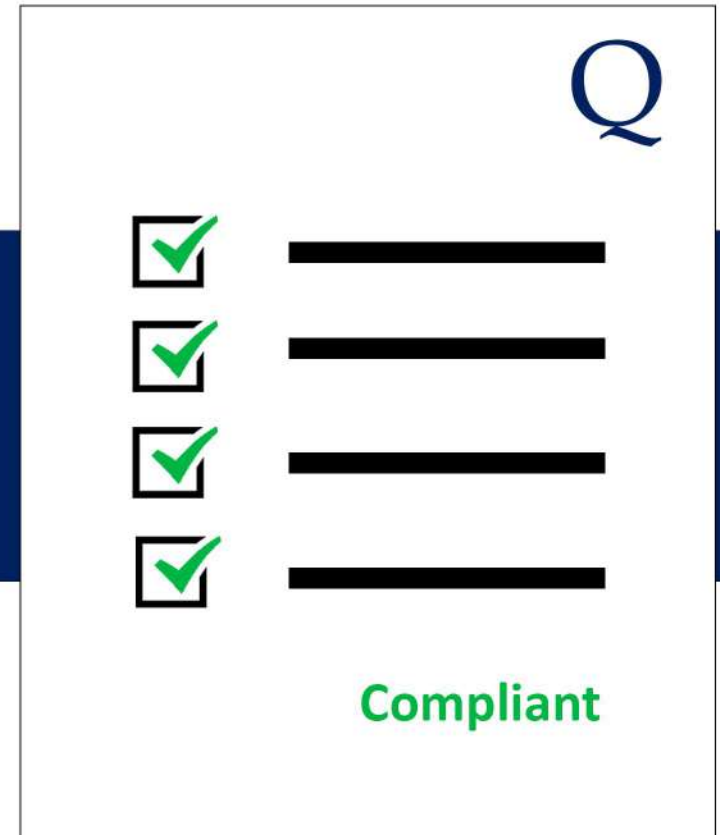


Quadpro Forms

Custom forms for use with
your Assets, Property, H&S
and Compliance Management.



What is Quadpro Forms?

As your estate or organisation grows, so do your financial and operational pressures. Quadpro Estate Management System software can assist by helping you manage your premises and facilities efficiently.

It is vital that estates and organisations have robust, consistent, and compliant systems for managing their estates and maintenance across all of their buildings and sites. Now with Quadpro Forms, this process can be entirely paperless.

Quadpro, our estates management solution provides all you need to keep your staff and visitors safe, your buildings well maintained, and your budgets and performance under control.



Quadpro already has the ability to set up maintenance profiles for assets such as boiler plant, external fabric maintenance, and other regularly maintained assets. These profiles can be used to generate job requests at specified dates which are then distributed to operatives via emails and the Quadpro web portal.



We have now created a powerful Forms module to work in tandem with your Asset, Property, H&S and Compliance management. It provides the ability to create custom checklists for use around your organisation.



This feature also links in with your Job Request and Asset Maintenance modules allowing you to directly relate items to specific Job Requests, or create remedial Job Requests from failed Checks.

Quadpro Forms adds a new dimension to the Quadpro Estates Management Software System.

You always have been able to set up and manage compliance routines for important compliance documents and for Asset Maintenance. Now with the addition of Quadpro Forms you can add H&S checks as well and then quickly create any number of digital forms for completion on site by operatives or other staff. Checks can be allocated individually or to a schedule and also able to attach them to Asset Maintenance Jobs or Job Requests.

Any check that fails can quickly be used to automatically create a Job Request or the remedial work necessary ensuring that no failure is left unattended and so ensuring compliance is safely managed.

Monitoring your compliance status is easy too. Each Compliance area is displayed as a RED, AMBER or GREEN marker for every building and each asset, so problems can be spotted easily and actioned quickly. For auditing purposes, all the completed forms are saved in the system with date, completed by and photos where required.

