## Complete reports (Trade)

For every job allocated by Bay Building Group, a report with accompanying photos, based on job allocated, is required to confirm works completed on-site. This confirms quality of works on-site and completion of job allocated. Submitted reports need to be approved by the job coordinator prior to invoice submission for payment.

This work instruction is for Bay Building Group Trades and will demonstrate how to complete the different report types in Crunchwork. \_Toc155362509

Α.	Step by step – Job completion report	
В.	Step by step – Make safe report	
C.	Step by step – Specialist report	
D.	Step by step – Assessment report	
Ε.	Step by step – Resubmit a report & / or quote at 'QA Failed' status	
F.	Step by step – Upload additional attachments to jobs (if required)14	

#### A. Step by step – Job completion report

#	Step Instruction	Desktop Image	Mobile Image
1	Every job completed for Bay Building Group requires a Completion Report.	OVERVIEW ACTIVITIES COMMUNICATIONS ASSETS AT	Assets
	Open the allocated job, click the <i>Assets</i> tab. A draft report (& Invoice) is ready to be completed once site has been attended.		









2	Click the <i>eye</i> icon next to the report. A new page will open in report writer, ready for completion.	Image: Second secon	Image: Second secon
3	Start by uploading attachments / photos to the report. Click <i>Attachments</i> in the right-hand panel and then click on <i>Upload</i> .	TEAMS O CREATE SAVE O PUBLISH DETAILS ATTACHMENTS REVIEW Attachments UPLOAD	Image: State of the
4	A new <i>Upload Attachments</i> pop-up will appear on your screen. Bulk add photos by choosing or dragging files. This should include pre- start and completion photos.	Updated Attachments	







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5	Select each uploaded image to add details like <i>Title</i> & <i>Description</i> in the information box. <b>TIP:</b> Select the information box, which will highlighted with a blue border, to view the related photo in the right panel of the pop-up.	istockphoto-85679467         67 KB         Title         Description         Included In Report         Included In Report         Included In Report
6	Once all completed, to save, click <i>Upload Attachments</i> (save icon), then click <i>Ok</i> .	UPLOAD ATTACHMENTS
7	Back on the report writer page, fill out all the relevant report details.	Image: Contract Control
	<b>TIP:</b> Grey bordered fields should be updated and fields with a red asterix `*' are compulsory. Fields with fixed choices have a dropdown arrow to the right. Date selections have calendar symbol in the field.	QE Augrand Andrew Construction of the second of the secon
	TIP: If a required field is not completed, an error will display:	Site Visit Details











	Click on the arrow in 'Show Navigation Panel' on the left- hand side to view where the missing fields are. These will be bordered in red and noted with 'This field is required'		
8	Once all fields have been completed and attachments have been uploaded, click <i>Publish</i> in the top right corner to update status.	PUBLISH	Published
	In Mobile: Bottom right of screen.	Published	
	Once published the report status at the top of the report panel will update to 'Published'.		
ĺ	<b>Note:</b> You can save the report at any time and return to complete by the page.	selecting the <i>Save</i> button at the top r	ight-hand side of SAVE
9	To exit report writer and navigate back to the job, select the <i>Jump To</i> button on the top left-hand side of the page.	<b>Б</b> ЈИМР ТО	⊐ ЈИМР ТО
	In Mobile: Bottom left of screen.		
i	<b>Note:</b> The status of the job will update to 'Complete Pending QA'. This and the job is now ready for Quality Assurance (QA).	s will advise the job coordinator that yo	ou have completed works onsite







10	A draft invoice has been created in the <i>Assets</i> tab of t Next step - Please refer to the Work Instruction – <u>CM</u> <u>Instruction – Submit an invoice (trade)</u>		ONS ASSETS	OVERVIEW ACTIVITIES COMMUNICATIONS ASSETS
i	<b>Note</b> : You will be able to submit your draft invoice fo by the job coordinator.	r repairs completed but this will not be sub	omitted for p	ayment until QA has been approved
	B. Step by step – Make safe report			
#	Step Instruction	Desktop Image		Mobile Image

#	Step Instruction	Desktop Image	Mobile Illiage
1	Every make safe job completed for Bay Building Group requires a Completion Report and Invoice submitted as soon as works are completed.	Job Information	Job Information
	A make Safe job is noted in the allocated job under the <i>Job Information</i> section in the <i>Overview</i> tab as <i>Service Type</i> : <i>Make Safe</i> .	Service Type Make Safe	Service Type Make Safe
2	Open the job, click the <i>Assets</i> tab. A draft completion report (& Invoice) is ready to be completed once site has been attended.	OVERVIEW ACTIVITIES COMMUNICATIONS ASSETS AT	
3	Click the <i>eye</i> icon next to the report to open the report.		
4	Complete steps 2-9 as above in section A.		

