



G Cloud Service Definition Document

Seeker Software Services

Property Management

Estates and Facilities Management (CAFM)

Compliance

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1. Seeker Integrated Software Services

1.1 Introduction - Seeker Software Services

Seeker Version 10 software is a third generation Cloud-based and mobile solution, resulting from many years of focused development and innovation in the property and estates sector.

In broad terms the strategic operations covered are

- Property Management
- CAFM and Work Management
- Compliance

and these services can be integrated and include core modules and some of them, such as Asbestos, Ventilation and Bookings, can be standalone if required.

Seeker Services are supported by further optional modules such as Finance Seeker, Stores Seeker and Portering Seeker.

Seeker enables you to:

- **Optimise** the management and compliance of property portfolios, fixed assets and operational resources for both small and complex estates.
- **Transform** operations with strong emphasis on BI and real-time dashboards
- **Efficiently manage** daily work operations
- **Schedule and Plan** future operations to facilitate resource deployment
- **Facilitate user working** from any location, such as hot desking and home working
- Provide an essential golden source of information to **improve performance**, safety, life-cycle management and sustainability
- **Comply** with statutory and regulatory registers and requirements

Organisations, Managers, Professionals and Occupants (staff and contractors) all benefit from Seeker's digitisation. Strong emphasis is placed on automation to improve the efficiency of many traditional administrative processes and for services such as PPMs and Compliance Inspections that minimises the admin burden of scheduling that work.

Seeker's digital ecosystem both optimises operations and their flexibility and minimises risk:

- it provides **self-service and 24/7 access** to real time data.
- Automations improve **operational efficiency** with alerts ensuring unacceptable performance is flagged to managers in real time by email and on-screen messaging.
- **Dashboards** help both visualise and optimise resource availability and utilisation.
- **Easily customised reporting** minimises time spent aggregating and analysing data.
- **High levels of security** ensure inhouse staff and contractors can work collaboratively.

Seeker's web-based services are engineered for the latest versions of Microsoft SQL to deliver BI and AI solutions which enable compliance and performance to be tracked and managed effectively. They incorporate both CAD and an SVG graphics capabilities which enables site/building drawings to be viewed over the Internet without additional software licencing.

Seeker's mobile app solutions for work management, auditing and surveying are available to both in house and external users on both Android and iOS platforms.

Seeker is designed to facilitate continual strategic improvement by being referenced to International Standards aligned to UN SDG, such as ISO 55001 on Asset Management, ISO 19650 and the OSCRE framework.

In turn it also supports UK best practice in form of:

- Legislation H& Safety Act, Fire Safety Act,
- Guidance HTM's and HBNs, SFG20, BS 40201
- Initiatives to encourage innovation/advance GS1

Services are securely delivered under ISO 27001 with **all data held in the UK**.

Seeker's core definition and tiered structure of Property and Organisation originated from the WIMS estate definition and work done for Strategic Health Authorities. The original core has been enhanced by Invigilatis to extend the solution's versatility, so it can embrace multiple services within a fully integrated cloud environment.

Seeker modules are integrated using a common set of data tables and program code. All standalone services incorporate the Seeker core property location structure enabling them to track their valuable resources and issues across the organisation's property portfolio.

1.2. Seeker functionality

Seeker's integrated solutions enable organisations to use exactly the functionality that they require and, by delivering them within a single database, reporting for all levels of management is facilitated.

Functionality includes:

<i>Seeker Operation</i>	<i>Function</i>
Property Management	Property Terrier
Property Management	Property Manager
Property Management	Property Register
Property Management	Drawings, Floor plans and BIM
Property Management	CAD Drawing integration
Property Management	Building Area and Space Management
Property Management	Lease Management
Property Management	Utility Management
Property Management	New Works/Capital works management
Property Management	Room Booking
CAFM	Work Management (Jobs – defects & allocation)
CAFM	PPMs (Planned Preventative Maintenance)
CAFM	Estate Team Management
CAFM	Contractor and SLA Management
CAFM	Asset Register & Management
CAFM	Portering & Logistic moves
CAFM	Stores and Purchasing
Compliance	Compliance Register & Management
Compliance	Risk Assessment
Compliance	Compliance Inspection Management
Compliance	Asbestos Register & Management
Compliance	Ventilation Verifications
Compliance	RAAC Register & Management
Compliance	Statutory and Regulatory Reporting
Compliance	Incident reporting
Compliance	Fire Action Plans
Compliance	Legionella Logbook
All	Dashboarding and Operational reporting
All	Document Management (inc. images)

Many of these of these functions are typically delivered within the core theme concept as mentioned above. In practice, due to Seeker's integrated environment, the individual functions can be switched either On or Off by configuration and delivered within any 'operational module' according to customer requirements.

For example:

- an all-embracing CAFM system delivery could include ALL the above, or just a selection of the functions required by the customer
- a Property Register system could provide Property and Leasing Management
- A Compliance Management system could provide a statutory reporting regime for the property portfolio using a combination of Compliance and property register services

Functions that can also be delivered as standalone systems are further described within their G-Cloud 15 listing documents:

- Compliance (Inspections, schedules and planning, remedials, KPIs)
- Ventilation (critical theatre and AHU systems, KPIs)
- Asbestos Management (Register, inspection schedules, planning, management)
- RAAC Management (Register, inspection schedules and planning)
- Room/space booking (Clinical and Administration)
- Car parking permit management (Sustainable Parking and Travel Plans)
- Contractor badging and on-site attendance

1.3. Flexibility, Versatility and Extendibility

1.3.1. Summary

Seeker is deployed by the users utilising its self-service tools, which provides them with complete **operational flexibility**. The levels of user permissions, menu configuration and User classes are entirely under the customers control which enables them to implement Seeker to reflect their own desired style of management control.

The Seeker system supports a comprehensive set of property related operations. This level of **versatility** allows the customer organisation to implement many aspects of operations that are often externalised to multiple small system or spreadsheets.

Whatever the Seeker system configuration, the customer can extend the functionality at any time by additional configuration without the need to perform a new system implementation and the export current data. The choice of **extendibility** is at the users' discretion and can be made in the knowledge that the system deployment can easily be varied.

1.3.2. System Extendibility

Seeker's data infrastructure is well defined, and the standard platform delivers an extensive range of functions.

Using that field structure, Seeker can be configured easily to provide a range of ‘off the shelf’ facilities which accommodate local requirements and practices. This standard configuration approach also facilitates easy extendibility of the system if the customer wishes to implement further modules. Also:

- Each delivered module can have its own dashboard to meet the requirement of the designated function
- Users can have their own range of dashboards, with operational level users having access to appropriate compliance dashboards whilst senior management user can have a consolidated top-level view.

1.4. Strategic and Operational viewpoints

Seeker is designed to accommodate two important managerial viewpoints – **strategic and operational** and to serve their respective management levels. Seeker’s extensive automated processing of data provides:

- Future work/job schedules for repetitive tasks, such as PPMs and Compliance Inspections
- BI style data analysis
- Consolidation summaries of reactive work
- Real-time feedback on daily operations
- Real-time update via Mobile app operations

Accordingly, a Seeker dataset can be used to achieve both viewpoint objectives:

- **Strategic** - Senior managers can view
 - consolidated top level data (with drill-downs) via dashboards
 - top level charts showing overall and component unit performance
 - KPI achievements
 - top level statistics on customer feedback
- **Operational** - Operational managers are provided with
 - dashboards providing operational alerts and scenarios, in terms of both real-time operations and to ‘programme’ performance
 - email alerts
 - operational level charts showing team, tradesperson and contractor performance
 - real-time information on ‘what and where’ their team operatives are working
 - customers can request jobs in real-time
 - customers and job requesters can be kept informed of progress

2. Seeker Property Management Service

2.1. Property Management Service Overview

2.1.1. Introduction

Seeker's Property functionality is well suited to manage all aspects of Property Management, and it reflects relevant international standards created and maintained by OSCRE and RICS

Invigilatis also pays due regard to International Standards, statutory requirements and guidance, such as ISO 55000 – Asset Management and GS1.

The service enables users to monitor their vital operations using real time dashboards, and it facilitates effective management and decision making by providing access to vital property data and floorplan views.

In Summary, Seeker supports three core property services:

- **Property Terrier** –location structure and attributes
- **Property Register/Viewer** – the property portfolio data as seen and used by the system and end users
- **Property Manager** – utilising the location structure to manage property related functions and data (e.g. leases, utilities and space management)

Taking these in turn:

- The Property Management Service provides full **Property Terrier** functionality so that the tenure and occupancy of each building is known, along with all the key dates for rent payments and review. It identifies lease types and the calendaring capability and associated workflows ensure managers and tenants are alerted to key dates for each lease according to its specific terms and buffer dates.
- The **Property Register/Viewer** Service delivers to the user screens the property information analysed by the Property Manager service, using the base Property Terrier information. This uses dashboards and data displayed using property hierarchy tree formats, the latter using a Tabbed format dedicated to a specific function (i.e. Maps, Plans, Images, Job Operations, etc.)
- The **Property Manager** delivers the analysed property services functional data that uses the base Property Terrier definitions, and which are then viewed by the user within the Property Register/Viewer (e.g. aspects such as Drawing, Lease and Utility management, etc.)

2.1.2. Property Management Service Methodology

Underpinning the range of services, and facilitating the integration and usage of the related data, is the core definition aspects of the:

- **Property Location ID** - identifies work and definitions with a geographical/physical location for building management purposes
- **Organisation ID** – identifies departmental/team usage and occupation for space, utility consumption and management control.

Both aspects can define data to eleven levels of hierarchy – most Seeker customers use a five-tier **Property Definition** (Region / Site / Building / Floor/ Space). Extra levels can be applied where required to accommodate extra categorisation such as Country, Local Authority (e.g. County, Borough, parish), Electoral Wards, etc.

The **Organisation Definitions** can handle a variety of terminology and levels such as Directorates, Departments, Branches, Groups, Sections, etc.

These data aspects are held separately for each property component so that drill-down exercises can be based on either aspect. Supporting the property definitions (via the CAFM service) is a comprehensive Asset Register so that equipment can be managed and maintained, so that the Property and Organisation aspects can be addressed to their fullest extent.

The Property Location ID is used consistently as core data throughout Seeker to facilitate other functionality (e.g. Defects, PPMs and Compliance; Asset location; Asbestos hazard location, etc).

2.1.3. Property Management Database structure

Invigilatis' Property Management Service runs on an extensive set of data tables/fields which enable clients to hold and access a wealth of information about each property in their portfolio:

- details of its acquisition, leases and licenses, occupiers
- space details including functional suitability and utilisation
- drawings and condition surveys
- utility information about the consumption/cost of water gas and electricity.
- site and block costs
- upwards consolidation of property information to facilitate configurable site/area/region management

This database architecture was developed in conjunction with the London Strategic Health Authority to manage their portfolio of primary healthcare properties in the

London boroughs. Accordingly, it is highly relevant to public sector organisations that have similar property portfolios and requirements.

2.1.4. Property Management Dashboarding and Operational Reporting

The general arrangements of our Dashboarding and Reporting facilities are described elsewhere (see later, System-wide facilities, Section 5). As with other Seeker Functions the Seeker Property service is supported by facilities dedicated to its function and can be enhanced by user defined dashboards that address local requirement.

The Property Viewer dashboard content arrangements can be configured for initial use by Invigilatis. The customer can switch off/on individual tabs for users and can control if they are able to *EDIT* detail or have *VIEW ONLY* permission.

The view of the overall property portfolio is also under local self-service and could, for example, limit a user to one building, thereby fulfilling a Building Manager view.

Dashboarding arrangements include higher level strategic output for utility, compliance and ERIC reporting. Operational level information includes details for properties and job operations relevant for each location (Defects, PPMs and Compliance inspections)

2.1.5. Property Management Document Management

The general arrangements of our Document Management facilities are described elsewhere (see later, System-wide facilities, Section 5).

The Property module of Seeker incorporates a Document Viewer facility. This can be used to monitor the uploaded documents for any property level (i.e. from region through building and down to space level) for *Property Type* documents and its sub-types. Property definition, Job, and Inspection documents can be viewed in context with other documents for the same location.

Documents can be retrieved/opened by users provided that the user has access to the software to open it, e.g. PDF reader, Microsoft Office (Excel, Word, PowerPoint, Outlook, etc.) etc. on their device.

For the protection of the Audit trail, the Delete function is reserved to authorised user's using the Documents Management facility.

As a dedicated facility, not only can images be stored as files they can also be displayed in the browser so that images can be compared to plans, etc.

2.1.6. Property Management Service functional content

2.1.6.1. Multi-function systems

A typical Seeker property Management solution will consist of a selection of the following operational functions:

Seeker Operation	Function
Property Management	Property Terrier
Property Management	Property Manager
Property Management	Property Register
Property Management	Drawings, Floor plans and BIM
Property Management	CAD Drawing integration
Property Management	Building Area and Space Management
Property Management	Lease Management
Property Management	Utility Management
Property Management	New Works/Capital works management
Property Management	Room Booking
All	Dashboarding and Operational reporting
All	Document Management (inc. images)

These are described below.

2.1.6.2. Single purposes systems

The following functions can be supplied as single purpose system, i.e. where they are the focus of a 'stand-alone' system:

Seeker Operation	Function
Property Management	Lease Management
Property Management	Room Booking

They will require core system functionality to be self-contained systems.

2.2. Property Terrier

2.2.1. Overview

The two major data definition structures. Property and Organisation, provided within Seeker accommodate the two major spines of administrative and managerial handling, that of locating **WHERE** the space is (the Seeker Location ID/address, and **WHICH** unit is responsible for using it (the Seeker Organisation ID).

The matrix of data relating to the two data structures facilitates a myriad of management reporting and analysis via BI initiatives. This is possible by allowing the identification of any space, site, building etc. and then to associate any operational data (e.g. costs, utilities information, space utilisation, etc.) with both location and management ownership.

This allows detailed analysis relating to management units that may occupy multiple buildings or parts of buildings that have shared occupancy. It also allows the effects of organisational moves to be calculated – the new liability for the unit compared to the ‘old’ location being vacated.

2.2.2. Properties

The Property Management Service provides full terrier functionality so that the tenure and occupancy of each building is known, along with all the key dates for rent payments and review. It identifies lease types and the calendaring capability and associated workflows ensure managers and tenants are alerted to key dates for each lease according to its specific terms and buffer dates.

Seeker uses multiple levels to register and display the property portfolio in a hierarchical way. For example, Region/Site/Building/Floor/Space is a typical format and up to 11 levels are available.

The details of every property in a client’s portfolios can be aggregated into sites and regions and, using mapping data, the location of every property can be displayed on a map/satellite image (e.g. see the map below being used as landing page).

In addition, documents such as leases and pictures can be held in the systems document store (virtually any type of file format relating to the property can be stored, the exception being file formats that are potentially dangerous to file storage).

2.2.3. Organisational Information

Similarly to the property portfolio, the organisations hierarchy data can be stored in Seeker - separate to the Property data (but linking and integrated with it) is the Organisation data tree.

- The organisation structures can also be held for the occupying departments or cost centres, thereby allowing departmental property/space information to be provided and the maps/reporting to reflect this sub-division of properties.
- Operational management can be enhanced by including budget information for each property, so detailed costing information can be provided and analysed.
- The organisation data in Seeker is also multi-level and allows for the hierarchy definition of cost centres and business units.

- This data structure is held separately from the Property/location structure, so that the two definitions are intentionally complementary.

2.2.4. Asset association with locations

The Seeker Location Id structure registers not only property assets but is used to facilitate the location of all other types of assets (e.g. equipment, plant, Lifts, etc.). This allows the property analysis for a building or department to consider the assets registered against that location.

The Asset Register (equipment/plant) is described within the CAFM section.

2.3. Property Register

2.3.1. Property Register overview

The Property Register/Viewer Service delivers property information to the user. It does so within a screen approach shows the Property portfolio in the form of a property hierarchy (which forms a selection facility) and a single display screen with data tabs devoted to individual data aspects. As a single screen approach that incorporates dashboards, the Property Register or Viewer typically is used as a summary approach for property review.

The Property Register Viewer provides access to all property information and associated data, and its configuration is determined by each client's operational requirement. Different levels of access can be established, e.g. some staff will only work on specific tasks/data, and senior managers and directors might only need easy access to summary information for decision making.

The Property Register can be viewable by users in view only mode thus ensuring that only 'authorised' users can change the portfolio details.

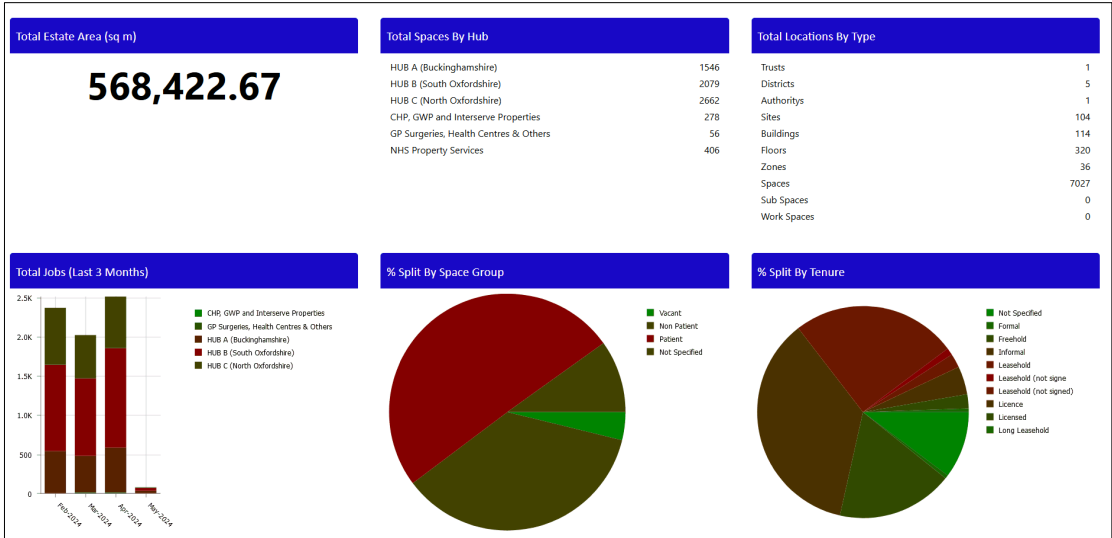
The Property Register data forms the basis of the system's underlying location structure and every item of operational information - job, inspection, compliance, risk and asset - is referenced to a location/property/space. In addition, clients, can use the system to hold supplementary operational information related to properties such as public transport, and details of electoral wards.

A summary screen is typically used as a landing page, and the Property Viewer itself can also be used as a landing page.

2.3.2. Property Register Summary (landing page)

The Property Service can use any Seeker screen as a landing page – and the screen that is often configured as such the Property Summary, which shows the property portfolio (a range of information and drill-downs).

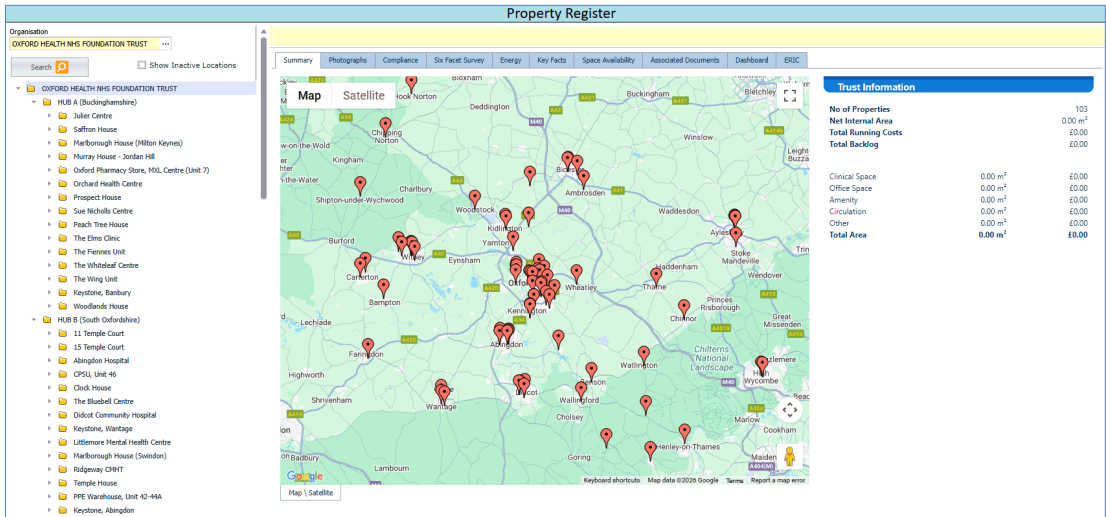
The Summary screen shows a dashboard with important property information, such as number of building and property space; property types; estate area; tenure; and job numbers:



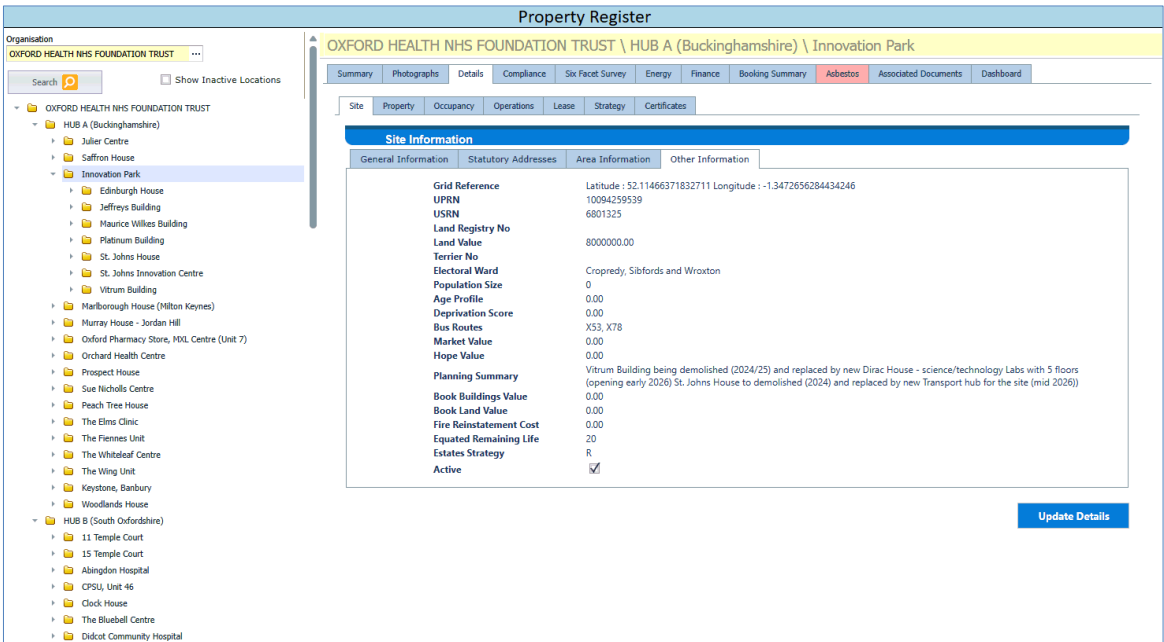
2.3.3. The Property Register/Viewer

The screen approach for the Property Register/Viewer shows the Property portfolio in the form of a property hierarchy (which forms a selection facility) and a single display screen area with data tabs devoted to individual data aspects, such as an interactive map; floorplans; and data lists.

