Agenda

▶ Welcome & Introductions

▶ Session 1 - 09.00 – 10.15

- Release Strategy overview
- Update on Latest release v17.2
- Future Release v18.1
- Interactive session: Servitor and Customer Information module (for the General Data Protection Regulation)
- Questions

▶ Coffee/ Comfort Break 10.15 – 10.30

▶ Session 2 - 10.30 to 12.00

- Demonstration of the new standardised Client Portal
- Interactive session on Documentation and Communications module
- Interactive session Admin Dashboard – Future Development options

▶ Questions and Answers

Release Strategy

Overview & Themes

▶ Current Development Themes

- Audit and Compliance
- Remote working and accessibility
- Integrating Civica products

▶ Oracle Update

Servitor & Civica Mobile Release	Oracle Compatibility	Comments
v17.2	Oracle 11g and 12c	Application tested on Oracle 11g and 12c
v18.1	Oracle 12c only	Oracle 11g becomes de-supported in December 18

Release Strategy

Servitor Release v17.2 – January 2018

▶ New modules available

- Standardised Client Portal
- Standardised Keystone Interfaces with Servitor

▶ Other Key Enhancements

- DRS appointment slot per contract
- Auditing user maintenance and gas appliance changes
- Mobile gateway create appliance method
- Trade Rates per contract
- E-Procurement2 – Buildbase integration
- E-Procurement 2 – Dashboard enhancements and exceptions checking
- Support fixes since v17.1

Release Strategy

Civica Mobile Release v17.2 – January 18

▶ Key features – Civica Mobile
  - Improved Servitor to Civica mobile Integration enhancements
  - M-Procurement (receipting and operative dummy stores)

▶ Other Enhancements
  - Two day operative view
  - Operative Contract restrictions
  - Mobile data retention archiving
  - Support fixes since v17.1

Civica Exchange

Release Strategy – Future Release

Servitor Release v18.1 Overview – April/ May 18

▶ Customer Information module (GDPR software)

▶ Servitor Express – Audit and Performance Dashboard

▶ Cx Integration

▶ NICEIC – Full electrical integration

Release Strategy – Future Release

Civica Mobile Release v18.1 – April/ May 2018

Key Features:
- Remote van stock check

Other Enhancements
- Support fixes from v17.2

Release Strategy – Future Release

Servitor & Civica Mobile Developments In Progress

▶ Standardised Tenant Portal

▶ Mobile IOS

Interactive session: Servitor and Customer Information Module (GDPR)

Overview

▶ A quick reminder of what we should already know

- Fines currently limited to £500,000. Changes to 4% of global revenue or €20m
- Applies to the processing of individuals' personal data when offering goods and services or monitoring their behaviour.
- Effective from 25th May 2018
- Appoint a Data Protection Officer to oversee the regulatory requirements

▶ What should you be doing?

- Update policies and processes to reflect the requirements of GDPR. As an example, it will require changes to how organisations obtain and use consent and also how they store information.
- Providing new and existing staff with suitable training and awareness, as well as additional sources of guidance and support when required.
- Conduct Data Protection Impact Assessments (DPIA) in order to design data privacy into any new systems and processes.
- Useful resources on the ICO website: https://ico.org.uk/for-organisations/resources-and-support/data-protection-self-assessment/getting-ready-for-the-gdpr/

Interactive session: Servitor and Customer Information Module (GDPR)

Interactive Session – Chaired by David Cockayne

▶ So what does it mean to you?

- Impact on your processes?
- Impact on your systems?

▶ Specific Requirements of Servitor?

- Property Records
- Tenant Details
- Job Records

Interactive session: Servitor and Customer Information Module (GDPR)

New functionality

▶ Standard changes available without upgrade

- Housekeeping
  - Data retention and archiving functionality

▶ Changes requiring Release v18.1

- New customer single view screen
- Anonymising data to comply with GDPR
  - Right to be forgotten
- Linking communication/ changes via Documentation and Communication module
- Detailed audit tracking visibility in Servitor

▶ New factsheet available March 18

Save the date – Housing Community Day

HOUSING COMMUNITY DAY

Tuesday 15 May 2018
Hilton Birmingham Metropole, NEC

civica

#CivicaHousing18

Customer Interactive Sessions - Overview

Customer Feedback

▶ The next sessions are designed as interactive sessions

- Regular feature at our yearly exchange session
- Gaining and valuing customer input on identified future developments
- Sharing development thoughts with customers
- Encourage early adopters of new or enhanced software
- Where sensible and prudent putting software/ functionality in place so the customer can self-serve and support routine changes
- Enable the Servitor Team to deliver focused products and services to its customers

▶ Ask questions and enjoy the interactive sessions

Demonstration – Standardised Client Portal

New standardised Module - Overview

▶ **Key Features:**

- Reviewing a repairs order
- Ability to search for a repair current or historically using multiple search methods such as:
  - Address
  - Customer details
  - Property details
- Recent views of job and property
- Ability to raise a new repairs order including getting the best available slot from Kirona's DRS system
- Authorising a repairs order so work can continue

Future Development – Documentation and Communication Module

Interactive session to identify Two high customer priorities

▶ To be included in future releases

- Integration with Purchase ordering functionality
- Integration with Job Order printing

▶ Customer priorities – 'Straw Poll'

- Option 1: Processing inward bound SMS messages and using workflow to action the reply. For instance for an appointment change
- Option 2: Simplify emailing documents retained
- Option 3: Include more lookups for bookmarking types across all screens
- Option 4: Multi-criteria communication triggers

Future Development – Admin Dashboard Functionality

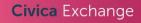Interactive session to identify Three high customer priorities

▶ To be included in future releases

- Improved DRS web service view
- Keystone interface view

▶ Customer priorities – 'Straw poll'

- Option 1: Additional DBA Tools
- Option 2: Ability to query specific errors
- Option 3: Additional interface querying (standard IF table, other import/ export tables)
- Option 4: Basic performance monitoring
- Option 5: Utility changes –ability to amend job status, amend job costs, purchase orders etc. with comprehensive audit monitoring
- Option 6: Remove/ Clear jobs from mobile
- Option 7: Export dashboard information to Excel

Civica Exchange