

# OVERVIEW

## ELOGS CAFM

### PRODUCTS AND FEATURES



CAFM+ Service Desk



Facilities Services



Occupier Portal



elogs



# Elogs CAFM Features

Elogs CAFM is designed as a tool to assist in the management of FM and procured service providers across a portfolio of properties. Although it has many more detailed features, it's best trick is the ability to simplify and automate process to the most simple version in order to make FMs more efficient. As such it is particularly powerful for the delivery of large-scale FM in property management.

In a survey our users indicated that the most important reasons for their using the system are:

- The ability to manage more work, more efficiently
- The ability to delegate work to the supply chain, in order to reduce workloads even further
- Better visibility over service provider performance and allows us to hold them to account
- Lower risk through better compliance
- They want to provide a better service to their tenants/occupiers
- Supporting their remote working staff

Often Elogs CAFM is provided as a fully managed solution including a 24/7 service desk so that there is virtually no requirement on the client to manage or maintain the system.

## Basic CAFM

All of the features listed below are available via both the web and mobile app without restriction or additional fees.

### Sites

Sites allow you to store and keep information about your clients, their portfolios and their properties. This includes contact details, addresses, key contacts and notes. Elogs CAFM is essentially a property-based system so this serves as the footprint for most of the other features.

### Tenant CRM

As part of the basic system and one of the features designed with property management specifically in mind is a tenant CRM. This allows you to import and manage tenant contact information. This isn't designed to compete with a property management or lease management system but to work in tandem and allows the FM to quickly email all of their tenants in an emergency or to book in a site visit. The system allows you to create template communications that can be stored and re-used offering the ability to mail merge in property and tenant info.

## Reactive Jobs

This is by far the most heavily used feature of the system and allows users to fully manage the workflow of reactive works. This could be anything from the repair of a coffee machine through to the replacement of an air-handling unit.

The job workflow is designed with automation in mind and a large proportion of the workflow is 'delegated' through the supply chain. This means that the amount of FM administration effort required is minimised. Additional checks and process can be introduced to the workflow but in its purest form Elogs CAFM should allow the FM to raise (or approve in the instance it is raised by a tenant or the helpdesk) the job and then not need to worry about it again, confident that the system (and the helpdesk if used) will chase the job to the completion.

Additional steps that can be introduced to reactive jobs can include:

- Pre-requisites - where an additional step approval is required before works commence, this could for example be a permit to work. The system caters for the creation of digital paperwork that can be used against pre-requisites
- Mandatory documentation and approval – where you decide a reactive task must have paperwork and if necessary, an approval of that paperwork at the end of the task
- Escalation – Where a task requires further action, this can raise a follow up action for the FM to review and decide whether to create further jobs or quotes

All jobs are managed against an attendance and completion SLA, but uniquely to Elogs CAFM there is also an 'update' SLA which means that the service partner or operative responsible for the task is also managed on the frequency of updates to the system. Reactive tasks can be fully managed from both the web and the mobile platform.

## Quotes

The Quote feature on the system allows for a user to create a quote to send to the sites quote approver. Also, more uniquely and with service charge property management in mind, the system allows an FM to request quotes from multiple service partners as part of a cost benchmarking exercise with a single action.

Service partners can respond with several quote options including costs and any attached information. The approver is notified and can accept all or parts of the quote, which would subsequently automatically raise the follow on reactive task.

In the instance that multiple quotes have been provided, accepting a single quote will automatically email and notify the other service partners that they were unsuccessful.

Quotes are also managed against definable SLA's and the system can automate the process of closing and expiring quotes after a set period of validity.

## Assets, Tasks and PPM

This part of the system is essentially a CMMS (computerised maintenance management system)

Assets, are a register of maintainable equipment. This includes basic information such as the model and manufacturer as well as attached OMS documentation, or technical guides. The asset can also be classified against an index of asset 'types' in order to group it for reporting or other system functionality. Assets can also have service routines, which are the maintenance instruction sets, typically SFG. The service routine can automate the production of tasks relating to the asset.

The asset also has the ability to have system defined values that are updated on each service visit. These are typically set to record it's condition but are also often used to rate it's energy performance, parts availability and other measures that together help to report on the overall state of the asset with regards any asset lifecycle management and replacement program. This and the ability to store budget costs against the asset can form a crude asset replacement schedule to help with capex expenditure forecasting.

Assets can also have sub-assets which in turn can also have their own conditions and status. Much like the parent assets these can also have reactive tasks associated so that a service history can be built against the sub asset if required.

Tasks are the blueprint for the creation of planned maintenance jobs. An asset can have multiple tasks, for example a boiler may have an annual 'statutory' maintenance task for a gas safe service provider and then a 3 monthly non statutory service visit task for a handyman. These tasks once defined then dictate when the related ppm jobs are created and how they appear within the ppm planner.