Overall portfolio view, showing property locations:



Site view showing details:



Views can be selected for any property location, including to space level. Viewing of the locations is by user permission, for example, the of building managers may be constrained to just the building for which they are responsible.

2.3.4. Property Dashboard Data

Using SQL BI functionality, the property dashboard and drilldowns are updated every day, during an automated over-night routine. This provides very fast access to the key property data. While up to the minute information is also available by running the updates manually.

The dashboard component has been parameterised and can be configured very easily to reflect each client's key data.

2.4. Property Manager

2.4.1. Property Manager Overview

The Property Manager organises and delivers the property services that are structured upon the base Property Terrier, and which are viewed by the user within the Property Register/Viewer.

2.4.2. Property Manager – associated Seeker functions

- Drawing Management
 - CAD
 - Floor plans (SVG file format)
 - BIM
- Property location details (at all levels)
- Building Area and space management analysis
- Lease Management
- Utility Management
- New Works/Capital
- Room Booking management
- Dashboard data analysis
 - Operational statistics - Utilities and Compliance
 - Strategic statistics – ERIC, Utilities and Compliance
- Car Parking Permit Management
- Resilience Plans
- Document Management

These functions are described below in section 2.5. to 2.12.

Where appropriate service data is analysed, consolidated and passed through to the Property Viewer dashboards.

2.5. Drawings, Floor plans and BIM

2.5.1. CAD Drawing handling

The software can hold CAD files (i.e. as part of the Document Management strategy) which can be opened in the Property Portal by any CAD viewer.

2.5.2. BIM

Now that BIM is established in ISO 19650, users are increasingly working collaboratively on a shared models and the use of Digital Twins is of growing importance. Seeker can share information using loading models derived from COBie spreadsheets.

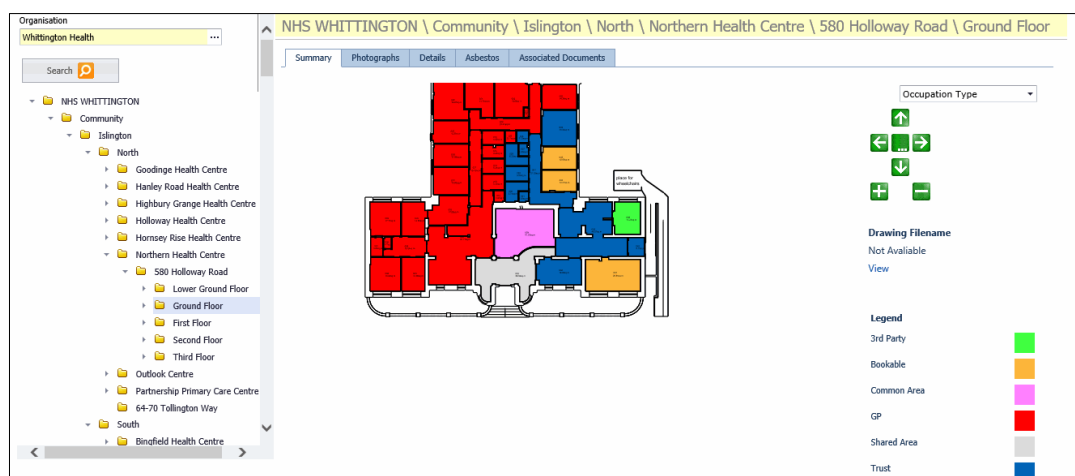
2.6. CAD Drawing integration

2.6.1. Viewing CAD information in the Browser

Seeker also provides the means to access CAD drawing information within the Seeker browsers application.

Invigilatis achieves this by converting the DWG files to SVG files using an automated process. SVG format files can be viewed in Seeker's supported browser without further software (see next)

The conversion process retains the CAD 'layer' information. Depending upon the layer data available, the Seeker floor plans shown in the browser application can also show instances of Asbestos, Space Utilisation, Cleaning regimes, Organisation Type and Occupancy, etc.



In this way Seeker can deliver floor plans and drawing information to thousands of users within a large organisation. This makes them accessible to end users without the need for:

- a separate application or
- a licence fee, or
- another learning/training overhead for users

2.7. Building Area and Space Management

- Area information is held for every space identified in the system.
- Gross and Net Internal areas can be held along with hazard information and assets associated with those spaces.

- At each location, the component elements and the associated data can be aggregated from space (i.e. rooms), to zones, to floors, to buildings and to sites. This is of particular relevance for cost, and occupancy and utilisation analysis.
- As costs, occupier and occupancy information is also held at space level, so managers can manage space effectively and satisfy annual reporting requirements such as ERIC and PAM for DoH.
- Costs can be assigned by reference to sites, buildings, floors and spaces, so making it possible to accumulate precise operational costs for each space for Service Line Costing.
- Space management information can be viewed directly in the system via dashboards, detailed listings and hatched floorplans – see the example in section 2.6.1.
- The floor plan information can be identified using colour coding for the purposes of usage and occupancy.

2.8. Lease Management

2.8.1. Lease Management Overview

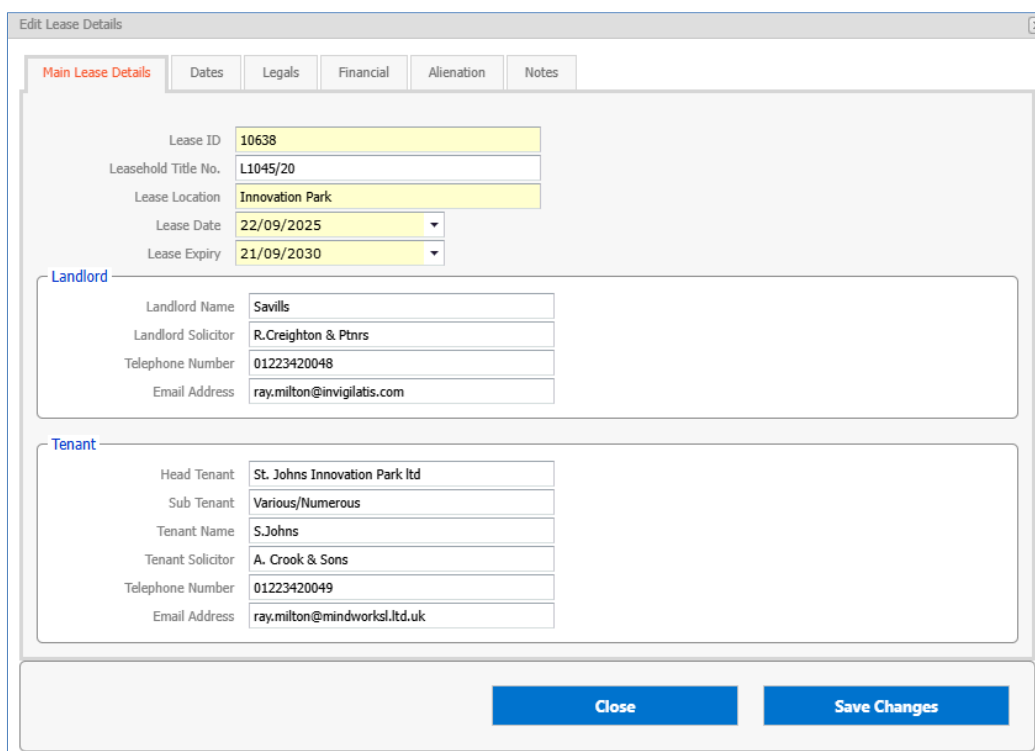
The design objective of the Seeker Lease Management service is to provide a solution for managing and administering the overall lease process and its obligations.

The Property Management Service identifies lease types, and its calendaring capability and associated workflows ensure managers and tenants are alerted to key dates for each lease according to its specific terms and buffer dates.

The Lease Management aspects allow the organisation to identify leases at Property locations at levels (including to space level) to control the following aspects:

- Properties owned or leased from external landlords
- Properties owned by the organisation and leased to external bodies/companies to attract income into the organisation
- A property portfolio that consists of a mixture of the aspects above (so that costs can be compared to income)

A full suite of relevant data is captured and stored – Dates, Financial aspects (e.g. Rent & service charges), Legal aspects, usage and changes of usage (e.g. alienation), Break clauses, areas, land registration, etc. For example, details for each lease include a full range of owners and tenants, together with their contact data:



Edit Lease Details	
Main Lease Details Dates Legals Financial Alienation Notes	
Lease ID	10638
Leasehold Title No.	L1045/20
Lease Location	Innovation Park
Lease Date	22/09/2025
Lease Expiry	21/09/2030
Landlord	
Landlord Name	Savills
Landlord Solicitor	R.Creighton & Ptnrs
Telephone Number	01223420048
Email Address	ray.milton@invigilatis.com
Tenant	
Head Tenant	St. Johns Innovation Park Ltd
Sub Tenant	Various/Numerous
Tenant Name	S.Johns
Tenant Solicitor	A. Crook & Sons
Telephone Number	01223420049
Email Address	ray.milton@mindworksltd.uk
Close Save Changes	

With Rent values being stored then rent income can be compared against other values held in the integrated overall property service data. The Seeker Lease records enable the organisation to identify various aspects of property values for each lease – market, disposal etc.

Each Lease is supported by the Seeker Document management facility so the important documents (and images) can be easily stored and viewed as required – where appropriate expiration dates are held to contribute to the overall process.

2.8.2. Service Management

The Leasing definitions link with Seeker property locations so the full range of work associated with a Lease location can be readily identified and monitored as to how it affects lease obligations:

- Defects
- PPMs
- Compliance Inspections (inc. asbestos)
- Assets (equipment/Plant) and their related work
- Risk Management

2.8.3. Work responsibility and Compliance aspects

The Seeker Lease definitions enable the responsibility for the compliance task to be accurately assigned to either in-house or 3rd party responsibility (i.e. some compliance

tasks will be the legal responsibility of the landlord/leaseholder rather than the 'occupier').

2.9. Utility Management

An integrated Utility Manager is available that holds usage, tariff, and cost data and it can provide a wealth of strategic information:

Building Footprint, and Energy Usage figures are held in the system for each building, and the following can be calculated:

- CO2 Emissions,
- Carbon Emissions,
- Energy Performance Indicator and Energy Performance of Building Directive (EPDB), which highlights the Buildings Rating, Operational Rating & Building Energy Rating.

As the energy usage figures are available for buildings then these can be attributed to occupancy and departmental usage of the building, and these can be driven down to floor/spaces on a proportional basis where shared occupancy is encountered.

As with other Seeker functions the utility data can be displayed as itemised data results and as multi management level dashboards.

The data collection can be performed either by system integration links to facilitate bulk loading or by a simple manual entry form.

2.10. New Works/Capital works management

The CAFM module has the functionality to create capital works projects that may lead to a change in the Property Terrier data.

The CAFM job creation process can be used to initiate capital work/projects – the Staff Portal contains a request mechanism to submit new requests which is then passed to authorised users (see under the CAFM notes). These new works can be linked to existing property locations or can be the basis for the creation of new location records within Property Terrier.

2.11. Room Booking

The Seeker Room Booking functionality is extremely flexible and can be configured to provide the end user with several approaches to booking' – first come first served, or approved, with each representing access to a specific function. Where the booking solution is for a particular location or technical function then the estate views are

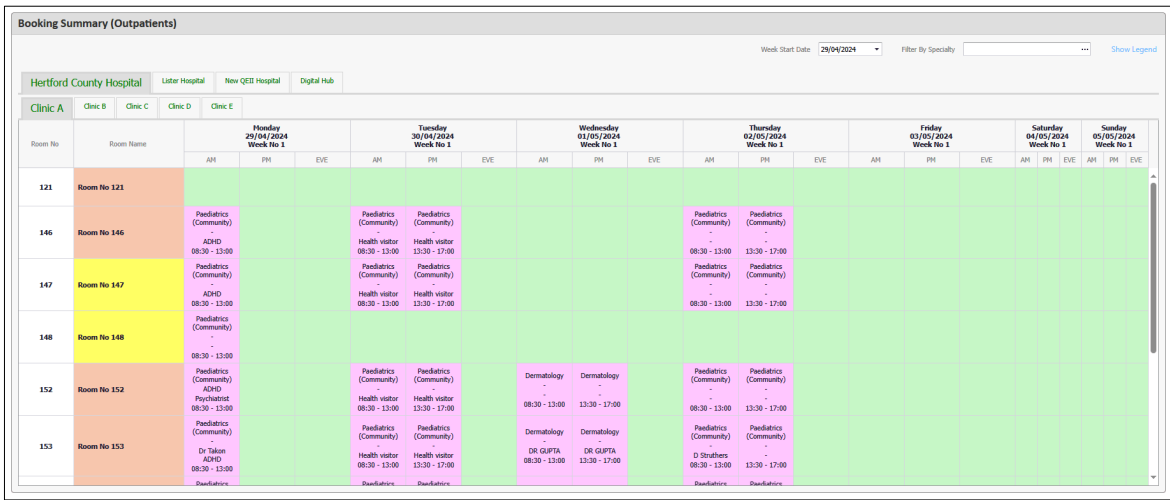
restricted to provide the end user with only the appropriate facilities being available to book.

The Booking Service functionality includes displays easy to use options for the user:

- New Room Booking Requests/recurrences
- Cancelations
- Dashboard – (Utilisation and Booking Charts)
- Room audit
- Move Manager

Bookings can also be extended to include other requests such as staff accommodation (on-site and hotels) patient family accommodation, parking, catering, specific layouts and IT. In addition, the booking functionality can also be deployed at sub-space level to manage hot-desking. Overall Governance and utilisation are improved

The booking services are delivered to the end user via the Booking Summary - a graphical planner that charts room availability by calendar and session time (e.g. morning/afternoon or time-slot):



The screenshot displays the 'Booking Summary (Outpatients)' interface. At the top, there are filters for 'Week Start Date' (28/04/2024) and 'Filter By Specialty'. Below this, a navigation bar shows 'Hertford County Hospital' and 'Lister Hospital'. The main area is a calendar grid for the week of 28/04/2024 to 05/05/2024. The grid is organized by room number (121, 146, 147, 148, 152, 153) and room name. Each room's availability is shown across the days of the week, with specific time slots (AM, PM, EVE) and session times (e.g., 08:30 - 13:00, 13:30 - 17:00) indicated. The sessions are color-coded: pink for 'Paediatrics (Community)', light blue for 'Health visitor', and light green for 'Dermatology'. The interface also includes a 'Show Legend' link.

The Seeker Room Booking service can also be deployed as a standalone system.

2.12. Supplementary property functions

2.12.1. Car Parking Permit Management

Seeker can also provide a system for the management of staff car park permits. Organisations with an extensive employee bank with important parking, prioritisation and logistical requirements can benefit from the administrative benefits that the Seeker Car Park permits can bring to its data. As sustainability is becoming increasingly

important, geographical data sets can be imported into Seeker to encourage active travel by providing individual travel plans and parking permits.

The Car Parking Permit Management service can also be deployed as a standalone system.

2.12.2. Resilience Plans

Resilience plans can be held for major locations, so facilitating business continuity management. With web-based and mobile access critical information is easily accessible for key utilities such as: Power, Water, Gas, and other services Catering, Linen and Soft FM.

Soft FM in healthcare:

- Assets*
- Planned Maintenance
- Jobs - Work Management (Defects and Remedials), Helpdesk and Job Requesting

* For the sake of convenient handling and data assimilation by the user, the term of 'Asset' in Seeker refers to **equipment and plant** – property 'assets' are referred to as property locations.

Good flows of real-time information between, staff, estates team, internal tradespeople and external contractors enable clients to benefit from highly responsive maintenance services. Coupled with effective planning capability enables clients to benefit from a well-controlled maintenance regime.

3. Seeker Estates and Asset Management -CAFM - Service

3.1. Estates Overview

3.1.1. Introduction

Seeker Estates and FM Service been developed over 25 years following a national project initiated by the NHS Confederation to improve the flows of work information for the healthcare estate. It is designed to manage all aspects of Hard and Soft FM and has been extended for both Property Management and Compliance

The core work aspects covered by Seeker are

- Job management
 - Creation -Defects, PPMs, Remedials (and Compliance Inspections and remedials if this module is also in use). If required, the Job creation process can include portering and logistical moves
 - Job Planning and scheduling – Defect job prioritisation and PPMs
- Estate Team Management
- Contractor Management
- Asset Register and Management

Taking the e aspects in turn, all jobs are uniquely registered in the system so **that Job Management** in all aspects is facilitated.

All jobs created within Seeker, whether reported via the Helpdesk, Staff Portal or a tradesperson's mobile device (new jobs or PPM remedials), or created by the system's automated processes (PPMs and Compliance Inspections), are recorded using a uniquely sequenced reference ID, and using appropriate categorization (e.g. job types, priority, and Issue/fault Type. Job documents and images can be stored, and the progress of each Job is monitored and managed by Status control.

All job records carry in their definition either a location ID or an asset ID, and as asset definitions use a property location, all property work can be managed and analysed for the relevant property. This enables a work history for the property to be identified.

For **Estate Team Management**, supervisors/managers and tradespeople can be registered against teams. Jobs are then allocated to Teams and Tradespeople which enables the working of the Team to be managed and monitored.

Jobs can be allocated by Supervisors to internal tradespeople or contractors, so that internal and external response performance can be evaluated against the SLA requirements

Regarding **Contractor Management**, a list of approved contractors is held in the system so that contractors can only be allocated by authorised personnel using vetted/authorised contractors.

A full **Asset Register** is provided within Seeker, and **Asset Management** is typically a stated objective of the organisation. The latter is facilitated by the Jobs registered against each Asset (Defects/PPMs/Compliance inspections) which together with the extent of data recoded against the asset definition enables lifecycle reviews to take place.

3.1.2. CAFM Dashboarding and Operational Reporting

The general arrangements of our Dashboarding and Reporting facilities are described elsewhere (see later, System-wide facilities, Section 5). As with other Seeker Functions the Seeker CAFM service is support by facilities dedicated to its function and can be enhanced by user defined dashboards that address local requirements.

The Work Management module is provided with multiple dashboards dedicated to providing alerts and data related to job activity and performance. Typically, it is also a prime recipient of **user defined dashboards** as users provide their own solutions for specific activities of local focus.

3.1.3. CAFM Document Management

The general arrangements of our Document Management facilities are described elsewhere (see later, System-wide facilities, Section 5). The Work Management module is provided with a Works Management Document Viewer that is dedicated to viewing Job related documents, thus providing a document view in context with the operations.

3.1.4. Estate Management functional content

3.1.4.1. Multi-function systems

A typical Seeker CAFM Work Management solution will consist of a selection of the following operational functions:

Seeker Operation	Function
CAFM	Work Management (Jobs – defects & allocation)
CAFM	Estate Team Management
CAFM	Contractor and SLA Management
CAFM	PPMs (Planned Preventative Maintenance)
CAFM	Asset Register & Management

Seeker Operation	Function
CAFM	Portering & logistic moves
CAFM	Stores and Purchasing
All	Dashboarding and Operational reporting
All	Document Management (inc. images)

These functions are described in the sections below.

3.1.4.2. Single purposes systems

The following functions can be supplied as single purpose system, i.e. where they are the focus of a 'stand-alone' system:

Seeker Operation	Function
CAFM	Asset Register & Management
CAFM	Portering & logistic moves

They will require core system functionality to be self-contained systems.

3.2. Work Management (Jobs – Defects & allocation)

3.2.1. Work Management overview

3.2.1.1. Functionality

Work Management is a core capability of Invigilatis' CAFM, Estates and Facilities Service. It is provided by the integrated functions of the Job Requesting, Helpdesk, maintenance Planner (see Planned Maintenance below), work allocation and time-sheet reconciliation functionality, together with associated dashboards and traffic light warnings to monitor job progress and SLA's.

(N.B. Seeker Planboard, a graphical scheduler for resource control enable allocation to be done graphically on a planner, which provides a holistic view of the job planning).

As with other Seeker functions, the Service Summary screen (often used as a landing page) can be customised easily for each client and it includes functionality to provide KPI's based on real time information. From this single page, users can be fully informed of the current operational situation and control day to day work effectively.

In seeker, the critical action of job creation is flexible and can be done in many ways:

- **Staff Portal** – Job Requests by the organisation's staff
- Helpdesk and other authorised users via **the browser app**

- Tradespeople on their **mobile devices** – ad-hoc jobs and PPM remedials
- **Automation** – planned PPM and Compliance Inspections are generated by Seeker's planning tools

Once raised, jobs are allocated to the Estate Teams and contractors. The Seeker Work allocation process ensures each job is:

- first allocated a **priority** which determines the expected response time for the completion of the required work, enabling monitoring and control of Service Level Agreements. This gives an operational window to undertake work which can be tracked on dashboards and alerts
- an **Estimated Time** allocation for the job can be entered – for internal resource management and to monitor contractors
- then allocated to one or more tradespeople/contractors.

Adherence with the priority allocated allows the consolidated job data to be analysed for KPI purposes and for comparison to be made so that internal work and contractors can be monitored for SLA analysis.

Using pre-analysed data, dashboards (both at operational and strategic management levels) can be configured to deliver a Performance dashboard which allows organisational performance to be benchmarked against a national dataset (e.g. KPIs)

3.2.1.2. Quality Assurance and Customer Feedback

Seeker's Quality Assurance capability (CSAT) is used to identify and extract statistically valid samples of completed jobs for quality inspection. The inspection scores both inform the performance dashboard, and they can also be re-used to provide PLACE survey evidence.

Customer feedback surveys can be managed via the Staff Portal and again the data can be analysed automatically and in real time, so the latest views are easily accessible.

3.2.2. Job Logging/creation and Job requesting

All jobs, via whatever method of reporting or requesting, are recorded using a uniquely sequenced reference. The source driver for the job request is typically a location (e.g. a room number) but can be an asset if required.

Seeker provides an extensive range of Job Creation process so that all circumstances can be addressed:

3.2.2.1. Staff Portal – Job Requests by the organisation's staff

Using a simple Staff Portal screen (which can be configured for the customer) any member of the organisation staff can request a job to be raised. The Staff Portal screen will probably be an important part of the Estate Teams contact with its customer base.

