

Traksis Lite is a simple interface for reporting, logging and actioning maintenance and other requests from staff and clients. Requests can be logged using either a web browser or through a mobile device using Traksis OnSite.

Requests can be logged against a Site and Sub-Site, e.g. First Floor — Male Toilets, and as well as a written description single or multiple files can be attached.

Users receive an automated acknowledgement if required.

When a request has been submitted it appears on the administrator’s view of Queued Job Requests as an Open Request.

Each request is given a unique reference number for the Site to which it relates and the date and time it was logged is recorded and displayed.

The administrator can now review the request, reply to the user who raised it, add notes, reject the request and complete the request. All of these actions are recorded against the request for future reporting and analysis.

Reference	Logged Date Time	Site	Job Location	Raised By	Job Type	Job Instructions	Date Required By	Attached Files	Reject	Reply	Notes	Complete
72	07/08/2019 18:47	Bostall House	Ground Floor - Show...	Rob Live Surveyor	Surveyor	DAN000233 - Please...	07/08/2019 18:47	07082019_0646...	Reject	Reply	Notes	Complete
71	07/08/2019 18:43	Bostall House	Ground Floor - Show...	Rob Live Surveyor	Issue Report	Shower dripping.			Reject	Reply	Notes	Complete
70	07/08/2019 18:12	Bostall House		Rob Live Surveyor	Surveyor	DAN000157 - Need to...	11/01/2019 16:52	11012019_0452...	Reject	Reply	Notes	Complete
69	07/08/2019 17:53	Bostall House		Rob Live Surveyor	Surveyor	DAN000233 - Propert...	07/08/2019 17:49	07082019_0549...	Reject	Reply	Notes	Complete
68	30/07/2019 14:07	Bostall House	First Floor - Femal...	Rob Live Head O...	Issue Report	Hot tap 20C needs su...		30072019_0207...	Reject	Reply	Notes	Complete
66	20/05/2019 17:20	Bostall House	Ground Floor - Male WC	Rob Live Head O...	Issue Report	Leak in toilet need...		20052019_0520...	Reject	Reply	Notes	Complete
2	16/05/2019 13:10	Monroe House		Sam Shackleton	Issue Report	Striplight out		16052019_0110...	Reject	Reply	Notes	Complete
65	16/05/2019 13:07	Bostall House	Ground Floor - Male WC	Sam Shackleton	Issue Report	Toilet out of use ...			Reject	Reply	Notes	Complete
64	16/05/2019 12:37	Bostall House	First Floor - Serve...	Sam Shackleton	Issue Report	Striplight out		16052019_1237...	Reject	Reply	Notes	Complete
63	25/04/2019 10:11	Bostall House	First Floor - Meeti...	Sam Shackleton	Issue Report	Leak in ceiling			Reject	Reply	Notes	Complete

## Reply and Notes

An administrator can send a reply, or multiple replies, to the user who raised the request to request further information, advise them what action is going to be, or has been, taken etc. Replies are notified to the requester via email and are saved against the request. The administrator can also add notes against the request that are not sent as replies. For both replies and notes files can also be attached as required.

The screenshot shows the 'Queued Job Requests' section of the Traksis interface. A 'Reply' dialog box is open, allowing an administrator to enter a message and attach documents. The background table lists various requests with columns for Reference, Logged Date Time, Site, Job Location, and Actioned Date Time. A 'Report an Issue' button is visible at the top.

Reference	Logged Date Time	Site	Job Location	Actioned Date Time	Action	Action Status	Attached Files
72	07/08/2019 18:47	Bostall House	Ground Floor - Show...				
71	07/08/2019 18:43	Bostall House	Ground Floor - Show...				
70	07/08/2019 18:12	Bostall House	Ground Floor - Show...				
69	07/08/2019 17:53	Bostall House	Ground Floor - Show...				
68	30/07/2019 14:07	Bostall House	First Floor - Femal...				
66	20/05/2019 17:20	Bostall House	Ground Floor - Male WC				
2	16/05/2019 13:10	Monroe House	Ground Floor - Male WC				
65	16/05/2019 13:07	Bostall House	Ground Floor - Male WC				
64	16/05/2019 12:37	Bostall House	First Floor - Serve...				
63	25/04/2019 10:11	Bostall House	First Floor - Meeti...				
1	25/04/2019 09:56	Redlands	First Floor - Meeti...				
56	20/02/2019 12:24	Bostall House	First Floor - Meeti...				
1	14/02/2019 14:19	Monroe House	External - Landscaping				
7	13/02/2019 15:34	Newbus Grange	External - Landscaping				
52	12/01/2019 12:03	Bostall House	External - Landscaping				
51	12/01/2019 12:03	Bostall House	External - Landscaping				
50	12/01/2019 11:28	Bostall House	External - Landscaping				
49	12/01/2019 11:19	Bostall House	First Floor - Meeti...				
48	11/01/2019 16:53	Bostall House	First Floor - Meeti...				
47	11/01/2019 16:53	Bostall House	First Floor - Meeti...				

