

LCC Property Contractor Portal

Lancashire County Council

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Login

Access to the Property Contractor Portal is through the <u>iSupplier Portal</u> on the Lancashire County Council website.

BT Lancashire Services	
Oracle Self Service	*User Rame *Password Login Cancel Forgot of: Request Username or Password, Click Here Accessibility

- 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.

BT Lancashire Services E-I	Business Suite - A	MTST cloned from AMDEV on	01-Feb-2016	Logout Pr	eferences H	elp
Enterprise Search All	~		Go	Search Results Display	Preference	Standard
				Logged In As	TESTUSER@	TEST.COM
Oracle Applications Home Pag	e					
Main Menu	Personalize	Worklist Note: For all your notifications Full List button then choose A	, including the Saved I Notifications from t	l For Later transactic he View drop-down	ons, click o list Full Lis	n the t (1)
🕀 🛅 LCC Sourcing Supplier		From Type	Subject		Sent 🔻	Due
		Supplier User Registration Workflow Version 2	mailencrypt Supplier Co Confirmation of Registra	Ilaboration Network: ation	16-Mar-20	16
		TIP <u>Vacation Rules</u> - Redirect or an TIP <u>Worklist Access</u> - Specify whice	to-respond to notification n users can view and act t	s. upon your notifications.		

• Click the LCC Property Contractor Portal link.

County Council		cloud ^
Warning Unauthori if you hav logging in able to di the site w	sed use of this system is prohibited. You should only login e permission to do so. This system uses cookies, by you are consenting to our use of cookies. You may be able cookies in your browser, but doing so will mean that ill not function correctly.	
Login De Site Group Usernam Passworr Submit Fo	Iancashirecc e testuser@test.com g ee	

- 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.



County Council	hire							You are logged in as: <u>TestContractor1</u> Lancashire County Council Test
Home Property	Finance H	lelp Calls	Inspection	Assessme	nt Help			Admin
View Work by Week Work by Month Documents	Home Records	ter	y Month)					
Recent Items			< Eeb	ruary 20	16 ১			
🍫 INT0000095	Monday	Tuocday	Wodnosday	Thursday	Friday	Saturday	Sunday	
🌺 <u>INT0000093</u>	1	2	3	4	5	6	7	
	8	9	10	11	12	13	14	
	15	16	17	18	19	20	21	
	22	23	24 INT0000009	25	26	27	28	
	29	1 INT000000	2	3	4	5	6	
		8	9	10	11	12	13	
								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.

Login Details
Site Iancashirecc Group Username Password
Submit Forgotten Password

• Click the forgotten password link underneath the login.



cloud ^

- 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.



• Click the link in the Forgotten Password email.

County Council	Cloud ^
Warning Unauthorised use of this system is prohibited. You should only login if you have permission to do so. This system uses cookies, by logging in, you are consenting to our use of cookies. You may be able to disable cookies in your browser, but doing so will mean that the site will not function correctly.	
Reset Password Please set a new password. New Password Confirm Password	
Submit	

- 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).

Lancashire

General Navigation

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

Home	Property	Finance (Contract	Help Calls	Inspection	Assess	ment Hel	p
View Work by \	Neek	Home Records	Due (b	y Month))			
Work by M Document	Month ts	Show Fil	lter					
ab123				< Feb	ruary 20)16 >		
	00132	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
4 INS011	1805	1	2	3	4	5	6	7
4 INS011	<u>1804</u> 1803	8	9	10	11	12	13	14
	00486 ST	15	16	17	18	19	20	21
4 INS011	1816	22	23	24	25 INS011803	26	27	28
		29	1	2 INT0000012	3	4	5	6

- 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.

View
Help Call
Invoices (0)
Notes (1)
Documents (1)

Actions Menu

Actions Instruction Details Change Status Add Invoice New Document New Note 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.

Recent Items
🍇 <u>INT0000556</u>
😋 <u>INT00000559</u>
🦓 <u>inv 2</u>

Links

Links
Help Calls
Instructions
Property Reports

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.



- 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.

County Council	hire							Yo	u are logg Lancash	ed in as: <u>t</u> ire County	Cloud estcontracto Council UAT Logout
Home Property	Finance	Contract	Help Calls	Inspection	Assessm	ient Helj	b				Admin
daw	Home										
New Work by Wook	Record	s Due (l	y Month)							
Work by Month	Charles F										
Documents	Show F	liter									
Recent Items							_				
😓 ab123			< Fe	bruary 20	16 >						
INT00000132	Monday	Tuesday	Wednesda	y Thursday	Friday	Saturday	Sunday				
# INS011805	1		2	3 4	5	0					
W INS011804	8	3	9 1	0 11	12	13	14				
# PL00000486	15	5 1	6 1	7 18	19	20	21				
FA TEST											
# <u>INS011816</u>	22	2 2	3 2	4 25 INS011803	26	27	28				
	29)		2 3	4	5	6				
			INT000001	2		12	10				
				9 10	11	12	13				
									My Open	Inspection	ns
						I	tems 1 - 3 of 3	12 Pe	r Page 🗸	< Prev	1 Next >
	Overdue	Records	List								
	Action	Туре	Code	Description		Site			Priority (Owner	Due Date
	Edit	Instructions	INT00000129	front door not a properly	working	236502000 SKELMERS	000012000 - DALE BRANCH LIE	BRARY	T	est Contractor	01/01/2016
	Edit	Instructions	INT00000130	ACC - Accident Broken window	al Damage in room 2	234502850 BRANCH LL	000012000 - INGO BRARY)L	T C	'est Contractor	09/12/2015
	Edit	Instructions	INT00000131	Plasterwork fal	ing off	231500340	90052000 - BURI	ILEY	T	est	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.



County Council	e	You are logged in as: <u>Testuaer@inst.com</u> Lancashire County Council Training Loggout	
Home Property Fina	nce Help Calls Inspec	ction Assessment Help	Admin
Property Details Plant			
No Picture Available	Home > Property > Site View Building Back Building Data	s > Edit Site > View Buildings > Edit Building	8
	Site	23600024800012000 - Leyland Learning Centre	✓
	Code	23600024800013001	
View Rooms (37) Areas (0)	Description	MAIN BUILDING	
Blocks (1)	Address		
Photo	Sub Dwelling		
Images	Number/Name	Learning Centre	
	Street	Lancashire County Council	
Actions	Locality	Redwood Avenue	
Links	Town	LEYLAND	
Help Calls	Region		
Instructions	Postcode	PR25 1RP	
Plant	Country		
	Main Phone	01772 535151	

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.

