# Work Order Portal

User Guide

CC Infrastructure Services

https://ccis.chp.me.uk

# Contents


- 1. Overview
- 2. Logging In
- 3. Uploading This Month's Job List
- 4. Reviewing and Editing Jobs
- 5. Mapping & Routes
- 6. Completed Photos
- 7. Generating a Work Order
- 8. Managing Users (Admin only)
- 9. Deleting an Upload (Admin only)
- 10. Tips & Troubleshooting

# 1. Overview

The Work Order Portal replaces the manual process of turning a monthly Solomon export into a printed job sheet for the crew. It does four things:

- Reads the monthly spreadsheet export and collates the description, photos, affected business, address, street and (when the spreadsheet includes it) location for every job.
- Lets you review, correct, and include/exclude jobs before anything goes out, and plots jobs on a map so the route can be sorted into an efficient order.
- Generates a downloadable work order as a PDF and a Word document, grouped by street and numbered sequentially, in the same layout the team already uses.
- Tracks “before” and “after” photos for each job, and can produce a finished work order once the crew has completed the work.

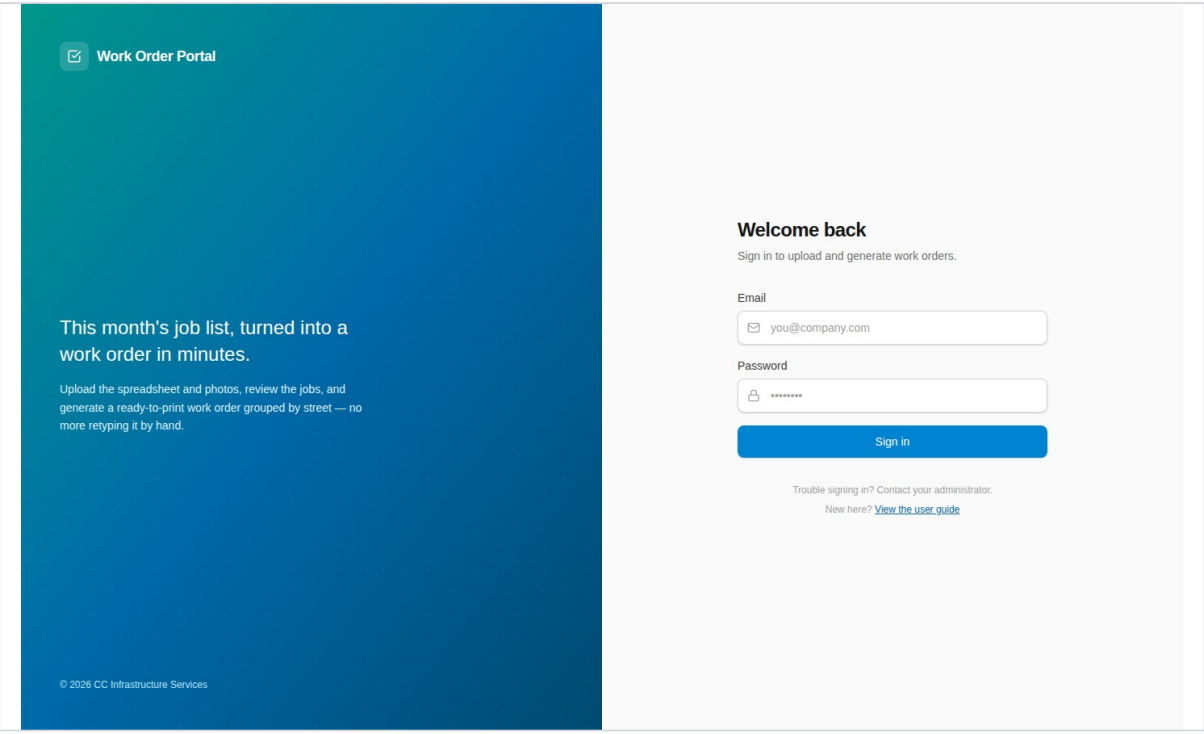
## Staff vs. Admin

Everyone with a login can upload spreadsheets, review and edit jobs, plot routes, and generate work orders — that part of the portal is identical for every user.

- Staff: everyday use — uploads, reviewing jobs, mapping routes, generating work orders.
- Admin: everyday use, plus the Users page (adding and removing logins) and the ability to delete an upload.

# 2. Logging In

Go to the portal address and sign in with the email and password given to you by an administrator.



