current guidance from the Health & Safety Executive (HSE) requires that any areas which cannot be inspected during an asbestos survey, must be recorded that asbestos is presumed to be present.

Searches (Filters)

Filters are used to search for specific information or records. A filter is available in each module, but the information to be entered for each is different.

- Select the required screen and if the search function is not displayed, click the **Show Filter** button.

Enter information into one or several of the fields to find the details required.

- Enter the search information into text fields.
- Use drop down lists to select information. 
- Use the magnifying glass or the Find button to search for and select information.  
- Use calendars to select dates. 
- Use links to select further options. 
- You may find it useful to search by Location, Target Dates and / or the Status. Please note; all search fields are optional.
 - For example, you may click the Next 7 Days link to search for all work instructions due in the next 7 days.

- You may change the Status to Complete to view work you have marked as completed.
- You may search for the name of an establishment by entering the name or partial name in the Location field or click the Find button to start your search.
- All sites will be displayed in the format "Town Site Name".
- If required, use % to separate words or to replace missing characters or words. E.g. to search for a library in Read, enter 'read%library'.
- The % can be used as a separator in the address field for a post code e.g. enter PR1%0LD

The screenshot shows a 'Choose Location' dialog box with the following details:

- Filter Data:**
 - Code: []
 - Description: read%library
 - Aliases: []
 - UPRN: []
 - Address: []
 - Status: Active, Inactive, All
 - Site type: All
 - Usage: All
 - Portfolio: All
 - Ward: All
 - Parish: All
- Buttons:** Apply Filter, Clear Filter, Hide Filter
- Results:** Items 1 - 12 of 2430, 12 Per Page, < Prev 1 2 3 4 5 6 7 8 ... 202 203 Next >
- Sites Table:**

Show	Action	Site Code	Description	LA Code	UPRN
<input type="checkbox"/>	Select	09300001000012000	WMERE TOWER WOOD OUTDOOR PURST	888	
<input type="checkbox"/>	Select	123	Testing Creation of a new site	888	
<input type="checkbox"/>	Select	23050000500012000	MELLOR CE PRIMARY	888	

- Click the **Apply Filter** button to search for the site.
- Results matching your search will be displayed.
- To choose a site, click the **Select** link.
- You will be returned to the original search screen and the establishment name will be displayed.

- Add further search information if required.
- When all the search criteria have been entered, click the Apply Filter button to start the search (or to clear the current search criteria, click the Clear button and start a new search).
- You may need to scroll down the page or hide the filter to view the search results.

Action Code	Parent Code	Site	Building	Supplier	Estimate (£)	Actual (£)	Description	Status	Authorisation
Edit	INT00000128	HLP000123 - READ BRANCH LIBRARY	23500128000412000	Test Contractor	150.00	0.00	Leaking gutters	PRI - Registered (Printed)	Open

- Your search result will be displayed. Click the Edit or Code link to view the full details or start a new search.

Documents, Notes and Images

Documents, notes and images may be added to a record to provide additional information to the contractor or from the contractor to the County Council.

Contractors must add a copy of their invoice when submitting the invoice online. Contractors should also add inspection paperwork and relevant certificates as documents.

Add Document

- Images, notes or documents can be added to a record to provide additional information to other users of the system.
- Search for and select the record the document is to be added to.

The screenshot shows the 'Edit Invoice' page in the Lancashire County Council system. The breadcrumb trail is 'Home > Finance > Invoices > Invoice'. The 'Details' section contains the following information:

- Type:** Invoice Credit Note
- Invoice No:** AB123
- Status:** DRAFT - Draft
- Supplier:** Test Contractor - Test Contractor (with search and clear buttons)
- CIS Applies:** Yes No
- Tax Date:** 25/02/2016
- Description:** First invoice

The 'Actuals' section at the bottom shows:

Labour (£)	27.50
	18.75

The left-hand sidebar has a 'New Document' link highlighted in the 'Actions' menu.

- Click the **New Document** link in the Actions menu on the left hand side of the screen.

- Click the **Browse** button; search for and select the document to be uploaded.

- Click the **Open** button to select the document.

- The filepath for the uploaded document is displayed and you must now enter the Description and Group.
 - **Please Note:** Do not try to save the screen until the Group has been added. The system will produce an error and the file in the filepath will disappear. You will then have to search for and select the document again.
- You must enter a description of the document. This may be the file name or a description of the document.
 - Once added, you can search for the document by the description or part description.
- Click the **Group** dropdown list to select the category for the document.
- Add comments if required.
- Review the details and click the **Save** button.
- **Please note: Next review date; Review owner and Archived** fields should be blank.