Lancas County Council	hire	•							You are log Lanca	ged in as: shire Coun	testcontractor ty Council UAT Logout	
Home Property	Finance	Contract	Help C	alls Inspection	Assess	ment	Help				Admin	
Instructions Invo	ices											
View	<u>Home</u>	> <u>Finance</u> >	Instructio	ns								
All Instructions	Inst	ruction L	ist									
For Approval (0) Printed (4)	Sh	ow Filter										
Complete (1) KPIs							Items 1 - 4	t of 4 12	Per Page 🗸	< Pre	ev 1 Next >	
Actions	i) In	struction L	.ist									1
Recent Items	Action	Code 🕴	Parent Code	Site	Building	Supplier	Estimate (£)	Actual (£)	Description	Status	Authorisation	,
% <u>ab123</u> % INT00000132	Edit	INT00000131	HLP000020	23150034090052000 - BURNLEY CAMPUS LIBRARY		Test Contractor	150.00	0.00	Plasterwork falling off	PRI - Registered (Printed)	Open	
<pre>% INS011805 % INS011804 % INS011803 *# PL0000486</pre>	Edit	INT00000130	HLP000050	23450285000012000 - INGOL BRANCH LIBRARY		Test Contractor	150.00	0.00	ACC - Accidental Damage Broken window in room 2	PRI - Registered (Printed)	Open	
FA TEST # INS011816	Edit	INT00000129	HLP000100	2365020000012000 - SKELMERSDALE BRANCH LIBRARY		Test Contractor	150.00	0.00	front door not working properly	PRI - Registered (Printed)	Open	
	Edit	INT00000128	HLP000123	23500128000412000 - READ BRANCH		Test Contractor	150.00	0.00	Leaking gutters	PRI - Registered	Open	

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.

County Council	shire							You a	re logged in as: <u>Ti</u> Lancashire Count	estuser@test.com Council Training Logout
Home Property	Finance	Help Calls	Inspection	Assessme	ent He	lp				Admin
Instructions Inv	oices									
View All Invoices	Home >	Finance > Inv e List	voices							
Actions	Show	Filter								
New Invoice							Items 1 - 1	2 of 2 12 P	er Page 🗸 <	Prev 1 Next >
Recent Items	🛭 Invo	ice List (Fil	tered)							
23600024800	Action	Invoice No	Tax Date	Supplier	Net	VAT	Gross	Credit Note	Status	Authorisation
% INT0000556	Edit	inv 2	16/06/2016	Test Supplier	2,431.35	486.27	2,917.62	N	REG - Registered	Open
% <u>INT0000559</u>	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.

County Council	hire O					You a	are logge L	ad in as: g ancashire.	<u>leneralbuildi</u> County Cou	cloud ngcontractor Incil Training Logout
Home Property	Finance Help	Calls Inspection	Assessment	Help						Admin
Asbestos View All Surveys All ACMs	Home > Assess Asbestos S Filter Data	<u>ament</u> > <u>Asbestos</u> > Survey List	<u>Surveys</u>							
All ACM Actions All Samples All Assessments	Next Review Date	All Next 7 Days	Overdue		Survey Type	All				
All Locations	Review From		То		Owner Location	d d			Fin	d Clear d Clear
ctions ecent Items > INTO0000554 § 01	Status Apply Filter	Draft Current Archive Clear Filter Hide Fi	lter		Site Filter on Code	2345 Road	i002900 I Branch	2942000 Library	- Fulwood G	arstang
≥ 23450029002 > 1000 ≤ INT00000545					Items	51-1 of 1	12 Pe	er Page 🗸] < Prev	1 Next >
LINT00000509	Asbestos Su	rvey List (Filtere	d)							
207 23600024800 01	Action Code 1	Site 23450029002942000 - F Garstang Road Branch L	Fulwood 234 ibrary BU	Iding 150029002943 ILDING	3001 - MAIN	Date 24/06/2005	Type HSG227	Status CURRENT	Reviewed	Next Review 08/12/2016
211 INT00000494 204										

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.



County Council	hire			You are logged in as: <u>generalbuildingcontractor</u> Lancashire County Coundi Training	^
				Logout	I
Home Property	Finance Help Calls	Inspection Assessment	Help	Admin	l
Asbestos					1
View	Home > Assessment	> <u>Asbestos</u> > <u>Surveys</u> > <u>Ed</u>	lit Survey		
Locations (11)	View Asbestos	Survey			
ACMs (19) Samples (6)	Back Details				l
Risk Assessments (19)	Code	869			
ACM Actions (0)	Created On	23/02/2016			
Notes (0)	Location	٩	Find Clear	a	
History	Site	23450029002942000 - Ful Library	wood Garstang Road Branch	4	
Actions	Building	23450029002943001 - MA	IN BUILDING		
Print Survey	Survey Type	HSG227 - HSG227 (2002)	\checkmark		
	Lead Surveyor	Q	Find Clear		
		CAPITA - See Archived Dat	a - LCC		
	Surveyor	٩	Find Clear		
	Survey Date	24/06/2005			
	Client Reference				
https://pams.train.ad.lancsc	c.net/assessment/asbestos/su	rveys/4284/rooms current survey			~

- 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.

County Council	snire						You are La	logged in as	s: testcontract anty Council U/ Logou
Home Property	Finance Co	ntract	Help Calls	Inspection	Assessment	Help			Admin
Instructions Inv	oices								
view	Home > Fina	nce > In	structions						
All Instructions	Instruction	on List	£						
For Approval (0)	Filter Dat	a							
rinted (5)	Codo					Ownor	0		Find Clear
complete (0)	Code	_				Cinemain			
PIs	Descriptio	• _				Year	All		
ctions	Reference					Account	Q		Find Clear
	Instructio Type	n All			~		All Next 7 Days	Overdue	
Recent Items	Parent	All			~	Target		То	
FA TEST	Туре					From			
# <u>INS011805</u>	Parent					Category	All		~
	Code					Status	Generated		
	Code	All			•	Туре	✓ Printed		
	Location	Q	1		Find Clear		Closed		
	Site Type	All			~		Cancelled		
	Supplier	Q			Find Clear	Status	All		~
	Authorise	r Q			Find Clear	Authorisation	Open		
							For Approval		
							Approved Rejected		
			ethere and a	c'h -			Rejected		

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

• Enter the search information into text fields.