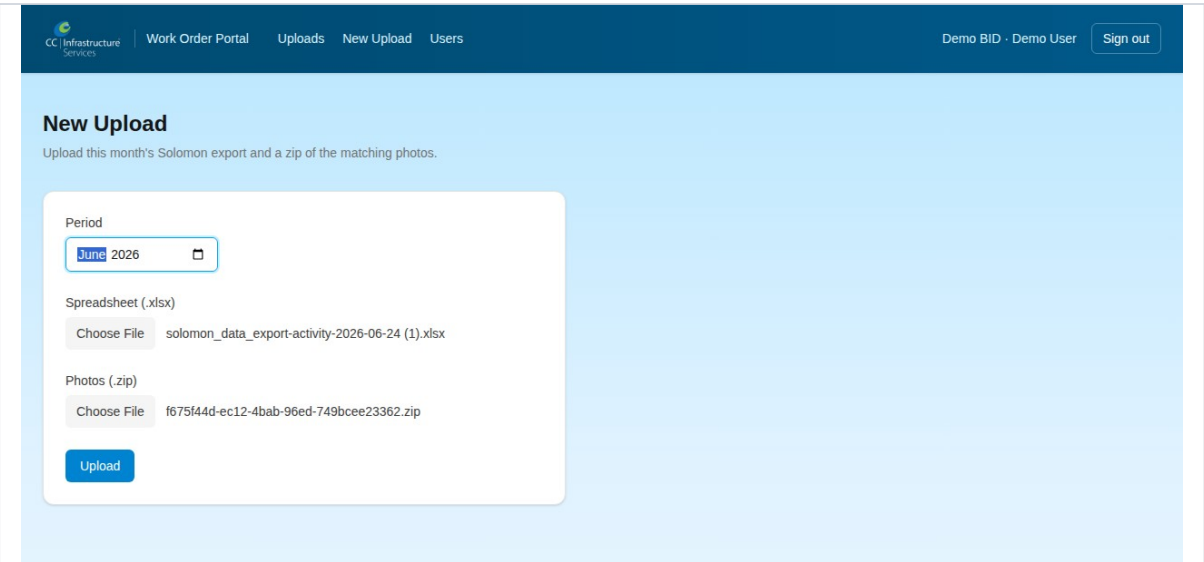

*The sign-in screen — it also links back to this guide.*

If you don't have a login yet, or you've forgotten your password, contact an administrator — there is no self-service “forgot password” option at the moment (see the Users section).

## 3. Uploading This Month's Job List

From the Uploads page, click New Upload.

1. Set the Period to the month the export covers.
2. Choose the spreadsheet (.xlsx) file from Solomon.
3. Choose the matching photos, as a single .zip file.
4. Click Upload.




*The New Upload form, ready to submit.*

Five columns are required from the spreadsheet: description, images, businesses, referenceAddress and tags. An optional sixth column, location, supplies GPS coordinates that place jobs on the map in Mapping & Routes below — jobs without it are simply left off the map. The ///what3words code inside the description is pulled out automatically. Photos are matched to jobs by filename — any job whose photo isn't found in the zip is flagged, never silently dropped, so nothing goes missing without you knowing.

## 4. Reviewing and Editing Jobs

After uploading, you land on the job table for that upload. This is your chance to fix anything before generating the work order.