(i) **Note**: If you have been asked to provide a repair or restoration quote as part of your attendance, please upload these as an attachment **prior** to submission. Please see work instructions below - <u>Step by step - Upload additional attachments to jobs (if required)</u>









5	For a Make Safe job, you must ensure that the invoice is submitted for approval to progress the job status to <i>Complete Pending QA</i> .			
	Next step - Please refer to the Work Instruction - <u>CW BBS Work Instruction – Submit an</u> <u>invoice (trade)</u>			
i	(i) <b>Note</b> : Once the make safe invoice and report have been submitted, the status of the job will change to 'Complete Pending QA'.			
	This will advise the job coordinator that you have c	ompleted the make safe works onsite and the j	ob is now ready for Quality Assurance (QA).	
6	Once QA is approved by the job coordinator, your invoice will be automatically submitted for			

#### C. Step by step – Specialist report

#	Step Instruction	Desktop Image	Mobile Image
1	A specialist report request is noted in the allocated job under the <i>Job Information</i> section in the <i>Overview</i> tab as <i>Service Type</i> : <i>Specialist Report</i> .	Job Information	Job Information
		Service Type Specialist Report	Service Type Specialist Report
2	Open the job, click the <i>Assets</i> tab. A draft completion report (& Invoice) is ready to be completed once site has been attended.	OVERVIEW ACTIVITIES COMMUNICATIONS ASSETS AT	
3	Click the <i>eye</i> icon next to the report to open the report.	۲	



payment.









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4	Complete steps 2-9 as above in section A.		
5	A draft invoice has been created in the <i>Assets</i> tab of the job.	OVERVIEW ACTIVITIES COMMUNICATIONS ASSETS	OVERVIEW ACTIVITIES COMMUNICATIONS ASSETS
	Next step - Please refer to the Work Instruction – <u>CW BBS Work</u> <u>Instruction – Submit an invoice (trade)</u>		
í	<b>Note</b> : You will be able to submit your draft invoice for the specialist re been approved by the estimator / repair coordinator / supervisor.	port completed but this will not be su	ubmitted for payment until QA has

### D. Step by step – Assessment report

#	Step Instruction	Desktop Image	Mobile Image
1	In the relevant job, click <i>Assets</i> tab to view the auto created draft reports ready to be completed.	OVERVIEW ACTIVITIES COMMUNICATIONS ASSETS	Instrument (bit 1993 2001 ALE)         2           The State Brancy Mark Mills 2001 ALE         2           OPERATIVE ACTIVITIES         ASSETS         ATLACHMENTS         THE THACHARD           OPERATIVE ACTIVITIES         COMMUNICATIONS         ASSETS         ATLACHMENTS         THE THACHARD           ASSETS         ASSETS         ATLACHMENTS         THE THACHARD         THE THACHARD           1300 200311 ALE AM-40         TT200/0003 51.51 FM         Image: State American A
2	Click the <i>eye</i> icon next on the report you want to complete. A new page will open in <i>report writer</i> .	Image: Second system       Image: Second syste	0
3	Start by uploading attachments / photos to the report. Click <i>Attachments</i> in the right-hand panel and then click on <i>Upload</i> .	Image: Constraints     Image: Constraints       Attachments     1	











4	A new <i>Upload Attachments</i> pop-up will appear on your screen. Bulk add photos by choosing or dragging files. This should include pre- start and completion photos.		Version And All
5	Select each uploaded image to add details like <i>Title</i> & <i>Description</i> in the information box.	istockphoto-85679467 □ 67 KB Title	
	<b>TIP:</b> With multiple uploads, select the information box, which will be highlighted with a blue border, to view the related photo in the right panel of the pop-up.	Description Included In Report  Yes O No	
6	Once all completed, click <i>Upload Attachments</i> (save icon), then click <i>Ok.</i> These can now be selected as you navigate the report.	UPLOAD ATTACHMENTS	1 UPLOAD









Back on the report writer page, fill out all the report details. **TIP:** Grey bordered fields should be updated and fields with a red asterix '\*' are compulsory. Fields with fixed choices have a dropdown arrow to the right. Date selections have a calendar symbol in the field.