Tasks don't necessarily relate to an asset, some tasks dictate scheduled inspections or other activities as required by the FM, this might include the FM's site visit, or a surveyors property inspection.

PPM jobs are the tasks that are defined by tasks. They are almost identical to reactive jobs in that they are subject to chasing on both attendance and update SLAs. Like jobs they can have paperwork uploaded against them and this can be mandatory. They also have the ability to be escalated for remedial action. Unlike Reactive jobs, a PPM does not require individual approval, a whole year's worth of PPM can be approved at once or in part by the sites ppm approver when the ppm planner is submitted to them.

Also, unlike reactive jobs, ppm is displayed on the ppm planner. This view allows a user to quickly and visually identify missed or incomplete ppm.

## Actions

Actions are things that need resolving by the FM. These are created as a result of:

- Statutory paperwork needs reviewing
- Job with remedial action
- Raised from an audit (see audit tool below)
- Raised using global action tool (generally where a central operations team requires something from ALL of their FMs)

Actions can be immediately closed, however they also have the ability to relate to and track multiple jobs and quotes, and they have their own progress comments and audit trail.

This means that if an action raised from an audit, or a remedial requires work from more than one service provider, both tasks can be tracked against the same action and the action can be closed once both are complete.

## Documents and Files

Elogs provides the ability to track critical documentation through different means depending on the use case. In the most simple way, you can upload files directly to the system and tag them in order to organise them. This works in a similar way to putting a document in a folder however a document on the Elogs system can have as many tags as you wish. Files can also have expiry dates. You can choose how soon to the expiry you wish to be notified.

Files can also be mandated against planned and reactive jobs. In this way, statutory certification can easily be managed. These files automatically get tagged with the task and site name. This is a good way to effectively schedule any required documents. Where files are uploaded against a job by a service partner an additional 'paperwork for review' process is mandated so that the file can be reviewed.

Default files can be uploaded to appear for information against all reactive and/or planned jobs. In this was site hazard lists, or important H&S information can be shared with any contractors visiting the property.

Files can also be uploaded against most other elements of the system including actions, quotes, assets, audits and image files against meter readings and patrols. All of these files can be searched for and found in the files section searching via the associated name or ID of the asset, action, quote etc.

## Forms (Digital Paperwork)

Where there is a requirement for bespoke paperwork to be added in a similar way to a document attachment, there is an option to create and use electronic forms. This allows the user to define a list of inputs and options that can be completed using the web or mobile app whilst carrying out an operation such as a ppm job.

A good example of where this might be used, is when a service operative needs to follow a very strict 'tick list' style maintenance procedure. Although typically this level of administration is discouraged, this can be useful for certain compliance tasks that require the additional burden of proof, for example L8 or emergency light checks. Forms may also be used where you require consistency in paperwork across multiple providers.

## KPIs

One of the more managing agent specific features of the system is the KPI tool. This allows for the FM and the service provider to conduct a joint performance review. This is designed to facilitate record of more qualitative scoring measures and shouldn't ideally replicate the scoring already gathered by the systems automated performance monitoring features.

The KPI questionnaires can be configured and weighted as required and there are no limit to the number of KPI templates. The KPIs can also be automatically scheduled.

The tool allows for the service provider to self-assess their performance by completing the KPI themselves. This also reduces the overall effort for the FM who may have several of these to complete each month.

Once the Service Provider has submitted their KPI, the FM is notified to approve it, they can change any of the scores they don't agree with and provide in line comment as to why. The system then saves and stores both versions so that a side by side scoring trend can be reported. This means that larger disparities can be identified and potentially indicative of a relationship issue between service provider and FM.

## Buddy Systems

The buddy system allows an FM user to quickly assign all of their system access, permissions and approval to another system user. This is very useful for when they are going on holiday and require cover by another FM.

## Reporting

\*Reports are available on the web only and additional user permissions are required.

Most data in the system is exportable for import into a standard BI tool, or for manipulation in excel. The dashboard is also a high-level reporting tool to focus on exceptions and to establish a critical view over the whole system. However, there are also a suite of standard reports built into the system that help gather insight into system use. The reports are as follows:

### Service Provider Summary

This report gives a dynamic overview of a service providers job performance over a period of time. It is a good tool to use in any kind of scheduled contractor update or performance meeting. You can quickly drill down through the exceptions to review tasks that have not been attended or completed on time.

### FM Activity Report

Similar to the sp summary report this allows you to review the performance of an FM in relation to their use of Elogs over a period of time, such as how quickly they are reacting to actions and approvals and the status of works on their specific sites.

### Age of Approvals

This gives a more granular view of a specific FM's response rate to different priority tasks.

## Summary

The summary report gives a good overall summary of different aspects of the system in relation to a portfolio of properties that can be exported to excel. This report is useful for a managing agent to be included in client reporting.

## Service Provider Summary

The PPM gap analysis report is used to identify where service partners have not scheduled any recurring activity. This is useful to answer the question of 'where am I missing ppm' without needing to scrutinise each sites planner individually.