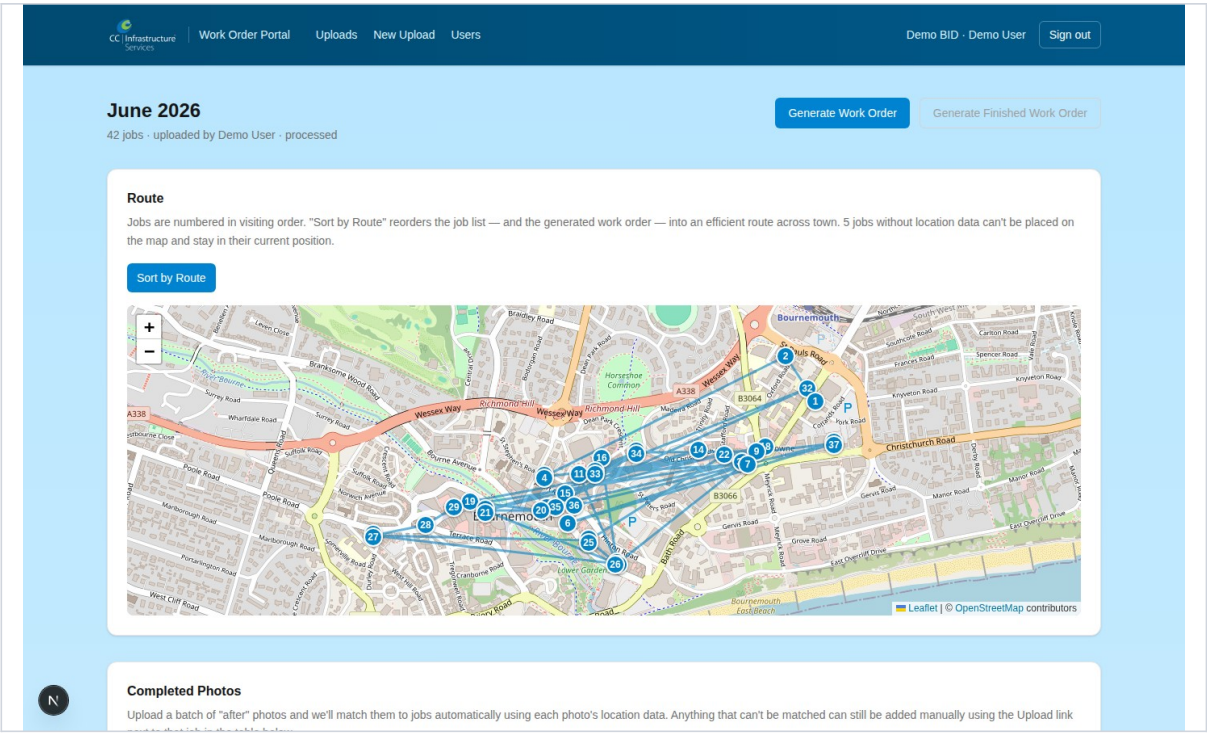
| ORDER | INCLUDE | STREET | BUSINESS | ADDRESS | DESCRIPTION / WHAT3WORDS | PHOTOS | COMPLETED PHOTO |
|---|---|---|---|---|---|---|---|
| 1 | ☑ | Holdenhurst Road | AXA PPP Healthcare (inf | Floors 7-8, Ocean, 80 Ho | ///giant.occupy.wires<br>Fire exit door towards left<br>Color. White | missing 1 photo(s) | Upload |
| 2 | ☑ | Oxford Road | Bournemouth Medical Ce | Ground Floor Suite A, Av | ///steer.bride.quiet<br>Towards right wall on vinyl.<br>Color white | missing 1 photo(s) | Upload |
| 3 | ☑ | Yelverton Road | Bournemouth Daily Echo | 19 Richmond Hill, Bourne | ///boots.lodge.zealous<br>On shutters | missing 1 photo(s) | Upload |
| 4 | ☑ | Albert Road | Bournemouth Daily Echo | 19 Richmond Hill, Bourne | ///happy.onions.posed<br>On shutters, fire escape and wall in Albert Road | missing 1 photo(s) | Upload |
| 5 | ☑ | Christchurch Road | (vacant) Naked Coffee | Gnd Floor, Union House, | ///tribes.degree.slurs<br>Down alley | missing 1 photo(s) | Upload |
| 6 | ☑ | St Peters Road | The Mary Shelley | 4-8 St Peters Quarter, Ol | ///tested.sizes.mouse<br>Fire exit door towards bayswater student accommodation | missing 1 photo(s) | Upload |
| 7 | ☑ | Old Christchurch Road | (vacant) House of Fraser | 14-24 Old Christchurch R | ///orders.stops.chest | missing 1 photo(s) | Upload |

*The job review table — street, business, address, description/what3words, before photos, and completed photos, for every job in the upload.*

- Click into any Street, Business, Address, or Description cell to edit it directly — changes save automatically when you click away.
- Untick Include to leave a job out of the work order without deleting it.
- A job showing “missing N photo(s)” means the spreadsheet referenced a photo that wasn't in the zip you uploaded — check the filename, or re-upload the photo separately.
- Use the filter box to jump to a specific street or business.
- The Completed Photo column shows any “after” photos already attached to that job — see Completed Photos below.

## 5. Mapping & Routes

Any job with location data from the spreadsheet is plotted on a map beneath the header, numbered in visiting order.