The cloud-based portal provides self-service access **with 24/7 availability** to log jobs at any time and at any location, so that each nursing shift can report issues so that out-of-hours working is facilitated.

Seeker recognises that a Staff Portal user may well be a ‘casual user’ that may be reporting a job for the first time, or perhaps only reporting a job very rarely and so provides a simple subset of data to ensure that data entry is kept as simple as possible.

The ‘casual user’ can request a Seeker account from the Seeker login screen, and this request follows pre-determined approach so that only the essential and relevant data is entered. The Staff Portal user is sent an email/text for password formulation (2FA and MFA options are available).

A series of constraints (the customer can decide which are mandatory aspects) control the request for data consistency purposes. For example, the customer organisation can specify a Room Number as the primary data collection aspect to ensure that the job’s location is correctly addressed.

The process follows a wizard style procedure, with primary screen recording the basic details:

1. Select the location.

☒ Registered

HUB B (South Oxfordshire) \ Abingdon Hospital

☐ Other

Room

AA035

Select Room

Abingdon Hospital \ Vale Resource Centre \ Ground Floor \ WC Disabled

Your registered location(s).

HUB B (South Oxfordshire) \ Abingdon Hospital

2. Now let's check to see if this has been reported already.

Check

Call Reference No	Date Reported	Job Details	Job Location	Status	
506641	12/08/2025	Please can we arrange a WEEE waste disposal of Our old steam cleaner?	HUB B (South Oxfordshire) \ Abingdon Hospital \ Oxford Stroke Rehabilitation Unit (OSRU) \ Ground Floor \ Gym	ALLOCATED TO CONTRACTOR	View
506651	12/08/2025	Hi The sink in D Bay is blocked. Please can someone come and take a look? Thanks	HUB B (South Oxfordshire) \ Abingdon Hospital \ Oxford Stroke Rehabilitation Unit (OSRU) \ Ground Floor \ 6 Bed Area	STAFF PORTAL	View
506656	27/08/2025	test	HUB B (South Oxfordshire) \ Abingdon Hospital	STAFF PORTAL	View
506657	03/10/2025	Test	HUB B (South Oxfordshire) \ Abingdon Hospital \ Generator \ Ground Floor \ General	STAFF PORTAL	View
506658	06/10/2025	Test	HUB B (South Oxfordshire) \ Abingdon Hospital \ Vale Resource Centre \ First Floor \ Office	STAFF PORTAL	View

3. Continue with request.

Continue

Subsequent screens allow for further details, documents and images to be assigned to the Job Request. Seeker email procedures allow a job confirmation to be sent to the registered Job contact.

The Staff Portal also allows the user to query the status of the requested job, to search for any job and to submit customer feedback surveys.

In summary, these are the key features:

- The Portal pages can be also configured to capture all the work request information required by the client, with a mandatory options for essential data, required by each organisation.
- The Job requests can be for all types of work (e.g. defects and new works for minor capital works).
- As part of their personal setup, the Staff Portal user is associated with a property location for which they are responsible, and this facilitates the quick entry of their location data in context with their operational role. Their locations are immediately recognised and does not need to be rekeyed.
- The Staff Portal workflow ensures users check that duplicate jobs are not being raised,
- The Staff Portal screens can be used to track jobs, to enter feedback and customer satisfaction surveys
- User satisfaction surveys for both periodic and ongoing Estates audits can be used to capture important user feedback about service quality. The user can quickly choose the tick boxes and drop-down comments.
- N.B. Allocation of the jobs raised on the portal is the responsibility of the Estates team, who prioritise that work

3.2.2.2. Helpdesk

The organisation may well have a Helpdesk function in use as well as the Staff Portal. For example, the Helpdesk function may well serve as an important assist for the reporting of emergency jobs that a Health and Safety risk.

The Helpdesk screens are configurable, and the data captured for each job is determined with the client during the initial set-up, when it is agreed which of the 100 plus available fields will be required and which of those will be mandatory.

Helpdesk operators can move from the input form directly into both asset details and space details – including floorplans and asbestos - the layout of the screen can be pre-configured to include these aspects if required.

Using Seeker's permission capability, the Helpdesk's browser-based screens can also be made available to other experienced users to report/request jobs.

3.2.2.3. Tradespeople on their mobile devices – ad-hoc jobs and PPM remedials

In addition to the Helpdesk and Staff Portal function described above, Work Requests can also be raised via:

- engineer's mobile devices (create an ad-hoc job on-site)
- PPM/compliance modules where remedial work is required to ensure/maintain compliance (i.e. Follow-On-Actions) – remedial jobs are automatically associated with host/parent PPM.

3.2.2.4. Automatic system processing (PPM and Compliance Inspections)

Seeker employs automatic processes to schedule future PPMs and Inspections. The system will automatically create such jobs in a timely fashion where appropriate. This eliminates the need for human resources in this aspect and also assists in the elimination of human error. Jobs are automatically delivered for the resource allocation process with predetermined categorisation and response priority windows.

3.2.3. Work/Job/Resource allocation

After the job is created then the new job is available on dashboards for resource allocation by authorised users (typically, managers/supervisors).

The Seeker Work allocation process ensures each job is:

- first allocated a **Priority** which determines the expected response time for the completion of the required work, enabling monitoring and control of Service Level Agreements. This gives an operational window to undertake work which can be tracked on dashboards and alerts
- an **Estimated Time allocation** for the job can be entered – for internal resource management and to monitor contractors
- categorised appropriately so that **management tracking** can take place
- then the job is allocated to one or more tradespeople/contractors

There are two ways to allocate work in Seeker, and Supervisors and Helpdesk operators can use

- either the standard Seeker facility known as the **job list**
- or the **Planboard** which is a sophisticated drag and drop graphical calendar-based scheduling tool, the manager can see real-time information about job progress and allocate work (see supplementary functions in 3.7)

Jobs can be allocated to

- either members of their trades team who receive their work on a mobile device or email
- or, approved contractors, who receive the via Email and Seeker Contractor Portal. The portal allows them to view their allocated jobs, (including PPMs and inspection), review the Asbestos Register and to submit comments/invoices.

When jobs are allocated, they are associated with work types/trades, which enables managers to monitor work and analyses of the overall performance. The job data analysis feeds into the Estates reporting functions to provide a variety of reports.

3.2.4. Work Management – our Mobile app and Job operations

The general arrangements of our mobile app are described elsewhere (see later, System-wide facilities, Section 5).

Mobile functionality allows users to interact with every aspect of the system. This is of particular relevance for tradespeople working on site. By using the same methodology for Defects, PPMs and Inspections, then the operative can handle all types of work.

As the work is carried out, real time information is sent back to Managers, Dashboards and the Helpdesk. Work progress can be tracked by job status and managers can review and control each tradesperson's allocation and job priorities.

When used for the automatic booking of time on jobs the devices record time for work, travel, and non-job time, and can also be used for note-taking, signature capture and incident reporting.

New job requests can be raised on the app for both PPM remedial work and for ad-hoc defects observed on-site, and real-time processing of data alerts the supervisor with relevant information. As our mobile app can keep recording information (e.g. job time) for users even when they are out of signal (e.g. inaccessible locations or for security reasons) continuity of operation is ensured.

Mobile users risk assess each job before they book onto it and the information is returned to Seeker's **Risk Assessment module**. Users must progress through series of questions; positive answers allow them to progress, but negative answers will result in either being referred to a supervisor or being de-allocated from the job because they pose an unacceptable risk. The risk assessment is audited so that the organisation can take note of the responses.

When the **Seeker Asbestos Register** is in use, mobile users will also be advised of hazards local to their current job, and their acknowledgement of the notification again provides an audit trail for the user organisation.

The mobile app can also be used to collect data on assets and hazards and to generate remedial actions.

Upon allocation, any information/photograph associated with the job is also sent to the tradesperson's mobile device, and the Work allocation functionality is enhanced further with the inclusion of the Permits Module. For example, the following permits templates are available:

- General
- Hot works

- Working at Height
- Confined Spaces.

More can be added and the permits can be tailored for each client. Also, as the system is web-based, permits can be issued from any location.

3.2.5. Works Orders, Feedback, Searching and Communication (Job Management)

Communication is an important feature within Seeker - alerts and dashboards provide alerts and timely notifications for job management purposes. When Seeker Mobile is used the system provides a live working environment and displays real time information. The system can be configured to create detailed job records and users can make specific fields mandatory to ensure consistency of reporting

Job records build in real time as the work progresses. Jobs have various work statuses: e.g. Received/Allocated/WIP/Complete. If required, emails can be generated automatically and sent to the job requester to advise them of each change of job status.

Extensive search is available over any of the job list fields – Seeker' standard Job list provides an extensive set of search criteria.

Communication is also facilitated via the system processes and procedures. Engineers/contractors can add comments to jobs so that Supervisors, the Helpdesk and end-users are aware of progress/problems and lone working requirements accommodated.

Similarly, end-users can add comments and request updates from the Helpdesk via the portal. The system also provides a wide variety of automated notifications and alerts which are agreed and set up as workflows during the system configuration.

- Engineers and contractors can be alerted to job hazards such as Asbestos and they can complete Risk Assessments on their mobile devices before starting work. If those risk assessments are unsatisfactory, the system can be set to prevent them booking on that job.
- Supervisors and engineers can be alerted to jobs nearing their target completion time and those which are overdue.

The information flow to users is enhanced by the provision of a document management system that can accommodate any form of document, including images.

3.3. PPMs (Planned Preventative Maintenance)

3.3.1. PPM Overview

Seeker's integrated PPM functionality is used to define and to schedule periodic maintenance and inspections tasks on assets; lists of multiple assets; systems; and at locations and list of multiple locations.

The whole process is defined and operated by user self-service. PPM tasks can be set up for either assets or locations, thus enabling the entire property and asset portfolios to be accommodated.

PPMs are scheduled automatically and can viewed via dashboard and planners. The automation ensures that PPM Jobs are created in a timely fashion, according to predefined schedules, without the need for deployment of admin. (N.B the same methodology is also used for Compliance and Asbestos Inspections thus ensuring consistency of approach to all scheduling within Seeker).

The detailed work instruction for each PPM operations can be defined using the either using the self-service set-up functionality within Seeker, or the national standards defined by SFG20 (which can be accessed via the Seeker's SFG20 API).

The predefined PPM job structure optimises schedule so that PPM can set up for:

- Location and lists of location
- Asset and lists of assets

* The concept of the list ensures that the job instruction is grouped and optimised for operational convenience and economy of management, as the list ensures that multiple assets or locations can be delivered as a **single job instruction**, and not as multiple jobs (one for each component) thus optimising the site visits by tradespeople/contractors.

What makes a Location List particularly useful is the ability to group together a list of otherwise disparate rooms/spaces into an 'administrative grouping', e.g. wards or a suite of management offices.

The consistency of the Question set approach leads to a consistent set of results that can be evaluated across the PPM Type.

PPM outcomes might imply 'failure' that requires remedial work. Those remedial works can be raised within the PPM job so that when fed back into the Job management process it is automatically associated with its original parent PPM job. This facilitates compliance and fitness for purpose monitoring and ensure the remedial job is also evaluated for risk.

3.3.2. PPMs – definitions and automated processes

The PPM definition and processes use **Seeker's Planned Task operations and automated processes** as described in Section 5, System wide facilities – please refer to this text for a detailed description of the following important setup and operational processes:

- Methodology employed (please see section 5.3)
- PPM job Management and allocation (please see section 5 3)
- PPM job Administration and Resource Management (please see section 5 3)
- PPM Jobs and Mobile app usage (please see section 5.3)
- Dashboards (please see section 5.3)
- Strategic Planning (please see section 5.3)
- SFG20 (please see section 5.3)

3.4. Estate Team Management

3.4.1. Estate Team - overview

Estate staff are assigned to a team, the formulation of which is determined by self-service (e.g. by region, trade or for administrative reasons, etc.).

The team members are assigned a trade/expertise, the types of which are again determined by self-service. These trade types are also used as part of the work/job allocation process so that the team member can be assigned to the appropriate job type by trade.

The manager of a team is typically flagged as a 'supervisor' (a role which in Seeker has a range of additional facilities), and these are authorised to allocate resources to work jobs (i.e. defects, PPMs and Inspections). The job definition contains many items of categorisation, e.g. work type, priority, resource allocation, etc., and these aspects taken into consideration with Job Status control, enable the workload and performance of the team to be monitored and managed.

Seeker has many types of dashboard queries to address the various team management aspects - numbers of jobs, jobs outstanding, jobs overdue, completed late, etc. These in turn feed into the Organisation's KPIs for achievement monitoring and strategic management

Planning for resources and jobs is achievable for future work as the system automatically provides future schedules for PPMs and Inspections, which can be inspected by use of a calendar-based Planner.

3.4.2. Supervisors - Job and Team Management

Designated Job Supervisors (identified both by user class and permissions for the individual user), have additional Seeker facilities to enable them to conduct work operations and to manage their teams.

The Seeker Supervisor screens enable them to manage/monitor their team:

- The provision of dedicated supervisor screens for job allocation and management
- How many jobs allocated to each tradesperson
- What Job they are currently working upon (current activity in real time)
- How many jobs are currently allocated to each tradesperson
- The job status – is it completed – in progress, etc.
- bulk resource and job allocation is facilitated
- how much time spent so far in comparison with the Estimated Time allocated

3.4.3. Managing the Team

3.4.3.1. Team monitoring – real time

Supervisors can see who is doing what at any time via the Seeker Mobile Control screen – see below:

Seeker MOBILE Activity

Bonus Group

Resource Type

Only Show Seeker Mobile Users

Associated Location

Refresh

Clear

Trades person has no Jobs

Trades person is not booked onto a Job

Trades person is currently working on a Job

Chart

Clock No	Name	Trade	Available	Number of Jobs				Todays Activity			Last Seen	Details
				Allocated	On PDA	Waiting	Future Planned	Completed Jobs	Activity	Hours Booked		
ALLENBELL	Allen Bell	Building Maintenance	Y	28	22	1	5	1	WIPSTARTED (461515)	2.81	Last seen 32 minute(s) ago	More Info...
AMANDAREED	Amanda Reed	Building Maintenance	Y	10	10	0	0	0	WIPSTARTED (461504)	2.13	Last seen 1 hour(s) ago	More Info...
CARLOS.MCKENZIE	Carlos McKenzie	Building Maintenance	Y	19	19	0	0	0	WIPSTARTED (461473)	0.00	Last seen 3 hour(s) ago	More Info...
GARY.FERNHOUGH	Gary Fernhough	Building Maintenance	Y	71	22	0	49	6	WIPSTARTED (461244)	1.91	Last seen 1 hour(s) ago	More Info...
GEOFFREY.STOCK	Geoffrey Stock	Building Maintenance	Y	16	10	0	6	0	No activity	0.00	Last seen 19 hour(s) ago	More Info...
GRAEME.MCKECHNIE	Graeme Mckechnie	Building Maintenance	Y	0	0	0	0	0	No activity	0.00	Last seen 63 day(s) ago	More Info...
HAMIS.YUSUF	Hamis Yusuf	Building Maintenance	Y	17	17	0	0	3	Completed (459620)	1.39	Last seen 1 hour(s) ago	More Info...
HOWARD.LANGWORTHY	Howard Langworthy	Building Maintenance	Y	0	0	0	0	0	No activity	0.00	Last seen 336 day(s) ago	More Info...
JOHN.MEROLA	John Merola	Building Maintenance	Y	6	6	0	0	2	WIPSTARTED (460943)	2.64	Last seen 23 minute(s) ago	More Info...
JULIAN.GRIFFITHS	Julian Griffiths	Building Maintenance	Y	39	17	0	22	4	WIPSTARTED (460846)	3.10	Last seen 14 minute(s) ago	More Info...

Page 1 of 4 (31 Items)

1

2

3

4

Page size: 10

Export to Excel

This is a real-time provision – the updates occur whenever a job is booked onto or its status changes. This facility also shows the numbers of ‘future jobs’ pre-allocated to each resource plus the number of jobs completed today. Drill-down details, Charting

and an Excel export is also provided. RAG indication is provided to identify where resource data is out of communication or is suspect.

3.4.3.2. Timesheet Reconciliation, Job Costing and Performance

Job time bookings are accumulated through the week (typically through automatic recording by our mobile app), and weekly reconciliation information is available to supervisors. A timesheet viewer is available to supervisors whereby they can drill-down to a date as required to view the job bookings:

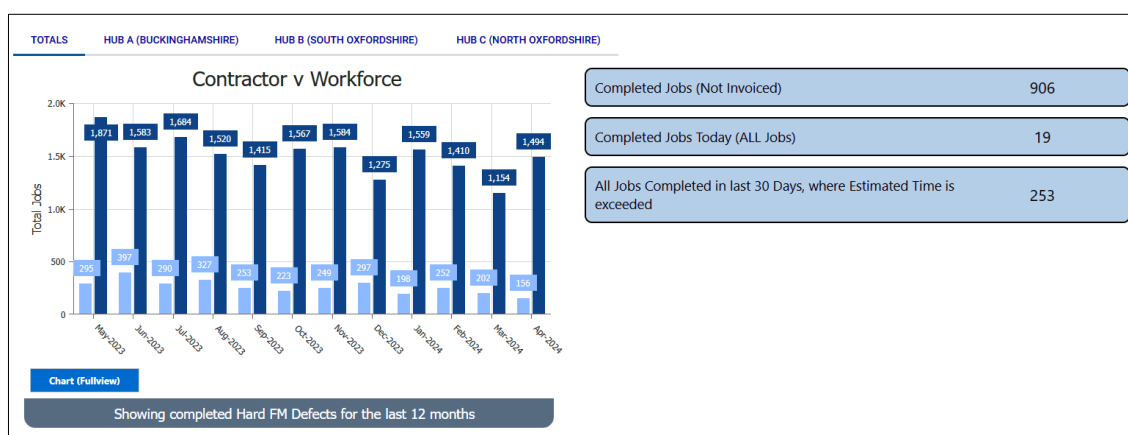
- Supervisors can view the bookings for Team management purposes
- The job time bookings can be costed according to hourly rates
- Similarly, with contractor jobs the time and cost are entered into the system via invoice/feedback.
- When combined with stores costs collected against each job to provide a total job cost this can be charged against the asset, location and department to provide a full service Line Costing.

This allows the organisation to monitor costs with an overall analysis that encompasses all job activity.

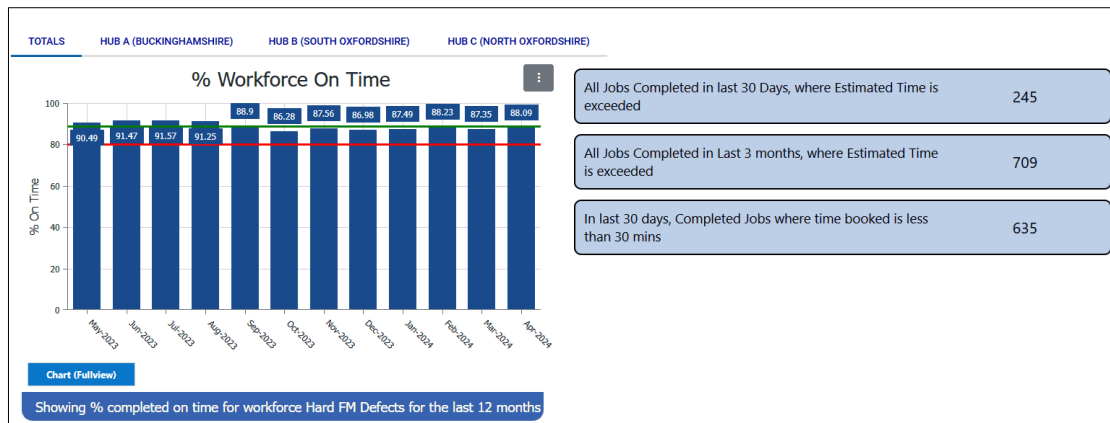
3.4.3.3. Management Reporting

A variety of Estate performance charts are also available for supervisors and senior managers. These utilise Seeker's overnight processing routines to deploy up to date analysis of the data that is facilitated by the integrated approach.

In addition to the Timesheet monitoring provisions described above, Seeker includes performance dashboards and charts – here are two examples:



The chart above shows the division of work between internal tradespeople and contractors. The following chart shows the response delivery of internal staff – the RED line is the target, and the GREEN line is the average achieved over the monitoring period:



A variety of facilities, reports and charts are also available for supervisors and senior managers for tracking work, e.g.:

- Dashboards (which can also incorporate charts and drill-downs)
- The Task Graph (see section 5.3 for an example)
- The Task Planner (PPM, Inspections, Asbestos, RAAC and Legionella), (see section 5.3 for an example)

3.5. Contractor and SLA Management

3.5.1. Contractor overview

Seeker enables the effective management of contractors allocation that meets its audit requirements and ensures safe working:

- Contractors are approved and full information is required to achieve compliance
- Only approved contractors can be allocated to a job
- Allocation of resources to jobs is typically performed by authorised users, i.e. supervisors.
- Seeker allows these authorised supervisor users to be further constrained by permissions – only supervisors with an additional authorisation can allocate external contractors as an additional measure of control.
- When a contractor is allocated then the supervisor must supply a reason for doing so (this can be configured for the customer organisation).
- Contractor performance is monitored

Jobs can be searched by contractor to review individual performance - dashboards enable overall performance of contractors to be monitored in terms of both numbers and priorities, and this is displayed by lists and charts.

