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Keystone

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Save the date – Housing Community Day



Agenda

- ▶ Housing Community Day – date & venue announced
- ▶ What's new from 2017
- ▶ Demonstration of Keystone including CAP
- ▶ Coffee Break
- ▶ Roadmap for 2018
- ▶ Sneak preview of 18.1 (05 Feb 2018)



17.1 (2017 Q1)

- ▶ New KAPI method for getting linked or added documents
- ▶ Release of Keystone MINI



17.2 (2017 Q2)

- ▶ Context sensitive help implemented throughout Keystone
- ▶ Import images or documents from the device into a survey (windows only)
- ▶ KRM enhancements based on customer feedback
- ▶ Financial export from KPM is now available as an Interface.
- ▶ New KAPI methods added
- ▶ Contractor portal for Keystone



17.3 (2017 Q3)

- ▶ Mark classifications as read only
- ▶ KSI workflow now supports letters in different languages
- ▶ KRM remedial actions no longer require a document
- ▶ Individual KAM fields can be marked as read only
- ▶ Additional KAPI methods added



17.4 (2017 Q4)

- ▶ CAP allows contract documents and multiple documents at the same time
- ▶ Template data reporting added to KAM
- ▶ Document long description now visible
- ▶ Energy results KAPI method
- ▶ KRM KAPI methods
- ▶ Publish KCD views to user groups
- ▶ KRM remedial action KGI added
- ▶ KPM contract RAG status
- ▶ KSI workflow in-tray performance fixes

Keystone Demonstration



PRODUCT ROADMAP SUMMARY FOR KEYSTONE

ROADMAP	2016				2017				2018				2019				2020			
Key Deliverables	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Digital 				Keystone MINI		Contractor Portal		MINI Enhancements CAP Enhancements												
Mobile 	Android Foundation					iOS Foundation														
Integration 	EDM Integration								Server Integration											
	Cx Integration																			
Analytics 		Compliance Dashboard							GIS Reporting											
										Internet of Things										
Cloud 		Cloud Hosting																		
Automation 	Keystone API							Keystone API Enhancements												
		KRM Integration (KSI, KPM)				Contract Financials		Data Disposal												
Compliance & Enhancement 	KRM Enhancements												Workbench User Interface Refresh							
		URL Support						Energy Plus	KRM Enhancements						Development Investment				Estate Management	
													KCA Manage Non-Dwellings							

18.1 Sneak Peak (05 February 2018)

- ▶ MOT Style Servicing
- ▶ Notifications
- ▶ Information Management (GDPR)



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MOT Style Servicing

Keystone Workbench v18.1.6576

Service Types

- Annual Fire Alarm Type 1
- Annual Fire Alarm Type 2
- Annual Lightning Protection Maintenance Visit
- Annual PEAT Testing
- Annual Sprinkler Maintenance
- Annual Water Pump Maintenance
- Annual Waverley House - FFE 2W 6Co2
- Auto Dialler - Annual Service
- Bell or Sounder - Annual Service
- Biannual Bath Hoist Service
- Break Glass - Annual Service
- CP12 Service & Inspection - LGSR - Communal
- CP12 Service & Inspection - LGSR - Domestic
- Domestic Smoke Detector - Annual Service
- Dry Riser Annual Full Pressure test
- Dry Riser Maintenance 6mth Visual
- Emergency Lighting 3 Monthly Service
- Emergency Lighting Annual Battery Drain test
- Emergency Lighting Tests Monthly
- Fire Alarm Maintenance
- Fire Blanket - Annual Inspection
- Fire Extinguisher Servicing
- Fire Risk Advice Assessments
- Fire Risk Assessment - 2 Year
- Fire Risk Assessment - 4 Year
- Fire Risk Assessment - Annual
- Fire Risk Reviews - 4 Year
- H & S Inspections - Sheltered Schemes & Foyers
- Hose Reel - Annual Inspection
- Insurance Engineer Inspection Combined Heat & Power Unit - Annual
- Insurance Engineer Inspection Home Lifts
- Insurance Engineer Inspection Passenger Lifts

Details

Description: CP12 Service & Inspection - LGSR - Domestic

Workflow Template: Gas Workflow

Cost (£): 102

Duration (days): 1

Interval: 1 Years

Service Due Date Renewal Mode

☐ Actual Date Where multiple pieces of equipment exist on a visit they must have the same Service Next Due Date. If these dates differ, each piece of equipment will be processed using the Actual date.

