



daisy.



Wisdom Modules

Getting Wise to the Safety Certificate Process

Wisdom from Daisy

Wisdom is a complete electronic Document and Records Management System (eDRMS) that ensures your data is stored securely, managed effectively and fully compliant. Wisdom is used to manage the life cycle of each of your documents, the information is always available when you need it, but just as importantly notifies you when it is time to remove the data from your organisation. As part of the ongoing development of Wisdom, Daisy have developed a module which extends the capabilities to allow for automated processing of Safety Certificates.

"We've been using Wisdom integration for our Gas Safety certificates for well over a year now. Accessibility to this documentation is now transparent throughout the organisation and this has helped us to cut down on paper records that have in the past been sorted in to mountains of boxes at external agencies. We now don't have to worry about the whereabouts of the certificates; they're available in a couple of clicks directly from the property screen within Orchard."

John Paul Petryczuk

ICT Mobile Services Manager – Regenda Group

The Process and the problem

Landlords are required by law to carry out a number of safety checks on properties each year. This requires safety engineers travelling to properties, carrying out the checks and often filling in paper based forms. The current process can be very inefficient with engineers having to collect the day's schedule from the office, travel to the properties, complete the checks and then deliver the forms back to the office. The information will then need manual keying onto a system in order to update the property record with the safety check details.

The process also introduces errors, paper can go missing; forms arriving at the office can be delayed and inaccurate information may be keyed. The completed form also needs to be sent to the tenant and made available to auditors. If a third party is completing the safety checks, a copy is required for their records too. The paper form eventually ends up in a filing cabinet taking up much needed office space.

The Solution

Our Automated Safety Check module removes much of the manual effort and all of the delay from the safety check process. Equipping the engineer with a mobile tablet or smartphone device means that the engineer is able to drastically cut down the amount of travelling which in turn allows them to spend more time carrying out the actual safety checks.

We can provide a mobile app that acts not only as the form equivalent but also as the scheduler. The engineer will automatically get appointments via the app which details the properties to visit. On completion of the safety check, the engineer will update the result of the check on the mobile device. No more paper forms.

Once the data has been updated, it is sent instantly to Wisdom and automatically filed in the correct location within the file plan. This means the data is held securely and compliantly. Wisdom will not only store the document however, at the same time it will notify the line of business system that the check has been completed and automatically pass it the required data in order to complete the check.

Using Daisy's Automated Safety Check Module the engineer has been able to complete the check, update the system and produce a certificate, all while in the field, without going back to the office. The certificate is stored securely within Wisdom, the line of business application has been updated and NO MANUAL intervention has been required.

- Greater productivity from field engineers
- Higher compliance with full auditability across whole process
- Higher efficiency – no manual intervention required
- Reduction in potential for manual errors
- Automatic storage of electronic document. No Filing cabinets needed!
- Reduced risk – process not dependent upon paper documents
- Multiple systems updated automatically
- Fully integrated with Orchard Housing
- Can be used with other types of certificates or reports and integrated into other line of business systems such as Care First, Core Logic, Liquid Logic etc...