For monitoring the contractors, a review facility is provided. This screen shows the details and the number of jobs by type that have been allocated to each contractor. The search facilities enable an individual contractor to be shown:

Search For Contractor											
Search Criteria		Search Results									
Contractor Reference	Contractor Name	Address 1	Post Code	Tel No	Email	Contractor Statistics					
						PPMs Planned	PPMs Outstanding	Defects	Items To Feedback		
INVIG20	Invigilatis Ltd	Dirac House	CB4 0WS	01223420048	ray.milton@mindworks.ltd.uk	0	0	3	5	View Details...	Go To Contractor
Page 1 of 1 (1 items) 1											
Export to Excel											

Or the entire bank of contractors:

Search For Contractor											
Search Criteria		Search Results									
Contractor Reference	Contractor Name	Address 1	Post Code	Tel No	Email	Contractor Statistics					
						PPMs Planned	PPMs Outstanding	Defects	Items To Feedback		
AGDE001	AG Dental	AG Dental	SN6 8NL	0800 023 6000	ray.milton@invigilatis.com	0	0	179	224	View Details...	Go To Contractor
AGGR001	Aggreko UK Ltd	Overburn Avenue	GB 2RL	03458 247 365	ray.milton@invigilatis.com	0	0	1	2	View Details...	Go To Contractor
AIDCALL	AidCall	Great King Street North	B19 2LP	07703000848 (44 (0) 1670 352371)	ray.milton@invigilatis.com	0	0	13	16	View Details...	Go To Contractor
ALFR002	Alfreco	Unit K1	OX13 5PE	01235 754000	ray.milton@invigilatis.com	0	0	0	0	View Details...	Go To Contractor
ALLI015	Allianz			01483 265932	ray.milton@invigilatis.com	0	0	0	0	View Details...	Go To Contractor
ALSL00001	Anti-Ligature shop Ltd	Unit 5	WA8 8TL	01543242992	ray.milton@invigilatis.com	0	0	0	3	View Details...	Go To Contractor
AMIT001	Amity Insulation Services Ltd	Amicus House	OX29 5BB	01865 733733	ray.milton@invigilatis.com	0	0	4	4	View Details...	Go To Contractor
ANT001	Ant Telecom	Swift House	HP13 7DL	01494 833100	ray.milton@invigilatis.com	0	0	1	8	View Details...	Go To Contractor
AQUA001	Aquathonic Group Management Plc	AGM House	CO6 3GT	01206 235300	ray.milton@invigilatis.com	0	0	0	0	View Details...	Go To Contractor
ARJ0001	Arjo Limited	St Catherine Street	GL3 2SL	08456 114 114	ray.milton@invigilatis.com	0	0	0	6	View Details...	Go To Contractor
AVER001	Avery Weigh-Tronix	P O Box 91	B66 2LP		ray.milton@invigilatis.com	0	0	0	0	View Details...	Go To Contractor
AYLE006	AYLESBURY GLASS	UNIT 9	HP19 3DB	01296 481920	ray.milton@invigilatis.com	0	0	2	1	View Details...	Go To Contractor
Page 2 of 30 (359 items) 1 2 3 4 5 6 7 8 ... 27 28 29 30											
Export to Excel											

Here the data on 359 contractors is being shown (with details redacted). A range of selection criteria is available to refine the search. Links for each contractor enable the user to view/edit the contractor details and to view the allocated jobs.

3.5.2. The Contractor Portal

Seeker includes a contractor portal, an on-line facility so that the contractor becomes a system user with a dedicated range of appropriate facilities.

The Contractor portal facilitates a simpler, timely and extended method of job management when using contractors.

- The contractor is allocated a secure login to allow them to view their allocated jobs, and only their jobs – ensuring commercial confidentiality
- Access is by self-service, with 24/7 availability

- Asbestos hazards alerts on each job are provided, and the contractors viewing acknowledgment can be audited
- Current work can be viewed, with overdue work highlighted
- Future PPMs and inspection work can be viewed
- Feedback on progress can be undertaken
- Document and images can be submitted
- Invoices can be submitted

The facility is presented in a dashboard style with alerts.

3.6. Asset Register & Management

3.6.1. Asset Management Overview

The Asset Register is a key component of the Estates and Facilities service as work jobs are assigned to either property locations or to designated Assets, which also are associated with specific property locations. (N.B. the term of 'Asset' in Seeker refers to **equipment and plant** – property 'assets' are referred to as property locations).

Users can manage and review the asset bank in multiple ways:

- **Location** – the work history for the location, including all assets at that location
- **Asset** – the work history for a specified asset, so that its serviceability and lifespan can be monitored
- **Asset Type** - the work history for a specified Asset Type across multiple individual assets, so that issues relating to that Types serviceability can be identified, so that its lifespan can be monitored
- **Compliance** can be monitored by location, specified asset or by Asset Type

3.6.2. The Asset Register

Seeker provides a full Asset Register which is integrally linked to the Property Register (each asset record incorporates a property location ID, down to space level). This forms the basis for an extensive asset management solution which can be configured for each client:

- Assets are categorized by Asset Types (these can be optionally linked to SFG20 if required)
- The Asset Register has many recordable data attributes for each asset (175+ fields) and is configurable so that only relevant data fields (and asset types) are seen
- A full service history can be held for each asset (Defects, PPMs, Inspections, and Remedials)

- The register provides convenient handling for jobs
- Jobs in Seeker can be directed at a property location or an asset
- For job allocation for multiple assets of the same type, then the assets for a location can be organised into a predefined list, so that the asset list provides a single job instruction, rather than multiple jobs (one for each asset).
- The asset records are supported by documents and images attached to each record (e.g. job documents, service manuals and parts lists, etc.)
- Assets can be bar-coded for audit purposes
- The register also integrates with asset tracking software/bar coded assets

Being fully integrated within the Seeker database and operations, the Register can associate any asset and the related data with any facility/function in the system (e.g. facilitating linkage to a Property Location ID or to an Organisation ID).

In this way, assets can be maintained through Planned Preventative Maintenance and defect operations and can participate in Compliance Inspections.

To ease the workload for the customer, Invigilatis will ensure that the register is configured and implemented for the customers' requirements:

- During implementation Invigilatis' team ensure the register is set up to contain and display all required information.
- The Asset Register vocabulary can be controlled by preloading the system with a fixed set of asset Types and names in a predetermined structure which will ensure total consistency of asset records and any associated reporting. (N.B. The default list of assets and systems was derived from NHS Backlog Maintenance documentation and optionally can be structured to align with SFG20.)
- The Asset Register is updated during operations by self-service and by operational data created by the Seeker processes
- Assets are associated with a property location and if the asset is relocated then the previous location is held as an audit reference
- Asset records are protected and controlled. Only authorised users can update them. (N.B. Asset records can also be updated by mobile devices, again only by authorised users.)
- Asset data is organised in context so that related data is presented to the user in a sensible way, e.g., Primary details, Usage, Technical/Manufacturers details, Purchase/Finance, etc.
- A review process allows the user to monitor the work and service history

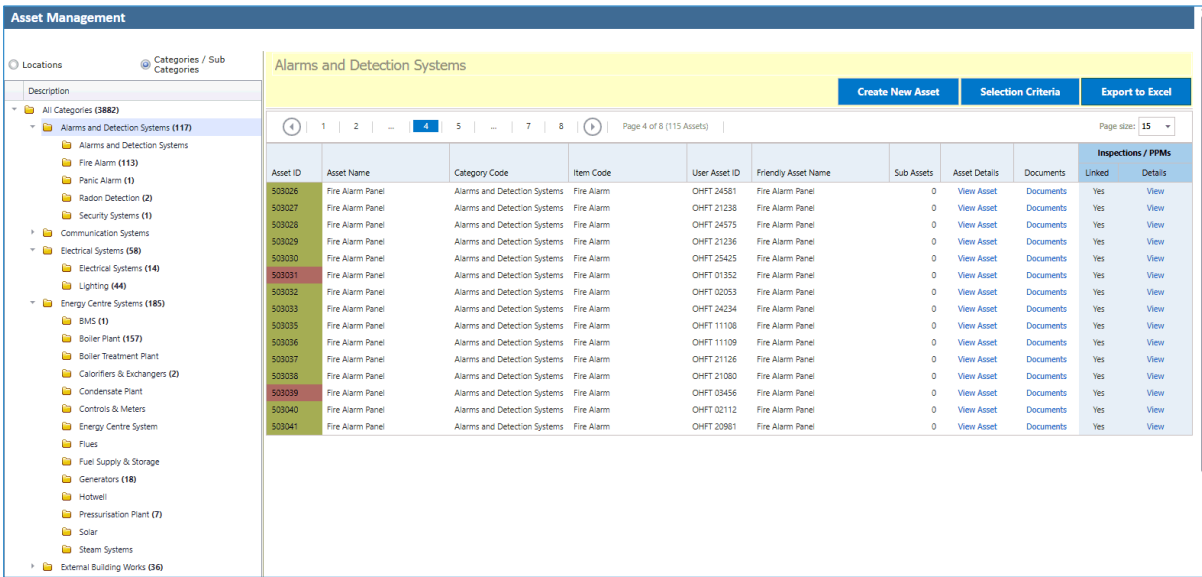
3.6.3. Asset Life-cycle Management

Among the data fields for the Asset Record are several for pricing, warranty and replacement dates. Maintenance costs can also be accumulated for each asset. This information can be used to provide a range of Life-cycle forecasts including purchasing and de-commissioning plans. Asset Management alerts can also be set to facilitate replace/repair decisions on high maintenance assets. Optionally SFG20 standardisation can be deployed to link with national statistics and reporting.

3.6.4. Assets and Compliance

Assets can be monitored for Compliance if the Compliance module is in use. The results of the Compliance operations facilitate the RAG indication of the asset on the register.

Here is an example with one asset type selected:



Asset Management										
Categories / Sub Categories		Alarms and Detection Systems								
Description		Create New Asset Selection Criteria Export to Excel								
- All Categories (3882) - Alarms and Detection Systems (117) - Fire Alarm (113) - Panic Alarm (1) - Radon Detection (2) - Security Systems (1) - Communication Systems - Electrical Systems (58) - Lighting (44) - Energy Centre Systems (185) - BMS (1) - Boiler Plant (157) - Boiler Treatment Plant - Calorifiers & Exchangers (2) - Condensate Plant - Controls & Meters - Energy Centre System - Flues - Fuel Supply & Storage - Generators (18) - Hotwell - Pressurisation Plant (7) - Solar - Steam Systems - External Building Works (36)		1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70 71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 100 101 102 103 104 105 106 107 108 109 110 111 112 113 114 115 116 117 118 119 120 121 122 123 124 125 126 127 128 129 130 131 132 133 134 135 136 137 138 139 140 141 142 143 144 145 146 147 148 149 150 151 152 153 154 155 156 157 158 159 160 161 162 163 164 165 166 167 168 169 170 171 172 173 174 175 176 177 178 179 180 181 182 183 184 185 186 187 188 189 190 191 192 193 194 195 196 197 198 199 200 201 202 203 204 205 206 207 208 209 210 211 212 213 214 215 216 217 218 219 220 221 222 223 224 225 226 227 228 229 230 231 232 233 234 235 236 237 238 239 240 241 242 243 244 245 246 247 248 249 250 251 252 253 254 255 256 257 258 259 260 261 262 263 264 265 266 267 268 269 270 271 272 273 274 275 276 277 278 279 280 281 282 283 284 285 286 287 288 289 290 291 292 293 294 295 296 297 298 299 300 301 302 303 304 305 306 307 308 309 310 311 312 313 314 315 316 317 318 319 320 321 322 323 324 325 326 327 328 329 330 331 332 333 334 335 336 337 338 339 340 341 342 343 344 345 346 347 348 349 350 351 352 353 354 355 356 357 358 359 360 361 362 363 364 365 366 367 368 369 370 371 372 373 374 375 376 377 378 379 380 381 382 383 384 385 386 387 388 389 390 391 392 393 394 395 396 397 398 399 400 401 402 403 404 405 406 407 408 409 410 411 412 413 414 415 416 417 418 419 420 421 422 423 424 425 426 427 428 429 430 431 432 433 434 435 436 437 438 439 440 441 442 443 444 445 446 447 448 449 450 451 452 453 454 455 456 457 458 459 460 461 462 463 464 465 466 467 468 469 470 471 472 473 474 475 476 477 478 479 480 481 482 483 484 485 486 487 488 489 490 491 492 493 494 495 496 497 498 499 500 501 502 503 504 505 506 507 508 509 510 511 512 513 514 515 516 517 518 519 520 521 522 523 524 525 526 527 528 529 530 531 532 533 534 535 536 537 538 539 540 541 542 543 544 545 546 547 548 549 550 551 552 553 554 555 556 557 558 559 560 561 562 563 564 565 566 567 568 569 570 571 572 573 574 575 576 577 578 579 580 581 582 583 584 585 586 587 588 589 590 591 592 593 594 595 596 597 598 599 600 601 602 603 604 605 606 607 608 609 610 611 612 613 614 615 616 617 618 619 620 621 622 623 624 625 626 627 628 629 630 631 632 633 634 635 636 637 638 639 640 641 642 643 644 645 646 647 648 649 650 651 652 653 654 655 656 657 658 659 660 661 662 663 664 665 666 667 668 669 670 671 672 673 674 675 676 677 678 679 680 681 682 683 684 685 686 687 688 689 690 691 692 693 694 695 696 697 698 699 700 701 702 703 704 705 706 707 708 709 710 711 712 713 714 715 716 717 718 719 720 721 722 723 724 725 726 727 728 729 730 731 732 733 734 735 736 737 738 739 740 741 742 743 744 745 746 747 748 749 750 751 752 753 754 755 756 757 758 759 760 761 762 763 764 765 766 767 768 769 770 771 772 773 774 775 776 777 778 779 780 781 782 783 784 785 786 787 788 789 790 791 792 793 794 795 796 797 798 799 800 801 802 803 804 805 806 807 808 809 810 811 812 813 814 815 816 817 818 819 820 821 822 823 824 825 826 827 828 829 830 831 832 833 834 835 836 837 838 839 840 841 842 843 844 845 846 847 848 849 850 851 852 853 854 855 856 857 858 859 860 861 862 863 864 865 866 867 868 869 870 871 872 873 874 875 876 877 878 879 880 881 882 883 884 885 886 887 888 889 890 891 892 893 894 895 896 897 898 899 900 901 902 903 904 905 906 907 908 909 910 911 912 913 914 915 916 917 918 919 920 921 922 923 924 925 926 927 928 929 930 931 932 933 934 935 936 937 938 939 940 941 942 943 944 945 946 947 948 949 950 951 952 953 954 955 956 957 958 959 960 961 962 963 964 965 966 967 968 969 970 971 972 973 974 975 976 977 978 979 980 981 982 983 984 985 986 987 988 989 990 991 992 993 994 995 996 997 998 999 1000								
Asset ID	Asset Name	Category Code	Item Code	User Asset ID	Friendly Asset Name	Sub Assets	Asset Details	Documents	Linked	Details
530326	Fire Alarm Panel	Alarms and Detection Systems	Fire Alarm	OHFT 24581	Fire Alarm Panel	0	View Asset	Documents	Yes	View
530327	Fire Alarm Panel	Alarms and Detection Systems	Fire Alarm	OHFT 21238	Fire Alarm Panel	0	View Asset	Documents	Yes	View
530328	Fire Alarm Panel	Alarms and Detection Systems	Fire Alarm	OHFT 24575	Fire Alarm Panel	0	View Asset	Documents	Yes	View
530329	Fire Alarm Panel	Alarms and Detection Systems	Fire Alarm	OHFT 21236	Fire Alarm Panel	0	View Asset	Documents	Yes	View
530330	Fire Alarm Panel	Alarms and Detection Systems	Fire Alarm	OHFT 25425	Fire Alarm Panel	0	View Asset	Documents	Yes	View
530331	Fire Alarm Panel	Alarms and Detection Systems	Fire Alarm	OHFT 01352	Fire Alarm Panel	0	View Asset	Documents	Yes	View
530332	Fire Alarm Panel	Alarms and Detection Systems	Fire Alarm	OHFT 02053	Fire Alarm Panel	0	View Asset	Documents	Yes	View
530333	Fire Alarm Panel	Alarms and Detection Systems	Fire Alarm	OHFT 24234	Fire Alarm Panel	0	View Asset	Documents	Yes	View
530335	Fire Alarm Panel	Alarms and Detection Systems	Fire Alarm	OHFT 11108	Fire Alarm Panel	0	View Asset	Documents	Yes	View
530336	Fire Alarm Panel	Alarms and Detection Systems	Fire Alarm	OHFT 11109	Fire Alarm Panel	0	View Asset	Documents	Yes	View
530337	Fire Alarm Panel	Alarms and Detection Systems	Fire Alarm	OHFT 21126	Fire Alarm Panel	0	View Asset	Documents	Yes	View
530338	Fire Alarm Panel	Alarms and Detection Systems	Fire Alarm	OHFT 21080	Fire Alarm Panel	0	View Asset	Documents	Yes	View
530339	Fire Alarm Panel	Alarms and Detection Systems	Fire Alarm	OHFT 03456	Fire Alarm Panel	0	View Asset	Documents	Yes	View
530340	Fire Alarm Panel	Alarms and Detection Systems	Fire Alarm	OHFT 02112	Fire Alarm Panel	0	View Asset	Documents	Yes	View
530341	Fire Alarm Panel	Alarms and Detection Systems	Fire Alarm	OHFT 20981	Fire Alarm Panel	0	View Asset	Documents	Yes	View

As can be seen two assets are currently non-compliant, and this screen demonstrates easy assimilation of this important aspect.

3.6.5. Assets and PPMs - Example PPM Management Screen

The PPM process in Seeker can monitor scheduled work on Assets, showing achievements and non-compliances:

PPM History								Selection Criteria
Page size: 10		1 2 3 4 ... 8 9						Page 1 of 9 (88 PPMs)
User Asset ID	Task & Location Details	No. Days Overdue	Key Dates			PPMs to Date	% Completed on Time	
			Feedback	Last PPM	Next PPM			
ASSET LIST	Window Restrictors (6 Monthly) HUB C (North Oxfordshire) \ Warneford Hospital \ Highfield \ Ground Floor Window Restrictor - Warneford / Highfield New -75	0	22/05/2023	22/05/2023	23/10/2023	7	28	View PPM History
ASSET LIST	Window Restrictors (6 Monthly) HUB C (North Oxfordshire) \ Warneford Hospital \ Isis Education Window Restrictor - Warneford / Isis Education -76	0	21/04/2023	21/04/2023	23/10/2023	7	42	View PPM History
ASSET LIST	Window Restrictors (6 Monthly) HUB C (North Oxfordshire) \ Warneford Hospital \ May Davison Building Window Restrictor - Warneford / May Davidson -77	0	21/04/2023	21/04/2023	23/10/2023	7	57	View PPM History
ASSET LIST	Window Restrictors (6 Monthly) HUB C (North Oxfordshire) \ Warneford Hospital \ Vaughan Thomas Ward \ First Floor - Neil Unit Window Restrictor - Warneford / Neil Unit -78	0	21/04/2023	21/04/2023	23/10/2023	7	42	View PPM History
ASSET LIST	Window Restrictors (6 Monthly) HUB C (North Oxfordshire) \ Warneford Hospital \ Out Patients Window Restrictor - Warneford / Outpatients -79	0	24/04/2023	24/04/2023	23/10/2023	7	42	View PPM History
ASSET LIST	Window Restrictors (6 Monthly) HUB C (North Oxfordshire) \ Warneford Hospital \ Vaughan Thomas Ward Window Restrictor - Warneford / Vaughn Thomas -80	0	24/04/2023	24/04/2023	23/10/2023	7	42	View PPM History
ASSET LIST	Window Restrictors (6 Monthly) HUB C (North Oxfordshire) \ Warneford Hospital \ Wintle Ward \ First Floor Window Restrictor - Warneford / First floor Wintle Ward offices -81	0	24/04/2023	24/04/2023	23/10/2023	7	42	View PPM History
ASSET LIST	Window Restrictors (6 Monthly) HUB C (North Oxfordshire) \ Warneford Hospital \ Wintle Ward \ Ground Floor (Wintle Ward) Window Restrictor - Warneford / Wintle Ward -82	0	24/04/2023	24/04/2023	23/10/2023	7	42	View PPM History
ASSET LIST	Window Restrictors (6 Monthly) HUB A (Buckinghamshire) \ The Whiteleaf Centre \ Resource Centre \ First Floor Window Restrictor - Whiteleaf Centre / Resource Centre -83	0	22/05/2023	22/05/2023	23/10/2023	7	42	View PPM History
ASSET LIST	Window Restrictors (6 Monthly) HUB A (Buckinghamshire) \ The Whiteleaf Centre \ Ground Floor Window Restrictor - Whiteleaf Centre / Resource Centre -84	0	22/05/2023	22/05/2023	23/10/2023	7	42	View PPM History
Export to Excel								

The screen above shows a PPM Type being conducted on a specified asset type over the range of assets located at various properties, showing two aspects of compliance (using RAG indication):

- Adherence to the planned schedule – has the task been carried out Y/N? (The left column)
- And was the last PPM done on time Y/N? (The right-hand column)

Both indicators provide important management information. For example, the example above shows that that some PPMs, although completed and therefore compliant with the achievement profile, were completed LATE, i.e. in excess of the period as determined by the PPM's priority.

3.7. Supplementary Work Management functions

3.7.1. Portering & logistic moves

Seeker includes many Soft FM capabilities: Portering, Transport, Loan Store, Accommodation and both Waste and Cleaning audits. It also incorporates a full EME module.

Portering can work either as a job recording system show just one location, or as a journey management tool showing both from and to locations and the tracking tools available on mobile devices provide additional capabilities to allocate the nearest porter to a job.

Portering and logistic job types can:

- be monitored on their own dashboards, and

- have their own priority of delivery allowances and
- be monitored so that effective performance monitoring can take place.

3.7.2. Stores and Purchasing

The optional Seeker Stores module can manage the stores/parts deployed on jobs

The parts charge for any job, which is combined with the associated labour charges to determine the full job-costing, is derived from the solution's stock functionality which covers all aspects of stock control and admin/financial controls required for ordering.

- In addition to receiving and issuing stock, it has functionality for stock checks and adjustments.
- The software can also prompt re-ordering when stock items fall below the minimum levels.
- Stock valuation is automatic using the average value methodology which combines existing stock with the values of newly added items.
- Multiple stores can be operated.
- System can operate with bar codes so increasing the Store efficiency and enabling Tradespeople using mobile devices to self-serve from any store location.

3.7.3. Contractor badging and on-site attendance

The Seeker Contractor Badging service can register, authorise and track the on-site attendance for approved contractors. The audit tracking of the attendance time/date can be compared to job feedback and completions.

The app enables contractors to sign in at remote sites where there is no reception, and supervisors are then able to monitor attendance and ensure they can monitor lone-working

3.7.4. Capital works/New projects

Capital works/Projects can be managed in Seeker. A new project is registered as a form of 'Super job', which is the host of multiple ancillary jobs that respond to its 'host' project in the form of a parent/child relationship. Each 'child job' (a standard Seeker Job) is then a component of the project (i.e. stages or tasks) and can be managed as required – all the Seeker job management and monitoring facilities are available. The project/parent job then consolidates all the jobs that are associated with it.