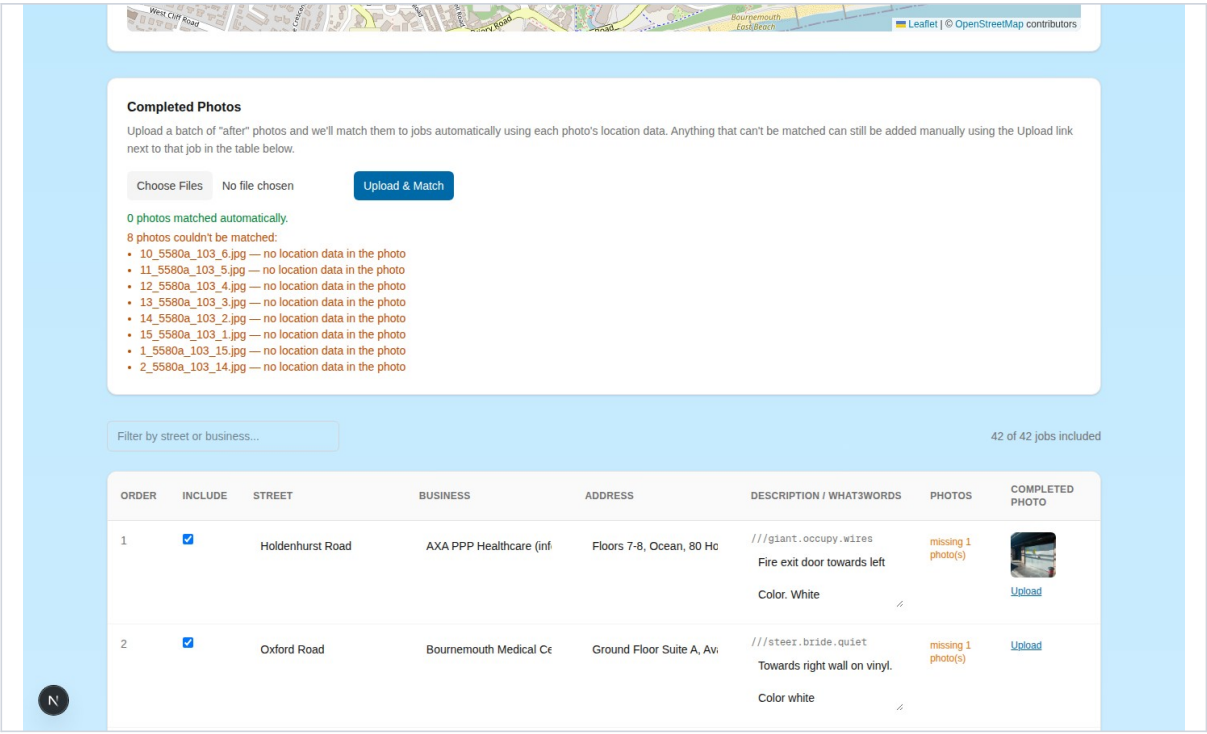



*The Route panel — click Sort by Route to reorder jobs into an efficient visiting order.*

- Click Sort by Route to reorder the job list — and the generated work order — into an efficient route across town.
- Jobs without location data can't be placed on the map and stay in their current position.
- If nothing appears on the map at all, re-upload the spreadsheet with a location column, or check that column's format.

## 6. Completed Photos

Once the crew has been out, attach “after” photos to show the work is done.




*The Completed Photos panel — upload a batch of after photos and they're matched to jobs automatically; anything unmatched is listed with the reason.*

