troks Cloud-Based Property Management

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.

troksis				Help Live Site Version: 1.0.3.362 03/05/2019
d GINSIS don't los	e track		Welcome Rob Live Rep	port Only: Bostall House/South/Demonstration Client [Change Password] [Log Off]
Queued Jobs Site Doo	uments Property Documents Site Equipment	t Emergency Contact Details		
Report an Iss	ue			
Enter the details of the is	sue, fault or question and the location below in the	box next to 'Enter the details'		
If required, attach any re	evant picture, documents or other files using 'Add	Attachment(s)'. Multiple files can be added at a time. Files added by mistake can be deleted		
When complete click on '	Submit Report'. You will receive an email advising w	what action has been taken		
	Select			
	+ External			
	= First Floor			
	Offices			
Job Location	Server Room Meeting Room 1			
	Meeting Room 2			
	Female WC			
	+ Ground Floor			
Date/Time Required				
Enter the details	Enter the details of the issue, fault or questio	on and the location here		
or question and				
the location here				
	+ Add Attachment(s) Acceptable Use Policy			
	Document	T Commands		
	No records to display.			
Attached Files				
	\$3 4 4 20 ▼ > >		Displaying items 0 - 0 of 0	
	Submit Report			

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.

t	Help Live Site Version: 1.0.3.362 03/05/2019													
		on flose track								Welcome	Rob Live	e Admi	n: [Change Password] [<u>Log Off</u>]
Qu	eued Jobs													
Queued Job Requests Report an Issue														
	Hide Search	Fields												
	Group Tra	ksis Group	Date Logged From		8									
	Client Der	monstration Client	Date Logged to		3									
	Region AL	L 🔻	Action Type	ALL	-									
	Site Name		Action Status	ALL	-									
	Reference													
	Search	et Export to Excel												
	Open Requests	Actioned Requests												
	Reference T	Logged Date Time	T Site T	Job Location	Raised By	Job Type 🛛 🔻	Job Instructions	Date Required By	Attached Files					
	72	07/08/2019 18:47	Bostall House	Ground Floor - Show	Rob Live Surveyor	Surveyor	DAN000233 - Please	07/08/2019 18:47	07082019 0646 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	<u>11012019 0452</u>	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 u		<u>30072019 0207</u>	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		<u>16052019 0110</u>	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		<u>16052019 1237</u>	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	

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Cloud-Based Property Management

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.

to	Toksis													
		ion't lose frack									Welcome Rob	Live Adn	in: [<u>Chang</u> e	Password] [Log Off]
Que	Jed Jobs													
Qu	eued Jol	b Requests	Report an I	ssue										
	Show Searc	h Field												
	on Poqueste	Actioned Requests												
	ven Requests	Actioned Requests	T 011	Net to attack and the	-					the lot of the				
1	(eference)	Logged Date Time	1 Site 1	Job Location T	Reply			×		07082019_0646				
1	72	07/08/2019 18:47	Bostall House	Ground Floor - Show	Enter Message					07082019 0646	Reject Repl	Notes	Complete	
	71	07/08/2019 18:43	Bostall House	Ground Floor - Show							Reject Repl	Notes	Complete	
2	70	07/08/2019 18:12	Bostall House							<u>11012019_0452</u>	Reject Repl	Notes	Complete	
0	59	07/08/2019 17:53	Bostall House							<u>07082019_0549</u>	Reject Repl	Notes	Complete	
6	58	30/07/2019 14:07	Bostall House	First Floor - Femal	Documents					<u>30072019_0207</u>	Reject Repl	Notes	Complete	
6	56	20/05/2019 17:20	Bostall House	Ground Floor - Male WO						<u>20052019_0520</u>	Reject Repl	Notes	Complete	
2	2	16/05/2019 13:10	Monroe House		+ Add new Docu	Iment Acceptab	le Use Policy			<u>16052019_0110</u>	Reject Repl	Notes	Complete	
6	55	16/05/2019 13:07	Bostall House	Ground Floor - Male WC	Document		Commands				Reject Repl	Notes	Complete	
0	54	16/05/2019 12:37	Bostall House	First Floor - Serve	No records to disp	lay.				<u>16052019_1237</u>	Reject Repl	Notes	Complete	
6	53	25/04/2019 10:11	Bostall House	First Floor - Meeti							Reject Repl	Notes	Complete	
1	L	25/04/2019 09:56	Redlands							<u>25042019_0956</u>	Reject Repl	Notes	Complete	
	56	20/02/2019 12:24	Bostall House	First Floor - Meeti						<u>20022019_1224</u>	Reject Repl	Notes	Complete	
1	L	14/02/2019 14:19	Monroe House					~		<u>14022019 0219</u>	Reject Repl	Notes	Complete	
1	7	13/02/2019 15:34	Newbus Grange	External - Landscaping	£3 H 4 20	▼ ▶ ▶		Displaying items 0 - 0 of 0		<u>13022019_0334</u>	Reject Repl	Notes	Complete	
1	52	12/01/2019 12:03	Bostall House				Send & Close		_	<u>12012019 1203</u>	Reject Repl	Notes	Complete	
1	51	12/01/2019 12:03	Bostall House							<u>12012019 1203</u>	Reject Repl	Notes	Complete	
	50	12/01/2019 11:28	Bostall House		NOD LIVE SUIVEYOR	15500 Report	LCON HUILLOU III VCm		2	<u>12012019_1128</u>	Reject Repl	Notes	Complete	
4	19	12/01/2019 11:19	Bostall House	First Floor - Meeti	Rob Live Admin	Issue Report	Table in meeting ro			<u>12012019 1119</u>	Reject Repl	Notes	Complete	
4	18	11/01/2019 16:53	Bostall House		Rob Live Surveyor	Issue Report	Check when last dec			<u>11012019_0453</u>	Reject Repl	Notes	Complete	
4	17	11/01/2019 16:53	Bostall House		Rob Live Surveyor	Surveyor	DAN000156 - Check w	11/01/2019 16:53		<u>11012019 0453</u>	Reject Repl	Notes	Complete	
Ľ	छ । व [1	.]2 <u>20</u> → M											Displa	ying itéms 1 - 20 of 36

