

Operative

User Guide

What an Operative will see when logged into the Teams App

Home Page: My Jobs

(Includes both Reactive Jobs & PPMs)

 **Overdue** – shows all jobs assigned to you with a **due date in the past**.

 **Due Today** – shows all jobs assigned to you that are **due for today's date**

N.B. These jobs will move into Overdue if they are not completed by their due date.

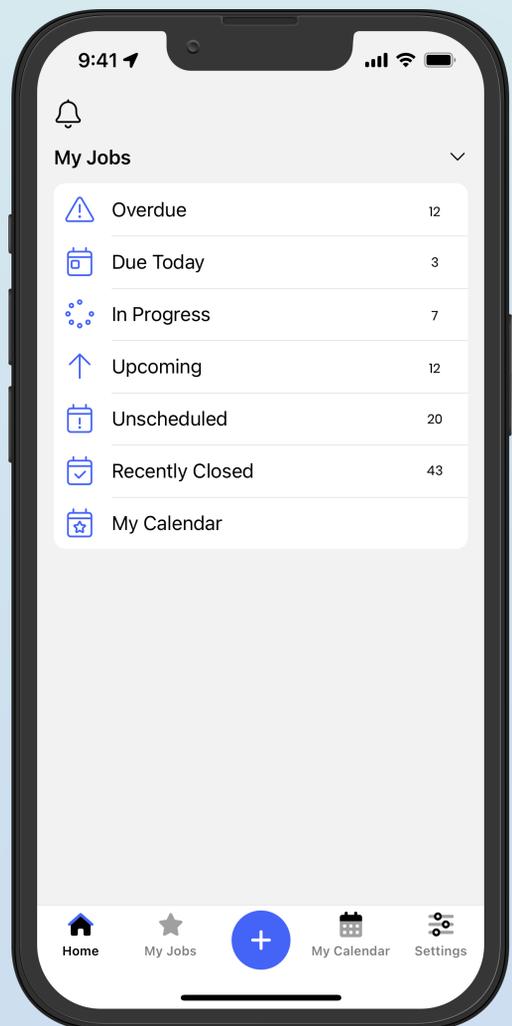
 **In Progress** – shows all jobs assigned to you that are **marked as 'In Progress'**

 **Upcoming** – shows all jobs assigned to you + **due within 1 month**

 **Unscheduled Reactives** – shows all jobs assigned to you without a due date – **these are your Reactive jobs**

 **Recently Closed** – all your completed jobs in the **last 30 days**

 **My Calendar** – jobs assigned to you in a **calendarised view**



Click to **Add New Reactive**

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How an Operative updates a Job and completes Forms

Job Details Page

(1) **Status** – update the status between

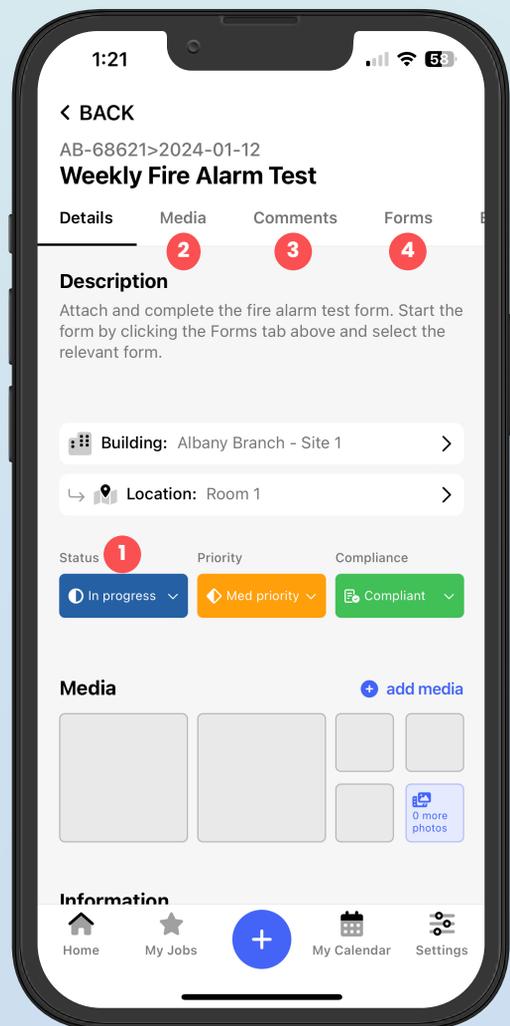
New **In Progress** and **Closed**

Marking a job as Closed will **drop the task off your To Do list** and will be available in your Recently Closed section

(2) **Media Tab** – this is where you can add photos, videos, documents, files, PDF etc

(3) **Comments Tab** – here you can log **internal comments** or notes which are visible to other admin/back office users. **Public comments** will send notifications to the user who Reported a job.

(4) **Forms Tab** – Click Forms > Add a Form > select from the list of templates to start completing your forms, checklists, audits, or steps etc.



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Completing a Form and Closing Jobs

Form Completion Page

(1) Mark form as Completed – this will lock your form/checklist/audit from further edits. It **can** be re-opened later but prevents further edits from being made whilst Completed.

(2) Close Job – this will close the Job and **remove it from your To Do list**. You can review closed jobs by clicking the home button and clicking **My Jobs: Recently Closed**

(3) Raise Remedial Issue – this will allow you to **create and link a Reactive Job** to this Job, ideal for showing remedial actions.

(4) Compliance Status – if the Task has a compliance status, you can set it as either **N/A** **Compliant** or **Non Compliant**