☐ Planned Date

☐ Earliest Date

☒ MOT Style

Interval: 2 Months

Quality Assurance

Foundation Job Package

Document Prefix

Visit Outcomes

Outcome	Document
<input type="checkbox"/> Audit Complete	
<input type="checkbox"/> Audit Found Issues	
<input type="checkbox"/> Cancel	
<input checked="" type="checkbox"/> Complete	
<input checked="" type="checkbox"/> No Access	
<input type="checkbox"/> Works Required	
<input type="checkbox"/> Complete - No Document	

Server: localhost Database: Test User: john.trott

MOT Style Servicing



Notifications - Configuration

Configure Notification Types

Notification Type

Description

Possible Asbestos Found

Details

Description

Possible Asbestos Found

Notification Type

Asbestos

Tool Tip

Use this notification when you think an asbestos survey is required.

Assigned To

Allied Protection

Job Package

Asbestos

Surveyor

John Trott

+ Add

Save

Delete

Notifications – New notification on MINI

CIVICA

Log Off

Search / Asset Dashboard / Notification Details

New Notification

Details

Type

Possible Asbestos Found

Description

I think the shed may have an asbestos roof.

For This Asset?

☒

For This Item?

☒

Priority

High

Note

Cancel

Save

v18.1.6577 © 2017 Civica.

Notifications – Viewing notifications on MINI

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Log Off

Search / Asset Dashboard

Asset Dashboard

Asset Details

Notifications

Show 5 entries

Notification Type	Assigned To	State	Priority	
Possible Asbestos Found	Allied Protection	New	High	Details

Showing 1 to 1 of 1 entries

New

Classifications

Tenant

Notifications – Notifications In-Tray

K Notifications In-Tray

Notifications

Filter

UPRN	Type	Assigned To	Status	Priority	Raised By	Raised Date	Approved By	Approved Date	Rejected By	Rejected Date	Completed By	Completed Date	Cancelled By	Cancelled Date
0010-Leo-KS	Possible Asbestos Found	Allied Protection	New	High	John Trott	03/01/2018								

Open Notification

Approve

Reject

Cancel

Complete

Replace

Reallocate

Reassign

Asset

Refresh

Export

Notifications - Approval

Approval Details

Previous

Next

Cancel

Default Settings (1/2)

Description	Possible Asbestos Found
Notification Type	Asbestos
Tool Tip	Use this notification when you think an asbestos survey is required.
Assigned To	Allied Protection
Date the Assessment is due	03/01/2018
Job Package	Asbestos
Surveyor	John Trott

Notifications – Foundation job raised

Job Manager

Job List | Pivot | Select Data

Displaying 1 items of a possible 2

Sort: UPRN

Surveyor: John Trott

Clear All

Search...

Information

Job Id

Job Package

Last Update By

Scheduled By

Stage

Surveyor

Sort: Quantity

☐ Aaron Else 1

☒ John Trott 1

0010-Leo-KS

Assigned

Address 10 Leopold Road Colchester CO1 10LP

Asset Type House

Job Id 7669

Job Package Asbestos

Date Due 03/01/2018

Surveyor John Trott

New Surveyor

Views | Save View | Reset View | Refresh Data

Assign | Unassign | Due Date | Validate | Archive | Legend | Export

Notifications - Completions

Notifications In-Tray

Notifications

Filter

UPRN	Type	Assigned To	Status	Priority	Raised By	Raised Date	Approved By	Approved Date	Rejected By	Rejected Date	Completed By	Completed Date	Cancelled By	Cancelled Date
0010-Leo-KS	Possible Asbestos Found	Allied Protection	Completed	High	John Trott	03/01/2018	John Trott	03/01/2018			John Trott	03/01/2018		

Open Notification

Approve

Reject

Cancel

Complete

Replace

Reallocate

Reassign

Asset

Refresh

Export

Notifications – Notification details

Notification Details

Type

Possible Asbestos Found

Description

I think the shed may have an asbestos roof.

☐ For This Asset?