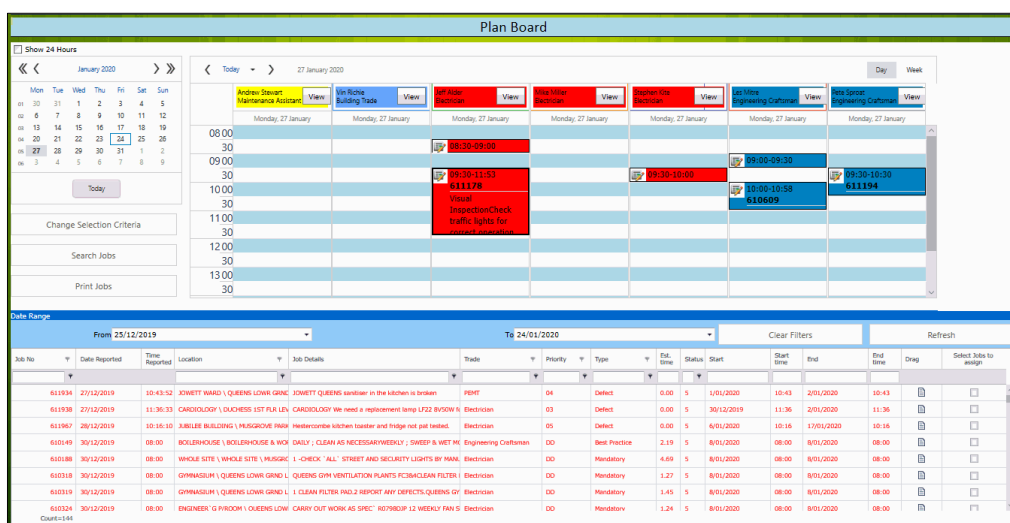
- Dashboards can bring together the alert and progress aspects

- The **Seeker Finance module** (which links via the various job IDs and Job types) can manage the budgetary aspect for the project and its associated job components (budget, clients and ledger, etc.) - see 5.13.
- The CAFM job creation process can be used to initiate capital work/project requests from staff – the Staff Portal contains a request mechanism to submit new requests which is then passed to authorised users (see under the Staff Portal notes above). These new works can be linked to existing property locations or can be the basis for the creation of new location records within Property Terrier.

3.7.5. The Seeker Planboard

The Seeker Planboard is an optional drag and drop graphical calendar-based scheduling tool, for resource and job allocation. The Planboard is an alternative way of allocating resources to jobs – jobs can be allocated by the manual method working on individual jobs or by the Planboard.

Both methods utilise the same data and the processes are interchangeable, and the method adopted is chosen by the user organisation to suit their working practices.



- The Planboard employs a calendar and work/time-slots to allocate jobs to appropriate staff by trade.
- Trades are colour coded and jobs can be dragged to different time-slots and/or tradespeople as required.
- Each user can configure their Planboard arrangements to show teams of resources that are appropriate to their own work context.
- Reported jobs (defect, PPMs, etc.) are listed on a job list that can be interrogated for priority, trade, location, date/time reported, etc. – all the important criteria that the supervisor needs to assess and allocate the job to the appropriate tradesperson using resource availability information.

- The Planboard incorporates configuration settings so that the user view and work content can be refined as required.
- Users can see real-time information about job progress and allocate work with reference to:
 - absences, holiday and bank holiday records which prevent job allocation to these unavailable times
 - shift management
 - team/trade work allocation

4. Seeker Compliance Services

4.1. Compliance Overview

4.1.1. Introduction

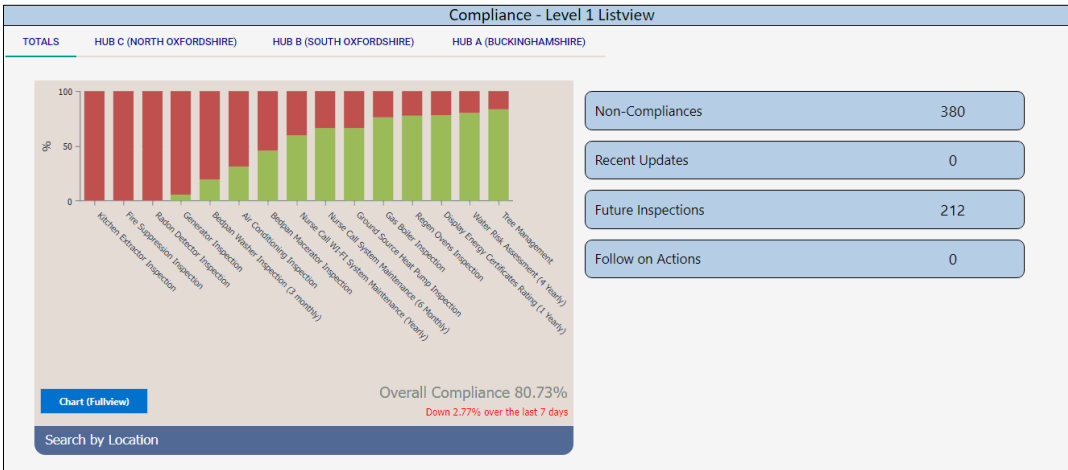
Seeker’s Compliance functionality is used to manage and evidence compliance and provides risk registers for its property and asset portfolio. It provides real time information to satisfy Statutory, Regulatory and Best Practice reporting requirements.

The Compliance Service uses an extensive set of data tables/fields in its extendable Framework which covers HSE topics, Health Technical Memoranda (HTMs) and can handle the other inspection regimes which underpin the smooth operations of an estate.

Seeker’s integrated Compliance Inspection functionality is used to define and to schedule periodic inspections tasks on assets; lists of multiple assets; and at locations and list of multiple locations. The checks are sent to mobile devices for completion, and the results are viewed on the dashboards, operational reports and alerts.

Directors can be assured that risks are minimised and controlled, managers understand their responsibilities, and it provides an essential repository of evidence for use in statutory submissions and returns.

Dashboards and drill downs support effective management action:



4.1.2. Compliance Service functional content

4.1.2.1. Multi-function systems

A typical Seeker Compliance solution will consist of a selection of the following operational functions:

Seeker Operation	Function
Compliance	Compliance Register & Management
Compliance	Compliance Inspection Management
Compliance	Asbestos Register & Management
Compliance	Ventilation Verifications
Compliance	RAAC Register & Management
Compliance	Statutory and Regulatory Reporting
Compliance	Risk Assessment
Compliance	Incident reporting
Compliance	Fire Action Plans
Compliance	Legionella Logbook
Compliance	General Audit for HTM Inspections
Compliance	Estates Strategy – Canty Compliance
Compliance	Control of Infection, Cleaning and Waste
Compliance	QIT Environmental Audit
All	Dashboarding and Operational reporting
All	Document Management (inc. images)

These functions are described below.

4.1.2.2. Single purposes systems

The following functions can be supplied as a single purpose system, i.e. where they are the focus of a ‘stand-alone’ system:

Seeker Operation	Function
Compliance	Asbestos Register & Management
Compliance	RAAC Register & Management
Compliance	Ventilation Verifications
Compliance	Legionella Logbook

They will require core system functionality to be self-contained systems.

4.1.3. Compliance and Operational Reporting

The general arrangements of our Dashboarding and Reporting facilities are described elsewhere (see later, System-wide facilities, Section 5). As with other Seeker services, Compliance dashboards and reports can be enhanced with the addition of user defined dashboards to address local requirements.

4.1.3.1. Inspection Dashboard

Dashboards and drill downs support effective management action:

- A selected Inspection type (e.g. Asbestos, RAAC, Lifts, Fire Alarms, etc.)

By selecting a map pin, users can drill-down to the details of the inspections relevant to the location

4.1.4. Compliance Documents

The general arrangements of our Document Management facilities are described elsewhere (see later, System-wide facilities, Section 5).

The Compliance module is provided with a Compliance Document Viewer. This enables users to view Inspection reports and photographs, both by Inspection Type and property locations. Uploaded documents can be view at property level (i.e. from region through building and down to space level) and they can all be viewed in context with other documents for the same location.

Images are stored as files and they can also be displayed in the browser: this is of particular relevance for Asbestos hazards, where a portfolio of images can be uploaded.

Documents can be retrieved/opened by users provided that they have access to the software to open it, e.g. PDF reader, Microsoft Office (Excel, Word, PowerPoint, Outlook, etc.) etc. on their device.

For security, the Delete function is reserved to authorised user's using the Documents Management facility and use is recorded in the Audit trail.

4.2. Compliance Inspections – definitions and automated processes

The Compliance Inspection definition and processes use **Seeker's Planned Task operations and automated processes** as described in Section 5, System wide facilities – please refer to this text for a detailed description of the following important setup and operational processes:

- Methodology employed (please see section 5.3)
- Inspection job Management and allocation (please see section 5.3)
- Inspection job Administration and Resource Management (please see section 5.3)
- Inspection Jobs and Mobile app usage (please see section 5.3)
- Dashboards (please see section 5.3)
- Strategic Planning (please see section 5.3)
- SFG20 (please see section 5.3)

4.3. Compliance Service Operations and Workflows

The Seeker Compliance Inspection operations make extensive use of automation that schedules jobs, feed charts and planners. The automation ensures that Inspection Jobs are created in a timely fashion, according to predefined schedules, without the need for manual administration. (This methodology is also used for PPMs the consistent approach ensures familiarity and experiences across all Seeker services).

The compliance framework handles audit questions and, it:

- enables the inspection work profile to conform to national standards and reporting frameworks such as SFG20)
- can incorporate relevant scoring methodologies options to ensure consistent evaluation of compliance in all areas of Estates and FM.
- provides operational dashboards with action prompts and professional guidance.
- enables the responsibility for the compliance task to be accurately assigned to either in-house or 3rd party responsibility (i.e. some compliance tasks will be the legal responsibility of the landlord/leaseholder rather than the 'occupier')
- includes a core repository for storing Policies, Checklists, Inspection Results and other documentation needed to evidence compliance.

Compliance is not just about complying with an established schedule, but also for identifying health and safety and 'fitness for purpose' issues. Remedial works incorporate risk rating so that rectification has a relevant prioritisation - criticality issues can be highlighted on dashboard alerts.

The Seeker Compliance Service can also be deployed as a standalone system.

4.4. Statutory and Regulatory Reporting

The Compliance Service can be configured to provide Statutory and Regulatory Reporting to meet all legislation and guidance by using Seeker's extensive self-serve functionality.

The checklists and Inspections can be set up and configured using that self-service functionality, so enabling each client to adopt their own preferred working terminologies. Alternatively, SFG20 Standard categorisations be applied to regimes viewed in Seeker, both in Compliance and the PPMs in Seeker CAFM.

Reporting and analysis can be specified for all aspect of compliance and viewed on real-time dashboards. While automated alerts can also be established to ensure non-compliance and remedials are highlighted promptly to managers.

4.5. Risk Register

Seeker's Risk Register can be used to analyse and assess risk, with both categorisation and evaluation to score each risk with severity and likelihood values in the standard 5 by 5 risk matrix. Compliance is not just about complying with an established schedule but also informs users on health & safety and fitness for purpose issues.

The register can be used as a standalone module, and it is embedded in several of the other compliance modules to provide holistic views and support remedial decision making for managers.

When remedial work is identified, the remedial jobs raised are linked automatically to the failed inspection. The remedial jobs are risk rated, so that critical issues can be identified and prioritised accordingly.

4.6. Asbestos Register & Management

4.6.1. Overview

Asbestos Inspections form part of a typical Inspection regime within a Compliance Service, but the issue is so critical to the property portfolio that it forms a **critical organisational Register** in its own right.

The **Asbestos Register** is compiled from asbestos inspection results that are part of the Seeker Compliance Service.

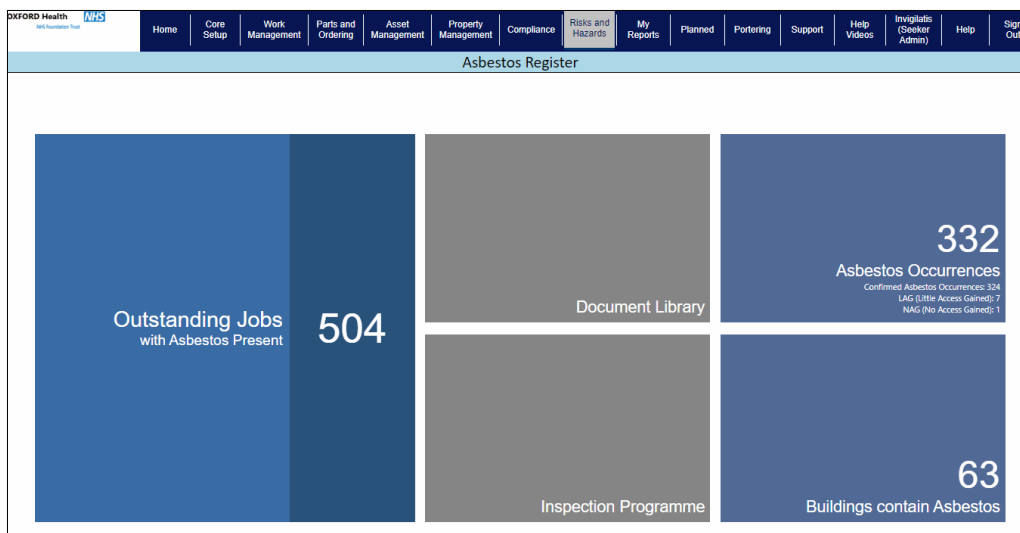
The Asbestos Register holds full details of every occurrence of Asbestos. It incorporates a full risk assessment to evaluate asbestos risks, and it is fully integrated with the property modules, so that:

- the Instances of hazards for buildings, and floors and rooms within the buildings can be seen in context
- a document register relating to Asbestos is available for the building
- photographs can be associated with asbestos hazards and thus linked to buildings
- the occurrence of Asbestos is flagged on all Work Orders/Job lists where the hazard occurs, i.e.:
 - All work orders carry advisory text about invasive work and the need to ensure there is no Asbestos present.
 - Job lists highlight jobs in locations with an Asbestos risk and the system transaction log records that the Register for those locations is checked prior to work starting.

- Jobs in locations with an Asbestos risk sent to mobile devices also require the recipient to acknowledge the register has been check and risks minimised prior to work starting.

The Seeker Asbestos Management service can also be deployed as a standalone system.

4.6.2. Asbestos Register Dashboard



Clicking on a dashboard pane initialises a drill-down to further detail, so that the display switches to a list of outstanding jobs or affected building, etc. (both with appropriate details).

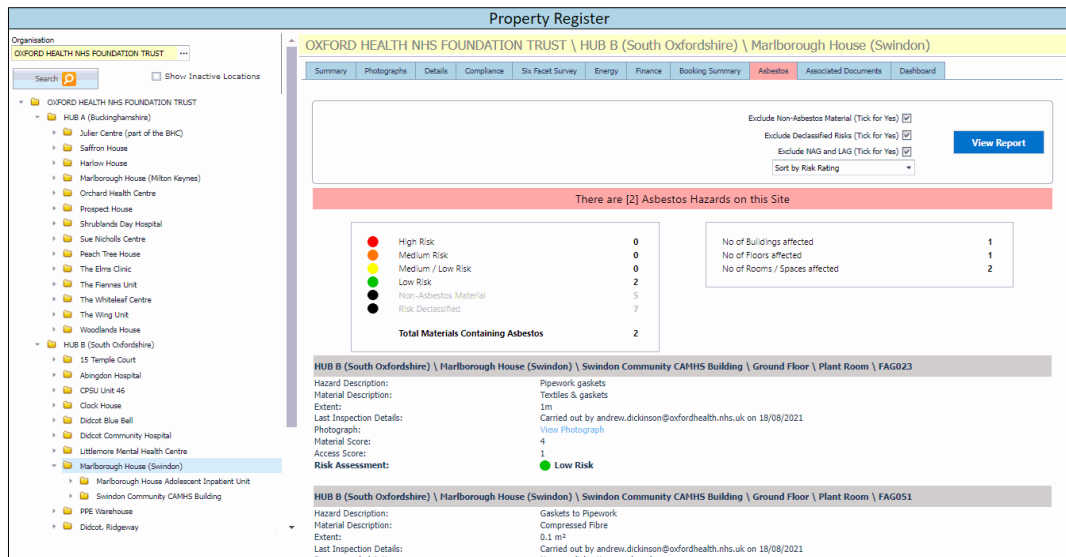
Using the dashboard, the user has facilities to view:

- Asbestos Occurrences – the Asbestos register
- Buildings with Asbestos – the list of affected buildings
- Document Library – a document viewer dedicated to Asbestos related documents
- Inspection Programme – this is the Compliance Planner
- Outstanding jobs – the list jobs at locations affected by asbestos

The asbestos inspection update allows additional occurrences to be registered and entries for new buildings to be listed. The facility to include associated documents allow supporting evidence (including Photographs) to be included in the property database.

4.6.3. Asbestos Register – linkage with Property pages

The asbestos information is integrated with the property information, and when a user views a property in the Property Viewer then the Asbestos Tab is highlighted in RED:



The presence of asbestos is specified for each location, so an occurrence for a space is also shown at other levels, e.g. building/site as shown above. The integration of the database facilities allows this asbestos information to be used in operational context, e.g. for jobs.

Before starting a job where asbestos hazards are present then the user (either internal staff or contractors) must register acknowledgement of the notification in order to proceed, so that the organisation can be satisfied that its legal obligations are being met.

For example:

- Job alerts can be sent to tradespeople when receiving job details on their mobile device).
- Contractors are notified during their job notification:
 - Seeker includes a contractor portal, an on-line facility so that the contractor becomes a system user with a dedicated range of appropriate facilities. The portal allows the contractor to view the details of a job and to view the registered hazards (flagged using RAG indication):
 - The notification and acknowledgement of an asbestos occurrence is a mandatory part of the job acceptance process for the contractor.

4.6.4. Asbestos Inspections

Using the Seeker self-service Compliance/PPM planning tools and methodology, the occurrences of Asbestos can be identified and monitored by a variety of inspection types, and at the required scheduled frequencies:

- Initial identification condition surveys
- Re-inspection surveys of pre-identified occurrences

The content of the inspection results is driven by the relevant question set, which can be pre-determined by the Estate's requirements and established by self-service.

The inspection survey feed the dashboard and management reporting regime, so that the adherence to schedules can be monitored

4.7. Ventilation Verifications

Seeker Ventilation digitises verifications to ensure compliance under HTM 03-01. These mandatory periodic inspections can be completed in a timely fashion with significant time saving on both the on-site verification and reporting which, in turn, improves patient safety and optimises the availability of operating theatres

Verifications are completed on an app which improves data quality with validation or measured items and Bluetooth capability to load them automatically.

Once the on-site verification work has been completed, the captured data is returned to Seeker, and it is immediately available on the dashboard and in an HTM formatted report:

NHS

Melton Healthcare

NHS Trust

Verification Dashboard

Verifications : 15

Melton Healthcare

Melton Hospital

Ferriby Hospital

Verification Date	Suite	Suite Compliance		Air Handling Unit	AHU Compliance		Report
		Compliance	Maint. Quality		Compliance	Maint. Quality	
26/02/2025	Ophthalmology Theatre 1	6	2	Air Handling (AHU03-03)	2	1	View Report
26/02/2025	Ophthalmology Theatre 1	5	1	Air Handling (AHU03-03)	2	1	View Report
25/06/2025	UCV Theatre 1	2	0	Air Handling (AHU03-03)	1	1	View Report
02/07/2025	Theatre 2	17	1	Air Handling (AHU)	0	1	View Report
02/07/2025	Theatre 4	10	1	Air Handling (AHU)	0	1	View Report
01/09/2025	UCV Theatre 8678	3	1	Air Handling (AHU45)	0	1	View Report
02/07/2025	UCV Theatre 888	2	0	Air Handling (AHU)	0	1	View Report
02/07/2025	UCV Theatre 889	8	0	Air Handling (AHU 889)	0	1	View Report
02/07/2025	UCV Theatre 890	7	0	Air Handling (AHU 890)	0	1	View Report
01/10/2025	Theatre 891	3	0	Air Handling (AHU 891)	0	1	View Report
19/09/2025	Theatre 891	4	0	Air Handling (AHU 891)	0	1	View Report
23/07/2025	Theatre 891	8	0	Air Handling (AHU 891)	0	1	View Report
15/07/2025	Theatre 891	14	0	Air Handling (AHU 891)	1	1	View Report
08/07/2025	Theatre 891	12	1	Air Handling (AHU 891)	0	1	View Report

Export Format:

Export

Users can drill down from the dashboard into the detail of each verification to plan remedials and maintenance, enable this work to be planned, and maximise the availability of these critical resources and minimise the operating costs.

An individual portal is available to each Trust and information can be shared easily with all members of the Ventilation Safety Group. Access for AE's enables them to improve the quality on timeliness of their annual audits.

The Seeker Ventilation Verification service can also be deployed as a standalone system.

4.8. Supplementary Compliance Functions

4.8.1. *Optional Compliance functions*

The Compliance Service can also provide many supplementary functions and as compliance becomes ever more important, additional compliance will continue to be added.

In addition, Seeker integrates with the complementary risk and compliance tools from Canty Compliance:

- Compliance Manager
- Risk Control
- Safety Rules and procedures

4.8.2. *Legionella*

Seeker's Legionella module and app provide full inspection functionality and reporting as required under HSE's ACOP L8. Inspections are set up for the different categories of assets and systems and as the results are submitted compliance is update in real time.

The Legionella Register and management facilities are similar to those provided for Asbestos Management and follow a similar approach, with a dedicated Inspection type and regime.

4.8.3. *Fire*

4.8.3.1. Fire Risk Assessments

Seeker's Fire Risk assessment is based on HSE's established methodology used for Asbestos. The Fire Risk Assessments for each property will be held in the relevant folder of the document manager. Those documents will be listed as being available and can be access direct from the property screens in a similar way to the Asbestos hazards.

- The items identified with the Fire Action plans will be accessible by a Fire Risk Register, and as they are remedied, they can be closed.
- Like many other aspects if the system viewer of the Fire Risk register will have a dashboard indicating the number individual risks and the number of buildings in which risks have been identified.
- Dashboards can provide access to listing that will be ordered in descending order of risk thereby enabling users to immediately see the highest risk items.

- As with the Condition Survey information the Fire Risk information can also be included in the strategic maintenance plan modelling and, where remedial costs can be identified, budgeting plans can also be produced.

4.8.3.2. Golden Thread

Seeker's portal enables fire safety information to be shared so building occupants are safe, as required under Phase 3 of the Building Safety Act, which came into force from 1st October 2023, and in line with the Building Safety Regulator requirements. Seeker provides a secure golden thread of information, which includes full details of relevant compliance and maintenance.

4.8.4. RAAC Register & Management

The RAAC Register and management facilities are similar to those provided for Asbestos Management (see above) and follow a similar approach, with a dedicated Inspection type and regime. The management facilities are based on the guidance from the Institute of Structural Engineers.

