



Operational Service Management Solution Overview

The **Summit 5000 Service Management solution** is a set of modules within Summit 5000 that offer specific operational control of the service and facilities management process including managing maintenance and small works. The solution integrates tightly with the back office suite providing a seamless solution for managing the service operational workflow together with the costing and final billing to clients. The solution is in short an integrated company wide management system – *from call to cash*.

Who is it for?

Summit 5000 Service Management has been developed for organisations involved in high volume often-low value jobs such as:

- Small Works Maintenance
- Building Services
- Facilities Management

What does the solution cover?

Summit 5000 covers the whole service process from:

- call management,
- control and scheduling of jobs,
- final job invoicing,
- profitability analysis on jobs
- managing schedule of rates

Operative	Operative Name	Timeslot	Wed 24/11	Thu 25/11	Fri 26/11	Sat 27/11	Sun 28/11	Mon 29/11	Tue 30/11
CC	Charles Carr	AM							
CC	Charles Carr	PM	PPM000001						
DD	Douglas Dakes	AM							
DD	Douglas Dakes	PM	LN0000006						
H&P	Heating & Pipework L	AM			LN0000011				
H&P	Heating & Pipework L	PM							
LS	Leslie Seard	AM							
LS	Leslie Seard	PM							
MH	Montgomery Haywood	AM	Holiday	Holiday	Holiday	Holiday	Holiday	Holiday	Holiday
MH	Montgomery Haywood	PM	Holiday	Holiday	Holiday	Holiday	Holiday	Holiday	Holiday
PL	Paul Leach	AM							
PL	Paul Leach	PM							
SA	Shepherd Airconditio	AM							
SA	Shepherd Airconditio	PM							

Manpower scheduling is shown clearly allowing work to be allocated to either an employee or sub-contractor

The solution can be deployed in a flexible manner either fully integrated with **Summit 5000 Financials**, or stand alone as required.

Which types of work are managed?

- Pre-Planned Maintenance (PPM)
- Reactive Maintenance
- Day works
- Schedule of rates based work
- Time & materials or cost plus invoicing.

Customer	Location	Asset	Service...	Description	Last Service	Frequency	Interval	Next Service	Exclude
POST001	1	ARC0201	1	WEEKLY FILTER CHECKS	16/11/04	D	7	23/11/04	<input type="checkbox"/>
EV0001	1	ACU002	2	WEEKLY CHECKS	23/11/04	D	7	30/11/04	<input type="checkbox"/>
POST001	4	ARC0202	1	WEEKLY Filter checks	23/11/04	D	7	30/11/04	<input type="checkbox"/>
BAR001	00001	1ST FLOOR	1	WEEKLY CLEAN EXTERNAL	23/11/04	D	14	7/12/04	<input type="checkbox"/>
BAR001	00001	1ST FLOOR	2	2ND SERVICE	23/11/04	D	7	7/12/04	<input checked="" type="checkbox"/>

For regular planned maintenance, Summit 5000 keeps a log of all work undertaken and will allow future planning of maintenance work



Operational **Service Management Solution** Overview

Summit 5000 tracks the job from order through to completion and final invoicing. It is a seamlessly integrated solution to ensure data is not re-keyed at any stage and thus accuracy and control are maintained. Summit 5000 makes efficient use of technology to avoid high volumes of paperwork when managing jobs in what is traditionally a very labour intensive process. The solution automates the whole service process and offers a much clearer view of the business even when spread across several locations or regions.

Features include:

- Ability to control the priority of jobs to ensure target response times are achieved to meet any client imposed KPIs and Service Level Agreements.
- Improves client satisfaction by offering reports and documentation (such as invoices) in a format that suits them.
- Includes an option to offer clients access to the solution via a secure extranet link in order to review status of jobs.
- Manages planned maintenance schedules by automatic generation of job tickets for each contract.
- Invoice management – all integrated and automatically generated when jobs are completed – to ensure improved cash flow.
- Flexibility through user-defined workflow to accommodate the variety of contracts, clients and work processes
- Management and scheduling of engineers for jobs based on skills and expertise – using the resource diary.
- Easy to use Windows environment which integrates with common desktop applications such as Microsoft Office.
- Option for an entry level solution with pre-defined workflow.