## SP Usage

The SP usage report is very similar to the SP summary report however it focuses on an exportable format, listing jobs and quotes that have missed SLAs or been escalated.

## Late Open / Early Close \*Premium Module

This report is designed to work with the late open and early close feature, designed for use in shopping centres. If late opening and early closing times are recorded by operatives in the mobile app, a report for a site over a period can be issued using this report.

## Monthly

The monthly report gives a rolling 12-month trend report on reactive and planned attendance and completion across a portfolio or specific site, or a specific service partner. This allows to visually track performance over time and is useful where service partners or sites are under improvement measures.

## KPI Monthly

This report allows you to track performance of a specific KPI by service provider, site or portfolio over a 12-month rolling period. This is useful for demonstrating a performance trend and can be used in conjunction with the monthly report if a site or service partner is on an improvement plan.

## Engineering Risk Summary

This is an easy visual way of tracking statutory compliance over a portfolio. Where tasks have been labelled as statutory, this report demonstrates and allows you to drill into compliant, upcoming or overdue statutory task.

## Audit Trend Report \*Premium Module

The audit trend report allows you to analyse the responses to batches of audit reports. This means if an audit is conducted over a thousand properties you can see the percentages of differing responses and identify outliers. For example if one of the questions is "have you done your PAT testing" you can quickly identify the sites that responded "no".

## Operative Performance

This is an extension to the SP summary report and allows you to track individual operative performance on tasks within a team including the volumes of tasks completed and which tasks were missed or overdue.

# Additional Premium CAFM features

## Sustainability

### Meter Reading

The meter reading module allows a user to keep a detailed register of all of their check meters and sub meters. The user can then select a service partner to conduct meter reads or conduct them him/herself.

Meter readings can be conducted via the mobile app and all reads are validated to ensure that they are measured correctly. The system then provides the ability to export meter readings in order to provide to an energy consultant or to import into a utility billing management system.

Meter readings can also require a photo for where the consultant or energy company require this as evidence.

## Inspections

### Audits

The audit tool allows you to create bespoke and detailed inspection templates. This tool is perfect for property inspections or compliance based assessments where you need to demonstrate an inspection process and where you want to demonstrate and track the follow up process to any identified actions.

Each section of the audit and the questions are set up in a way that feedback can be easily measured or controlled. Answers can include weighted scoring, option selects, yes/no, free text or mandatory file upload such as a photo or document.

Audits can be scheduled or raised on the fly, and can be completed offline on the mobile app. When answering an audit question you can trigger a follow up action, this automatically raises an Elogs action which can in turn become a reactive job, quote, or be closed by an FM.

There is also an audit dashboard to help users keep track of the state of their own inspections.

## Shopping Centre Package

### Patrols

The patrol tool was designed as an inexpensive replacement and improvement on traditional guard tour/diester systems. It uses the mobile app to allow users to scan barcodes or tap against NFC stickers or tags in order to demonstrate adhering to a given route or set of instructions.

The patrols can be customised and set up to include requirements such as photos or signatures and can be scheduled in a daily calendar. The tool also includes a dashboard and reporting to help identify patrols that have been missed.



The tool is most commonly used in sites with large public spaces in order to help mitigate against claims. The tool can be used to provide evidence that cleaning or security staff were available or had been in a specific area.

## Spillages

The spillages tool is another designed specifically for defensibility in a retail environment. Any operative can report a spillage which will ask the to take a photo and if any accident has occurred, the spillage is reported to the sites designated spillage contact. The tool will then ask the operative to take another image once the spillage has been cleared. The incident is timestamped and recorded for evidence.

If an accident has occurred this triggers a report including the information in order to start an accident report.

## Late Opening/Early Closing

This feature allows operatives using the mobile device to record when a store has opened late or closed early. It allows the operative to record the time against the tenant and to take a photo of the store front.

# Other Elogs Products

## elogs Occupier Portal

Occupier Portal is a tenant facing version of Elogs CAFM that has functions to assist the relationship between the building management or FM and the occupiers.

### Visitor Management

The visitor management feature allows you to register visitors to the site. This includes a kiosk based self-check-in facility and a badge printing option.

The visitor check in form can also be customised to provide important information to the visitor or to collect important information from the visitor.

Once a visitor checks in, the occupant they have arrived to see is automatically notified via an email.

### Amenity Booking

The amenity booking facility allows you to manage a diary of booking for any building facilities that occupiers may want to use. This can include meeting rooms, loading bays, car park spaces, lockers or any other form of amenity.

### Key Management

The key management tool keeps a record of all building keys which can then be booked out to occupants or visitors. When the key is booked out an expiry is set so that if the key is not checked back in, both the person who has the key and the building management staff can be notified.

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### **Maximise compliance, minimise risk.**

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Occupier Portal

Property portal to make facilities management easier.

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