## Actioned Requests

Once a request has been actioned, i.e. completed or rejected, it is moved to the Actioned Requests tab. An administrator can still send a reply, or multiple replies, to the user who raised the request, or add notes. Replies are notified to the requester via email and are saved against the request. The administrator can also reopen a completed request should the need arise.

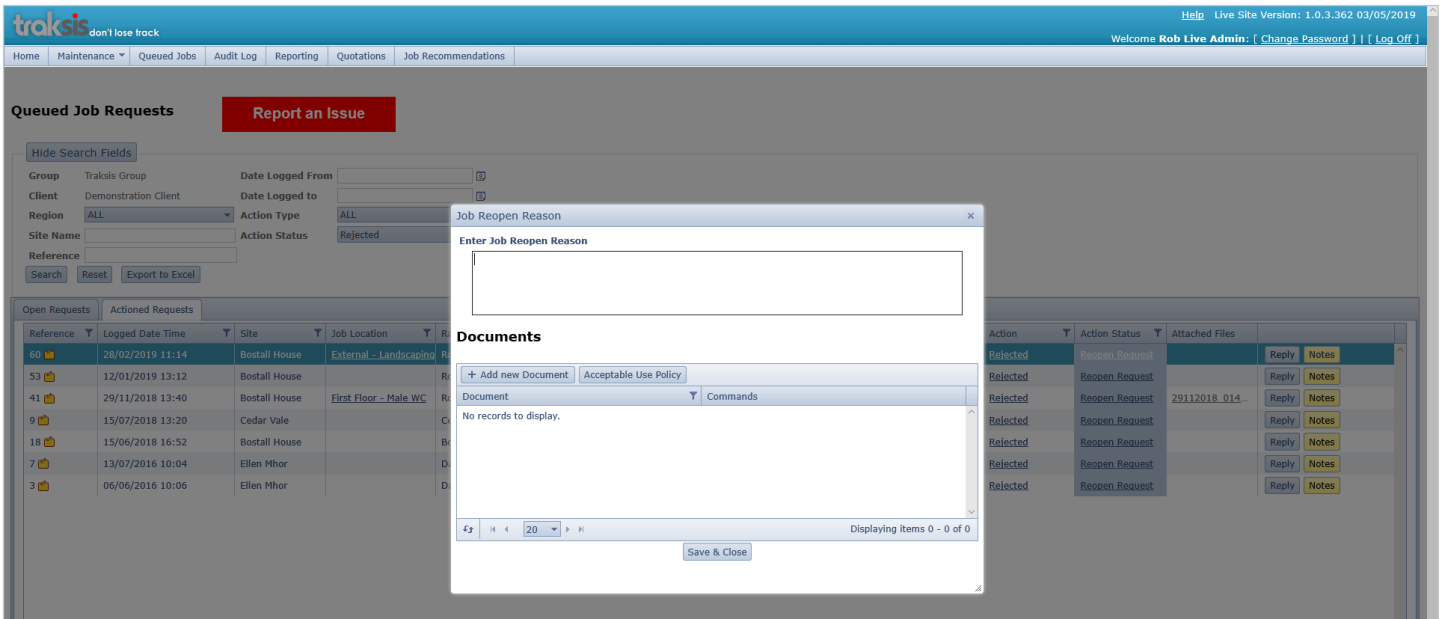
The screenshot shows the 'Actioned Requests' section of the Traksis interface. The table lists requests that have been completed or rejected, with columns for Reference, Logged Date Time, Site, Job Location, Raised By, Job Instructions, Date Required By, Actioned Date Time, Action, Action Status, and Attached Files. A 'Report an Issue' button is visible at the top.