Summit 5000 Service Management Offers:

- Multi-user solution
- Client/Server or stand alone
- Options to use in a web browser
- Call centre front end
- Integrated quotes/estimating
- Field based mobile solution

Return on Investment

- More efficient processing
- Timely submission of invoices
- Quicker cash collection
- Proactive management against Service Level Agreements
- Avoidance of penalties
- Improved resource utilisation



Summit 5000 Service Management Core Product

At the heart of the product is a user-defined workflow system controlling the stages, statuses and priorities that you follow for specific clients or any given contract.

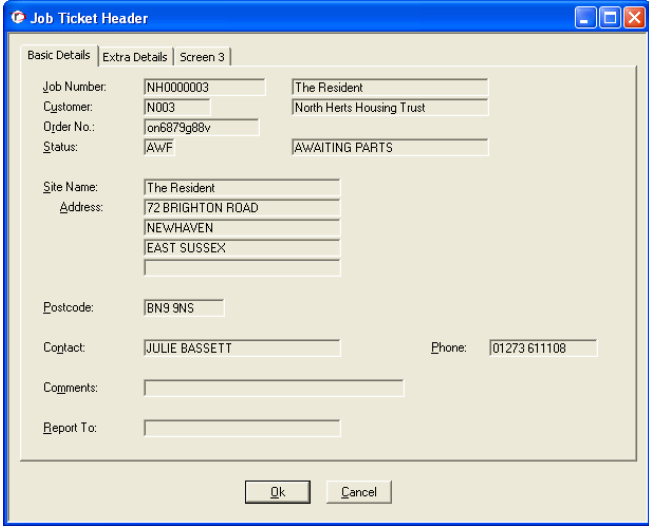
1. Workflow

Users can define a controlling rule set – which is the definition of the stages that a work ticket *could* move through in its life cycle.

An example could be:

- Enter New Ticket
- Amend Ticket
- Inspection Required
- Inspection Complete
- Work Complete.

The controlling rule set also determines what status (or range) that a ticket must be in before the system will allow the next stage to be completed. The movement to a stage can trigger an automatic e-mail to a specified person such as the Surveyor or Contracts Manager. E-mail groups can also be used including external contacts. This is particularly useful when a stage such as ‘awaiting materials’, or ‘inspection required’ is reached.



The screen shows the logged job details, including the current status of this job.

2. Priorities

These are user definable by contract. Priorities can be on the basis of a number of hours (including when a day starts and ends) or a number of days. It will also account for working at weekends and Bank Holidays. This information is used to prompt the user on input of a work ticket with the anticipated completion date and time.

3. Service Schedules (for PPM)

Routine maintenance contracts can be easily controlled using location assets service schedules.

For each client a list of locations can be held; against which you can record the service details of any item of equipment you are contracted to maintain.

By entering the last service date and the service interval, Summit 5000 can create the required job tickets when the service becomes due, complete with any relevant resource lines for standard items, which can be carried through to invoicing.



4. Tracking Status

The status of the ticket can be tracked using an enquiry program where the user can define tracking criteria. These criteria may show, for example, all orders for a depot that are in a waiting status (materials, inspection, access) or all orders that are within say 2 hours/days of their completion that are still outstanding. This enables a proactive approach to be taken by the management.