Lancashire County Council cloud
You are logged in as: TestContractor1
Lancashire County Council Test
Logout

Home Property **Finance** Contract Help Calls Inspection Assessment Help Admin

Instructions Invoices

Home > Finance > Invoices > Documents > Edit Document

Document successfully uploaded.

Edit Invoice Document

Invoice Details

Type Invoice Credit Note

Invoice No AB123

Status DRAFT - Draft

Supplier Test Contractor - Test Contractor

Tax Date 25/02/2016

Description First invoice

Invoice Code INV00000016

Save Cancel Delete

Details

Name EDMS_TFC_Invoice_20160225_56.pdf

Description First invoice for.....

Group FIN - Financial

Loaded Date 25/02/2016

- Confirmation that the document has been successfully uploaded is displayed at the top of the screen.
- To view the saved document, click the **Documents** link in the View menu on the sidebar.
 - The number of documents attached to this record is shown in brackets.

Invoices (0)
Notes (0)
Documents (1)

Actions
Instruction Details
Change Status
Add Invoice
New Note
New Document
Create Help Call

Instruction Details

Code INT00000093

Help Call Code HLP000038

Status ISS - Issued Directly (not via Oracle)

Supplier Test Contractor - Test Contractor
contractor@email.co.uk Main: 01772123456

Plant Repairs to building

Description Repairs to building

Show Filter

Items 1 - 1 of 1 12 Per Page < Prev 1 Next >

Document List

Action	Document	Group	Group Description	Description	Loaded Date
Extract Email	Del	CLC	Client Correspondence	Example of attachment	23/02/2016 09:43:07

- The attached documents are listed below the Instruction Details in the Document List section.
- Click the **Extract** link and then open the document you wish to view.

Notes and Images

A note or image can be added to any type of record. For invoices over £200, an image of the completed work may be required, and if so, it should be submitted with the invoice using the notes and images function.

The screenshot shows the 'View Instructions' page in the Lancashire County Council system. The breadcrumb trail is Home > Finance > Instructions > Instruction. The 'New Note' link in the sidebar is highlighted. The form contains the following data:

Code	INT00000095
Help Call Code	HLP000039
Reference	
Target (Complete)	24/02/2016
Target Time (24h)	09:48
Status	POS - Posted (Sent to Oracle)
Location	Q
Site	23550011000022000 - BACUP BRANCH LIBRARY
Description	ACC - Accidental Damage Broken window at main entrance
Permit Required	<input type="radio"/> Yes <input checked="" type="radio"/> No
Permit Number	

- Click the **New Note** link.

The screenshot shows the 'Add Instruction Note' page in the Lancashire County Council system. The breadcrumb trail is Home > Finance > Instructions > Instruction > Notes > New Note. The 'New Note' link in the sidebar is highlighted. The form contains the following data:

Code	INT00000095
Help Call Code	HLP000039
Status	POS - Posted (Sent to Oracle)
Supplier	Test Contractor - Test Contractor contractor@email.co.uk Main: 01772123456
Plant	Q
Description	ACC - Accidental Damage Broken window at main entrance
Author	TestContractor1
Date Created	23/02/2016 15:46
Last Updated	23/02/2016 15:46

- Notes are added below the Instruction Details in the Note Details section.

The screenshot shows a web form for creating a note. On the left is a sidebar with 'Actions' including 'Instruction Details', 'Change Status', 'Add Invoice', 'New Note', 'New Document', and 'Create Help Call'. The main form has two sections: 'Help Call Code' and 'Note Details'. The 'Help Call Code' section includes fields for 'Status' (POS - Posted (Sent to Oracle)), 'Supplier' (Test Contractor - Test Contractor), and 'Plant' (ACC - Accidental Damage). The 'Note Details' section includes fields for 'Author' (TestContractor1), 'Date Created' (23/02/2016 15:46), 'Last Updated' (23/02/2016 15:46), 'Type' (GEN - General), and 'Detail' (Additional part required - leaving site with job incomplete). There are also 'Private Note' radio buttons (Yes/No) and an 'Upload Image' section with a 'Browse...' button. Copyright information is visible at the bottom: 'Copyright © 2011-2016 The Technology Forge Ltd.'