- Use calendars to select dates.
- Use links to select further options.
 <u>Next 7 Days</u>
- 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.
- o 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

Filte	r Data								^	Co
Code Desc Alias UPRI Addr State	ription r ies N vess us @	ead%library Active	,	Site type Usage Portfolio Ward Parish	All All All All All All All All	> > > >				l
Appl	ly Filter	Clear Filter Item	Hide Filter	130 12 Per Page 🗸) < Prev 1	2 3 4 5 6 7	8 202 20)3 Next >]	nd
Sites	ly Filter	Clear Filter Item	Hide Filter	130 12 Per Page 💌) < Prev 1	2 3 4 5 6 7	8 202 20)3 Next >		nd
Sites Show	ly Filter	Clear Filter Item Site Code	Hide Filter	12 Per Page V	<pre> < Prev 1</pre>	2 3 4 5 6 7	8 202 20	03 Next >		nd
Sites Show	Vertion Select	Clear Filter Item Site Code 0930000100	Hide Filter s 1 - 12 of 24	130 12 Per Page Description) < Prev 1	2 3 4 5 6 7 URST	8 202 20 LA Code 888	03 Next >		nd
Sites Show + +	Action Select Select	Site Code 0930000100 123	Hide Filter s 1 - 12 of 24	130 12 Per Page V † Description WMERE TOWER WO Testing Creation of MELLOR CREATION	ODD OUTDOOR P a new site	2 3 4 5 6 7	8 202 20 LA Code 888 888	03 Next >		nd

- 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.



County Council	shire					You a I	re logged ir .ancashire (testcontracto County Council UA Logout	H H T
Home Property	Finance Contra	ct Help Cal	ls Inspection	Assessmen	t Help			Admin	
Instructions Invi	Home > Finance	> Instructions	<u>5</u>						1
View	Instruction	List							- 1
All Instructions	1.000 00000	2.00							
For Approval (0)	Filter Data								1
Complete (1)	Code				Owner	Q		Find Clear	
KPIs	Description				Financial	All		~	
	Reference				Year				
Actions	Instruction	All			Account	Q		Find Clear	
	Туре					All Next 7 Day	s <u>Overdue</u>	2	
Recent Items	Parent	All		~	Target		То	i	
🐝 <u>INT00000130</u>	Туре				From				
🛸 <u>ab123</u>	Parent				Category	All		~	
INT0000132	Code				Status	Generated			
# <u>INS011805</u>	Trade	All		~	Туре	Printed			
47 INS011804	Legation			Find Clear		Complete			
# INS011803	Location	4		Find Clear		Closed			
.∉ <u>PL00000486</u>	Site	2350012800	0412000 - READ I	BRANCH		Cancelled			
🛸 <u>FA_TEST</u>		LIDRART			Status	All		~	
44 INS011816	Site Type	All		×	Authorisation	Open			
	Supplier	Q		Find Clear		For Approval			
	Authoriser	Q		Find Clear		Approved Rejected			
	Apply Filter	Clear Filter H	ide Filter						

- 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.

County Council	hire	•							You are log Lanca	ged in as: shire Count	testcontractor y Council UAT Logout
Home Property	Finance	Contract	Help C	alls Inspection	Assess	ment	Help				Admin
Instructions Invo	ices										
View	Home	> <u>Finance</u> >	Instructio	ns							
All Instructions	Inst	ruction L	ist								
For Approval (0) Printed (5)	Sh	ow Filter									
Complete (0) KPIs							Items 1 - 1	l of 1 12	Per Page 🗸] < Pre	v 1 Next >
Actions	i) In	struction I	ist (Filte	red)							
Recent Items	Action	Code 🕴	Parent Code	Site	Building	Supplier	Estimate (£)	Actual (£)	Description	Status	Authorisation
♣ FA_TEST	Edit	INT00000128	HLP000123	23500128000412000 - READ BRANCH LIBRARY		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.

County Council	hire		You are logged in as: <u>TestContractor1</u> Lancashire County Council Test
			Logout
Home Property	Finance Contract	Help Calls Inspection Assessment Help	Admin
Instructions Invoid	ces		
View	Home > Finance >	Invoices > Invoice	
Instruction	Edit Invoice		
Notes (0)	Save Cancel		
Documents (0)	Details		
Actions	Туре	Invoice Credit Note	
nvoice Details	Invoice No	AB123	
Change Status	Status	DRAFT - Draft	
New Note	Supplier	Q Find	Clear
New Document		Test Contractor - Test Contractor	
inks		contractor@email.co.uk Main: 01772123456	
INT0000093			
	CIS Applies	O Yes No	
	Tax Date	25/02/2016	
	Description	First invoice	
	Actuals		
	Labour (£)	27.50	
ns://nams.test.ad.lancscc.r	net/invoice/invoices/16/do	uments/create 18.75	

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



Lanca County Council	shire						You are logged in as: <u>TestContractor1</u> Lancashire County Council Test	
Home Proper	rty Finance	Contract	Help Calls	Inspection	Assessment	Help	Admin	
Instructions	Invoices							l
	Home >	Finance > 1	nvoices > Do	cuments > Ne	w Document			
View	Load	Invoice I	Document					1
Notes (0)	Taura	ice Details						
Documents (0)	-	ice Details						1
	Туре	co No	Invoice	Credit Not	8			1
Actions	Thvo State	ice no	AB125	roft			1	
Change Status	Statt		DRAFT - D	rait	- b b			
New Note	Supp	ner	Test Contr	actor - Test Col	tractor			
New Document	IdXI		25/02/201	0				
Linke	Desc	ription	First invoid	;e				1
INTOOOOOOO	Invo	ce Code	1000000	J16				
1110000055	Either ch	oose a file or	enter URL. Ent	ter details of do	cument, then se	lect 'Save'.		1
	Save	Cancel						J
	Docu	iment						
	Туре		● File ○	URL				
	File				Browse			
	Deta	ils						
	Desc	ription						
	Grou	D	Not Select	ed				