The ticket can be moved through the statuses defined for that client and the system date and time stamps the changes. Priorities can be automatically re-calculated based on statuses i.e. if no access add X days/hours to the completion date

Job Ticket	Site Name	Work Desc	Date Received	Date Target	Time Target	Priority	Order No.	Status
JC000003	Evans & Co Ltd	CANNOT SWITCH UNIT ON	19/10/04	28/10/04	21:39:48	P2	0N7H776	LEDGERS UPDATED
JC000004	Evans & Co Ltd	AIR CON UNIT IS NOT CHILLING	19/10/04	20/10/04	10:30:25	P1	668	LEDGERS UPDATED
JC000007	89 RED SQUARE	WOPK	22/10/04	22/10/04	14:26:21	P1	777	LEDGERS UPDATED
JC000002	SUSSEX BARR PUBLIC H	Repair to window	29/10/02	1/11/02	11:41:48	N	ABC5543	LEDGERS UPDATED
LN000001	Post Office House	ROLLER SHUTTER IN LOADING BAY	22/11/04	22/11/04	16:04:34	2	784JK V879	CONFIRMED COMPL
LN000002	Post Office House	Attend to leaking tap in kitchen	22/11/04	23/11/04	18:45:05	4	Y1	INVOICED
LN000003	Vehicle Depot South	LOOSE KERBING O/S ENTRANCE	23/11/04	23/11/04	13:51:24	4	666	QUOTE REQUIRED
LN000004	Regional Call Centre	WOPK	23/11/04	23/11/04	14:21:25	4	797	QUOTE REQUIRED
LN000005	Central Soring Office	Entrance door is sticking	23/11/04	23/11/04	14:58:59	2	5677598768	
LN000006	Regional Call Centre	Leaking overflow pipe in kitchen wall	23/11/04	23/11/04	14:13:17	2	0N75667	INVOICED
LN000007	Vehicle Depot South	Outside lights have fused	23/11/04	24/11/04	00:27:09	4	7987	JOB COMPLETED (v)
LN000008	Regional Call Centre	Carryout works as per Order	23/11/04	23/12/04	20:48:31	4	6877883	JOB COMPLETED (v)
LN000009	Regional Call Centre	maintenance	23/11/04	23/11/04	21:01:28	4	6889	ORDER LOGGED
LN000010	Regional Call Centre	Lock needs replacing on side entrance	23/11/04	23/11/04	17:03:11	4	JK88003796	ORDER LOGGED
LN000011	Regional Call Centre	Drains are blocked in carpark	23/11/04	24/01/05	21:06:24	4	687KH88	CONFIRMED COMPL

The tracking screen shows at a glance the status of all current work

5. Print a Job Ticket

The industry standard Crystal Reports tool is used to print the job ticket; this allows a great deal of flexibility in the layout of work tickets. Users can customise tickets with different formats for each client they work with.

6. Schedule of Rates

Multiple schedules of rates can be associated with each client/contract. These can be imported electronically.

Item ref	Description	Unit price cost	Rate
112011	WALL 225MM CHEM INJECT DPC INT	9.120	9.1200
1101	LAY NEW 127x254MM PCC KERB	20.350	20.3500
1103	RENEW 127x254MM PCC KERB	14.200	14.2000
1105	REBED ANY TYPE OF PCC KERB	8.330	8.3300
1301	RENEW NE 250x125MM	17.090	17.0900
1303	REBED NE 250x125MM	9.390	9.3900
1501	LAY 50x152MM PCC EDGING	13.260	13.2600
1503	RENEW 50x152MM PCC EDGING	9.490	9.4900
1505	REBED - STRAIGHT/CURVED	6.390	6.3900
1507	RENEW 25x150MM TIMBER	4.740	4.7400
3001	EXC H CORE 75MM CONC BED	18.820	18.8200
3003	EXC H CORE 100MM CONC BED	23.360	23.3600
3005	RENEW WITH CONCRETE 75MM	21.820	21.8200
3007	RENEW WITH CONCRETE 100MM	27.310	27.3100
3009	EXTRA NON SUP FINISH	1.680	1.6800

Schedule Items can be picked from the list at any time during the workflow process of a job.