- Click the **Type** dropdown list.
 - **GEN - General**; always select this option. Do not select Call Back.
- Enter your note into the **Detail** field.
- **Private Note** - always select **No** to enable the note to be seen by the County Council system users.
- You also have the option to add an image at this stage. To add an image, click the **Browse** button.

This screenshot shows the same web form as above, but with a 'Choose File to Upload' dialog box open over the 'Upload Image' section. The dialog box shows the file explorer view with 'Broken Window.jpg' selected. The file name is 'Broken Window.jpg', the date modified is '07/12/2015 21:26', and the type is 'JPEG image'. The 'File name' field is empty, and the file type is set to 'All Files (*.*)'. The 'Open' and 'Cancel' buttons are visible. Below the dialog box, the 'Private Note' radio buttons are still set to 'No', and the 'Upload Image' section with the 'Browse...' button is visible. Copyright information is visible at the bottom: 'Copyright © 2011-2016 The Technology Forge Ltd.'

- Search for and select the image.
- Click the **Open** button.

- The filepath is now shown in the File field.
- Once the details are complete, click the **Save** button.

- The message at the top of the screen confirms the note has been added successfully.
- To view the note, click the **Notes** link. The number of notes attached to this record is identified by the number in the brackets.

The screenshot shows the Lancashire County Council web application interface. At the top left is the Lancashire County Council logo. At the top right, it says 'You are logged in as: TestContractor1 Lancashire County Council Test' with a 'Logout' button. Below this is a navigation menu with 'Home', 'Property', 'Finance', 'Help Calls', 'Inspection', 'Assessment', 'Help', and 'Admin'. The 'Finance' menu is active. Below the navigation is a breadcrumb trail: 'Home > Finance > Instructions > Instruction > Notes'. The main content area is titled 'View Instruction Notes' and contains 'Instruction Details' for a specific instruction. The details are as follows:

Field	Value
Code	INT00000095
Help Call Code	HLP000039
Status	POS - Posted (Sent to Oracle)
Supplier	Test Contractor - Test Contractor contractor@email.co.uk Main: 01772123456
Plant	ACC - Accidental Damage Broken window at main entrance

At the bottom of the page, there is a footer area showing the user 'TestContractor1' on '23rd February 2016 @ 15:47' with a 'Public' type and 'GEN - General' category. The description 'Additional part required - leaving site with job incomplete' is visible.

- Scroll down to view the notes and images.

Work Instructions

Work Instructions will be issued to the contractor with details of the work required and the target date for completion. The contractor will be notified by email that a work instruction has been issued.

If you are unable to complete the work within the agreed costs or required timescale, please contact the District Surveyor, who will be identified on the order.

To view a work instruction and the details of the site at which the work is to be carried out.

The screenshot shows a web interface with a navigation menu on the left containing 'View', 'Work by Week', 'Work by Month', and 'Documents'. Below this is a 'Recent Items' list with entries like 'ab123', 'INT00000132', 'INS011805', 'INS011804', 'INS011803', 'PL00000486', 'FA TEST', and 'INS011816'. The main content area is titled 'Records Due (by Month)' and features a calendar for February 2016. The calendar has a 'Show Filter' button and displays work instructions as links on specific dates: 'INT00000132' on Feb 1, 'INS011803' on Feb 24, and 'INT00000131' on Feb 29. Below the calendar is a pagination control showing 'Items 1 - 3 of 3' and '12 Per Page'. At the bottom is an 'Overdue Records List' table with the following data:

Action	Type	Code	Description	Site	Priority	Owner	Due Date
Edit	Instructions	INT00000129	front door not working properly	23650200000012000 - SKELMERSDALE BRANCH LIBRARY	Test	Contractor	01/01/2016
Edit	Instructions	INT00000130	ACC - Accidental Damage Broken window in room 2	23450285000012000 - INGOL BRANCH LIBRARY	Test	Contractor	09/12/2015
Edit	Instructions	INT00000131	Plasterwork falling off	23150034090052000 - BURNLEY CAMPUS LIBRARY	Test	Contractor	27/11/2015

- Work instructions can be seen on the calendar on the home page. These will start with 'INT'.
- Click on the link in the calendar to view the work instruction, or alternatively, click the **Finance** link in the green title bar at the top of the page.