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

Choose File to Upload	▶ Training ↓ Sear	rch Training	:cloud
Organize 🔻 New folder		i≡ • 🔳 🔞	You are logged in as: <u>TestContractor1</u> Lancashire County Council Test
Favorites	ents library	Arrange by: Folder -	Logout
Desktop Name	*	Date modified	Admin
Downloads	AP132 docx	24/02/2016 12:20	
Recent Places	AB123.pdf	25/02/2016 08:05	
Computer Computer Vindows MBR (C Please Ignore. (H - File name: Invoice A	™ • All Fil • O	es (`.*)	
Either cho	ose a file or enter URL. Enter details of	document, then select 'Save'.	
Save	uncel		
Docum	ient		
Туре	File O URL		
File		Browse	
Detail	5		
Descri	otion		

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

		LCC
Notes (0)	—Invoice Details	
Documents (0)	Туре	Invoice Credit Note
Actions	Invoice No	AB123
Invoice Details	Status	DRAFT - Draft
Change Status	Supplier	Test Contractor - Test Contractor
New Note	Tax Date	25/02/2016
New Document	Description	First invoice
Links	Invoice Code	INV00000016
INT0000093		
	Either choose a file or Save Cancel	r enter URL. Enter details of document, then select 'Save'.
	Document	
	Туре	● File ○ URL
	File	\\CorpData01\LCCUsers Browse
	Details	
	Description	First invoice for

Comment

Save Cancel

- 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.

Either choose a file or enter URL. E	inter details of document, then select 'Save'.		
Save Cancel			
Document			
Туре	File URL		
File	Browse		
Details			
Description			
Document Date			
Next Review Date	i i i i i i i i i i i i i i i i i i i		
Review Owner	٩	Find Clear	
Group	Not Selected		
Comments			
Archived	⊖ Yes ⊛ No		
Save Cancel			

and



County Council	ihire		You are logged in as: <u>TestContractor1</u> Lancashire County Council Test
			Logout
Home Property	Finance Contract	Help Calls Inspection Assessment Help	Admin
Instructions Inv	oices		
View	Home > Finance >	Invoices > Documents > Edit Document	
Instruction	Document successfu	illy uploaded.	
Notes (0)			
Documents (1)	Edit Invoice D	ocument	
Actions	Invoice Details		
Invoice Details	Туре	Invoice Credit Note	
Change Status	Invoice No	AB123	
New Note	Status	DRAFT - Draft	
New Document	Supplier	Test Contractor - Test Contractor	
Links	Tax Date	25/02/2016	
INT0000093	Description	First invoice	
	Invoice Code	INV0000016	
	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)	Instructio	n Details								^
Notes (0)	Code	INT	тооооо	093						
Documents (1)	Help Call C	ode HLI	P00003	B						
Actions	Status	ISS	5 - Issu	ed Directly (not via Oracle)						
Instruction Details	Supplier	Q			Find	Clear				
Change Status		Tes	st Contr	actor - Test Contractor						
New Note		cor	ntractor	@email.co.uk Main: 0177212	3456					
New Document										
Create Help Call	Diant					Circle	Class	-		
	Plant	ų (FINU	Clea			
	Description	n Rej	pairs to	building						
										_
	Show Filter									
						Item	ns 1 -	1 of 1 12 Per F	Page 🗸 < P	rev 1 Next >
	Document	List								
	Action			Document		G	Group	Group Description	Description	Loaded Date
	Extract Email	Edit	Del	EDMS_TFC_Instruction_201602	23_46.0	locx C	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.

County Council	bire				You are logged in as: <u>IestContractor</u> Lancashire County Council Test	^
Home Property	Finance Help Calls	Inspection Assessme	ent Help		Admin	1
Instructions Invo	nices					1
View	Home > Finance > Ir	nstructions > Instruction				l
Invoices (0) Notes (1)	Back Details					l
Documents (0)	Code	INT0000095				
Instruction Details	Help Call Code Reference	HLP000039				1
Add Invoice New Note	Target (Complete)	24/02/2016	Target Time (24h)	09:48		
New Document	Status	POS - Posted (Sent to O	racle)			
Create Help Call	Location	Q		Find Clear	נ	
	Site	23550011000022000 - 8	BACUP BRANCH LIBR	ARY		
	Description	ACC - Accidental Damag Broken window at main	e entrance		-	
	Permit Required	🔘 Yes 🖲 No				
	Permit Number					
	Back					
https://pams.test.ad.lancsco	c.net/instruction/instructions/95	/notes/create				`

• Click the **New Note** link.

Lancas County Council	shire				You are logged in as: <u>TestContractor1</u> Lancashire County Council Test Logout	
Home Property	Finance Help Calls	Inspection Assessment Help			Admin	
Instructions Inve	oices					
View	Home > Finance > 1	instructions > Instruction > Notes > Net	ew Note			
Help Call	Add Instructio	n Note				
Invoices (0)	Instruction Deta	nils				
Notes (1)	Code	INT0000095				
Documents (0)	Help Call Code	HLP000039				
Actions	Status	POS - Posted (Sent to Oracle)				
Instruction Details	Supplier	٩	Find Clear			
Add Invoice		Test Contractor - Test Contractor				
New Note New Document		contractor@email.co.uk Main: 017721	23456			
Create Help Call	Plant	Q	Find	Clear		
	Description	ACC - Accidental Damage Broken window at main entrance				
	Save Cancel					
	Note Details					
	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.



	Help Call Code	HEP000039	
Actions	Status	POS - Posted (Sent to Oracle)	
Instruction Details	Supplier	Q Find Clea	
Change Status		Test Contractor - Test Contractor	
Add Invoice		contractor@email.co.uk Main: 01772123456	
New Document			
Create Help Call			
	Plant	Q Fin	d Clear
	Description	ACC - Accidental Damage Broken window at main entrance	
	Save Cancel		
	Note Details		
	Author	TestContractor1	
	Date Created	23/02/2016 15:46	
	Last Updated	23/02/2016 15:46	
	Туре	GEN - General	
	Detail	Additional part required - leaving site with job incomplete	
	Private Note	O Yes 💽 No	
	Upload Image		
	File	Browse	
	Save Cancel		
		Copyright © 2011-2016 The Technology Forge Ltd	

- Click the **Type** dropdown list.
 - **GEN General**; always select this option. Do <u>not</u> 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.

Choose File to Upload	 New folder 	✓	^
Organize 🔻 New folder		≋ - □ 0	
Windows MBR (C ^ Please Ignore. (H Databases and Al C C A	Name Broken Window.jpg	Date modified Type 07/12/2015 21:26 JPEG image	
Corporate (MK) Carlos and nLCCI CCI ACS (Q) CCI (R) CCI (R) C		Clear III	
File nan	ne:	All Files (".") Open Cancel	
	Private Note	○ Yes ● No	
	Upload Image File	Browse	
	Save Cancel		
		Copyright © 2011-2016 The Technology Forge Ltd.	