Created From

Asset

Note

Priority

High

Notes

Raised By	Raised Date	Note
John Trott	03/01/2018	Status changed from New to Approved with comment - Approved
John Trott	03/01/2018	Status changed from Approved to Completed with comment - Completed off of foundation

Save

+ Note

Clear Note

Close

Information Management

Keystone Workbench v18.1.6576

HelpLog Out

Configure KDR Rule Sets

Favourites

Asbestos Register

Asbestos Workflow

Asset Management

Compliance Management

Component Accounting

Configuration

EcoHomes

Energy

Energy Performance Certificate

Forecasting

Foundation

Housing Quality Standard (HQS)

Interfacing

Northgate Interfacing

Planned Maintenance

Planned Maintenance Reporting

Risk Management

Satisfaction Surveys

Servicing and Inspections

Servicing and Inspections Reporting

Sustainability Modelling

Rule Sets / Rules

Description

Rule Sets

Document Management Rule Set

Equipment Rule Set

Example Asset Rule Set

Asset changed status more than 5 years ago

Asset is not in Leopold Road

Asset is not owned by Council

Example Combination rule set - multiple tables

Asset is non-residential

Tenant has been superseded

Tenant vacated more than 12 months ago

Example Tenant Rule Set

Tenant has been superseded

Tenant vacated the asset more than 2 years ago

Example Tenant Rule Set - Any Rules

Risk Assessment Rule Set

Details

Rule Set Description

Example Tenant Rule Set

Must Match On

All Rules

Any Rules

Add

SaveDelete



Information Management

Keystone Workbench v18.1.6576

HelpLog Out

Favourites

- Asbestos Register
- Asbestos Workflow
- Asset Management
- Compliance Management
- Component Accounting
- Configuration
- EcoHomes
- Energy
- Energy Performance Certificate
- Forecasting
- Foundation
- Housing Quality Standard (HQS)
- Interfacing
- Northgate Interfacing
- Planned Maintenance
- Planned Maintenance Reporting
- Risk Management
- Satisfaction Surveys
- Servicing and Inspections
- Servicing and Inspections Reporting
- Sustainability Modelling

Rule Sets / Rules

Description

Rule Sets

Document Management Rule Set

Equipment Rule Set

Example Asset Rule Set

- Asset changed status more than 5 years ago
- Asset is not in Leopold Road
- Asset is not owned by Council

Example Combination rule set - multiple tables

Example Tenant Rule Set

- Example Tenant Rule Set - Any Rules

Risk Assessment Rule Set

Details

Rule Set Description

Example Asset Rule Set

Rule Description

Asset is not in Leopold Road

View / Table

Asset

Column

Address

Operator

not like

Value

Leopold Road

Add

SaveDelete

Information Management

K Manage Interfaces

Interfaces

ID	Name	Description	Status
4006	Data Retention	Information Management	OK (?)

Configuration

Interface Description

Information Management

Interface Name

Data Retention

Settings

Schedule

Log

KGI output path

C:\Interfacing

Email address(s)

john.trott@civica.co.uk

Sender email address

Keystone@civica.co.uk

Subject

Keystone data highlighted by retention policies.

To configure the KGI to be sent to multiple email addresses seperate each email address with a comma (,).

+ Add

Refresh

Save

Delete

Information Management

A	B	C	D	E	F	G	H	I	J
User Notes	Outcome	Action	Process	ID	Error(s)	Data Type	Rule Set	Description	Review Date
Optional	Internal	Mandatory	Mandatory	Internal		Read Only	Read Only	Read Only	Optional
			Yes/No			Text (50)	Text (50)	Text (100)	dd/mm/yyyy
		Delete	Yes	1		Tenant	Old Tenants	[0001-LEO-KS] Mrs Smith, from 01/06/2010 to 31/03/2016	
		Anonymise	Yes	2		Tenant	Old Tenants	[0002-LEO-KS] Mr Banks, from 01/09/2000 to 31/03/2016	
		Review	Yes	3		Tenant	Old Tenants	[0003-LEO-KS] Mr Woodhouse, from 01/02/2002 to 31/03/2016	03/01/2019

- ▶ Delete will remove the record only leaving the audit tables
- ▶ Anonymise will update the record so *Mr Banks* would become *Tenant2*
- ▶ Review will mean the data item does not show up again until the review date is passed

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