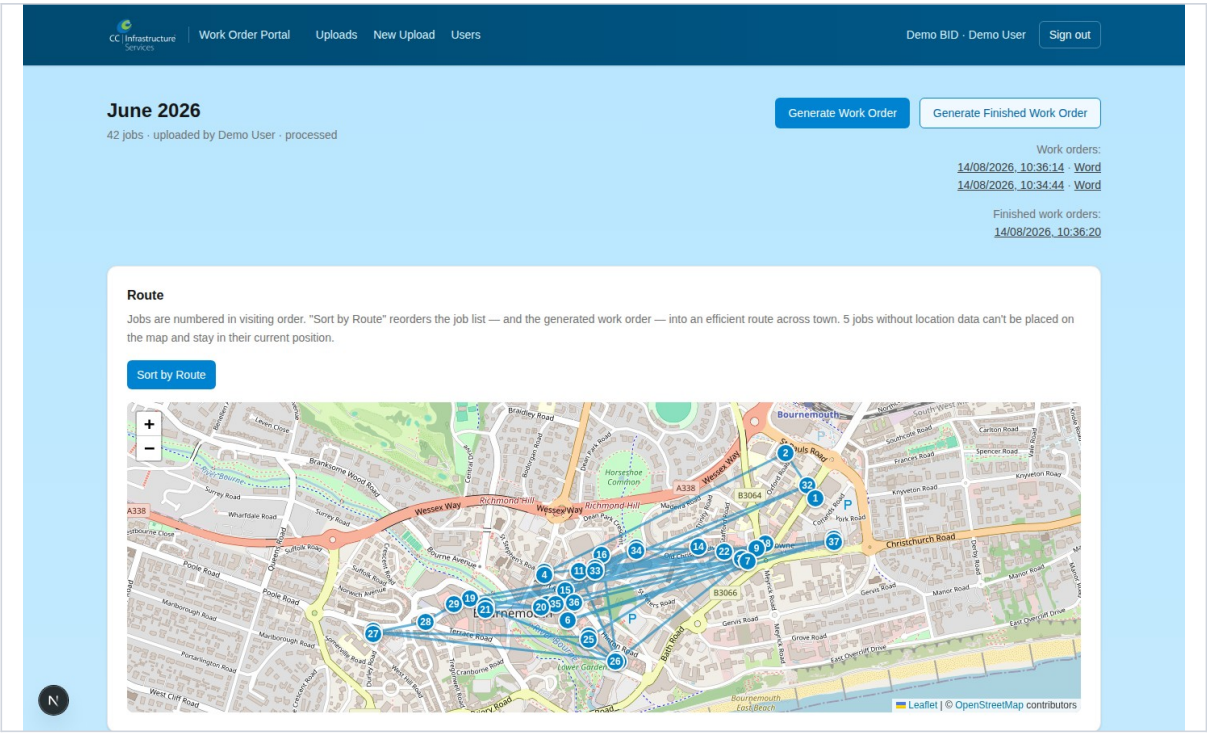
- Bulk upload: use the Completed Photos panel above the job table to upload a batch of after photos at once. Each photo's own location data (from the camera or phone that took it) is matched against nearby jobs automatically.
- Anything that can't be matched — no location data in the photo, no job nearby, or too close to call between two nearby jobs — is listed so you know what to check.
- Manual upload: any job can also have a photo attached directly using the Upload link in its Completed Photo cell in the table — useful for anything the bulk match couldn't place.

# 7. Generating a Work Order

Once the table and route look right, click Generate Work Order at the top of the page.

The work order groups included jobs by street (alphabetically) and numbers them sequentially for that month (e.g. Jun26 01, Jun26 02, …) — the same format the crew already works from. Every generation produces both a PDF and a Word document — download either from the Work orders list. You can regenerate at any time (after fixing something in the table, for example); every past generation is kept, so earlier versions are never lost.

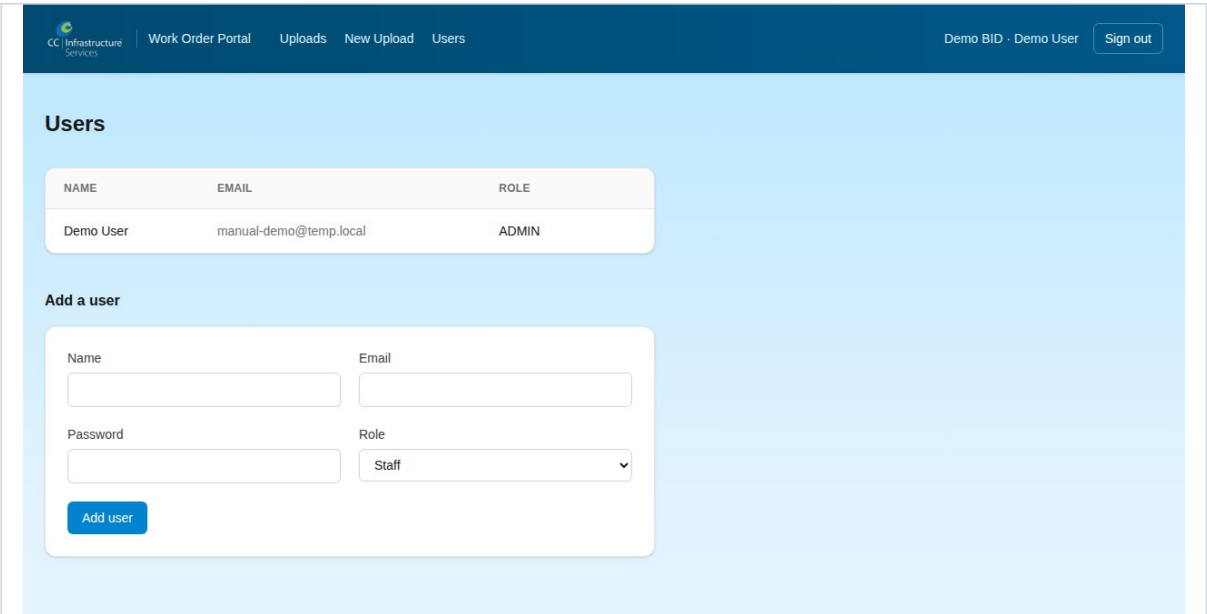
Once the crew has completed the work and you've attached completed photos (see Completed Photos above), click Generate Finished Work Order to produce a before/after PDF for each job. It reuses the original work order's job numbers, so it only becomes available once an original work order exists for that upload.