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.

troksis	Help Live Site Version: 1.0.3.362 03/05/2019												
Our call take	Ion Hose hack								Welcome	Rob Live Admin: [<u>Change</u>	Password] [Log Off	
Queued Jobs													
Queued Jol	Show Search Field												
Open Requests	Actioned Requests												
Reference T	Logged Date Time	T Site T	Job Location	Raised By	Job Instructions	Date Required By	Actioned Date Time	Action T	Action Status	Attached Files			
67 📫	29/06/2019 12:35	Bostall House	External - Yard Areas	Rob Live Admin	Need to obtain guot		29/06/2019 12:38	Completed	Reopen Request	Yard.ipq	Reply	Notes	
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		Reply	Notes	
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		Reply	Notes	
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		Reply	Notes	
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		Reply	Notes	
45 📫	09/01/2019 12:52	Bostall House	First Floor - Meeti	Rob Live Admin	Light faulty		25/04/2019 09:53	Completed	Reopen Request	<u>09012019_125</u>	Reply	Notes	
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	Electricity Meter factory-lighting	Reply	Notes	
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	<u>29112018_123</u>	Reply	Notes	
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	<u>28112018 015</u>	Reply	Notes	
35 📫	28/11/2018 10:46	Bostall House	First Floor - Offices	Rob Live Queued	Projector faulty		09/01/2019 12:15	Rejected	Reopen Request	<u>28112018_104</u>	Reply	Notes	
34 📫	28/11/2018 09:10	Bostall House		Rob Live Queued	Broken window needs	28/11/2018 09:	28/11/2018 10:05	Completed	Reopen Request	Office 01.ipg Office 02.ipg	Reply	Notes	
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		Reply	Notes	
29 👛	24/11/2018 13:15	Bostall House	Ground Floor - Offices	Bostall House M	Please arrange for		30/11/2018 15:53	Completed	Reopen Request		Reply	Notes	
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.ipg	Reply	Notes	
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	<u>08112018 120</u>	Reply	Notes	
4 📫	25/10/2018 11:37	Newbus Grange	First Floor - All A	Rob Live Head	Need guote for ligh		25/10/2018 12:06	Rejected	Reopen Request	<u>25102018_113</u>	Reply	Notes	
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	Reply	Notes	
1 📫	09/10/2018 15:53	Newbus Grange	First Floor - Engin	Rob Live Admin	Need additional 13A		31/10/2018 09:42	Rejected	Reopen Request		Reply	Notes	
16 👛	13/06/2018 17:27	Bostall House		Bostall House M	Cupboard door hinge		13/06/2018 17:28	Rejected	Reopen Request		Reply	Notes	
fg H + 1	2 20 • H	Bestall House		Dan Cuninnar	Maad ta amanaa a k		20/11/2010 15:50				Displayi	Motors ing items 1 - 20 of 31	

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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.