4.8.5. Inspections and Condition surveys

Building inspections and condition surveys are available based on the NHS' six facet rules. The results are collected on app and sent back for viewing on Seeker's Property Register Viewer

4.8.6. HSE Incident reporting

Seeker's 'My Safety' mobile app can be used to report safety incidents. Field staff can capture full details of incidents and ensure appropriate Riddor reports are completed and that they feed into corporate SHE reports.

MySafety app uses simply structured question-sets which are supplemented with photographs on time, date and geolocated reports. The app's messaging functionality enables details to be shared amongst members of dispersed teams

4.8.7.HSE Machine checks

Seeker's 'My Safety' mobile app can also be used to capture daily machine checks to both to evidence they have been completed, in line with HSE guidance, and to report on remedial maintenance requirements.

MySafety app uses structured question-sets which are supplemented with photographs on time, date and geolocated reports,

4.8.8 Infection Control, Cleaning Waste

Seeker provides access to IPS Environment QIT Audits and the NHS 2025 Cleaning Standards

5. System-wide facilities and standards

5.1. Common aspects

Seeker uses an infrastructure that is common to all its functional modules. Accordingly, there are many service and delivery aspects that are also typically common, and this section covers their descriptions:

- Core functionality
- Automation of Planned Tasks
- Mobile Apps
- Document Management
- SFG20
- Reports
- Dashboarding
- Alerts and email notifications
- Newsflashes
- The Audit Trail
- Self-service configuration
- Seeker Finance Module

5.2. Core functionality – property locations

Seeker Jobs, Assets and Property Locations all share a common aspect – that of a property location definition, and its place within the Seeker Property hierarchy. This provides a common backbone of definition that both facilitates and ensures Seeker's integrated services.

Accordingly, ALL Seeker modules must have the property location definitions available within their operations and so this is a CORE provision. Essentially, all modules must have the Property Terrier function at their heart to enable all operations that relate to an individual property location to be identified.

An all-encompassing Seeker system or a standalone Property Management System will automatically have the Property Terrier installed, but a standalone CAFM or Compliance system must also have the Property Terrier installed.

5.3. Automation of Planned Tasks

5.3.1. Planned Task overview (PPMs and Compliance Inspections)

Seeker's integrated **Planned Task functionality** is used to define and to schedule periodic maintenance and inspections tasks on assets; lists of multiple assets; systems; and at locations and list of multiple locations.

The Planned Task methodology, definitions and operations are common to both **PPMs and Compliance Inspections** – the only difference between the two services is that in the core common task definition certain fields reflect the differences between PPMs and Compliance Inspections (the vast majority of fields are standard to both).

The whole process is defined and operated by user self-service. The source driver of a Planned Task can either be asset or location based, thus enabling the entire property and asset portfolios to be accommodated.

The Seeker Planned Task operations make **extensive use of automation** that schedules jobs, feed charts and planners. The automation ensures that Planned Jobs are created in a timely fashion, according to predefined schedules, without the need for deployment of human resources. This methodology is common to PPMs, Compliance and Asbestos Inspections thus ensuring consistency of approach and familiarity for the user experience of these functions.

A full set of Planned Task operations can be defined by self-service within Seeker using a bank of operational **Question Sets** that are also defined by self-service. These arrangements can optionally use SFG20 standards

The predefined Planned Task job structure allows for optimisation, as the tasks can be targeted at a specified:

- Location
- Asset
- A list of Assets *
- A list of Locations *

* The concept of the list ensures that the job instruction is grouped and optimised for operational convenience and economy of management, as the list ensures that jobs relating to multiple assets or locations can be delivered as a **single job instruction**, and

not as multiple jobs (one for each component) thus optimising the site visits by tradespeople/contractors.

What makes a **Location List** particularly useful is the ability to group together a list of otherwise disparate rooms/spaces into an ‘administrative grouping’, e.g. wards or a suite of management offices.

The consistency of the **Question set approach** leads to a consistent set of results that can be evaluated across the Planned Task Type.

Results of jobs can also imply ‘failure’ that require **Remedial Work**. Remedial works can be raised within the Planned task job so that when fed back into the Job management process it is automatically associated with its original parent Planned Task job. This facilitates a priority infrastructure for the rectification of PPM for Compliance Inspection works, with both being **rated for risk**. This facilitates compliance and fitness for purpose monitoring.

5.3.2. Planned Task methodology and setup

Planned Task setup is by self-service, and as the methodology is standard then this ensures consistency of approach and familiarity for the user experience.

First of all, a set of ‘**common**’ tasks are established for a Task Type that are associated with a question set of instructions that are standard for the task (any number of tasks can be established within the PPM/Inspection remit). This contains the base description for the common task, such as periodicity, allocated time to complete, Statutory or Best Practice, Type categorization and Priority. Some fields delineate the use for PPM or Compliance inspections. Similarly, there is one set of questions/work instructions set for the ‘common’ task.

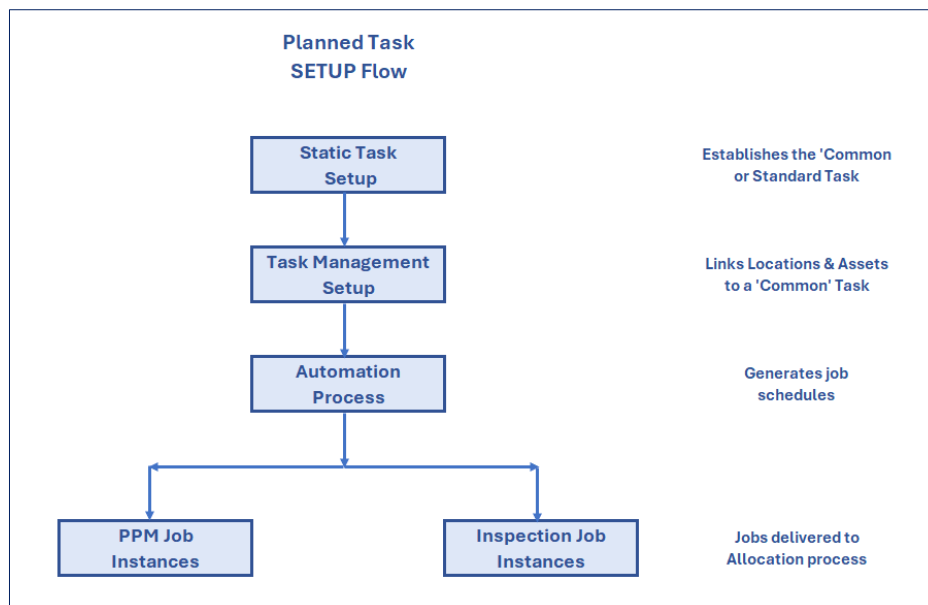
This then sets a consistent standard for ALL **Asset and Location based Planned tasks** that are subsequently associated with the specified Task Type (any number of tasks can be established within the remit of the specified Planned Task Type), which is the second step of the process.

Any number of Asset/Location tasks can be established for each of the Planned Task common/standard definitions. As new PPM or Compliance tasks are identified, or new properties are added to the property portfolio, then additional records can easily be added. Optionally, SFG20 standardisation can be deployed

Each Asset/location task is established with a **commencement date** – this date is interpreted by the Seeker automation processes which automatically creates a **schedule for the specified task** in the systems calendar according to the predefined periodicity – it creates the **job instances** for the appropriate periodicity (not only does it create the NEXT job instance but also the projected future dates).

As each day passes, the system automatically updates the schedules with job completions and omission so that the schedule is fully updated for the next operational day. The automation process also produces BI style data for use in Dashboards and the Seeker Planner.

As a job's scheduled date is approaches, the planned jobs details are extracted for inclusion into the work/job allocation process.



The Seeker Planned Tasks' process utilises Seeker's internal scheduling processes to provide automation, thus reducing human input and human error.

Once the base definition records are established, then the job creation process is **essentially maintenance free**, and accordingly such operations do not require human resources.

As actual jobs are undertaken (or missed) then Seeker re-adjusts the schedules automatically.

The schedule runs for many years, and therefore the calendar records form the basis for future planning, as visualised in the Seeker Planner (see later, Strategic Planning see 5.5.7.2).

5.3.3. Planned Task job Management and allocation

A job instance of a Seeker Planned Task (either PPM or Compliance Inspection) is, effectively, just another job to be managed by the standard seeker job management facilities.

This standardisation of job management promotes user familiarity for the user and eases assimilation of knowledge when multiple Seeker services are in use.

In addition to the standard Job provisions, Seeker provides extra screens to manage the PPM and Compliance Inspection jobs in the form of lists, dashboards and charts that relate in context to their management activity – i.e. assembly, location, non-compliances and overviews.

When the Planned Task job is created from the Planned Task Calendar (using Seeker's automated processes – see later), then it is available to the supervisor for allocation, either to the Estates Team or to a contractor. The additional facility for Planned Tasks (over defects) is that the job can be pre-allocated in the Task definition record to a specific contractor if required (useful for specialist work or for framework agreements).

Accordingly, as with other jobs in Seeker Planned Task jobs feature in the dashboards, alert and notifications regime:

- The maintenance/ inspections jobs and services are associated with assets or locations. As with other job information, they can receive **notifications and warnings** (e.g. asbestos alerts).
- Planned Task **Job omissions** (i.e. scheduled jobs that are missed or omitted) can also be viewed on an asset-by-asset basis. Typically, users are alerted to these issues by way of numeric alerts on their Service landing pages.
- Planned task remedial jobs can be evaluated for **RISK**, and appropriate notifications can be delivered to users, i.e. by criticality alerts

All Planned Task jobs can be costed by reference to times worked and standard rates, and any stores issued to that work. This historic costing information can then be re-used for budgeting purposes

5.3.4. Planned Task job Administration and Resource Management

Planned Task jobs can be setup with standard job descriptions, which can include checklists to ensure all aspects of the work have been completed in full. If required, SFG20 standardisation can be optionally deployed. Furthermore, the Job definition can include a pre-allocated 'estimate of time' for the job to be undertaken, useful for both resource allocation and or planning.

A series of common Planned Task aspects can be established by self-service so that Planned Task operations on a range of location or assets can be performed according to a strict regime of consistency. This promotes consistency of:

- Operations
- Operational instructions
- Results analysis

- Compliance monitoring
- Reviews

Planned Task jobs are handled in the same way as any other job in Seeker and so the standard Job Management and Resource management tools can be deployed (please refer to the section describing Estate Team Management, Work Management, above see 3.2 and 3.4).

In addition, the actual time taken to perform the job can be compared to the pre-allocated estimate, and variation can be reviewed so that the 'Estimated Time' allowance is fit for purpose. The **Task Graph** can provide a comparison between resource hours availability to the expected commitment (see later under Strategic Planning). In this way the resource hours commitment can be fine-tuned.

Job Management is enhanced by:

- Tradespeople in the Estate Team or with contractors can use mobile devices for job operations
- For contractors using the Contractor portal the equivalent practice is performed using a description or set of standard instructions.
- Jobs can be marked with attributes such as statutory, mandatory and best practice; and timescales can be added to define priorities and how long the estates team have to perform each service.
- The Planner also holds the average time required for each activity and these averages are automatically maintained being calculated from the time taken on the three last occurrences of each maintenance activity.

5.3.5. Planned Task Mobile operations

5.3.5.1. Planned Task Mobile Operations – Overview

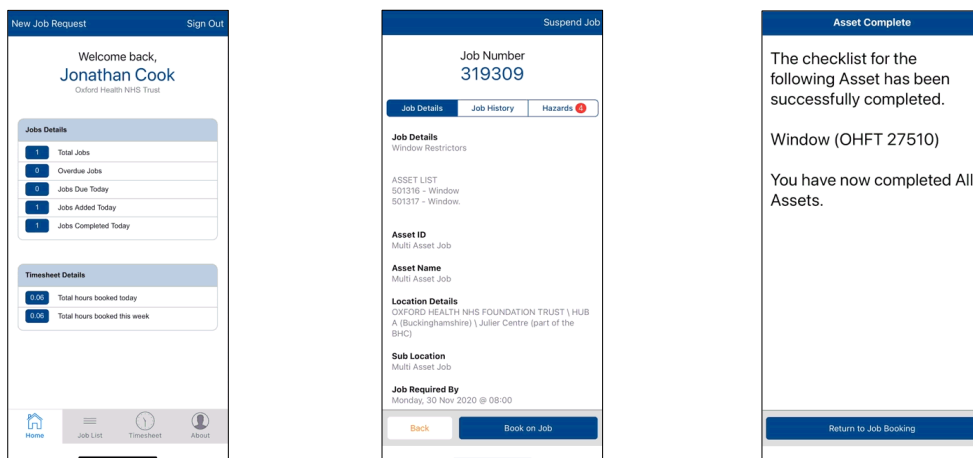
Planned Task Jobs are managed on the Seeker mobile app in the same way as a defect job, with extensions to provide additional facilities to enable the extra considerations of Planned Task working to be managed and monitored. For example, a typical defect job will require just a single fault rectification instruction whereas a Planned Task will probably require multiple instructions derived from a predefined question set.

By using the same methodology for Defects, PPMs and Inspections, then the operative can perform work of any nature.

Planned Task instructions contained in a question set are presented in a way so that every question is answered and omissions flagged before completion of the overall job can be achieved.

Planned Task Jobs that involve multiple components (assets-or locations) can be consolidated into a single job instruction via the use of Asset lists and Location lists.

The mobile app delivers these arrangements so that the list components are presented to the user in an organised way, so that every component on the list is itemised and its completion separately recorded.



Remedial works can be raised within the PPM job so that when fed back into the Job management process it is automatically associated with its original parent PPM job. This facilitates compliance and fitness for purpose monitoring.

5.3.5.2. Planned Task Mobile operations - benefits

There are benefits in the ease of **device handling**:

- Tradespeople using mobile devices can receive jobs that are suitably defined for the context of the job:
 - a single instruction, with descriptive text, or
 - a set of questions provide a check list, whereby standard operations can be defined
- the question answers are stored within Seeker to form a results set that can be recalled for audit and checking purposes
- For multiple Assets and Locations, the question sets are repeated until the content of the lists is completed – the job cannot be completed until all activities are done

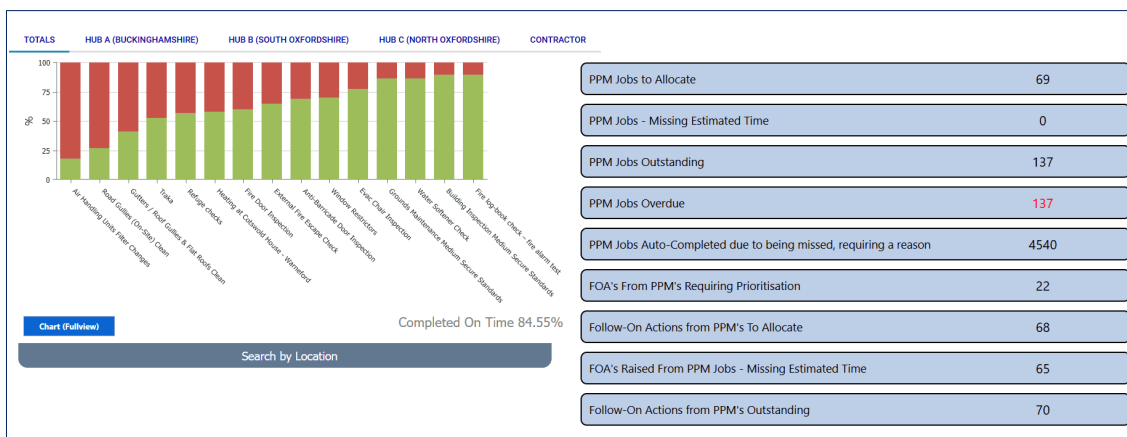
There are **operational benefits**:

- This facility allows the data entry/collection by mobile devices using a pre-defined answer/question set that is fully user definable, so that inspection/surveys can be predefined.
- The response format for the question is set within the question set so that human error is minimised.
- The content of the question set is by self-service and can be used to implement a regulatory format so that targeted results can be assessed

- The consistency enforced by the setup process ensures that results for Planned Task Type are evaluated consistently, so that the review process are meaningful, both in terms of staff and Task Type reviews
- Any number of question templates can be defined and maintained on a local basis (note that question sets can also be set for compliance inspections and condition surveys).

5.3.6. Planned Task Dashboards

The PPM and Compliance modules provide dedicated dashboards to monitor and manage their respective processes:



The dashboards incorporate alerts, and the charts shows the 'compliance' performance of each Planned Task type using RAG indication and has multi-level drill-down facilities to show the Task details. The RAG indication shows compliance achievements where the best/worst performing Types can be monitored.

5.3.7. Planned Task - Strategic Planning

Seeker processes automatically establish a future range of PPM and Compliance Inspection jobs, and this facilitates forward planning.

5.3.7.1. Site and Building planning overview

The Seeker PPM and Inspection regimes share two important planning tools:

- The **Task Planner**
- The **Task Graph**

Both tools can have a PPM or Inspection view and a combination of BOTH Task Types (initiated via Selection Criteria). This is important for Site/Building management as ALL planned work can be viewed in a single tool for the **selected location**. The Planner and the Task Graph can be made available to authorised users and can thus be helpful to **Building Managers** who can view the works planned for their building.

The usage of these will be described below.

5.3.7.2. The Planned Task Planner

The Planner screens in Seeker, which can show ALL Task Types, thus promoting a common approach and user familiarity, incorporate selection criteria so that Locations, Assets, Task Types and Date Ranges can be specified. Also, the Status can be specified (the latter using colour coding as illustrated below):

The screenshot shows the 'Inspection Planner' interface. At the top, there's a header with the title 'Inspection Planner' and a sub-header indicating the data is for the week ending 18/04/2024. Below this is a table with columns: Task Number, Task Description, Link Type, Asset Number, Location, Frequency, and a grid of dates from 20/04/24 to 07/07/24. The table contains multiple rows of tasks, each with a unique task number and description. The 'Frequency' column indicates how often the task is performed (e.g., Weekly, Monthly). The date grid shows the status of each task on specific dates, with colors indicating different states: green for 'On Schedule', red for 'Missed', orange for 'Overdue', and grey for 'Not Scheduled'.

This planning tool can be viewed in multiple ways for planning purposes:

- in totality over many years, for a strategic overview of all tasks
- A programme view, for a specified Task Type
- A programme view, for a specified Asset
- A programme view, for a specified Location
- A programme view, for a pre-allocated contractor or the estate team

Effectively it shows a range of **Job commitments** for the foreseeable future and highlights past 'failures'.

5.3.7.3. Visualisation of Schedules, plans and outcomes

Via the use of the Planner, having created yearly, or multiple year plans of cyclical activities, users can view those plans as graphical views based on single assets, collections of assets, or by locations:

- The plans can be coloured to highlight different types of work, e.g. electrical or mechanical, and tasks (service visits) which have been missed can be colour coded, so users have easy visual prompts about omissions.
- Additionally, the visual Planner can be switched to show the programme of jobs by work status colour, thus allowing the easy assimilation of job progress.
- Furthermore, the planner's selection date range criteria allow for past performance to be examined, so that omissions can be identified.

- For planning purposes, the display can be switched to show a selected contractor and their jobs, thus allowing the manager to review individual contractors

The Planned Task process in Seeker can monitor scheduled work on Locations and Assets, showing achievements and non-compliances, and RAG indication is applied on the Planned Task management screens:

PPM History

Selection Criteria

Page size: 10

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Page 1 of 9 (88 PPMs)

User Asset ID	Task & Location Details	No. Days Overdue	Key Dates			PPMs to Date	% Completed on Time	
			Feedback	Last PPM	Next PPM			
ASSET LIST	Window Restrictors (6 Monthly) HUB C (North Oxfordshire) \ Warneford Hospital \ Highfield \ Ground Floor Window Restrictor - Warneford / Highfield New -75	0	22/05/2023	22/05/2023	23/10/2023	7	28	View PPM History
ASSET LIST	Window Restrictors (6 Monthly) HUB C (North Oxfordshire) \ Warneford Hospital \ Isis Education Window Restrictor - Warneford / Isis Education -76	0	21/04/2023	21/04/2023	23/10/2023	7	42	View PPM History
ASSET LIST	Window Restrictors (6 Monthly) HUB C (North Oxfordshire) \ Warneford Hospital \ May Davison Building Window Restrictor - Warneford / May Davidson -77	0	21/04/2023	21/04/2023	23/10/2023	7	57	View PPM History
ASSET LIST	Window Restrictors (6 Monthly) HUB C (North Oxfordshire) \ Warneford Hospital \ Vaughan Thomas Ward \ First Floor - Neil Unit Window Restrictor - Warneford / Neil Unit -78	0	21/04/2023	21/04/2023	23/10/2023	7	42	View PPM History
ASSET LIST	Window Restrictors (6 Monthly) HUB C (North Oxfordshire) \ Warneford Hospital \ Out Patients Window Restrictor - Warneford / Outpatients -79	0	24/04/2023	24/04/2023	23/10/2023	7	42	View PPM History
ASSET LIST	Window Restrictors (6 Monthly) HUB C (North Oxfordshire) \ Warneford Hospital \ Vaughan Thomas Ward Window Restrictor - Warneford / Vaughn Thomas -80	0	24/04/2023	24/04/2023	23/10/2023	7	42	View PPM History
ASSET LIST	Window Restrictors (6 Monthly) HUB C (North Oxfordshire) \ Warneford Hospital \ Wintle Ward \ First Floor Window Restrictor - Warneford / First floor Wintle Ward offices -81	0	24/04/2023	24/04/2023	23/10/2023	7	42	View PPM History
ASSET LIST	Window Restrictors (6 Monthly) HUB C (North Oxfordshire) \ Warneford Hospital \ Wintle Ward \ Ground Floor (Wintle Ward) Window Restrictor - Warneford / Wintle Ward -82	0	24/04/2023	24/04/2023	23/10/2023	7	42	View PPM History
ASSET LIST	Window Restrictors (6 Monthly) HUB A (Buckinghamshire) \ The Whiteleaf Centre \ Resource Centre \ First Floor Window Restrictor - Whiteleaf Centre / Resource Centre -83	0	22/05/2023	22/05/2023	23/10/2023	7	42	View PPM History
ASSET LIST	Window Restrictors (6 Monthly) HUB A (Buckinghamshire) \ The Whiteleaf Centre \ Ground Floor Window Restrictor - Whiteleaf Centre / Resource Centre -84	0	22/05/2023	22/05/2023	23/10/2023	7	42	View PPM History

Export to Excel

The example screen above shows a PPM Type being conducted on a specified Asset type over the range of assets located at various properties, showing three aspects of compliance (using RAG indication):

- Adherence to the planned schedule – has the task been carried out Y/N? (left column)
- And was the last PPM done on time Y/N? (right column)
- it shows a Task Type being conducted over the range of various Assets or properties to which the Type applies, allowing the entire programme for that Type to be evaluated (using RAG indication):

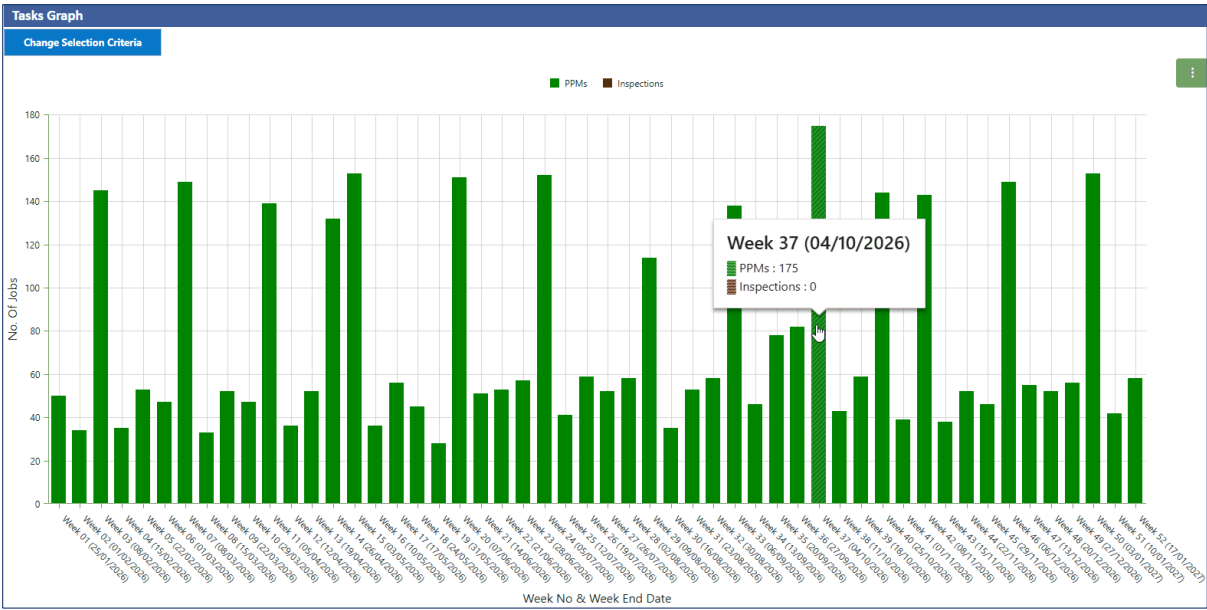
Additionally, the data for each Planned Task includes drill-down facilities.