*Work orders and finished work orders are listed here — download the PDF or Word version of any past generation.*

# 8. Managing Users (Admin only)

Admins can see a Users link in the top navigation; staff cannot, and the page isn't reachable for them even by direct link.




*The Users page — visible to admins only.*

## Adding a user

1. Go to Users.
2. Fill in their name, email, and a password, and choose a role (Staff or Admin).
3. Click Add user.

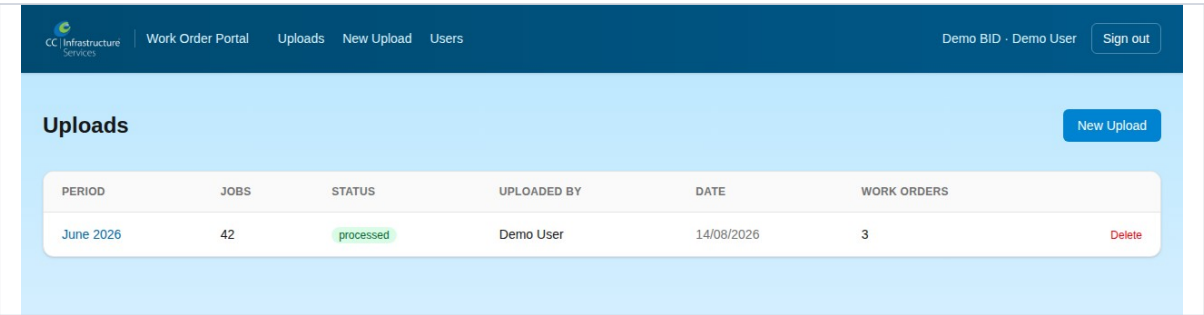
Share the password with them directly (there's no automatic invite email) — they can't change it themselves yet, so pick something they can be given securely.

### Removing a user

Click Remove next to their name. You can't remove your own account this way, which prevents everyone from accidentally being locked out.

## 9. Deleting an Upload (Admin only)

Admins see a Delete link next to each upload on the Uploads page. Deleting an upload removes all of its jobs, photos, and generated work orders — this can't be undone, so use it for clearing out a test upload or a period that was created by mistake, not as a way to tidy up work orders you might need again.




*The Uploads page — admins see a Delete link for each upload.*

## 10. Tips & Troubleshooting

- Nothing happens when you click Sign in: double-check the email and password. If it still doesn't work, ask an administrator to confirm your account exists and check with them about resetting it.
- A job's before photo shows “missing”: the filename in the spreadsheet doesn't match anything in the photos zip — re-check the export and the zip contents match.
- A completed photo wasn't matched automatically: the panel lists why — no location data in the photo (screenshots and edited/re-saved images often lose this), no job nearby, or it was too close to call between two nearby jobs. Attach it manually from the job's row instead.
- Wrong street grouping: streets are taken from the spreadsheet's tags column — edit the Street cell in the review table to fix a mis-tagged job.
- Nothing shows on the map: the spreadsheet needs a location column in the [latitude | longitude] format — jobs without it just don't appear, and the rest of the portal works the same either way.
- Need last month's work order again: open that upload from the Uploads page — every generated PDF and Word document is kept under “Work orders.”
- Deleted an upload by mistake: there's no undo — check with another administrator before removing anything you're not sure about.