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

	Help Call Code	HEP000039	
Actions	Status	POS - Posted (Sent to Oracle)	^
Instruction Details	Supplier	Q Find Cle	ar
Change Status		Test Contractor - Test Contractor	
Add Invoice		contractor@email.co.uk Main: 01772123456	
New Document			
Create Help Call			
	Plant	Q, Fi	nd Clear
	Description	ACC - Accidental Damage Broken window at main entrance	
	Save Cancel		
	Note Details		
	Author	TestContractor1	
	Date Created	23/02/2016 15:46	
	Last Updated	23/02/2016 15:46	
	Туре	GEN - General	
	Detail	Additional part required - leaving site with job incomplete	
	Private Note	○ Yes ● No	
	Upload Image		
	File	\\CorpData01\LCCUser: Browse	
	Save Cancel		
		Copyright © 2011-2016 The Technology Forge L	td.
https://pams.test.ad.lancscc.r	net/instruction/instructions/9	5/notes	~

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

County Council	bire			You are logged in as: <u>TestContractor</u> Lancashire County Council Tes Loggout	^
Home Property	Finance Help Calls	Inspection Assessment Help		Admin	
Instructions Invoi	ces				
View	Home > Finance > In	structions > Instruction > Notes > Edit Note			
Help Call	Note successfully add	ed.			
Invoices (0)					1
Notes (2) Documents (0)	Instruction Deta				
Actions	Code	INT00000095			
Instruction Details	Help Call Code	HLP000039			
Change Status	Status	POS - Posted (Sent to Oracle)			
Add Invoice New Note	Supplier	Q Find C	Clear		
New Document		Test Contractor - Test Contractor			
Create Help Call		contractor@email.co.uk Main: 01772123456			
	Plant	٩	Find	Clear	
	Description	ACC - Accidental Damage Broken window at main entrance			
	Save Cancel	Delete	е		
	Note Details				
https://pams.test.ad.lancscc.i	net/instruction/instructions/9	Contractor1			~

- 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.



County Council	hire		You are logged in as: <u>TestContractor1</u> Lancashire County Coundi Test
Home Property	Finance Help Calls	Inspection Assessment Help	Admin
Instructions Invo	ices		
View	Home > Finance > 1	nstructions > Instruction > Notes	
Help Call	View Instructi	on Notes	
Invoices (0)	Instruction Deta	ils	
Notes (2)	Code	INT00000095	
Documents (0)	Help Call Code	HLP000039	
Actions	Status	POS - Posted (Sent to Oracle)	
Instruction Details	Supplier	Q Find Clear	
Change Status		Test Contractor - Test Contractor	
Add Invoice New Note New Document		contractor@email.co.uk Main: 01772123456	
Create Help Call	Plant	Q Find Clear	
	Description	ACC - Accidental Damage Broken window at main entrance	
	Show Filter		
		Items 1 - 2 of 2	12 Per Page <> Prev 1 Next >
	Additional p	tor1 23rd February 2016 @ 15:47 <i>Public</i> Type: GEN - General art required - leaving site with job incomplete	<u>Edit</u> <u>Del</u>

• 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.

	Home										
by Week	Records	Due (b	y Month)							
by Month	Show Fi	lter									
ments	Show I										
nt Items					46 .						
123	Mandau	Turneday	< Fei	oruary 20	16 >	Caturday	Gundau				
T00000132	Monday 1	Tuesday	2 weanesaa	3 4	Friday 5	5aturuay 6	Sunday 7				
IS011805											
IS011804 IS011803	8	1	9 10	0 11	12	13	14				
00000486 TEST	15	10	5 17	7 18	19	20	21				
IS011816	22	2	3 24	4 25 INS011803	26	27	28				
	29		1 INT000001	2 3	4	5	6				
	7		B 9	9 10	11	12	13				
									My Ope	n Inspectio	<u>15</u>
						I	tems 1 - 3 of 3	12 Pe	r Page 🗸] < Prev	1 Next
	Overdue	Records	List								
	Action	Туре	Code	Description		Site			Priority	Owner	Due Date
	Edit	Instructions	INT00000129	front door not v properly	vorking	236502000 SKELMERS	00012000 - DALE BRANCH LIE	RARY		Test Contractor	01/01/20
	Edit	Instructions	INT00000130	ACC - Accidenta Broken window	al Damage in room 2	234502850 BRANCH LI	00012000 - INGO BRARY	L		Test Contractor	09/12/20
	Edit	Instructions	INT0000131	Plasterwork fall	ing off	231500340	90052000 - BURI	ILEY		Test	27/11/20

- 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.



County Council	shire						You a	re logged in as: Lancashire Cou	TestContractor1 nty Council Test Logout
Home Property	Finance	Help Calls	Inspection	n Assessment Helj)				Admin
Instructions Inve	oices								
Home > Enance > Instructions All Instructions Instruction List 5r Approval (0) Show Filter Printed (2) Show Filter Complete (0) Items 1 - 2 of 2 12 Per Page) < Prev 1 Next >									
Actions	0 Instr	uction List							
Recent Items	Action	Code 🕴	Parent	Site	Building	Supplier	Description	Status	Authorisation
 INT00000095 INT00000093 	Edit	INT0000095	HLP000039	23550011000022000 - BACUP BRANCH LIBRARY		Test Contractor	ACC - Accidental Damage Broken window at main entrance	POS - Posted (Sent to Oracle)	Open
	Edit	<u>INTO0000093</u>	HLP000038	23500128000412000 - READ BRANCH LIBRARY		Test Contractor	Repairs to building	ISS - Issued Directly (not via Oracle)	Open
tps://pams.test.ad.lancsc	c.net/instruction/	instructions/93/	edit						

- 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.

County Council	shire				You are logged in as: <u>TestContractor1</u> Lancashire County Council Test
					Logout
Home Property	Finance Help Calls	Inspection Assessm	ent Help		Admin
Instructions Inv	voices				
View	Home > Finance > I	nstructions > Instruction			
Help Call	View Instructi	ons			
Invoices (0)	Back				
Notes (0)	Details				
Documents (1)	Code	INT0000093			
Actions	Help Call Code	HLP000038			
Instruction Details	Reference				
Change Status					
Add Invoice	Target (Complete)	01/03/2016	Target Time (24h)	09:31	
New Document					
Create Help Call	Status	ISS - Issued Directly (n	ot via Oracle)		
	Location	Q		Find Clear	
	Site	23500128000412000 -	READ BRANCH LIBRA	RY	
	Description	Repairs to building			
	Permit Required	◯ Yes ● No			
	Permit Number				
	Back				

• 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.

