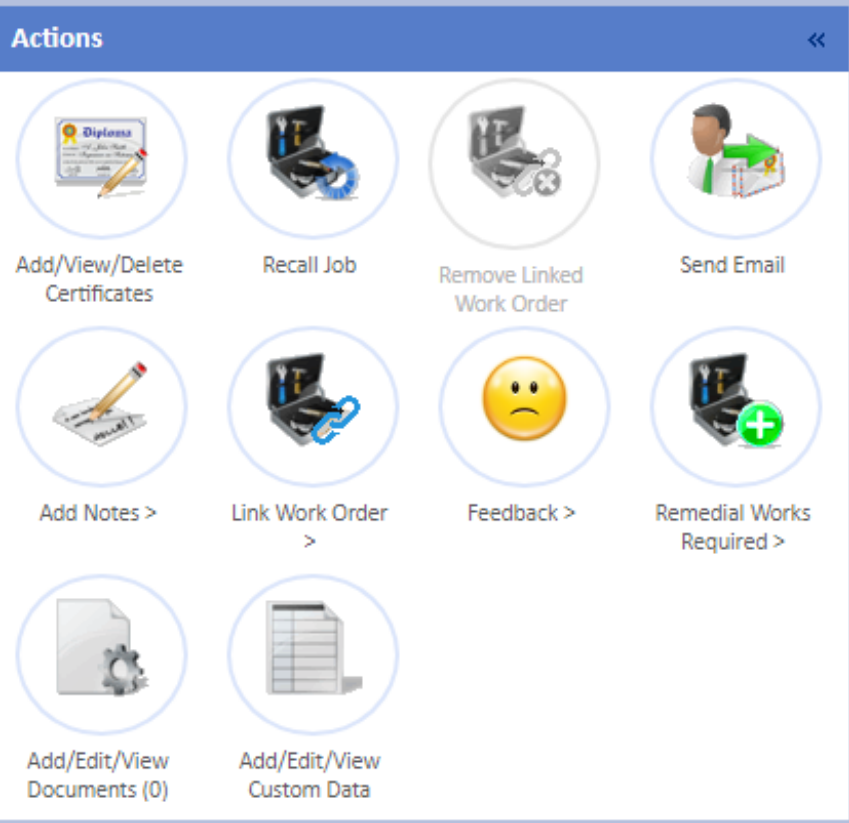


Add/View/Delete Certificates

Certain jobs cannot be completed just by completing the work. Some jobs may require a certificate to be uploaded as part of the job completion. Uploading certificates can be achieved using the "Add/View/Delete Certificates" action.

1. On the Job Detail screen, select the "Add/View/Delete Certificates" button to display the Add/View/Delete Certificates screen.



2. There are two screens that can appear depending on the settings of the Contract in the system: Per Asset screen or the Per Work Order screen.


The Per Asset screen will list the Assets on the job. Select an Asset to upload the certificate to. This will display the Document List screen. Click the link to upload the certificate.

Add/View/Delete Certificates					
Certificate	Frequency	Certificate For Compliance	Valid From	Valid To	Status
Air Conditioning Inspection/Refrigerant Leak Check	Annual				Pass
Save					
Return to job without saving					

The Per Work Order screen will display the Document List screen. Click the link to upload the certificate.

Document List

Job	7609690
Job Description	Air Conditioning PPM (Trimesterly)

 If you are about to upload both a pass and a fail certificate please upload the fail certificate first

[Click to upload a new PPM certificate](#)

Done

3. Next, choose the certificate that is going to be uploaded and give it a description. Depending on the type of work that took place, it is possible that an service or examination took place. If that is the case then it is possible for the job to "Pass" or to "Fail". Using the Sub Type field, the User can determine whether the certificate being uploaded is a "Pass" certificate or a "Fail" one as well the duration of the certificate (how long it is active for).

Select the date the certificate is active from in the "Valid From" field and, depending on the settings of the system, the "Valid To" date will automatically adjust to match the duration of the certificate.

Upload File

Name

Type

Certificate

Failed Certificate?

☐

Sub type

Air Conditioning Inspection/Refrigerant Leak Check (Annual) - Pass

File

Choose File

No file chosen

Valid From

4/14/2016

Valid To

4/14/2017

NOTE: The maximum file size for uploaded documents is 30 MB

Upload

Cancel

Once the details have been entered and the certificate is selected, click the "Upload" button to perform the upload.

Note: If the "Valid To" date falls in the past, the certificate will not be uploaded. The "Valid To" date must fall on or after todays date. Also, the "Valid To" date can only be changed if the user has the "Can Edit Work Order Certificate Valid To Date" [Permissions](#) against their [Powered by PHPKB](#) (Knowledge Base Software)

Profile.

4. Once uploaded, click the "Save" button to apply the upload to the job. This will then move the job onto a completed state.

If for some reason the certificate isn't required to be uploaded at this point then click the "Return to without saving" to cancel the changes.

Note: If the certificate uploaded is a "Fail" certificate then the work will not progress onto a completed state. Instead it will stay at an awaiting further information state until a "Pass" certificate is uploaded.

Online URL: <https://ostarasystems.knowledgebase.co/article.php?id=606>