A variety of screens are provided to focus on different issues, e.g. selected by Type or specified location. Shown below is a screen showing ALL inspections for a selected Site, thus allowing the manager to assess overall compliance for the site:

Compliance by Location								
Site Name		Abingdon Hospital						
Task Description	No. of Tasks	Non Compliant	Recent Updates	Future Inspections	FOA's Outstanding	All Inspections	Latest Notes	Notes
Air Conditioning Inspection	91					All Inspections	ongoing - holding to schedule : 10.10.25 ib	View Notes
Asbestos Inspection	2	2				All Inspections	2025.12.08 awaiting attendance schedule from Gary Morris : ib	View Notes
Automatic Door Inspection	12	4	8			All Inspections	-	View Notes
Bedpan Macerator Inspection	4					All Inspections	-	View Notes
BMS Maintenance	2					All Inspections	-	View Notes
Cold Water Booster Service	1					All Inspections	-	View Notes
Display Energy Certificates Rating (10 Yearly)	7	3				All Inspections	-	View Notes
Drug Fridges Inspection	16	1				All Inspections	service sheets uploading as available via OPUZ : 10.12.25 ib	View Notes
Emergency Lighting Inspection	15	14				All Inspections	awaiting attendance schedule : 13.01.26 ib	View Notes
Fire Alarm Servicing	7			7		All Inspections	-	View Notes
Fire Extinguisher Inspection	15					All Inspections	-	View Notes
Fire Hydrant Inspection	3					All Inspections	-	View Notes
Fire Suppression Inspection	1					All Inspections	-	View Notes
Fire Suppression Inspection (Quarterly)	2	3				All Inspections	-	View Notes
Fixed Electrical Testing	16	1				All Inspections	To check with Andy Blythe on current EICR works progression	View Notes
Gas Boiler Inspection	35	1				All Inspections	6 units still to clear (only 1 operational) (5 to confirm status) : 11.11.25 ib	View Notes
Generator Inspection	1		1	1		All Inspections	-	View Notes
Generators Fuel and Oil Testing	1	1				All Inspections	samples all taken Jan 26 - awaiting analysis & reports : 13.01.26 ib	View Notes
Intruder Alarm Inspection	4	4				All Inspections	sheets uploaded as become available via Constella links to Milestones. Sheets showing ACT & CCTV saved to Teams , needing new task templates in Seeker to record fully: 10.12.25 ib	View Notes
Lift Insurance LOLER (6 Monthly)	1					All Inspections	-	View Notes
Lift Maintenance (Monthly)	1					All Inspections	-	View Notes

5.3.7.4. The Task Graph

The Seeker Task Graph is a useful tool for strategic Task and Resource planning, as it can output information on planned tasks both in terms of job hours and numbers.



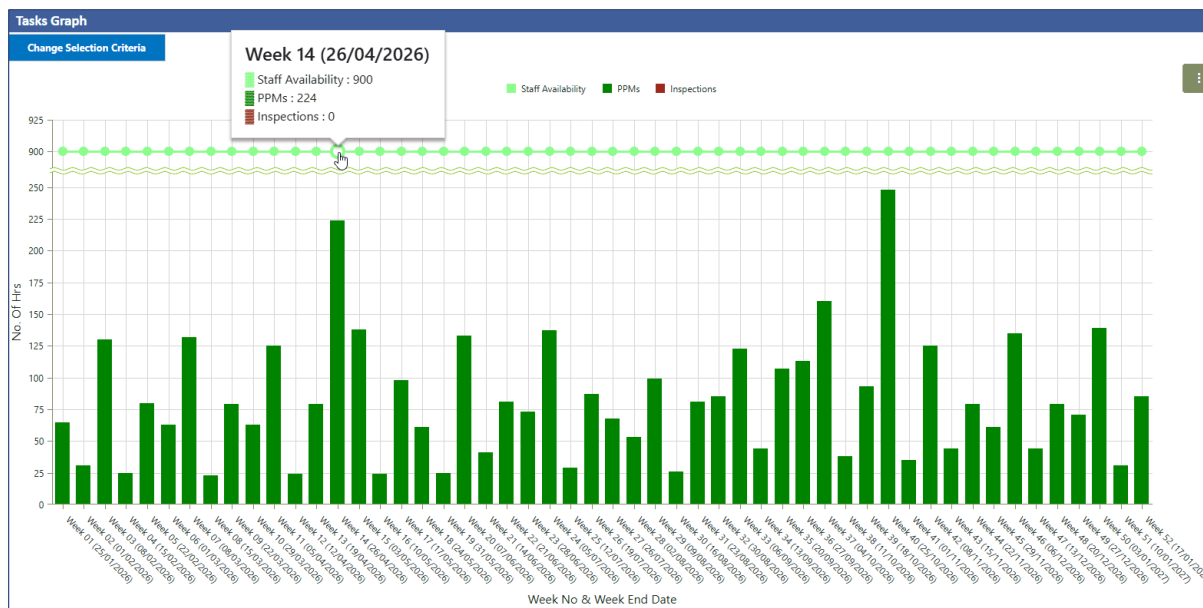
The view can be switched to show the:

- Range of dates
- Numbers of jobs for PPMs or Inspections, or both
- Number of hours scheduled for PPMs or Inspections, or both
- All trades or a selected Trade

- Jobs of all Frequencies or a selected Frequency
- Contractor or internal allocation
- All Locations or a Selected Location
- A combination of the above

A drill-down facility is available for the selected week.

When showing Hours, the Task Graph will also show the Estate Team's resource availability in hours (taken from the staff setup information):



Detailed resource planning is therefore possible by type (e.g. trade, electrical, building etc.) for the annual budgeting process. It is also possible to compare the resources required for the Planned work with the overall resource availability, and changes can be made via the Job Management processes in Seeker (including the Planboard, a graphical scheduler where jobs can be allocated to tradespeople using drag/drop facilities).

The Task Graph facility is available for both PPM and Compliance Inspection Tasks, and as these cover a broad remit effectively any type of Planned Task can be evaluated.

5.3.8. SFG20 and Planned Tasks

To replace/supplement the Seeker Planned Task definitions, SFG20 Standard categorisation routines can optionally be applied to Seeker PPM and Compliance work definitions as required by the customer organisation.

5.4. Mobile Apps

Seeker operations are complemented by our mobile app solutions. As with its browser-based software, Invigilatis develops its mobile software entirely in-house.

Our Mobile apps (available for Android and iOS) allow versatile data collection that feeds into the core Cloud based browser software. We have an increasing number of apps being deployed to provide mobile functionality or to support core browser operations. Mobile functionality allows users to interact with every aspect of the system.

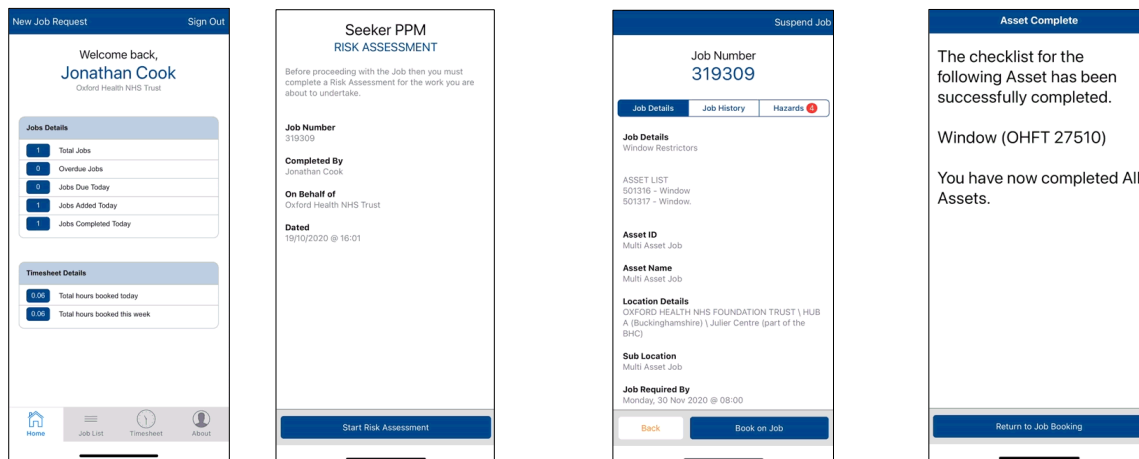
The mobile data interfaces for specified activities use screens that are designed and optimised for the function in context of its usage, thereby providing very high levels of usability satisfaction.

Seeker provides 24/7 working so that mobile working for weekend and out of hours is seamless. The information feedback is active and is fed back into Seeker work operations, dashboards and alerts --in real-time wherever this is required.

The functions include mobile working for tradespeople who receive jobs information via mobile devices, asset collection, inspection and compliance checks, risk assessments and the provision of Safety Rules and procedures. Any type of job can be delivered to the mobile app, e.g. Defects, PPMs, Inspections and remedial works, condition surveys, etc. Other mobile apps cover the aspects of incident reporting/site safety and Ventilation Verifications surveys.

The mobile devices work on either WIFI or GPRS and users can keep recording information even when they are out of signal (e.g. inaccessible locations or for security reasons).

Invigilatis' philosophy is that of constant improvement, and it is likely that future releases of the software will be engineered to provide the full mobile functionality for seamless use with any device, laptop, tablet devices and large screen smartphones.



5.5. Document Management

5.5.1. Document Management Overview

Seeker incorporates a powerful document attachment facility which enables users to reference operational documents and create an essential archive of audit evidence.

Documents are classified by Type and by Sub-type allowing the documents to be stored in relation to operational functionality so that documents are visible in context to the Seeker module in use.

Documents are held in a Type structure which allows users to define and build filing taxonomies: e.g. a Contractor Document Type can have Certificate and Insurance sub folders, a Document Type of Compliance Inspection can have reports/test results and photographs, Certificates and O&M Manual sub-types, Asbestos photographs, and so on.

The documents stored in the system can be reviewed in conjunction with RAG indication for overdue expiry dates.

Document storage is unlimited and one of our customers is holding over 29,000 documents in a live environment.

Many different forms of document, e.g. PDF, Word, Excel, Outlook, Photographs etc. can be attached to various categories of data e.g. Jobs, Inspections, Assets, Properties, Locations, Staff, Spaces, Contractors, Suppliers, etc.

As document storage is by self-service then the customer is free to upload and store documents relating to any subject, examples being manufacturers service and user manuals (equipment and plant), Building and Safety certificates, Regulations, operational templates, etc.

5.5.2. Document Control & the audit trail

Document uploading is controllable by user definable access permission, with the added facility that the document DELETION function is additionally restricted to authorised users. This is done to protect the evidence/audit trail for important functions such as compliance reports. Document upload is monitored via the Seeker **Transaction Log**.

Document uploading is available throughout the system in relation to each Seeker function and an additional **Document Manager function** is available within the Core facilities (typically restricted to higher levels of authorisation). This facility has **full control** over all the documents within Seeker, and allows the authorised user to Delete, Move, and Archive documents as required.

Associated Documents

Selection Criteria

28901 Documents

Expand All

Collapse All

Export to Excel

Linked to	Description	File Name		Date Added	Added By	Expiry Date	Archived	
Building Document								
Building - Asbestos Photos								
Building - Asbestos Report								
Building - Drawing								
Building - Other Document								
Building - Photographs								
Sue Nicholls Centre	Sue-Nicholls-pic.png	Sue-Nicholls-pic.png		21/05/2025	Invigilatis (Seeker Admin)	No Expiry	N	View Edit Delete Archive Move
Murray House - Jordan Hill	Murray House.png	Murray House.png		21/05/2025	Invigilatis (Seeker Admin)	No Expiry	N	View Edit Delete Archive Move
Inspection Document								
Air Conditioning								
JOB ID : 517056 - Ground Floor - Air Conditioning Inspection	2025.09.17 OHFT 37807 Fulbrook chervell ctyrd SMSE 07711 Split AC condenser1233894.pdf	2025.09.17 OHFT 37807 Fulbrook chervell ctyrd SMSE 07711 Split AC condenser1233894.pdf		14/11/2025	Ian Barnett	No Expiry	N	View Edit Delete Archive Move
JOB ID : 514029 - Keystone, Banbury - Air Conditioning Inspection	2025.10.25 OHFT 21910 11a Castle Quay Banbury Keyst. roof SMSE 18949 split AC condenser.pdf	2025.10.25 OHFT 21910 11a Castle Quay Banbury Keyst. roof SMSE 18949 split AC condenser.pdf		16/10/2025	Ian Barnett	No Expiry	N	View Edit Delete Archive Move
JOB ID : 514031 - Keystone, Banbury - Air Conditioning Inspection	2025.10.25 OHFT 21909 11a Castle Quay Banbury Keyst. roof SMSE 18948 split AC condenser.pdf	2025.10.25 OHFT 21909 11a Castle Quay Banbury Keyst. roof SMSE 18948 split AC condenser.pdf		16/10/2025	Ian Barnett	No Expiry	N	View Edit Delete Archive Move
JOB ID : 514039 - Ground Floor - Air Conditioning Inspection	2025.10.15 OHFT 23082 Rectory Cntr rear wall SMSE 07662 split AC condenser.pdf	2025.10.15 OHFT 23082 Rectory Cntr rear wall SMSE 07662 split AC condenser.pdf		16/10/2025	Ian Barnett	No Expiry	N	View Edit Delete Archive Move
JOB ID : 514041 - Roof - Air Conditioning Inspection	2025.10.15 OHFT 22493 Rectory Cntr fit roof SMSE 09174 split AC condenser.pdf	2025.10.15 OHFT 22493 Rectory Cntr fit roof SMSE 09174 split AC condenser.pdf		16/10/2025	Ian Barnett	No Expiry	N	View Edit Delete Archive Move
JOB ID : 514028 - Keystone, Banbury - Air Conditioning Inspection	2025.10.15 OHFT 21911 11a Castle Quay Banbury Keyst. roof SMSE 18950 split AC condenser.pdf	2025.10.15 OHFT 21911 11a Castle Quay Banbury Keyst. roof SMSE 18950 split AC condenser.pdf		16/10/2025	Ian Barnett	No Expiry	N	View Edit Delete Archive Move
JOB ID : 514032 - Keystone, Banbury - Air Conditioning Inspection	2025.10.15 OHFT 21908 11a Castle Quay Banbury Keyst. roof SMSE 18947 split AC condenser.pdf	2025.10.15 OHFT 21908 11a Castle Quay Banbury Keyst. roof SMSE 18947 split AC condenser.pdf		16/10/2025	Ian Barnett	No Expiry	N	View Edit Delete Archive Move

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The Seeker property definition records are utilised for search facilities (as are Document Type and Sub-Type) so relevant documents can be found easily.

In each primary theme within Seeker i.e. Property, CAFM and Compliance) a Document viewer facility is provided. These provide the same facilities as the Document Manager except for the Delete facility (thus implementing a regime of authorised data security)

5.5.3. Document Attachment, Uploading and Viewing

Any document/file format can be linked (within the provision of allowable 'safe' formats for data security/integrity reasons), and they can be retrieved/opened by users provided that the user has access to the software to open it, e.g. PDF reader, Microsoft Office (Excel, Word, PowerPoint, Outlook, etc.) etc. on their device.

Document Viewers are provided with each primary service – Property, CAFM and Compliance, and each viewer provides access to the documents relevant for that service. In addition, a dedicated facility is provided within the Asbestos module.

5.6. SFG20 – A standard approach (National Standards)

To replace/supplement the Seeker PPM and Compliance Inspection definitions and Question sets, **SFG20 Standard categorisation** routines can optionally be applied to Seeker PPM and Compliance operations as required by the customer

The application of SFG20 Standards will allow the customer to demonstrate and register their compliance with emerging national standards.

If the customer applies SFG20 standards to register/qualify for national qualification and regulation purposes, Seeker definitions, processes and routines can still provide the additional detailed work operations that can be considered as best practice or desirable work operations, so that the customer's strategic vision can be fully achieved.

5.7. Reporting

5.7.1. Reporting strategy

Throughout the functional modules of Seeker, Invigilatis provides access to the wealth of real time information via dashboards and reports. Reports can be exported as Excel output and dashboard graphics can be dragged into Word and Excel documents.

The Seeker reporting strategy is based upon five core concepts:

- The provision of online enquiry facilities
- The provision of overnight automated processes to analyse and manipulate data
- The availability of real-time data updates
- The use of Excel as the user tool for ad-hoc reporting
- The provision of dedicated reports

5.7.2. The provision of online enquiry facilities- real-time data updates

The majority of Seeker operational screens incorporate search facilities and filters to provide an enquiry facility. These search routines attached to Seeker operations (e.g. job management) are structured to provide both basic and advanced filters and data extraction.

The ad-hoc nature of enquiries means that the Seeker facilities at that point are configured for the current context, so that user knowledge of linking data tables and/or fields is not required as the context provides this automatically

5.7.3. The provision of overnight automated processes to analyse and manipulate data

Increasingly, as more ad hoc interrogation of the data is required, BI processes are being deployed in Seeker to run detailed queries overnight to populate fact tables with information. This has two major benefits:

- The user data can be analysed and manipulated to provide a greater level of pre-define data analysis (additional data tables)
- This makes accessing information much faster by pre-loading analysed data and does not burden the server with transactional queries during peak operating times – thereby ensuring maximum response times for all users.

The overnight processing routines ensure that pre-analysed data is available to integrate with the daily operational routines delivered to the Seeker user. This data can be made available to operational processes (an example is the Task Planner, available with Compliance, PPM and Asbestos management).

5.7.4. The use of Excel as the user tool for ad-hoc reporting

The search routines attached Seeker operational screens (e.g. job management) are structured to provide so that on-line enquiries can be easily performed. These search routines provide a data Export to Excel, a facility that provides an ad-hoc reporting facility that is embedded into the system and is available in context with the current usage, and this facility will satisfy most immediate requirements.

As the search and criteria routines are easily re-definable and presented in a non-technical way then most users will find that data output can easily be down loaded into Excel and then into other Office applications as required

Excel is readily understandable by most office staff so that the training overhead is minimised and the data can easily be formatted into reports in Word, etc.

Export formats that are performed on a regular basis can be saved for recall.

5.7.5. The provision of dedicated reports

Seeker is supplied with a range of pre-formatted reports, and Invigilatis adds to this bank as new requirements are identified. Several of these reports are pre-defined dedicated data exports (Export to Excel) that present extensive data delivery for extended data analysis and facilitate interchange with other systems. These data

dumps take advantage of the overnight data processing to provide a comprehensive range of data.

5.7.6. External data analysis

Seeker runs under MS SQL Server, and its data is therefore compatible with Power BI.

Clients wishing to run their own more complex reporting queries can be provided with a reporting version of the database, which is updated overnight by automated processes. Using SQL Reporting Services or Power BI, queries can be developed and run without impacting upon operational services on the live database.

5.8. Dashboarding

5.8.1. Dashboarding strategy

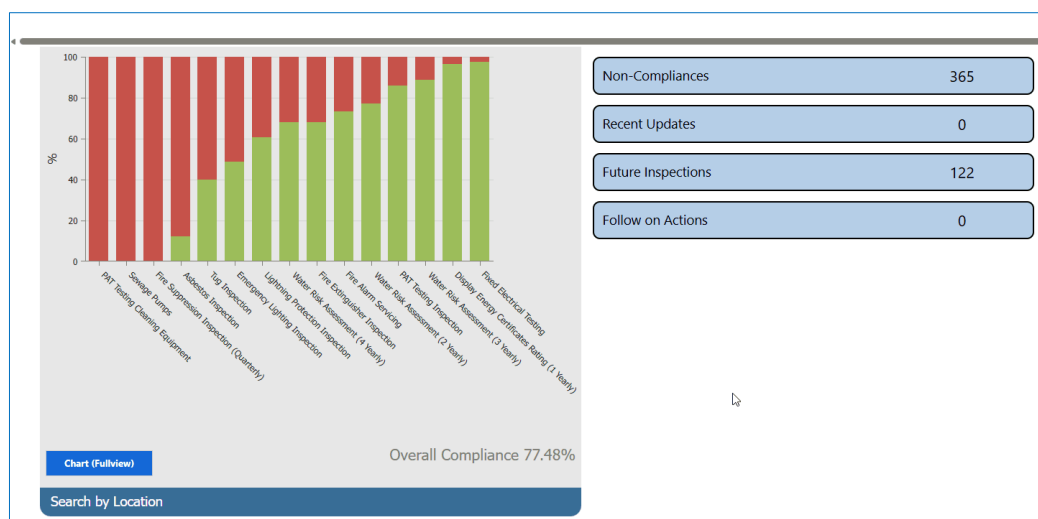
Seeker dashboarding strategy employs three key concepts:

- The widespread provision of pre-defined dashboards
- The facility for the user to define their own dashboards
- The ability to deploy dashboards as landing pages by self-service

5.8.2. Predefined dashboards

The functional modules of Seeker are provided with dashboards, alerts and drill-downs, which are delivered in context, i.e. to landing pages for a user or embedded within functional modules in context with the operation. RAG indication is applied for ease of data assimilation. The level of provision is under constant review.