troks	c								Help Live Site		03/05/2019
Gento	don't lose frack							Welcome R	ob Live Admin: [Change Password]	[<u>Log Off</u>]
Home Main	tenance VQueued Jobs	Audit Log Reporting	Quotations Job Recor	mmendations							
Queued 2	lob Requests	Report an	Issue								
Hide Sea	rch Fields										
Group	Traksis Group	Date Logged Fro	m	8							
Client	Demonstration Client	Date Logged to		8							
Region	ALL	 Action Type 	ALL	Job Reopen Reason		×					
Site Name		Action Status	Rejected	Enter Job Reopen Reason							
Reference	Proved Connect to Social			1							
	Export to Excel										
Open Reque	sts Actioned Requests										
Reference	T Logged Date Time	T Site T	Job Location T R	Documents			Action T	Action Status	Attached Files		
60 🖆				Re Contraction Contraction			Rejected	Reopen Request		Reply Notes	
53 📩	12/01/2019 13:12	Bostall House	R	(+ Add new Document) Acceptable Use	Policy		Rejected	Reopen Request		Reply Notes	
41 💼	29/11/2018 13:40	Bostall House	First Floor - Male WC	Document	T Commands		Rejected	Reopen Request	<u>29112018_014</u>	Reply Notes	
9 💼	15/07/2018 13:20	Cedar Vale	c	No records to display.		^	Rejected	Reopen Request		Reply Notes	
18 👛	15/06/2018 16:52	Bostall House	e	sc			Rejected	Reopen Request		Reply Notes	
7 📩	13/07/2016 10:04	Ellen Mhor	C				Rejected	Reopen Request		Reply Notes	
3 💼	06/06/2016 10:06	Ellen Mhor	C	2.			Rejected	Reopen Request		Reply Notes	
						~					
				<i>\$</i> 3 H ← 20 ▼ → H		Displaying items 0 - 0 of 0					
					Save & Close						
						h					

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 Spread-sheet for further review and analysis.

•	troksi	Selen't loso track				
(Queued Jobs	don Flose track				
0	Queued J	ob Requests		Report an Is	ssue	
	Hide Sea	rch Fields				
	Group	Traksis Group		Date Logged From		13
	Client	Demonstration Client		Date Logged to		8
	Region	ALL	-	Action Type	ALL	-
	Site Name			Action Status	ALL	-
	Reference					
	Search	Reset Export to Excel				
ſ	Open Reques	ts Actioned Requests				
ŀ	open reques				-	
	Reference	Logged Date Time	T	Site Y	Job Location	Raised By
	72	07/08/2019 18:47		Bostall House	Ground Floor - Show	Rob Live Surveyor
	71	07/08/2019 18:43		Bostall House	Ground Floor - Show	Rob Live Surveyor
1	70	07/00/2010 10:12		B		Park the commen

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.

Cloud-Based Property Management

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.

traksis don't lose	frack						<u>Help</u> Live Site Version: 1.0.3.362 03/05/2019
Quound John Site Docur	nonte Bronorty Documente	Site Equipment	Emorgoney Contact Details		Welcor	ne ROD LIVE	Report Only: Bostall House/South/Demonstration Client [<u>Change Password</u>] [Log Off]
Queucu 5005 Site Docur	inclus integration becaments	Site Equipment	Emergency contact betails				
Bostall House							
Search							
Document Name							
Search Reset							
Acceptable Use Policy							
Document File Name	T Document Type	Start / Added Date	e 🔻 End / Review Date 🎙	Notes	T Reminder	T	
PUWER.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.ipg	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				
						~	
fr ⊨ (1) 20 v	⊢ H				Displaying items	1 - 10 of 10	

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.

troks	Hele Live Site Version: 1.0.3.362 03/05/2019													
UMIN	don't lose tra	ck									Welcome Rob Live Report On	ly: Bostall House/So	th/Demonstration Client	Change Password] [Log Off]
Queued Jobs	Site Docume	nts Prope	rty Documents	Site Equipment	Emergency (Contact Details								
Bostall H	Search													
Fauinmer	t Description			Equipment 1	vne ALL		*							
Serial/As	set Number				100									
Search	Reset Expor	to Excel												
Item	T Equipment	t Type	Description		T	Location	▼ Install Date	т	Warranty End	T I	Notes T	Serial/Asset Number 🔻	Attached Files	
1	Equipme	t Type 1	Aircon			First Floor Office	03/07/2017		04/07/2018		Hitachi unit, clear access.	SR123	Aircon Unit 01.ipg	Jobs
2	Equipme	t type 2	Aircon			Main House Ground	I.F 30/08/2013		29/08/2014		Hitachi Unit, mounted over desks	SR456	Aircon Office 02.jpg Aircon Office 03.jpg	Jobs
3	Equipmer	t 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.ipg	Jobs
4	Equipme	t type 5	Fire Shutter			Warehouse	01/05/2015		30/04/2016		Fire rated		Fire Shutter.jpg	Jobs
5	Equipmer	t Type 1	Washing Mac	hine		Main House Ground	<u>I.F</u> 01/07/2018		30/09/2018	1	Washing Machine	SR786	Washing Machine.jpg	Jobs
														~
₽ 3 H → (20 ▼ →													Displaying items 1 - 5 of 5

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