The screenshot shows the 'Instruction List' page in the Lancashire County Council web portal. The page includes a navigation menu with 'Home', 'Property', 'Finance', 'Help Calls', 'Inspection', 'Assessment', 'Help', and 'Admin'. The 'Finance' tab is selected. Below the navigation, there are sections for 'View' (All Instructions, For Approval (0), Printed (2), Complete (0)), 'Actions', and 'Recent Items' (INT00000095, INT00000093). The main content area shows the 'Instruction List' with a 'Show Filter' button and a table of instructions. The table has the following data:

Action	Code	Parent Code	Site	Building	Supplier	Description	Status	Authorisation
Edit	INT00000095	HLP000038	23550011000022000 - BACUP BRANCH LIBRARY		Test Contractor	ACC - Accidental Damage Broken window at main entrance	POS - Posted (Sent to Oracle)	Open
Edit	INT00000093	HLP000038	23500128000412000 - READ BRANCH LIBRARY		Test Contractor	Repairs to building	ISS - Issued Directly (not via Oracle)	Open

- A list of your open instructions is displayed.
- The Instruction List includes a summary of the requirements and details of the site at which the work is to be carried out.
- Click the relevant Edit link or the Instruction Code.
 - If the required instruction is not displayed, click the Show Filter button to search for it.

The screenshot shows the 'View Instructions' page in the Lancashire County Council web portal. The page displays the details of a specific instruction. The details are as follows:

- Code:** INT00000093
- Help Call Code:** HLP000038
- Reference:**
- Target (Complete):** 01/03/2016
- Target Time (24h):** 09:31
- Status:** ISS - Issued Directly (not via Oracle)
- Location:** Q
- Site:** 23500128000412000 - READ BRANCH LIBRARY
- Description:** Repairs to building
- Permit Required:** Yes No
- Permit Number:**

- Full details of the work instruction are displayed.

- This includes the target date for completion, the site and the description of the work required.
- **Reminder:** check the View menu for notes and documents associated with the instruction.
- To view the full site address, click in the **Site** field.

The screenshot shows the Lancashire County Council PAMS system interface. The user is logged in as 'TestContractor1'. The navigation menu includes Home, Property, Finance, Help Calls, Inspection, Assessment, Help, and Admin. The current page is 'View Instructions' for an instruction with the following details:

Details	
Code	INT00000093
Help Call Code	HLP000038
Reference	
Target (Complete)	01/03/2016 Target Time (24h) 09:31
Status	ISS - Issued Directly (not via Oracle)
Location	Q Find Clear
Site	23500128000412000 - READ BRANCH LIBRARY View Read Branch Library, 41 Whalley Road, Read, BURNLEY, BB12 7PB
Description	Repairs to building
Permit Required	<input type="radio"/> Yes <input checked="" type="radio"/> No
Permit Number	

The URL at the bottom of the browser window is: <https://pams.test.ad.lanccsc.net/property/sites/1333/summary>

- This opens the field up to give the full address.
 - To view further site details hold down the **[Ctrl]** key on your keyboard and click in the **View** field. This opens the Site screen in a separate window to allow you to return to the instruction easily.
 - The Site screen displays a summary of the buildings and rooms within the site.

Confirm Work Completed

Unless this is an interim payment (agreed by the County Council), the work must be marked as completed before the invoice is submitted.

The screenshot shows the 'Instruction List' page in the Lancashire County Council system. The page title is 'Instruction List' and it includes a search filter and pagination controls. The table below lists several instructions:

Action Code	Parent Code	Site	Building	Supplier	Estimate (£)	Actual (£)	Description	Status	Auth
INT00000132	HLP000060	23250046000012000 - LYTHAM ANSDELL BRANCH LIBRARY	23250046000013001 - MAIN BUILDING	Test Contractor	150.00	0.00	broken roof tiles	PRI - Registered (Printed)	Open
INT00000131	HLP000020	23150034090052000 - BURNLEY CAMPUS LIBRARY		Test Contractor	150.00	0.00	Plasterwork falling off	PRI - Registered (Printed)	Open
INT00000130	HLP000050	23450285000012000 - INGOL BRANCH LIBRARY		Test Contractor	150.00	0.00	ACC - Accidental Damage Broken window in room 2	PRI - Registered (Printed)	Open
INT00000129	HLP000100	23650200000012000 SKELMERSDALE BRANCH LIBRARY		Test Contractor	150.00	0.00	front door not working properly	PRI - Registered (Printed)	Open
INT00000128	HLP000123	235001280000412000 - READ BRANCH LIBRARY		Test Contractor	150.00	0.00	Leaking gutters	PRI - Registered (Printed)	Open

- Search for and select the instruction.