Home Property Finance Help Calls Inspection Assessment Help Admin Instructions Invoices View Home > Einance > Instructions > Instruction Help Call Home > Einance > Instructions Invoices (O) Notes (O) Back Details Documents (1) Code Actions Help Call Code Help Call Code HLP000038 Instruction Details Code Change Status Graget Add Invoice Status New Document ISS - Issued Directly (not via Oracle) Create Help Call Code Status ISS - Issued Directly (not via Oracle) Create Help Call Permit Description Repairs to building Permit Yes ® No Required Permit Number	County Council	hire				You are logged in as: <u>TestContractor1</u> Lancashire County Council Test Logout
Instruction Involues View Home > finance > Instructions > Instruction Helip Call View Instructions > Instruction Involues (0) Packing Occuments (1) Occide Actions Helip Call Code Instruction Details Code Add Involce 01/03/2016 New. Note Target New. Note 01/03/2016 New. Note Target Status TSS - Issued Directly (not via Oracle) Location Q Status TSS - Issued Directly (not via Oracle) Location Q Site 23500128000412000 - READ BRANCH LIBRARY Wirgy Read Branch Library, 41 Whalley Road, Read, BURNLEY, BB12 7PB Description Repairs to building Permit Number Yes ® No	Home Property	Finance Help Calls	Inspection Assessmen	t Help		Admin
Home > Finance > Instructions > Instruction Home > Finance > Instructions > Instruction Hole Call View Instructions Invoices (0) Back Details Code Invoices (0) Actions Help Call Code HLP000038 Instruction Details Reference Chance Status O1/03/2016 Target Time 09:31 Mew Note Status ISS - Issued Directiy (not via Oracle) New Note Status ISS - Issued Directiy (not via Oracle) Location Q Find Clear Site 23500128000-12000 - READ BRANCH LIBRARY Misw Read Branch Library, 41 Whalley Road, Read, BURNLEY, BB12 7PB Description Repairs to building Permit Number Yes ® No	Instructions Invo	ices				
View Instructions Invoices (0) Notes (0) Documents (1) Actions Instruction Details Code Instruction Details Connen Status Reference (complete) (complete) Isso ISS - Issued Directly (not via Oracle) Create Help Call Location Status Isso ISS - Issued Directly (not via Oracle) Location Status Isste 23500128000412000 - READ BRANCH LIBRARY View Read Branch Ubrary, 41 Whalley Road, Read, BURNLEY, BB12 7PB Description Required Permit Required Permit Number	View	Home > Finance > J	Instructions > Instruction			
Instructions Notes (0) Decuments (1) Code Instruction Details Code Instruction Details Channes Status Add Invoke Mew Note New Note New Note Status ISS - Issued Directly (not via Oracle) Location Create Help Call Description Reparts Description Reparts to building Permit Required Permit Number	Help Call	View Instructi	ons			
Detrift Detrift Documents (1) Code Actions Help Call Code Help Call Code HLP000038 Instruction Details Reference Chanae Status Add Invoice New Note 101/03/2016 New Note Status Status ISS - Issued Directly (not via Oracle) Location Issued Directly (not via Oracle) Location Q Site 23500128000 + IEAD BRANCH LIBRARY Wiew Read Branch Library, 41 Whalley Road, Read, BURNLEY, BB12 7PB Description Repairs to building Permit Yes INO Required Yes INO	Invoices (0)	Death				
Documents (1) Details Actions Help Call Code INT00000093 Instruction Details Reference Change Status Add Invoice Cooplete) 01/03/2016 New Note Cooplete) Status ISS - Issued Directly (not via Oracle) Create Help Call Location Site 23500128000412000 - READ BRANCH LIBRARY View Read Branch Library, 41 Whalley Road, Read, BURNLEY, BB12 7PB Description Repairs to building Permit Required Yes No	Notes (0)	васк				
Code INT00000093 Help Call Code HLP000038 Instruction Details Reference Chanae Status Instruction Details Chanae Status 01/03/2016 Target Time (09:31) (24h) New Note Status New Document ISS - Issued Directly (not via Oracle) Location Q Site 23500128000412000 - READ BRANCH LIBRARY View Read Branch Library, 41 Whalley Road, Read, BURNLEY, BB12 7PB Description Repairs to building Permit Required Yes No	Documents (1)	Details				
Actions Help Call Code HLP000038 Instruction Details Reference Chanae Status Target Add Invoice (Complete) New Note Status New Note Status New Note Status Status ISS - Issued Directly (not via Oracle) Location Q Site 23500128000412000 - READ BRANCH LIBRARY MEW Read Branch Library, 41 Whalley Road, Read, BURNLEY, BB12 7PB Description Repairs to building Permit Required Yes No		Code	INT0000093			
Instruction Details Reference Chanae_Status Target Add Invoice Target New Note 09:31 Yew Document Status Status ISS - Issued Directly (not via Oracle) Location Q Site 23500128000412000 - READ BRANCH LIBRARY WW Read Branch Library, 41 Whalley Road, Read, BURNLEY, BB12 7PB Description Repairs to building Permit Yes No	Actions	Help Call Code	HLP000038			
Chance Status Target (Complete) 01/03/2016 Target Time (09:31) Madd Invoice (Complete) (Z4h) (99:31) New Note Status ISS - Issued Directly (not via Oracle) Create Help Call Location Q Find Clear Site 23500128000412000 - READ BRANCH LIBRARY Wiew Read Branch Library, 41 Whalley Road, Read, BURNLEY, BB12 72PB Description Repairs to building Permit Required Yes No	Instruction Details	Reference				
Add Invoice New Note Target (Complete) D/03/2016 Target Time (24h) 09:31 New Note New Document Status ISS - Issued Directly (not via Oracle) Issued Directly (not via Oracle) Create Help Call Location Q Find Clear Site 23500128000412000 - READ BRANCH LIBRARY Wiew Read Branch Library, 41 Whalley Road, Read, BURNLEY, BB12 7PB Description Permit Required Yes No	Change Status					
View Note Centry New Document Status ISS - Issued Directly (not via Oracle) Location Q Site 23500128000412000 - READ BRANCH LIBRARY View Read Branch Library, 41 Whalley Road, Read, BURNLEY, BB12 7PB Description Repairs to building Permit Yes No	Add Invoice	Target (Complete)	01/03/2016	Target Time (24h)	09:31	
Vew Document Status ISS - Issued Directly (not via Oracle) Create Help Call Location Q Find Clear Site Z3500128000412000 - READ BRANCH LIBRARY BURNLEY, BB12 7PB Find Clear Description Repairs to building Permit Required Yes ® No	New Note	(complete)		(241)		
Location Q Find Clear Site 235000412000 - READ BRANCH LIBRARY View Read Branch Library, 41 Whalley Road, Read, BURNLEY, BB12 7PB Description Repairs to building Permit Required Yes I No Permit Number Yes No	New Document	Status	ISS - Issued Directly (not	via Oracle)		
Site 23500128000412000 - READ BRANCH LIBRARY View Read Branch Library, 41 Whalley Road, Read, BURNLEY, BB12 79B Description Repairs to building Permit Required Yes No Permit Number Ves No	reate Help Call	Location	Q		Find Clear	
Description Repairs to building Permit Yes Yes No Permit Number 		Site	23500128000412000 - RE <u>View</u> Read Branch Library BURNLEY, BB12 7PB	AD BRANCH LIBRA , 41 Whalley Road	ARY I, Read,	
Permit O Yes O No Required Permit Number		Description	Repairs to building			
Permit Number		Permit Required	🔘 Yes 🖲 No			
		Permit Number				
(/ · · · · · · · · · · · · · · · · · · ·						

