# Innovise®

## Monitor, Measure & Manage

# servicetrac

# System Overview

Management of large, complex and multi-site contracts is a major issue particularly if your staff operate in the field. Servicetrac is a web based modular suite of solutions which combine to provide an operation tool to monitor, measure and proactively manage your staff and their activity.

# Audit

**Audit** provides a simple to use yet powerful web-based quality monitoring tool that supports multiple surveys such as Cleaning, Security, Health and Safety, Risk Assessment, Staff PPE and Training etc.   In fact surveys relating to any type of service you provide can be setup and recorded using Windows Mobile handheld devices.

Using handheld computers ensures that the user has accurate and relevant auditing information.  A variety of handheld units can be used, ranging from the standard mobile/Pocket PCs such as the HP iPAQ, to the PDA phones such as the Qtek 9100, thus creating fast and effective data transfer.

More robust handhelds are available using the same Windows operating systems, these can be used with integrated barcode scanners or RFID readers (radio frequency tags) on sites where external location identifiers are required, or simply where a more rugged unit is necessary.  The rugged units are also available with GSM .

Using the **Data Tree** allows existing site specific information to be set up easily on the simple user-friendly system, or alternatively, data can be automatically imported.

The simple layout and inherent ease of use of Audit will ensure that users can quickly adapt to the new style of system. The PDA is also very simple to use. Despite this simplicity, the solution has been designed with flexibility in mind and is highly configurable. This unique ability to configure what is monitored, how and when is a key factor in ensuring effective returns from the Servicetrac tool.

**Worth noting...**

Provided the PDA being used has the facility, the system can be set up at this stage in the data tree to give the audit compiler the chance to take photographs or record audio notes during an  audit and the photos will be   incorporated into the reports.

The handhelds can be used to collect a much wider variety of information than is currently being collected.

Just a few examples of this could be as follows:-

**KPI / Client Satisfaction** – Overall client satisfaction relating to staff performance, their perception of delivery against expectations, summary level site feedback as opposed to results against individual areas / staff etc.  Data relating to this can be collected on the handheld either against pre determined KPIs / SLAs or as generic or anecdotal information.

**Health & Safet**y – This could relate not only to the cleaning stores and the equipment that staff use on a daily basis i.e. chemicals stored correctly, electrical equipment in working condition and PAT tested etc, but also to the environment within which they operate, thereby providing an additional service in terms of identifying potential hazards within the workplace.

**Staff PPE** - Ensuring that members of staff are wearing the correct uniform or dress for the site and that they are using the correct PPE equipment, be they cleaners, maintenance staff, security staff etc.  Checking that cleaners are wearing tabards, using the correct colour coded materials in the correct areas, using chemicals correctly or carrying out tasks using the correct process is as important as ensuring that a security guard is displaying a current SIA licence.  Also, in the cases of all staff, ensuring that they are presentable, approachable, knowledgeable and even good natured is important to monitor.

**Training Records** – Training received, courses attended, training requirements, ongoing assessments etc,.  The benefit of using the audit system to collect this data ensures that it is collected in a timely manner, there are digitally captured signatures of staff and trainers, an automatic audit trail and history recorded against each member of staff, it can be setup to identify when retraining is required etc.

**Process Audits** – Ensuring that tasks are carried out in line with the correct procedure including scheduling of these checks at relevant intervals to reflect the risk of non compliance.

**Security –** the ability to track your security staff and carry out security audits rather than simply recording a proof of presence.

**Plus many more such as:**

**Condition Reporting**
**Food Hygiene Reporting**
**Risk Assessments**
**Grounds Maintenance**

The ability to carry out audits covering any aspect of data collection against a location / vehicle / item of equipment / person / process etc makes the system an extremely powerful piece of software when used as a management tool.   It can be used to assist in both the achievement of key performance targets in respect of clients expectations, but also in terms of ensuring that internal operational issues are highlighted and dealt with in a timely and effective manner.

# Help Desk



Using the Servicetrac integrated Help-desk, any issues can be recorded using the handheld unit. Remedial actions recorded on the PDA, can be sent via standard or mobile telephones directly into the integrated web based Helpdesk, where further information can be added if necessary, leading to the generation of a uniquely numbered job sheet.