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#### (i) Please note:

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- If a make safe is identified on site. Please contact the office by telephone and send an email for the BBG Team to action.
- Any risks identified will need to be highlighted in the risk assessment report and the office will need to be notified so they can follow up and action as required.

(1) **Note:** If a further specialist report is required, this request will need to be emailed to the BBG team to be allocate as required and noted within your report under the "Conclusion field".











8	Snippets have been created to assist with report writing paragraphs. Select Snippets. A new Add Snippets pop up will appear on screen. Review library from the available categories.	C Snippets	Image: Participation     Image: Participation     Image: Participation     Image: Participation       Add Snippots     X       Tata Demogram     V       Train     V       T
	TIP: If you are unable to see the snippets icon, please check your page width.		PREME       © CLEMALL         The manufacture for severates, the for both enders and the full severate duration to the full severates duration for the full severates duration fort duration for the full severates duration
9	Select the appropriate <i>Snippet</i> category from the left panel and select the snippet (green tick).	0	
10	<i>Insert Snippet</i> on the bottom right-hand side of the pop up.	INSERT SNIPPET	
11	Once all fields have been filled as required, click <i>Publish</i> at the top right-hand side of the page. In Mobile: Bottom right of screen.	A PUBLISH	Image: Construction
	TIP: If a required field is not completed, an error will display:		Initiation of the second secon











	Click on the arrow in 'Show Navigation Panel' on the left- hand side to view where the missing fields are. These will be bordered in red and noted with 'This field is required'.							
12	Select <i>Jump To</i> to exit the report and navigate back to the job.	<b>Б</b> ЈИМР ТО						
í	(i) <b>Note</b> : For an assessment job you will need to complete assessment and risk assessment report.							

### E. Step by step – Resubmit a report & / or quote at 'QA Failed' status

#	Step Instruction	Desktop Image	Mobile Image
1	If works complete have failed QA, you will be notified by your job coordinator. The status of your job will appear as 'QA Failed'.	QA Failed	
i	<b>Note</b> : You will be able to submit your draft invoice for the specialist repayment until QA has been approved by the estimator / repair coordinates approved by the es		t this will not be submitted for
ĺ	<b>Note</b> : This is also visible on your <i>Vendor Dashboard</i> :		









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4	A new version of the report / quote will be created, and the status of the report/quote will now appear as 'Draft'.	Draft	Draft
5	Update the report/quote as required including revised photos.		
6	Click Save once completed to save any of your changes.	SAVE	Report Writer Actions         SAVE DRAFT         PUBLISH REPORT
7	Click <i>Publish</i> on the top right-hand side of the page. In Mobile: Bottom of screen.	PUBLISH	Report Writer Actions         Save Draft         PUBLISH REPORT
ĺ	<b>Note</b> : Once published, you can view both versions of the report / que when selecting the report /quote from the assets tab in the job and t down at the top of the page in report writer / quotes. The original ve	hen selecting the revision from the drop	
8	Select <i>Jump to</i> in the top left-hand side to navigate back to the job. In Mobile: Bottom left of screen.	Э ЈИМР ТО	C OT 9MUL
í	<b>Note</b> : Once the report / quote has been submitted, the status of the coordinator or estimating stuff member that you have completed the		







## F. Step by step – Upload additional attachments to jobs (if required)

#	Step Instruction	Desktop Image	Mobile Image
1	In a job, click on the <i>Attachments</i> tab.	OVERVIEW ACTIVITIES COMMUNICATIONS ASSETS ATTACHMENTS TIMELINE	
2	Select Upload New Attachment (Desktop) or tap Upload (Mobile).		L UPLOAD
3	A new pop up will display. Drag and drop file onto the screen to upload or click on the screen to search for a file on your computer.	Uplead Attachments x core Uplead Attachments v v v v v v v v v v v v v v v v v v v	







4	To assist with file management, add a <i>Title</i> to each attachment.	Title Title of attachment	Construction     Construction     Construction     Construction     Construction     Construction
	Hover over the attachment, click on <i>Edit details</i> , add information in the <i>Title</i> field. Add a <i>Description</i> if required.		