- 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.

County Council	hire	•						You are lo Lanci	gged in as: t ashire Count	testcontrac y Council U	
Home Property	Finance	Contract	Help C	alls Inspection	Assessment I	Help				Admir	
Instructions Invoid	ces										
View	Home	> Finance >	Instructio	ns							
All Instructions	Inst	ruction L	ist								
For Approval (0) Printed (5)	She	ow Filter									
Complete (0)							r .4 r				
KPIs						Items I	- 5 07 5 12	Per Page	< Prev	V 1 Next	2
Actions	i) Ins	struction L	ist								
Recent Items	Action	Code 🕴	Parent Code	Site	Building	Supplier	Estimate (£)	Actual (£)	Description	Status	Au
# <u>INS011805</u> # <u>INS011804</u>	Edit	INT00000132	HLP000060	23250046000012000 - LYTHAM ANSDELL BRANCH LIBRARY	23250046000013001 - MAIN BUILDING	Test Contractor	150.00	0.00	broken roof tiles	PRI - Registered (Printed)	Ор
₩ IN5011803 ₩ PL00000486	Edit	INT00000131	HLP000020	23150034090052000 - BURNLEY CAMPUS LIBRARY		Test Contractor	150.00	0.00	Plasterwork falling off	PRI - Registered (Printed)	Op
# INS011816	Edit	INT00000130	HLP000050	23450285000012000 - INGOL BRANCH LIBRARY		Test Contractor	150.00	0.00	ACC - Accidental Damage Broken window in room 2	PRI - Registered (Printed)	Ор
	Edit	INT00000129	HLP000100	2365020000012000 - SKELMERSDALE BRANCH LIBRARY		Test Contractor	150.00	0.00	front door not working properly	PRI - Registered (Printed)	Ор
tor//name ust ad langes	Edit	INT00000128	HLP000123	23500128000412000 - READ BRANCH		Test Contractor	150.00	0.00	Leaking gutters	PRI - Registered (Printed)	Op

• Search for and select the instruction.

County Council	hire				You are logged in as: <u>testcontractor</u> Lancashire County Council UAT
Home Property	Finance Contract	Help Calls Inspection	Assessment	Help	Logout
Instructions Invo	ices				
View Help Call Invoices (0) Notes (0)	Home > Finance > I View Instructi Back	nstructions > Instruction ons			
Documents (0)	Code				
Actions	Help Call Code	HLP000060			
Instruction Details	Reference				
Add Invoice New Note	Target (Complete)	15/12/2015	Target Time (24h)	16:50	
New Document	Status	PRI - Registered (Printe	d)		
Create Help Call	Location	Q		Find Clear	ิล
	Site	23250046000012000 - LIBRARY	LYTHAM ANSDELL B	RANCH	*
	Building	23250046000013001 -	MAIN BUILDING		
	Description	broken roof tiles			
	Permit Required	🔘 Yes 🖲 No			
	Permit Number				
tps://pams.uat.ad.lancscc.	net/instruction/instructions/1	32/status			

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



				Logout
Home Property	Finance Cont	ct Help Calls Inspection Assessmen	t Help	Admin
Instructions In	voices			
View	Home > Finan	> Instructions > Instruction > Change Statu	<u>s</u>	
Help Call	Change St	tus		
Invoices (0)	Instruction	Details		
Notes (0)	Code	INT00000132		
Documents (0)	Help Call Co	e HLP000060		
Actions	Status	PRI - Registered (Printed)		
Instruction Details	Supplier	Q	Find Clear	
Change Status		Test Contractor - Test Contractor		
New Note		Main: 01772 123456		
New Document				
Create Help Call	Plant	Q	Find	Clear
	Description	broken roof tiles		
	beschpaon	broken roor dies		
	Change Sta	us		
	Status	COM - Completed		
	Date	24/02/2016 🗮 Time (24h) 1	3:40
	Comment			
	connent			
	Save Cancel			
				https://pams.uat.ad.lancscc.net/instruction/instructions/132/stat

- 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.