7. Enquiry

Work tickets can be enquired on using multiple search criteria including:

- Work Ticket number,
- Contract, Customer,
- Customer Order,
- Site Address,
- Status.

This enquiry screen shows the main details of the job including the priority

Basic Details		Extra Details		Screen 3	
Customer:	POST001	POST OFFICE	CB		
Rec'd Date:	24-11-04			Time:	07:51:47
Ordered By:	FS			Order No:	0N789H7586
Location:	1	Post Office House			
Address:		23-53 Green lanes Road			
		Bromley by Bow			
		London			
Post Code:	E1 3GB				
Depot:	HO	HEAD OFFICE			
Contact:	Peter Smith				
Report To:	Office Manager	Phone:	0208 776 7789		
Site Comments:					
Priority:	4	4 Hour Response			
Target Completion on:	24-11-04	at:	11:51:47		
Work Required:	Attend to Leaking Tap in Kitchen				
Notes:					
Schedule Item:					
Category:	A				
Order Date:	24-11-04			Time:	07:51:47

8. Completion

The ticket is marked as completed and charge details can be added, this is achieved by reference to a resource list of labour, materials and plant costs. Uplifts and discounts can be applied to these and general text comments can be added to describe work. A minimum order value can be applied if the items on the order do not reach a set value.

9. Invoicing

Once the detail of what is to be invoiced has been input, the works ticket can be marked as ready for invoicing.

Invoices can be produced per work ticket or grouped over a time period by customer or contract. Where a 'bulk' invoice is input a backing sheet is produced giving details of the individual values. 'Pro Forma' invoices can be produced to allow for modification of invoices prior to submission of a VAT invoice to reduce the need for credit notes.

Invoice layouts are definable by client or by specific contract.

The Sales Ledger and Contract Ledger are automatically updated with the invoice information.

"We use the system to track works through to completion and when each job is completed the software is used to invoice our clients. It also helps manage and schedule the proactive work such as garden and road maintenance. We can now review the whole Annington contract and ensure that we continue to meet the service level agreements in place."
Neil Oakey, Project Manager, MITIE Scotgate



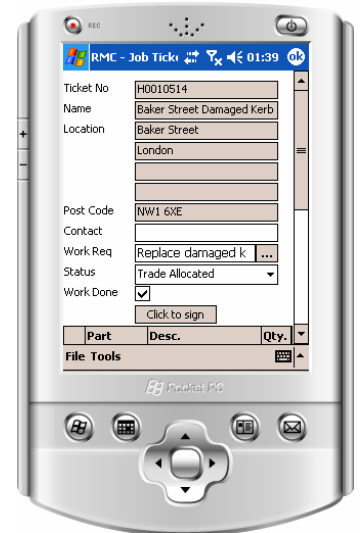
10. PDA and Summit 5000 Service Management

The introduction of mobile working can cut response times and increase efficiency. Better resource scheduling will result in a reduction in costs and improvement in cashflow.

The workflow within Summit 5000 Service Management can be tailored to suit your business workflow with the layouts and functions being matched to your specific requirements

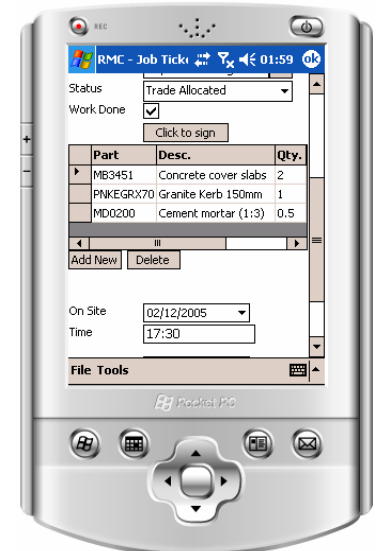
Benefits:

- Real time updating of Job history \ Status
- Reduces double entry (engineer updates paper copies, office then updates system etc)
- Reduces need for paper Job Tickets to be printed and distributed to operatives
- Increases efficiency of getting jobs completed and ultimately invoiced
- Faster response times
- Reduction in paperwork
- Secure data
- Improved accuracy



PDA shows a Job Ticket for a maintenance job with the job details including location and the work required

The necessary materials and equipment are listed on each job ticket. When a batch of job tickets are sent to an operatives PDA, all materials for that batch can be loaded into their van to save time having to go back to the depot/stores. Should an emergency job be required, details can be sent to the operative's PDA instantly, therefore increasing response times for emergency repairs.



As the screen is scrolled down, it shows the materials used for the work



Once the job has been completed, the operative changes the job status to complete and the time recorded and sent back to the office.

A signature for the work can be collected on the screen. The job can then be invoiced instantly as the information is fed from the PDA into the Service management software and in turn updates the accounts system.

Technology

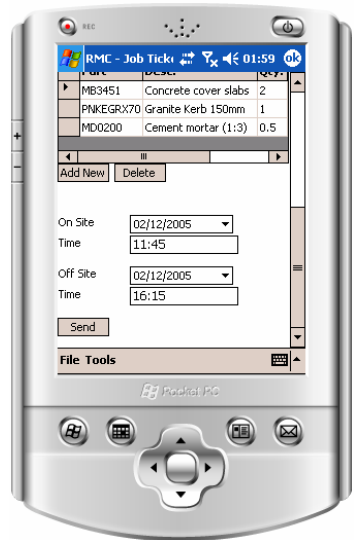
The screens visible on the PDA are designed using XML. This allows the design to be flexible, and tailored to the user's specification. Different screens can be used for different workflows, so that only relevant information is passed to field based operative.

Communication between Summit 5000 and PDA can take place at any stage in the workflow. Information can be recorded on the PDA and be passed back updating Summit 5000 Service Management, without further manual intervention.

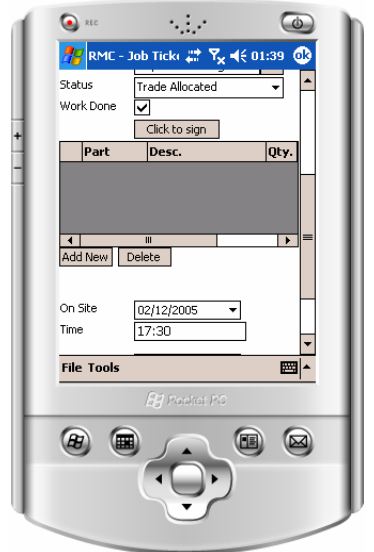
This can be in the form of Key Dates & Times, Signatures from the client, Status of the call, Materials Used, Text and any filed that exists within Service Management

Photographs can also be taken and attached automatically to the relevant call, if using a camera enabled PDA

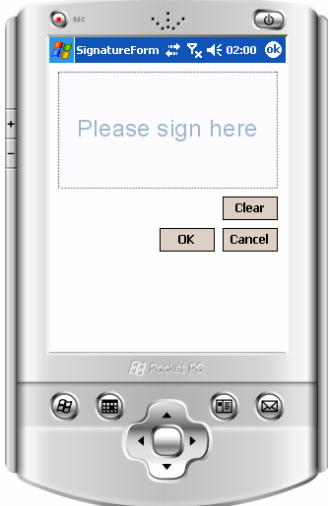
Data can be picked and verified from maintainable lists, e.g. Materials, Available Status, Hold reasons etc



The time on site and off site is recorded for timesheet and invoicing purposes



The screen shows the job status as completed



Data is transmitted via the current email system, in conjunction with the RedSky IT Mobile Client (RMC), thus allowing various means of transmitting data to and from the PDA (eg GPRS, Bluetooth Modem, Activesync)

A signature from either the contractor or client is sent with the completed job ticket