Quadpro Forms can be utilised in a variety of scenarios including:

- Maintenance Checklist for Boilers and other M&E assets
- Fire Safety Checks
- Legionella Testing schedules
- Risk Assessments
- Vehicle pre-use checks
- Ladder checks
- Swimming pool water safety

The list is endless and each form can contain any question you can conceive. All your paper forms can be transferred to digital format. Other time saving features include the ability to reuse question sets and to clone forms from one asset to another and to reassess checks when staff or workloads are changed.

Overview



What can Forms do for you?

Forms can be used in many different ways within your current and future management processes. Whether it is maintaining your compliance related assets, or completing an important checklist before undertaking work at height. Detailed below are scenarios where Forms can help you.



Attached to an Asset Maintenance Record:

Forms can be activated for each individual asset as needed, and you can directly set up a Check to be assigned to each Automatic Job Request generated with that asset. So If your boiler requires a yearly servicing over the next 15 years, but has to have a set criteria achieved to pass, you can configure this all within a few steps. The Check, along with the Asset Maintenance record can then be assigned to the relevant operative and all results are transferred automatically straight into the system for you.



Regular or One-Off Check Form: (Assigned to Staff & Operatives):

You will more than likely have a variety of compliance and health and safety requirements that need to be met, and these can often be undertaken by either staff or operatives. With Forms, you can assign these checks - such as Fire Equipment or Internal Safety reviews to those who are required to do them. Utilising the schedule feature, they will appear in the designated user's workload when the date arrives to complete the Checks.



Link a Check to Existing Job Requests:

Should there be a Job Request which reports extensive damage or a safety risk to structure, items or people, then a linked form can be created and assigned to an operative. This will then in turn allow them to determine if the issue is compliant or non-compliant and whether it needs further action to make safe. These records will be linked to the original Job Request.

How Easy is Forms to Use?

Although Forms is a comprehensive module, it is easy to use and set up . You can create Forms as and when needed or even clone records to save time during the set up process. Our diagram below outlines how Forms works.

Create your Compliance Sectors, Form Lists, and Questions then Create your Checks

** This only needs to be done during first set up or when adding new information.*

Assigned user completes Checks when required to.

Check results are displayed in the main system. If a check has failed, remedial action can allocated and tracked.

The Forms

Forms utilises five different categories, four of which build the information that makes up your main record - Checks.

Compliance Sectors:

Sectors are the basis of your checks and where they will be tagged, such as Fire Safety or H&S and Electrical.

Form Lists:

This is where you can configure the naming of your Checks, for example 'Fire Safety Check - Monthly'.

Question Groups:

Groups consist of a further sub category where you can break information down into Fire Warning system checks or Firefighting Equipment etc.

Questions:

Questions can be created and stored under any combination they apply to above for use in your Checks.