Reference	Logged Date Time	Site	Job Location	Raised By	Job Instructions	Date Required By	Actioned Date Time	Action	Action Status	Attached Files
67	29/06/2019 12:35	Bostall House	External - Yard Areas	Rob Live Admin	Need to obtain quot...		29/06/2019 12:38	Completed	Reopen Request	Yard.jpg
62	25/04/2019 10:10	Bostall House	First Floor - Offices	Sam Shackleton	Striplight out in m...		25/04/2019 10:17	Completed	Reopen Request	
61	09/04/2019 09:51	Bostall House	First Floor - Male WC	Sam Shackleton	Leaking waste from ...		25/04/2019 09:41	Completed	Reopen Request	
59	27/02/2019 11:54	Bostall House	First Floor - Offices	Sam Shackleton	Striplight out in s...		25/04/2019 09:54	Completed	Reopen Request	
58	21/02/2019 14:29	Bostall House	First Floor - Meeti...	Sam Shackleton	Light out in meetin...		25/04/2019 09:38	Completed	Reopen Request	
45	09/01/2019 12:52	Bostall House	First Floor - Meeti...	Rob Live Admin	Light faulty		25/04/2019 09:53	Completed	Reopen Request	09012019_125...
43	09/01/2019 11:18	Bostall House	Ground Floor - Offices	Rob Live Site H...	Teebay lights out a...		09/01/2019 11:38	Completed	Reopen Request	
39	29/11/2018 12:39	Bostall House	First Floor - Meeti...	Rob Live Queued	Broken light fitting.		09/01/2019 12:09	Rejected	Reopen Request	29112018_123...
37	28/11/2018 13:50	Bostall House	First Floor - Male WC	Rob Live Queued	Toilet leaking		28/11/2018 14:38	Completed	Reopen Request	28112018_015...
35	28/11/2018 10:46	Bostall House	First Floor - Offices	Rob Live Queued	Projector faulty		09/01/2019 12:15	Rejected	Reopen Request	28112018_104...
34	28/11/2018 09:10	Bostall House	External - Yard Areas	Rob Live Queued	Broken window needs...	28/11/2018 09:...	28/11/2018 10:05	Completed	Reopen Request	Office 01.jpg Office 02.jpg
5	24/11/2018 17:47	Ducks Halt	External - Yard Areas	Bostall House M...	Car park needs to b...		28/11/2018 10:23	Rejected	Reopen Request	
29	24/11/2018 13:15	Bostall House M...	Ground Floor - Offices	Bostall House M...	Please arrange for ...		30/11/2018 15:53	Completed	Reopen Request	
20	17/11/2018 17:24	Bostall House	Ground Floor - All ...	Rob Live Site H...	Service smoke detec...		17/11/2018 17:26	Completed	Reopen Request	Ceiling Tiles.jpg
6	08/11/2018 12:00	Newbus Grange	External - Car Park	Rob Live Head ...	Pot holes need fixing		30/11/2018 15:52	Completed	Reopen Request	08112018_120...
4	25/10/2018 11:37	Newbus Grange	First Floor - All A...	Rob Live Head ...	Need quote for ligh...		25/10/2018 12:06	Rejected	Reopen Request	25102018_113...
2	09/10/2018 15:54	Newbus Grange	External - Car Park	Rob Live Admin	Car park in need of...		09/10/2018 18:25	Completed	Reopen Request	09102018_035...
1	09/10/2018 15:53	Newbus Grange	First Floor - Endin...	Rob Live Admin	Need additional 13A...		31/10/2018 09:42	Rejected	Reopen Request	
16	13/06/2018 17:27	Bostall House M...	External - Yard Areas	Bostall House M...	Cupboard door hinge...		13/06/2018 17:28	Rejected	Reopen Request	