As the web based system includes a helpdesk, issues generated by the handheld computer and those reported directly by the client can be taken, monitored and managed by one central system, thus ensuring that nothing is missed. The ability to identify problem areas is therefore a simple task.

The Helpdesk system can also be used to manage tasks allocated to internal staff and external contractors and record information such as order numbers, job costs, categories job histories etc. The tasks recorded on the system can also cover various services or categories such as cleaning, waste management, pest control, maintenance, health and safety, and in fact categories can be setup by the user to cover any service as may be required.

Helpdesk tasks may be prioritised in order of importance and target completion time. The Helpdesk software provides reporting features to help the contractor and client identify the performance of reactive and corrective cleaning tasks.

A response time can be attached to each individual job recorded through the Helpdesk system; these can be based upon standard response times or assessed against each individual job reported. An audit trail is automatically generated against each help desk job as different actions are performed, e.g. reported, actioned, suspended, completed etc., this ensures that the history of each job is readily available, also performance statistics for response times, different job categories etc. can be produced quickly and easily.



Many of the input fields within the system are linked to look-up tables, thus making the recording of information quicker and simpler for the operator.

Rectification sheets can be produced showing all relevant information in a clear and concise format, satisfaction sheets can be produced ensuring that reactive tasks have been completed to the satisfaction of those reporting them.

These can all be printed or e-mailed to the relevant people to ensure that all issues raised are dealt with swiftly, effectively and professionally.

The Helpdesk software also provides robust reporting features allowing performance figures to be produced.   The use of the Servicetrac Audit Helpdesk system ensures that jobs can be tracked, managed and monitored quickly and efficiently, and performance can be measured against clear benchmarks

Reactive tasks can be logged against each location within a campus by using the site tree, costs or charges can be identified and flagged, this means that reports can be produced at the month end giving a breakdown of any extra charges against individual locations or individuals.



**Help Desk Job Sheet**

Job No. **1**

Contact:
Ref: **AV 4435**
Allocated To: **Mark Sumner**

Location:
**Maybin > Joan Hill > Ellen Hall > Banners > Managers Office**

Concern:
**clean Carpets where coffee was spilt**

| Reported By: **John Wilson** Contact Info: | Job Type: **Any Job Type** Status: **New** | Created: 16/10/2006 14:51:00 Respond In: 3 Actioned: Due: 16/10/2006 17:51:00 Completed: |
| --- | --- | --- |
| Completed By: (Print Name) | Signed: | Date: |

**Comments**

## Reporting

Once the data recorded on the handheld unit is uploaded onto the web system, using the range of reports available, the supervisor or manager can immediately produce reports and performance information.

User-driven selection criteria ensures that reports relating to the most recent audit session, last full week, month etc. covering all or any locations, looking at specific or general tasks, can be generated at the touch of a button.
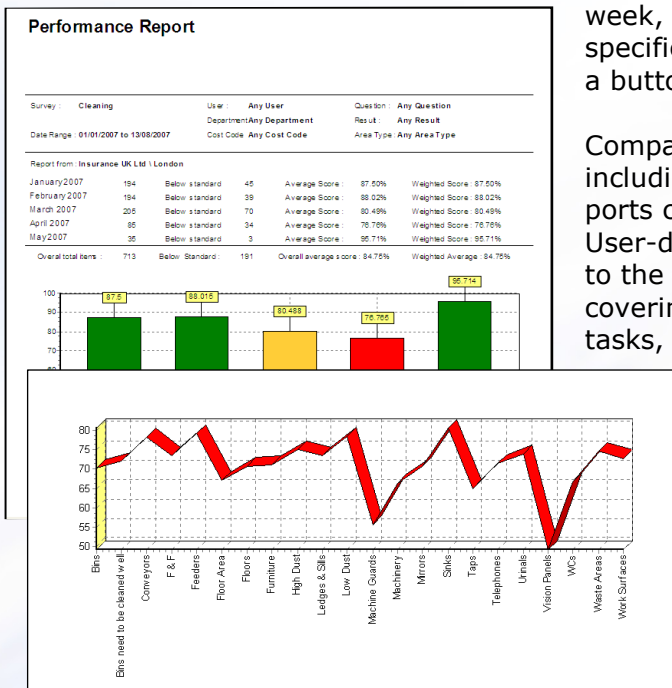
Comparison reports looking at ongoing performance, including graphs can easily be produced.   Servicetrac reports can also be used to support ISO 9000 accreditation. User-driven selection criteria ensures that reports relating to the most recent audit session, last full week, month etc., covering all or any locations, looking at specific or general tasks, can be generated at the touch of a button.