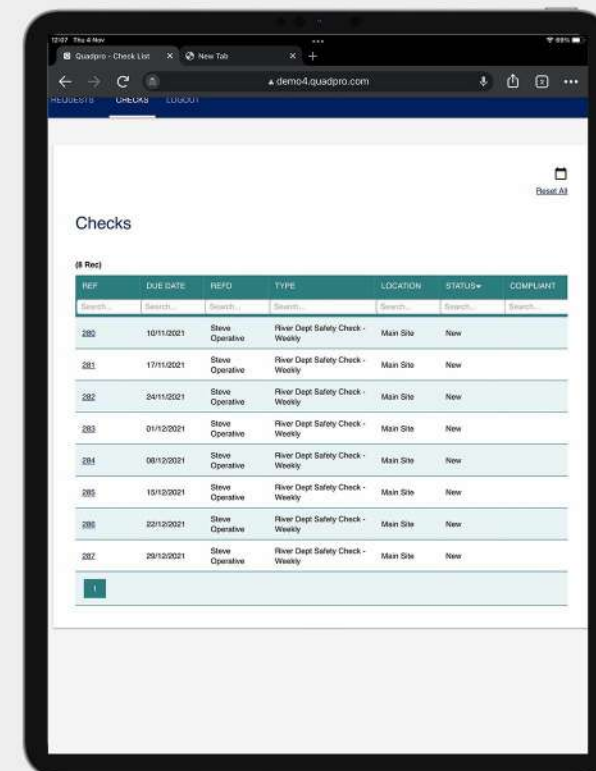
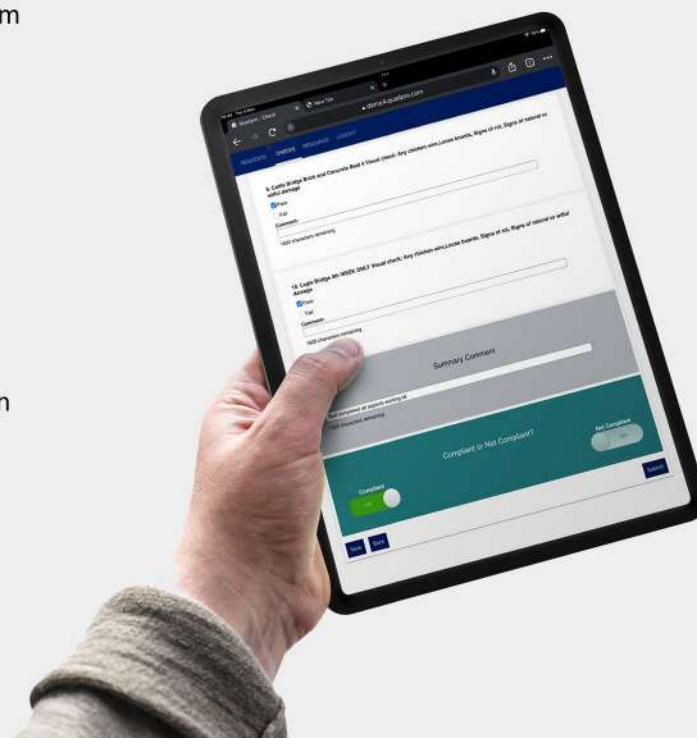
Checks:

These are your fully built checklists that you utilise in the field to complete your H&S review, Fire Safety inspection and much more.

Each and every one of these categories help you build specific Forms to use in a multitude of scenarios.

The best part about this module is that you do not have to repeat the process every single time you need to use a Check. If you need to use the same check for multiple items, just clone them and assign where needed.

All Questions are stored in the system and are instantly combined when you generate a new Check to use. You only need to go through the full process if new Questions are added, criteria has changed, or a new Compliance requirement is introduced.



The Process

The process can vary depending on what you are setting up and if the information you need is already in the system.

If you are setting up all information as new, you will need to follow the steps for each set of Form Sectors, Form Lists, Question Groups and Questions that you would like to add. **The Quadpro Helpdesk can assist with this if you require assistance.*

This will likely only be done when you are first using the module, or if any changes are made to the criteria.

All information is stored within the Forms module and when you need a new Check, you just add and configure the location and frequency of the check.



Checks can be configured to automatically generate when you need them. If you have a regular Fire Safety Check that is completed every 3 weeks, this can be set up once to then arrive on time in the assigned user's workload every three weeks. The ways you can use Forms in your establishment vary depending on how you intend to utilise them.

Briefly outlined below are how users can expect to integrate Forms within their work.

1. You can attach a Form to an Asset Maintenance Profile

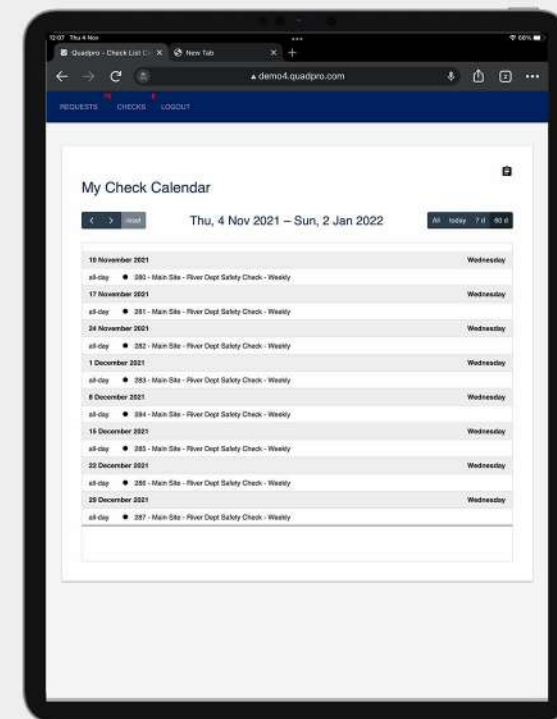
2. Create a Form to be used by an estates operative in a regular Check.