## Reject and Reopen

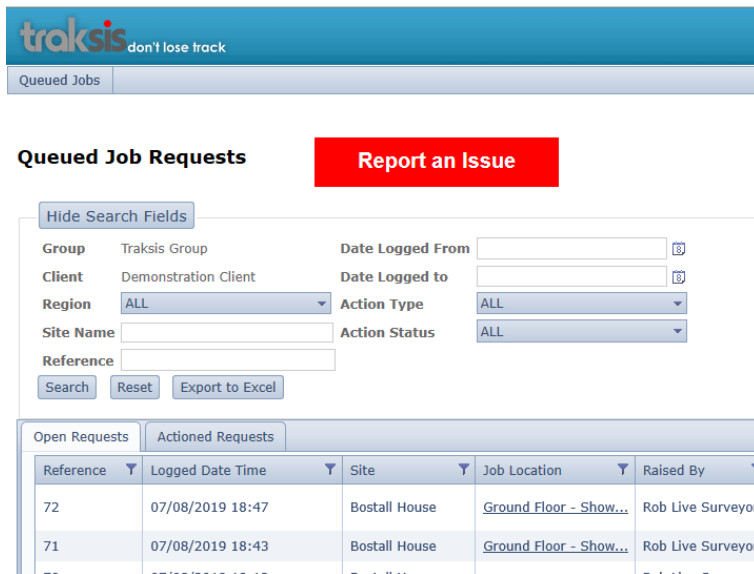
An administrator also has the option to reject the request. This might be where the request is raised in error, is for something that can be handled locally or is rejected for some other reason. The rejection is notified to the user who raised the request via email and is stored against the request.

Rejected requests can, as for completed requests, be reopened. The reason for reopening is stored against the request.



## Reporting and Exporting

An administrator can filter open and actioned requests based on a number of criteria, e.g. between two dates, by site, by region or by status. The result of the filtered Search can be exported to an Excel Spreadsheet for further review and analysis.



## Column Filtering

Any column on the Open and Actioned Requests tabs that has a filter icon in the title can sort or filter the information displayed on screen. Note that sorting and filtering using a columns filter icon is not reflected in an exported report.

## Site Documents

Users can be allocated to a single or multiple sites. A user can be set, on a per User basis, to have access to Site Documents, Property Documents and Site Equipment. Once a user has selected a site to report an issue against these options appear in the Toolbar.

Document File Name	Document Type	Start / Added Date	End / Review Date	Notes	Reminder
PJWER.pdf	QHSE	20/02/2018	19/02/2019	H&S Requirements	07/01/2019
Site Drawing 03.pdf	Site Plans	01/06/2016	31/05/2017		
Site Drawing 02.pdf	Site Plans	01/06/2016	31/05/2017		
Site Drawing 01.pdf	Site Plans	01/06/2016	31/05/2017		
Yard.jpg	General Site Documents	01/06/2015	31/05/2020	Picture of yard	
Bostall House.png	General Site Documents	01/06/2015	31/12/2018	Picture of site	
Electrical Test Report.pdf	Legal & Compliance	13/12/2016	12/12/2019		03/12/2019
Disabled Toilet 01.jpg	Legal & Compliance	15/06/2018			
Aircon Office 01.jpg	Legal & Compliance	28/11/2018			
Asbestos Register.pdf	QHSE	20/02/2019	28/02/2019		

Site Documents can be used to display a range of relevant documentation, from compliance documents, e.g. permits to work, asbestos reports etc., to site plans, photographs and others. The Site Documents view allows the documents to be viewed or downloaded, as well as displaying information about the document such as document type, dated it was added and an end/review date which colour codes to display when it is approaching or past. Reminders can also be set against a document to give warning when a document is about to expire, e.g. insurance, compliance etc.

## Site Equipment

Site Equipment displays any equipment added against a site. Each item of equipment added can display its location at the site, install date and warranty end date. Warranty end dates colour code to show when they are approaching or expired. Multiple files can be attached against a piece of equipment so that user manuals, frequently asked questions and other information can be available to users.

Item	Equipment Type	Description	Location	Install Date	Warranty End	Notes	Serial/Asset Number	Attached Files	Jobs
1	Equipment Type 1	Aircon	First Floor Office	03/07/2017	04/07/2018	Hitachi unit, clear access.	SR123	Aircon Unit 01.jpg	Jobs
2	Equipment type 2	Aircon	Main House Ground E...	30/08/2013	29/08/2014	Hitachi Unit, mounted over desks	SR456	Aircon Office 02.jpg Aircon Office 03.jpg	Jobs
3	Equipment type 3	Aircon	First Floor Office 3	18/01/2014	17/01/2015	Old unit, wall mount on fire escape route	SR789	Aircon Unit 03.jpg	Jobs
4	Equipment type 5	Fire Shutter	Warehouse	01/05/2015	30/04/2016	Fire rated		Fire Shutter.jpg	Jobs
5	Equipment Type 1	Washing Machine	Main House Ground E...	01/07/2018	30/09/2018	Washing Machine	SR786	Washing Machine.jpg	Jobs