Performance data covering the last full week, month etc., covering all or any   locations, looking at specific or general tasks, can be generated at the touch of a button. Comparison reports looking at ongoing performance, including graphs can easily be produced.

# Periodic Task Planning

The optional Periodic Task Planning module gives the user the ability to effectively plan and manage periodic tasks i.e. any task that takes place on a regular basis.  In relation to any site or building, each location can be allocated a specific program of dates across a year for example, to have a major deep clean, Health and Safety audit, Asset PAT test over and above that carried out on a day to day basis.

The system is able to produce a work specification, move work programs relating to a single area etc, at the touch of a button to ensure that the schedules for the whole site can be managed effectively and proactively.

Jobs planned through the Task Planning module need could include periodic planned maintenance issues, cleaning tasks, service visits, health and safety checks, external contractor regular site visits etc.
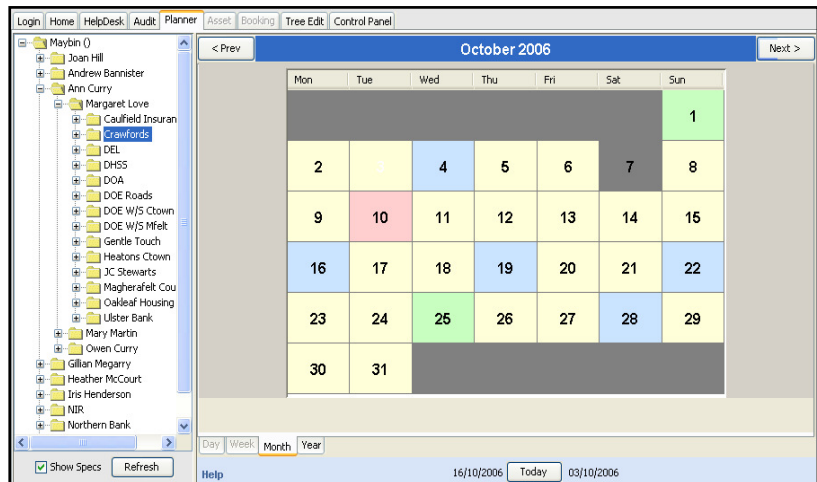


The system ensures that all issues relating to managing the quality of service provided, can be managed and monitored quickly and effectively, covering the planned and reactive tasks, and those occurring on a day to day and periodic basis.

# Other Features:

## Scheduling
This allows the user to set up the required frequency of audits for each specification type for each survey type.  Audits can be scheduled for a particular time, day, week, month or year at whatever interval necessary. For example cleanliness of offices may be scheduled to be checked monthly, whereas PAT tests of equipment are scheduled yearly.

The user can also set up a 'warning time' for each specification type which determines how far in advance the user is warned that the audit needs to be completed.