3. Create a Form for use by other staff to undertake regular Checks.

4. Create Forms to be used in one- off Checks.

5. Create a Form which can be used when requested by staff.

6. Create and link Forms to existing Job Requests.



All Checks can be accessed and completed via the Web Portal Checks area on either mobile, tablet or desktop platforms.

The Checks

The Checks are the most important feature of Forms. These help you manage your compliance routines across the organisation and aid you in the streamlining of vital and necessary tasks.



Each result from every Question is stored under their associated Check. Any uploaded data is also stored - such as temperature check results.

10/11/2021 River Dept Safety Check - Weekly

S1
280
COMPLIANT

Results Documents Completed - 04/11/2021

Order #	Question	Photo	Option 1	Result 1	Option 2	Result 2	Option 3	Result 3	Option 4	Result 4	Option 5	Result 5	C
1	Beat 5 Bridge (bottom) Visual check: Any chicken wire,	<input type="checkbox"/>	Pass	<input checked="" type="checkbox"/>	Fail	<input type="checkbox"/>							
2	Cattle Bridge Meadows Visual check: Any chicken wire,	<input type="checkbox"/>	Pass	<input checked="" type="checkbox"/>	Fail	<input type="checkbox"/>							
3	Cattle Bridge Beat 5 Visual check: Any chicken wire,Loc	<input type="checkbox"/>	Pass	<input checked="" type="checkbox"/>	Fail	<input type="checkbox"/>							
4	Cattle Bridge Beat 4 Visual check: Any chicken wire,Loc	<input type="checkbox"/>	Pass	<input checked="" type="checkbox"/>	Fail	<input type="checkbox"/>							
5	Cattle Bridge Brick and Concrete Beat 4 Visual check: A	<input type="checkbox"/>	Pass	<input checked="" type="checkbox"/>	Fail	<input type="checkbox"/>							
6	Logie Bridge 4th WEEK ONLY Visual check: Any chicken	<input type="checkbox"/>	Pass	<input checked="" type="checkbox"/>	Fail	<input type="checkbox"/>							
7	Wharf Bridge Visual check: Any chicken wire,Loose boa	<input type="checkbox"/>	Pass	<input checked="" type="checkbox"/>	Fail	<input type="checkbox"/>							
8	Kissing Gates along Canal (5No) Visual check: Any chick	<input type="checkbox"/>	Pass	<input checked="" type="checkbox"/>	Fail	<input type="checkbox"/>							
9	Brandy Stream Bridge Visual check: Any chicken wire,Lr	<input type="checkbox"/>	Pass	<input checked="" type="checkbox"/>	Fail	<input type="checkbox"/>							
10	Gater Field Bridge Visual check: Any chicken wire,Loose	<input type="checkbox"/>	Pass	<input checked="" type="checkbox"/>	Fail	<input type="checkbox"/>							



Any Checks that have failed can be instantly actioned via an automatically created Remedial Job Request - helping you stay on top of those important repairs.

Check Failed

Check #281 - River Dept Safety Check - Weekly has failed.

Do you want to create a Job Request?

Job Request
27147

Remedial - 281



Your Checks can be assigned to any designated Forms user and can also be configured to generate at a given frequency or can be created as and when required.

76 6

REQUESTS CHECKS LOGOUT



Most of all, Checks help make your H&S, Compliance and Asset Maintenance Management that much easier. Move on from the piles of paperwork and manage your compliance needs through an entirely paperless process.

S1
247
COMPLIANT

Completed - 24/03/2021