County Council	hire					You are logged in a Lancashire Cou	s: testcontractor unty Council UAT
Home Property	Finance Contract	Help Calls I	nspection	Assessment	Help		Admin
Instructions Invoi	ces						
llow	Home > Finance >]	nstructions > Ins	truction				
ielp Call	The instruction statu	s has been updater	d.				
ivoices (0) otes (0) ocuments (0)	View Instructi	ons					
tions	Details						
struction Details	Code	INT0000132					
hange Status	Help Call Code	HLP000060					
ew Note	Reference						
ew Document reate Help Call	Target (Complete)	15/12/2015		Target Time (24h)	16:50		
	Status	COM - Complet	ted				
	Location	Q			Find Clear	ิล	
	Site	232500460000 LIBRARY	12000 - LY	THAM ANSDELL B	RANCH	4	
	Building	232500460000	13001 - MA	IN BUILDING			
	Description	broken roof tile	!S				
	Permit	Yes 🖲 No					

• 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

County Council					You are logged in as: <u>TestContractor</u> Lancashire County Council Te
Home Property	Finance Contract	Help Calls Inspec	tion Assessment	Help	Admin
Instructions Invoi	ces				
liow	Home > Finance > 1	nstructions > Instruction	on		
Help Call	The instruction status	has been undated.			
nvoices (0)	the methoded on States.				
otes (0)	View Instructi	ons			
ocuments (1)	Back				
ctions	Details				
nstruction Details	Code	INT0000093			
hange Status	Help Call Code	HLP000038			
dd Invoice	Reference				
lew Note					
reate Help Call	Target (Complete)	01/03/2016	Target Time (24h)	09:31	
	Status	COM - Completed			
	Location	Cont - Completed		Find Clear	
	Site	3350013800041300			
	Site	2330012800041200	U - READ BRANCH LIB	NART	
	Description	Repairs to building			
	Permit Required	🔍 Yes 💿 No			
	Permit Number				

- 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.



County Council	hire				You are logged in as: <u>LesContractori</u> Lancashire County Coundi Test
Home Property	Finance Contract	Help Calls Inspectio	n Assessment	Help	Admin
Instructions Invoi	ces				
	Home > Finance >	Invoices > New Invoice			
	New Invoice				
	Save Cancel				
	Details				
	Туре	● Invoice ○ Credit №	lote		
	Invoice No	AB123			
	Status	DRAFT - Draft			
	Supplier	۹		Find Clear	
		Test Contractor - Test	Contractor		
		contractor@email.co.ul	< Main: 017721234	56	
	CIS Applies	○ Yes ● No			
	Tax Date	25/02/2016			
	Description	First invoice			
	Actuals				
	Labour (£)				
	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.



	contractor@email.co.uk Main: 01772123456	^
CIS Applies	○ Yes ● No	
Tax Date	25/02/2016	
Description	First invoice	
Actuals		
Labour (£)	27.50	
Material (£)	18.75	
Other (£)		
Net Total (£)	46.25	
VAT (£)	9.25 ST - Standard Rate	
Gross Total (£)	55.50	
Linked Instructio	ns	I
Invoice 0.00 Value:	Allocated: 0.00 Unallocated: 0.00	I
Instruction	Q Find Clear	
	INT00000093	
Amount (£)	46.25	
Final Payment	○ Yes ● No	
Save Cancel		I
https://pams.test.ad.lancscc.net/invoice/invoices?	Copyright $\ensuremath{\mathbb{G}}$ 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.



Lancas County Council	shire				You are logged in as: <u>TestContractor1</u> Lancashire County Council Test
Home Property	Finance Contract	Help Calls Inspection	Assessment	Help	Admin
Instructions Invo	pices				
View	Home > Finance >	Invoices > Invoice			
Instruction	The invoice has be	en added.			
Notes (0) Documents (0)	Edit Invoice				
Actions	Save Cancel				
Invoice Details	Details				
Change Status	Туре	Invoice O Credit No	ote		
New Note	Invoice No	AB123			
New Document	Status	DRAFT - Draft			
Links	Supplier	۹		Find Clear	
INT0000093		Test Contractor - Test C	ontractor		
		contractor@email.co.uk	Main: 017721234	56	
	CIS Applies	○ Yes ● No			
	Tax Date	25/02/2016			
	Description	First invoice			
	Actuals				
	Labour (C)	27.50			

- 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.

Lancas County Council	You are logged in as: <u>TestContractor</u> Lancashire County Council Test						
			Logout				
Home Property	Finance Contract	Help Calls Inspection Assessment Help	o Admin				
Instructions Invoi	ices						
View	<u>Home</u> > <u>Finance</u> >	Invoices > Notes > Edit Note					
Instruction	Note successfully added.						
Notes (1) Documents (1)	Edit Invoice N	ote					
Actions	Invoice Details						
Invoice Details	Туре	Invoice Credit Note					
Change Status	Invoice No	AB123					
New Note	Status	DRAFT - Draft					
New Document	Supplier	Test Contractor - Test Contractor					
Links	Tax Date	25/02/2016					
INT00000093	Description	First invoice					
	Invoice Code	INV00000016					
	Save Cancel	Delete					
	Note Details						
	Author	TestContractor1					
	Date Created	25/02/2016 11:47					
	Last Undated	25/02/2016 11:47					

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

County Council	shire					You are logged in as: <u>festContractor</u> 1 Lancashire County Coundi Test Logout
Home Property	Finance Contract	Help Calls	Inspection	Assessment	Help	Admin
Instructions Inv	oices					
View	Home > Finance > 1	nvoices > Inv	<u>voice</u> > <u>Status</u>			
Instruction	Change Invoid	e Status				
Notes (1)	Invoice Details					
Documents (1)	Туре	Invoice	Credit Not	e		
Actions	Invoice No	AB123				
Invoice Details	Status	DRAFT - DI	aft			
Change Status	Supplier	Test Contra	actor - Test Co	ntractor		
New Note	Tax Date	25/02/201	5			
New Document	Description	First invoic	e			
Links	Invoice Code	INV000000	16			
INT0000093						
	Change Status					
	Status	REG - Regi	stered		×	
	Date	25/02/201	5 🗰	Time (24h)	11:48	
	Comment					
	Save Cancel					



- 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.

County Council	hire					You are logged in as: <u>TestContractori</u> Lancashire County Council Test			
Home Property	Finance Contract	Help Calls In:	spection Assessment	Help		Admin			
Instructions Invo	ices								
View	Home > Finance >	Invoices > Invoice							
Instruction	The invoice status has been updated.								
Notes (1)									
Documents (1)	View Invoice								
Actions	Back								
Invoice Details	Details								
New Note	Туре	Invoice 0	Credit Note						
New Document	Invoice No	AB123							
Links	Status	REG - Registere	d (25 Feb 2016, 11:48)						
INT0000093	Supplier	Q		Find	Clear				
		Test Contractor	- Test Contractor						
		contractor@ema	ail.co.uk Main: 017721234	56					
	CIS Applies	🔍 Yes 🔍 No							
	Tax Date	25/02/2016							
	Description	First invoice							
	Actuals								
	Labour (C)		27.50						

- 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.