'Colour coding' will be applied to the Site tree on both the web-interface and the PDA to identify the status of the audit. Green means the audit does not need to be completed, orange means it is within the warning time and red means it is overdue.
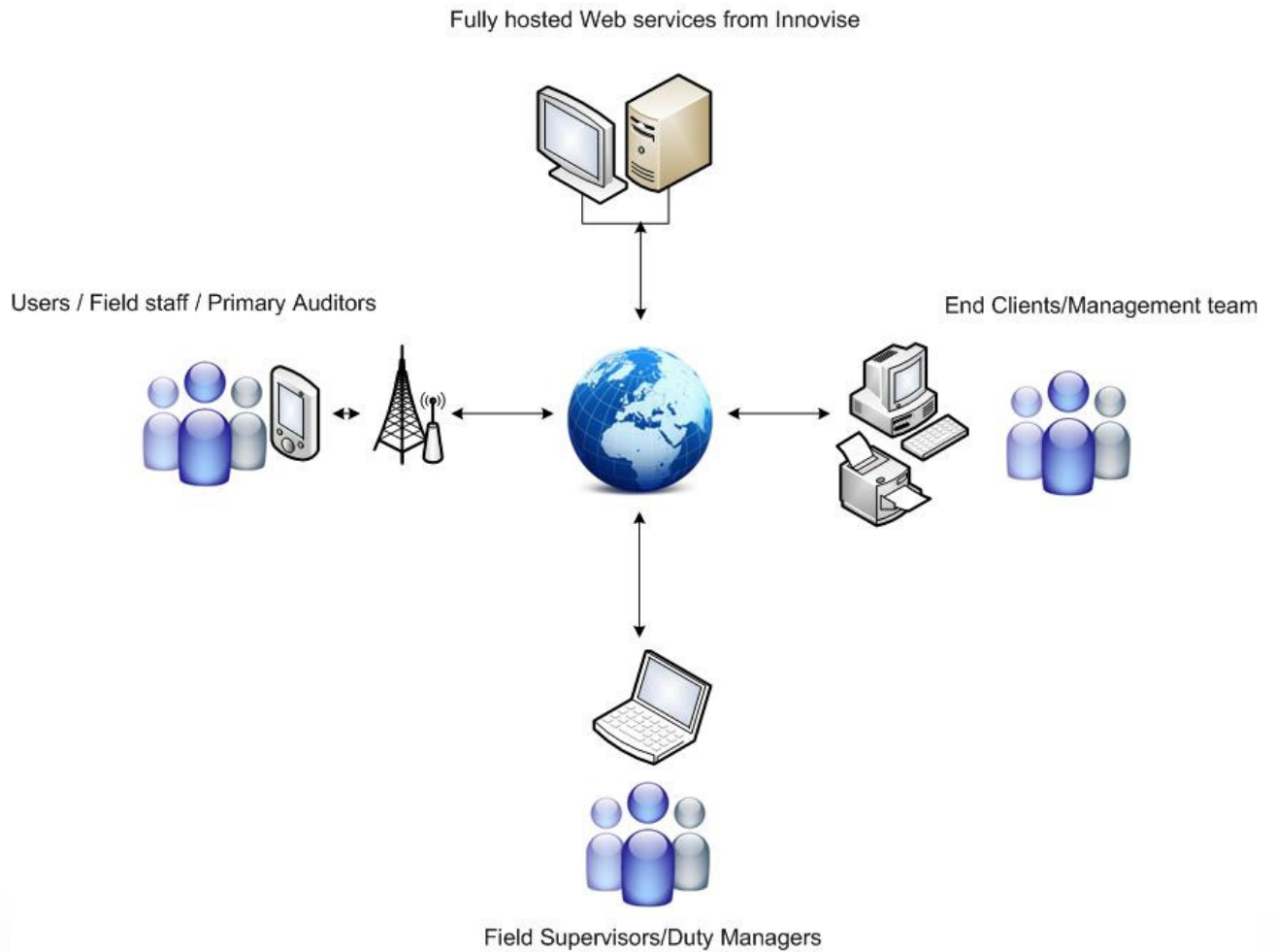
## Information Panel
The information panel allows the user to see instantly the last date and time an audit was completed on a particular part of the site tree, be that a room or a piece of equipment.  This will also show the user the next scheduled audit date.

## Alerts
If an audit is not completed at the required time, an alert can be sent to an individual or group of individuals either by SMS text message or email. The details of who the alert is sent to are pre-defined against the specification type.

# How it works



Fully hosted Web services from Innovise

Users / Field staff / Primary Auditors

End Clients/Management team

Field Supervisors/Duty Managers

# What you need:

- PDAs with Microsoft Windows for Mobile — Version 5 or Version 6 Professional

- GPRS, Wifi or ActiveSynch cradle connections to the world wide web for the PDAs to upload data

- Internet access for the Web users who want to manage the system or see reports