The screenshot shows the 'View Instructions' page for instruction INT00000132. The details are as follows:

- Code:** INT00000132
- Help Call Code:** HLP000060
- Reference:**
- Target (Complete):** 15/12/2015
- Target Time (24h):** 16:50
- Status:** PRI - Registered (Printed)
- Location:** Q
- Site:** 23250046000012000 - LYTHAM ANSDELL BRANCH LIBRARY
- Building:** 23250046000013001 - MAIN BUILDING
- Description:** broken roof tiles
- Permit Required:** Yes No
- Permit Number:**

- Click the **Change Status** link in the Actions menu on the left of the screen.

- Click the **Status** dropdown list and change the Status to Completed.
- The completion date and time will default to the time that you complete this screen, but can be overwritten if required.
- Add Comments if required.
- When the details have been completed, click the **Save** button.

- Confirmation that the status has been changed is displayed at the top of the screen. The invoice can now be submitted.

Invoicing

To submit an invoice for payment:

- Unless this is an interim payment (agreed by the County Council), the Instruction Status must be changed to Completed to confirm the work has been completed.
- The Invoice must be raised against the Work Instruction.
- An uneditable copy (e.g. PDF format) of the invoice and any supporting invoices must be added as Documents.
- If the value of the invoice is more than £200, you may be requested to add an image of the completed work.
- Once the invoice is raised and all attachments added, the Invoice Status must be changed to Registered. If the status is not changed to registered, the invoice cannot be paid.

Rejected Invoices

An invoice may be rejected by the County Council, e.g. if the copy of the invoice is not attached, or if the details on the copy invoice do not match the details on screen, or if a CIS breakdown is required but has not been provided.

If the invoice is rejected, you will receive an email to notify you. The invoice will then need to be completed again, documents and images added and the status changed, in the same way as when submitting a new invoice.

The invoice number must be unique even if your invoice is rejected and you are submitting a revised invoice.

In this case, you may wish to use the original invoice number, but adding a character to make the number unique.

Credit Notes

A credit note is raised in the same way as an invoice. Select the Type 'Credit Note' to identify that you are raising a Credit Note. The value is always a positive amount.

You cannot raise an online credit note for an invoice which has been paid or is pending payment. In this case, please raise a manual credit note.

Raise Invoice/Credit Note

The screenshot shows the Lancashire County Council PAMS system interface. The user is logged in as 'TestContractor1'. The navigation menu includes Home, Property, Finance, Contract, Help Calls, Inspection, Assessment, Help, and Admin. The 'Finance' tab is active, and the 'Instructions' sub-tab is selected. A message states 'The instruction status has been updated.' The main content area is titled 'View Instructions' and shows details for an instruction with ID INT0000093. The status is 'COM - Completed', which is highlighted with a red box. Other details include a target date of 01/03/2016, a target time of 09:31, a location search field, a site ID of 23500128000412000, and a description of 'Repairs to building'. The 'Add Invoice' link in the left-hand actions menu is highlighted in yellow.

- The invoice is raised from the instruction.
- Unless this is an interim payment, the Status should be Completed.
- From the Instruction, click the **Add Invoice** link.

The screenshot shows the 'New Invoice' form in the Lancashire County Council system. The form is titled 'New Invoice' and includes the following fields:

- Type:** Radio buttons for 'Invoice' (selected) and 'Credit Note'.
- Invoice No:** Text input field containing 'AB123'.
- Status:** Text input field containing 'DRAFT - Draft'.
- Supplier:** Search field containing 'Test Contractor - Test Contractor' with 'Find' and 'Clear' buttons.
- CIS Applies:** Radio buttons for 'Yes' and 'No' (selected).
- Tax Date:** Calendar field showing '25/02/2016'.
- Description:** Text input field containing 'First invoice'.
- Actuals:** Text input fields for 'Labour (£)' and 'Material (£)'.

- **Type:** Identify if you are raising an Invoice or a Credit Note.
- **Invoice No:** Enter your invoice number.
 - Every invoice submitted must have a unique number; do not use the same number twice, even for the same instruction.
- **CIS Applies:** Contractors who are Construction Industry Scheme (CIS) registered are responsible for flagging each invoice as CIS applicable if appropriate.
 - Contractors who are not CIS registered will leave as No.
- **Tax Date:** Use the calendar to select the Tax date.
- **Description:** Enter a description.
- Click the scrollbar to continue.