Dashboards can have drill down facilities, charts, floor plans, maps etc., and can deploy pre-analysed data obtained by automatic overnight processes. An example with a chart multi-level drill-down is shown below:



In addition a facility is provided to construct simple landing pages based upon a pre-defined range of dashboard charts.

5.8.3. User definable dashboards via Self-service

Users can define their own dashboards (and deploy them in the menu structure as with any other component in Seeker) by employing a pre-defined query from the bank of supplied queries.

Invigilatis provides a bank of data queries that can be utilised as dashboard objectives, and this has the benefit that the queries require no IT knowledge to formulate, thus making the provision simple to understand and quick to deploy. Additionally, filters can be deployed within the final dashboard provisions, making the individual dashboard provision flexible to meet the required context.

The methodology employed requires no specialist IT knowledge and follows the Seeker principle of providing self-service tools that are easy to use.

The user is available to mix the number and range of dashboard queries according to their requirements. A standard query can be used in multiple dashboards if required.

5.8.4. Deployment of dashboards on menus by self-service

The deployment of Seeker dashboards is by menu location, and the menu configuration is facilitated by local self-service. Accordingly, the user organisation can use dashboards as landing pages for user classes, thus providing a significant part of their operational alert strategy for exception notification and reporting.

The menu configuration for user classes is easily and simply achieved by use of a drag and drop facility on the configuration screen provided within the Core Setup module.

Accordingly, Users can have their own range of dashboards, with operational level users having access to appropriate compliance dashboards whilst senior management user can have a consolidated top-level view. User classes (one user or more) reflect operational roles and enforce consistency of dashboard operation for the role.

5.9. Alerts and email notifications

Seeker's Alert strategy encompasses both dashboard and email initiatives.

Seeker provides a wealth of email notifications. These may be specific alerts, job confirmations, job status change notifications or delivery of instructions. The email strategy is configurable so that the user organisation can balance delivery requirements with volumes, together with the relevancy of staff roles and authorisation. This ensures

that managers and users who need information are alerted in a timely fashion, thus facilitating situational awareness.

5.10. Newsflashes

Seeker has a self-service newsflash messaging system where on-screen messages can be delivered to:

- Individual users
- User classes
- ALL users

The messages are displayed to a user by means of a scrolling message across a screen line immediately underneath the Seeker Menu Bar. The messages can be created by authorised users, edited as required and deployed for a user defined length of time.

In this way timely messages can easily be deployed to users and shown for as long as required. Any number of messages can be stored to create a bank of useful messages.

5.11. The Audit Trail

Seeker provides a self-service 'Transaction Log' of important events to authorised users (i.e. a user/manager with the appropriate menu access permissions). This provides a monitoring and enquiry facility to access the audit trail. Typical actions include the logging of

- Creation of data records
- Editing/updating of data records
- Making data records active/inactive

The Transaction log records the identity of the user, date/time and the action taken, i.e. a regime of **Who, What and When**.

The data is timely (and as with all Seeker data, is available on-line 24/7) and is effectively unlimited in scope, and the data can remain live for the duration of the service. This provides security both for the organisation and the user.

5.12. Self-service configuration

5.12.1. Self-service overview

Seeker is provided with a menu system that can be easily configured by self-service using the supplied non-technical tools. The primary form of control is the user class or user group (which typically represents an operational role), with additional controls for individual users.

The menu configuration for user classes is easily and simply achieved by use of a drag and drop facility on the menu configuration screen provided within the Core Setup module.

Seeker provides the user organisation with self-service tools to undertake the vast majority of local system administration, e.g.:

- Setting up users and their Permissions
- User classes
- Menu configuration (any Seeker menu component)
- Planned Task administration (PPMs and Inspections)

The availability of these tasks facilitates local strategy formulation, timeliness, and the minimisation of external support costs.

These system tasks are typically delegated to an authorised user class, and whilst this can be considered as ‘System Administration’ it should be noted that NO specialist IT knowledge is required to use them, as all the tools utilise simple and typical office app type techniques.

All local administration tasks are performed within the Seeker menu structure operating within the cloud-based server

5.12.2. *Seeker menu structure*

Regarding the selection of operational functions, Seeker uses a Menu structure that uses a nested hierarchy levels are optional and are dependent on the user’s access permissions. The single database and menu framework approach facilitates the ease of transition for new users to additional modules by means of familiarity – it lessens the learning curve and reduces the training overhead.

With the exception of a few ‘reserved’ system aspects (e.g. Home and Sign Out), Seeker Menu items do not have an ‘absolute’ position and can be placed ANYWHERE on the menu and at any level -their location is dependent upon the current user’s system permissions. Any Seeker menu item can be used as a landing page for a user.

An important menu item (which is locally customisable) is the Guidance provision which delivers on-line Video courses, User Guides, and ‘How To’ notes.

5.13. The Seeker Finance Module

Associated with job related work is the **Seeker Finance Module**, which handles transactional finance data of all types.

The Seeker Finance module, (which links via the various job IDs and Job types) can manage the budgetary aspect for the Job (budget, clients and ledger, etc.).

Capital Projects and its associated job components can be monitored by linking with the Job ID.

The purpose of the Finance module is to maintain the commitment accounting records within the organisation so that links with Seeker operations can be maintained and the information made available for management purposes.

Within the 'Chart of Accounts' are financial years, with one or more 'higher' financial codes referred to as Budget Centres and one or more 'lower' financial codes referred to as Account Codes.

Account Codes are then attached to Budget Centres. Yearly budgets can then be allocated to each budget centre for the year, and these budgets may then be apportioned amongst the account codes attached to the budget centres.

If the Stores module is in use, then when Purchase Orders are raised, their values are allocated to a budget centre and account code so that when the order is authorised the outstanding commitment will update the relevant financial codes.

The Purchase Orders may be linked to stores items or may be service orders/jobs.

Property rentals and costs can all be recorded in Seeker Finance and allocated to individual locations and organisations.

Alternatively, links with an external Finance system can be provided by Invigilatis as an additional service.

6. Our Services - Service Delivery & Support

6.1. Content

This section of this document covers the following aspects:

- Service Delivery and Implementation
- Project Management - Delivery philosophy
- Resources
- Training
- Seeker Services – Operational Environment
- Data – bulk data and Integration services
- Data and Business Intelligence (BI)
- Configuration
- Support, SLA, and Quality Assurance
- Service Operations and Access
- Hosted data services
- Software Upgrades and New Versions
- Pricing and Commercial aspects

6.2. Service Delivery and Implementation

Whilst the Seeker Menu system is configurable by self-service by the customer, Invigilatis will deliver an initial menu set that has been assessed for usability during the implementation discovery process. Similarly, a default set of user classes will be supplied in line with the initial discovery process discussions.

Invigilatis solution is highly configurable within a single set of data tables. During implementation, the system is configured to meet the specific requirements of each client's business rules.

Invigilatis' services are securely delivered using https connections, so data transmissions are encrypted. However, for this service we would also recommend encrypting the database.

6.3. Project Management - Delivery philosophy

Invigilatis prefers to work using a **Prince 2** style methodology- while the full formality might not be adopted the project milestones are identified and a series of project meetings confirmed to allow both parties to monitor the delivery and any associated risks.

- **Initiating Projects**
 - Invigilatis' standard approach begins with a discovery phase - a thorough review of the client's requirement, meeting the key staff and confirming their project aims and their required timescales.
 - Typically, time is spent with key members of the Estates team, Director, Associate Directors and the Estates Manager leading the project, to gain a fuller understanding of the project aims and potential risks and identify key people to champion the implementation.
 - Having considered all those elements, the initial project plan which is based solely upon the written specification is then revised to accommodate any changes, if any, necessitated by the review. The reviewed plan is then shared with the client and a formal programme of engagement confirmed.
- **The Project Plan**
 - A system implementation will proceed in line with our standard implementation plan - a MS project plan embedded into QA set. This plan will be adjusted in line with the discovery process and will form the basis of monitoring via the progress meeting sessions.
- **Project Delivery** - the four main stages of the delivery project which overlap and normally run in parallel are:
 - Configuration, Development and testing
 - Data migration
 - Trial to confirm the configured software will satisfy client's requirements.
 - Training that will involve Champions for each element of the required functionality

Working to **Prince2 principles**, Invigilatis will deploy its resources to ensure there is no discernible break in services between the present and new operation. If, during the rollout period, it becomes apparent the project timescales are at risk, additional resources will be deployed:

- Implementations are managed strictly to **minimise risks**.
- **Stages and roles** are clearly defined and agreed for each project and then controlled formally as the implementation proceeds.

- **Clear milestones** are identified for each stage and regular meetings are held to ensure the project progress can be monitored and well controlled.
- During the implementation phase of the project, periodic progress updates will be provided and periodic **Project Review meetings** scheduled to ensure that delivery can be formally monitored.
- Each implementation concludes with a **formal review** to ensure there are no outstanding items.

This modus operandi also ensures a high level of initial support and training for the operational staff until the system goes live. From that point, ongoing support for the client's team with periodic review meetings during the first year of operation ensures that all training issues are identified and resolved.

6.4. Resources

Invigilatis' software and mobile apps are developed entirely in-house by our UK based staff. Invigilatis' team have many years' experience of delivering and supporting major systems for Government, Local Government and Healthcare clients with links via complex IT arrangements necessary for very high levels of security.

That extensive experience of its client environments enables Invigilatis to offer an extremely high level of knowledgeable support. Invigilatis provides a full range of design and configuration services, and these also encompass Data Analysis, Business and Workflow Analysis, Business Transformation and Change Management.

6.5. Training

Invigilatis provides a flexible and extensive range of training options for service users:

- Training is tailored to the **customer's requirements** (i.e. dependent upon the module and implementation plan)
- Training can be delivered either **on-site or virtually** as required
- The system incorporates **in-built delivery** of:
 - User Guides
 - **Video courses** - short videos on how to use selected features
 - How To's
 - Locally produced 'organisational procedure documents'
 - Input templates where required

All the above are embedded into the system menu structure and can be delivered to the user by **on demand self-service**.

The Seeker system is comprehensively documented with guides for core staff and each functional module. The provided video courses and user guides facilitate the approach of **refresher training** and **induction training** for new users.

For core system users, Invigilatis provides training on a 'train the trainer' concept, i.e. we train the core staff and 'champions'. Extra courses for end users can also be accommodated at extra charge (at the standard Daily Rate).

The reporting and usage principles of Seeker also facilitate a minimising effect on the training overhead:

- As the search and criteria routines are easily re-definable and presented in a non-technical way then most users will find that data output can easily be downloaded into Excel and then into other Office applications as required (little or no training is required).
- Floor plans and drawings derived from CAD files are converted to .SVG format and embedded into the browser without the need for an external (and complex) CAD application

The training environment is enhanced by the standard provision of a Training system, where users can practice without compromising live data.

6.6. Seeker Services – Operational Environment

Invigilatis' hosted environment delivers the application via IIS and using Microsoft SQL server 2022. The processing within the solution is all server sided and user access is achieved by use of industry accepted browsers (any device can be used, and the only requirements are that it is running MS Edge, Chrome, Safari, or Firefox). MFA (Multi-factor Authentication) can be applied as can Single sign-on using Active Directory

A range of environments can be provided with implementation available in several ways including a database selection menu at the point of login or a specific URL for each environment. Typically, a customer solution will comprise of three systems/databases:

- **Live** – real data collection
- **Test** – used for acceptance testing of maintenance releases
- **Training** – end user self-service training

Clients' data can either reside on a shared server, or it can be held on a dedicated server (the latter at an additional charge).

6.7. Data – bulk data and Integration services

6.7.1. Bulk data/on-boarding

Invigilatis typically will import a customer's existing data (either historic data or a subset of new requirements during a new implementation (as a variable element of configuration this will be charged at our standard day rate).

For on boarding, Invigilatis first map the data to determine exactly how the loading will proceed, how the data will be received, whether from disparate flat file formats and directly from database tables, and which control totals will be used to ensure the transfer has been successful. During loading, the data insertions are checked via business logic to ensure validations, integrity checks and business rules are adhered to.

6.7.2. Data exchange

Over the years, as Estates systems have become more integrated with other organisational systems, Invigilatis' team has gained considerable experience of linking their system to their client's financial and other systems:

- Importing Data from Seeker into another system
 - Typically, Invigilatis can use the capabilities of SQL Server's integration services to import data.
- Exporting Data from another system into Seeker
 - Simply the reverse of importing and either staging tables or Integration service can be deployed
- To facilitate on-going interchanges, APIs can be provided.

6.7.3. Archiving and data deletion

Data can be archived and retrieved, or deleted when it is no longer required, and both of these policies are Customer driven. When a service ends, all data which has not been off-boarded, will be purged. Invigilatis undertakes to provide an exit plan.

At termination and for off boarding, Invigilatis undertakes to provide a full database backup of customer data using the MS SQL server format.

6.8. Data and Business Intelligence (BI)

Invigilatis can utilise BI data services, using SQL Reporting Services or Power BI, thus assisting service users to exploit the full potential of their amassed data. These BI services range from transactional solutions linked to real time dashboards to cubed

solutions built on warehoused datasets in OLAP databases which can deliver valuable predictive analytics for managers and senior managers.

Using SQL toolset, Invigilatis can customize ETL (extract, transform and load) processes to ensure services users' data mining and predictive analytics are run on clean datasets. This process would be automated and require no user action

Invigilatis are increasingly using these techniques to refresh the dashboard information throughout the solution. This ensures that information is viewable almost immediately without having to wait for queries to run. Greater reliance is then placed on the solution, and its organisation value is fully realised. Obviously, these analyses are dependent on discussions with the client and Invigilatis.

6.9. Configuration

6.9.1. Menus and user permissions – initial provision and self-servicing

Seeker systems are supplied with an initial set of menu and user class configuration records that enable the customer to proceed with operations. This configuration is based upon the results of detailed consultation with the customer during the initial discovery process.

Thereafter, the customer can use the provided simple tools to reconfigure the system as required. Seeker is provided with a menu system that can be easily configured by self-service using the supplied non-technical tools. The primary form of control is the user class or user group (which typically represents an operational role), with additional controls for individual users.

The User Groups can be configured locally by the system administrator by self-service, and so the ultimate menu layout can be configured for each User Group and will accord with the local role strategy.

6.9.2. Standard System Capabilities and facilities

In summary:

- The software is **task driven** and individual logins can be tied to certain groups of tasks, e.g. Contractors restricted to contractor task-based screens.
- **All screens can be configured** and Invigilatis will work closely with the client before going live to ensure that all the required capture screens, layout are satisfactory, to add/remove fields and change field labels.

- **Core setup screens** for self-service can be made available to clients (e.g. tools for setting up users/user classes and changing access permissions)
- The system can accommodate a wide variety of **automated notifications** and alerts which are agreed and set up during the system configuration.
- Seeker provides a wealth of standard reports; dashboards alerts; and e-mail notifications
- Using pre-analysed data, **dashboards** can be configured to deliver a Performance dashboard which allows organisational performance to be benchmarked against a national dataset (e.g. KPIs)
- All aspects of the software include **search forms** with extensive selection criteria for detailed searches.
- Results of searches are typically displayed in a grid, and the results can be further filtered by column header Excel style filtering/sorting, so it is easy to **refine searches** when there is more than one result.
- Search results can be **exported to Excel** thus providing a rapid means of ad-hoc reporting
- A **transaction log** is maintained automatically by the seeker system capturing a whole host of activity-based logs for all modules (data is time and date stamped to provide a full transactional audit trail)
- Seeker can be set-up to **archive datasets** automatically in accordance with rules based on the likely need to access that data.

6.9.3. A common data core

Seeker has a well-established infrastructure of data tables and fields. This infrastructure has been developed in-line with the requirements of major property and asset protocols (OSCRE, WIMS* etc.) and has been successfully operated for many years in challenging data intensive environments. The data structure has been subjected to changes due to operational requirements, legislative and managerial initiatives and so the structure has evolved as required. This has ensured that the data definitions are fit for purpose and have evolved with real world essentials.

Seeker's core definitions originally arose out of the need to accommodate and to fully manage the legacy operational data aspects relating to WIMS*, a long established and major definition of property and asset operations within the NHS Estates environment.

(* WIMS – 'Works Information Management System' – a national specification developed by the NHS Estates staff as a task management system to record operations in their estates. Its primary contribution was the adoption of a standard national definition, thus ensuring a comprehensive specification that could cater for all NHS sites).

6.10. Support, SLA, and Quality Assurance

- **Support - Post implementation:**
 - Post implementation, the Invigilatis Account Manager will liaise regularly with the client System Administrator to ensure the solution is operating as expected.
 - For the first year, monthly communication will be made and thereafter the periodicity will reduce to quarterly.
 - The aim is to ensure staff are well supported and all those involved in the implementation phase of the project have an opportunity to explain any further operational issues and future requirements.
- **Live System Support** – Helpdesk and 24/7 web support site:
 - A helpdesk is provided for support during office hours.
 - Out of hours' support is available via Invigilatis' web-based Support Manager where issues can be logged 24/7
 - it is used to register new support issues and track existing issues.
 - The knowledge base allows users to search for resolutions to common issues
 - Issues which recur are prime candidate enhancements for maintenance releases of the software.
 - Typically, support is delivered remotely via the Helpdesk with a four-hour response target.
 - Any issue raised is handled the next day and, if critical, investigated fully and a response sent at the earliest opportunity.
 - Non-critical issues are investigated, and a response sent the next working day.

Invigilatis prides itself on the quality of its support and therefore escalation is extremely simple and rapid so that any issue is dealt with immediately.

- **Service Level Agreement**
 - Our support SLA is based on the simple metrics stated above
 - the development SLA is monitored initially by reference to the client's implementation plan and then on an ongoing basis by reference to the Strategic Development Plan.
 - Items are prioritised according to criticality and target delivery dates set for those deliverables – those targets are published to clients so they can also monitor the delivery performance.
 - The SLA is described in our terms and Conditions document

- **Quality Assurance**

- Invigilatis has always been dedicated to continuous improvement:
- Review procedures facilitate both improvement and customer satisfaction
- Compliance with legislation and any regulatory body
- It has a documented system of Quality Assurance procedures (we are currently part way through the process of gaining ISO 9001 accreditation)
- Business Continuity and Disaster Recovery plans are documented

6.11. Service Operations and User Access

- User Access to the service is permission-based and is customer driven.
- Various levels of usage can be established (by local self-service using simple non-technical tools) giving systems administration, write/read and read only access to some or all the data.
- Two-factor Authentication (2FA) and Multi-factor authentication (MFA) options are available.
- Service access can be linked to the Customer's active directory, enabling it to be accessible via the users' single sign on
- We recommend a regime of strong password usage, and this can be enforced if required

6.12. Hosted data services

The hosted service for its Seeker software is provided by ANS (formerly UKFast), which like Invigilatis, is another G-Cloud supplier to the public sector, and which operates industry-standard, best-practice methodologies, processes and management principles. ANS services are delivered with an extremely robust security policy, (physical security of buildings/servers, with disaster recovery systems and policy in place).

ANS has data centres in the North West of England and so Invigilatis can guarantee that all data is held securely in the UK. The Data Centres are to IL4 capability, and availability of the service (24/7) is warranted at 99.99%.

ANS is a 100% carbon neutral company (PAS2060) and amongst its list of accreditations it has the following

ISO/IEC	20000:2018	IT Service Management
ISO/IEC	27001: 2022	Information Security Management
ISO/IEC	27017: 2015	Cloud Service Security

ISO/IEC	27018: 2019	Personal Information in cloud storage
ISO/IEC	20000-1: 2018	IT Service Management
ISO	14001: 2015	Environment Management System
ISO	9001: 2015	Quality Management
ISO	22301: 2019	Business Continuity/security & resilience
ISO/IEC	42001:2023	Artificial Intelligence Management System (AIMS)
	Cyber Essentials +	

As part of the project implementation processes, formal data gathering activities enabling Invigilatis to define the exact specification of the server which is required for the customer.

- Backup, Restore and Disaster Recovery
 - Invigilatis' hosted services are triply secured with host, service provider and remote back-ups.
 - Both the host provider and Invigilatis provide restore mechanisms and disaster recovery services.

6.13. Software Upgrades and New Versions

6.13.1. Seeker Version 10

Invigilatis' development policy and strategy is one of continuous improvement. The current version of Seeker provided to new customers is Version 10 and will be supported for the duration of a customer contract. Invigilatis' software, which underpins its service, will be progressively upgraded with a mix of maintenance releases and incremental enhancements.

Releases to correct issues will be supplied to customers as a matter of course, and enhancements will be similarly released to customers free of charge, providing that such enhancements lie within the remit of the originally purchased configured environment. Service users will be advised fully about these upgrades.

For enhancements to the customer's configured functional infrastructure, whilst operating charges to the customer will not vary, there will be a modest upgrade fee levied to the customer (identified within the pricing document) to cover the time and cost of the revised installation of the upgrade to the customers' service.

6.13.2. New Versions

It is highly likely that during the lifetime of G-Cloud 15 Invigilatis will release a new version of its software to take advantage of major technological and development

improvements. A **new version** will be a major software change, and existing customers will not be obliged to upgrade to the new version.

Where the customer decides to upgrade, Invigilatis reserves the right to charge for additional services, such as implementation and configuration at our standard day rate.

6.14. Pricing and Commercial aspects

Invigilatis provides two further G-Cloud 15 information documents regarding:

- Pricing
- Terms and conditions

These are also available within our G-Cloud 15 documentation and can be downloaded as required.

Our **Pricing document** includes aspects relating to:

- Module Pricing
- Consulting and Project Management
- Training
- Additional services (e.g. bulk loading of data)

Our **Terms & Conditions** document includes aspects relating to:

- SLA
- Service Credits
- Ordering
- Termination