The screenshot displays a web-based form for entering invoice details. At the top, there is a contact information field with the email 'contractor@email.co.uk' and phone number 'Main: 01772123456'. Below this, the 'CIS Applies' section has radio buttons for 'Yes' and 'No', with 'No' selected. The 'Tax Date' is set to '25/02/2016' and the 'Description' is 'First invoice'. The 'Actuals' section contains input fields for 'Labour (£)' (27.50), 'Material (£)' (18.75), 'Other (£)', 'Net Total (£)' (46.25), 'VAT (£)' (9.25), and 'Gross Total (£)' (55.50). A dropdown menu for VAT is set to 'ST - Standard Rate'. The 'Linked Instructions' section shows 'Invoice Value: 0.00', 'Allocated: 0.00', and 'Unallocated: 0.00'. It includes a search field for an instruction (currently 'INT00000093') and an 'Amount (£)' field (46.25). The 'Final Payment' section has radio buttons for 'Yes' and 'No', with 'No' selected. At the bottom, there are 'Save' and 'Cancel' buttons. The footer contains the URL 'https://pams.test.ad.lancscc.net/invoice/invoices?' and the copyright notice 'Copyright © 2011-2016 The Technology Forge Ltd.'

- Enter the correct values into the relevant fields in the Actuals section.
 - Leave blank any fields that are not relevant.
 - Do not enter negative amounts; if a credit is due, select Credit Note at the top of the screen.
- **Labour (£)**: Enter the cost for labour.
- **Material (£)**: Enter the cost for materials.
- **Other (£)**: Enter any additional costs.
- The VAT, Net and Gross Totals are automatically calculated.
- **VAT (£)**: The VAT defaults to Standard; use the drop down list to change the tax classification if required.
- **Final Payment**: Specify if this is the Final Payment (no further invoices to be issued against this work instruction).
 - Select 'No' if further invoices will be issued.
- Check the invoice details and if correct, click the **Save** button.

The screenshot shows the 'Lancashire County Council cloud' interface. The user is logged in as 'TestContractor1'. The navigation menu includes Home, Property, Finance, Contract, Help Calls, Inspection, Assessment, Help, and Admin. The 'Finance' tab is active, and the 'Invoices' sub-tab is selected. A confirmation message at the top reads 'The invoice has been added.' Below this is the 'Edit Invoice' form with the following details:

- Type:** Invoice Credit Note
- Invoice No:** AB123
- Status:** DRAFT - Draft
- Supplier:** Test Contractor - Test Contractor (contractor@email.co.uk Main: 01772123456)
- CIS Applies:** Yes No
- Tax Date:** 25/02/2016
- Description:** First invoice

- Confirmation that the invoice details have been added is displayed at the top of the screen.
- You must now add an uneditable copy of your invoice. Any additional invoices (e.g. covering plant hire etc.) must also be attached. You can add multiple attachments if required.
- **Please note: your invoice submission will be rejected if you do not add the copy of the invoice. If your invoice is rejected, you will be required to repeat the entire invoice submission process including adding the relevant attachments.**
- If your invoice is over £200, you may also be required to add an image of the completed work.

Change Invoice Status

Once all attachments have been added to the invoice, change the Status to Registered.

Changing the Status submits the invoice for payment; if you do not change the status, the invoice cannot be paid.

- From the invoice screen, click the **Change Status** link on the left hand side of the screen.

- Click the **Status** dropdown list.
- Always change the status from Draft to **REG - Registered**.
 - Please take care not to select Rejected status in error, as if the Status is set to Rejected, you would have to restart the submission process.
- The date and time default. Add Comments if required.
- When the details are correct, click the **Save** button.

The screenshot shows the Lancashire County Council web portal. The user is logged in as 'TestContractor1'. The navigation menu includes Home, Property, Finance, Contract, Help Calls, Inspection, Assessment, Help, and Admin. The 'Finance' tab is active, and the 'Invoices' sub-tab is selected. A confirmation message states: 'The invoice status has been updated.' The 'View Invoice' section shows the following details:

Details	
Type	<input checked="" type="radio"/> Invoice <input type="radio"/> Credit Note
Invoice No	AB123
Status	REG - Registered (25 Feb 2016, 11:48)
Supplier	Test Contractor - Test Contractor contractor@email.co.uk Main: 01772123456
CIS Applies	<input type="radio"/> Yes <input checked="" type="radio"/> No
Tax Date	25/02/2016
Description	First invoice

- Confirmation that the invoice status has been updated is displayed.
- The invoice and attached documents and images can now be seen by the County Council.
- Only invoices with the Status of Registered can be processed for payment.