DBS PBMC Contract Management System

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Overview

The DBS PBMC Contract Management System (known simply as DBS) is a comprehensive software solution for managing all aspects of your Kāinga Ora Maintenance contracting business.

Using this software will help your business operate more efficiently, achieve high levels of Kāinga Ora contract performance with on-time and accurate invoicing and improve overall revenue and profitability.

Essentials

All Kāinga Ora Prime Contractors are required to receive and update work orders via the Kāinga Ora Performance Based Maintenance Contract Contactor Interface (PBMCCI). Contractors also receive billing documents through the PBMCCI, including Buyer-Generated Tax Invoices, Credit Notes and Remittance Advices.

The current PBMCCI specification is a 95 page document covering the various XML message formats and responses required.   In order to comply with this specification, the contractor's system must not only send and receive messages in the correct formats, it must also process the orders through their entire life-cycle in accordance with the Kāinga Ora rules, using the correct job codes, location codes and processing steps according to the job type and priority. It must capture exactly the right information, on handheld devices and in the back-office functions. For this reason an off-the-shelf job dispatch system is unlikely to be suitable, unless heavily modified, nor is an off-the-shelf mobile job app.

DBS was designed from the ground up to work with the Kāinga Ora interface and processes. It consists of a Job Tracking Portal, which can be accessed via a web browser on desktop PCs and tablet-sized devices, and an Android App for use on mobile devices.

The Portal uses various prebuilt but configurable modules, such as the CRM Database and the B2B Job Processing Engine as the building blocks for a suite of Order Management functions which is tailored exactly to meet the Kāinga Ora requirements, from receipt of the order via the interface, through dispatch and execution to performance management and invoicing. Access to the various applications and functions within the system is governed by user access profiles which allow you to control who can access what based on their role and relationship to your company.

The rest of this document looks at each of the main functions in the DBS Portal and the Apps which are used in the Job Tracking Suite.

Please note: all screen shots in this document are taken from our test system using fictitious data. No actual tenant names, contact details or job details are used.

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Kāinga Ora Interface

The DBS System provides a high-performance, high-availability message processing service which polls the Kāinga Ora system at frequent intervals to check for new messages from Kāinga Ora. As each message is received, the XML content is parsed and the order is created or updated in the DBS System.
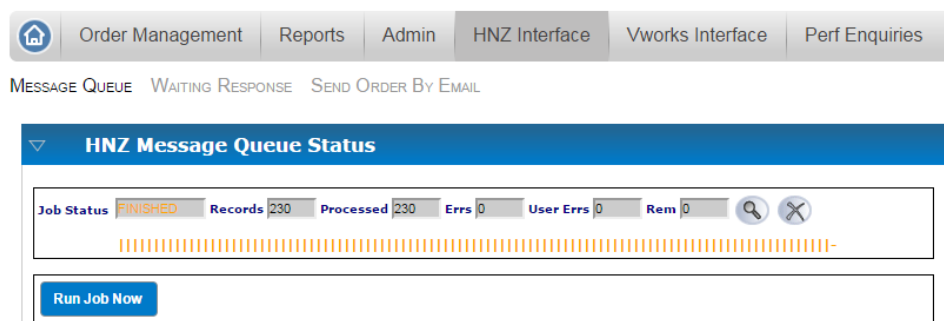
During the life-cycle of the order in the DBS System, updates are automatically notified to Kāinga Ora whenever the order status is updated by your users, both in the office and on the road using the mobile apps.

Note this interface will be updated in 2020 to use JSON over REST APIs as per the 2020 PBMCCI specification.

A view of **Orders Waiting Response** from Kāinga Ora is also available.

Multi-contract

The DBS System handles multiple contracts within a single instance of the system. Unlike other systems the user does not have to log into a different database in order to work with jobs for different contracts.

Job Dispatch

Orders are classified as Urgent, General, Scope or Planned according to the Order Type and Priority.

Orders can be auto-dispatched in most cases, or dispatched manually.

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Jobs are notified to the appropriate resource on their mobile device or by SMS or email as soon as they are assigned.

Scope Auto-Dispatch

Scoped Orders can be auto-dispatched immediately to a designated scoper's mobile device based on cities and/or suburbs. If a scoper is absent, their work can be temporarily re-assigned to another scoper. Temporary overrides can be set up for a date range in advance of their absence.

Contractor/Employee/Subbie Database

Before orders can be assigned, you must set up details of all your labour suppliers and trades, whether employees or outside contractors.

The DBS System provides a CRM database maintenance tool where you can enter details of all your resources, allowing you to classify them as Contractors, Employees etc. Here you can specify which geographical areas your trades work in as well as their trade specialities, to assist with correct job assignment.

Each individual can be given a user account allowing them access to the Portal and the Apps. You have full control over which functions and applications the user can access and can lock a user out of the system or force a password reset at will. The DBS System provides a Mobile Interface Manager to streamline the administration of mobile users.

Order Management

The DBS System provides numerous tools, reports and functions for the management of orders.

The **View Orders** screen allows for searching of orders by a wide range of criteria - dates, assignee, status, type etc.

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Order Details

Further functions are available for each order:

- Change order header details such as status, dates and assignee.
- Send update request message to Kāinga Ora
- Send payment request message to Kāinga Ora.
- Add job lines.
- Allocate Work.
- Exclude or Include Lines.
- Request a PMBC Exemption.
- Create and View Notes.
- Enter time spent.
- Set up a Cover/Program Sheet.
- Print and Email Job Cards.
- Upload, View and Email Documents and Images.
- Manage Variations on Planned Work
- View history of messages to /from Kāinga Ora.
- View exceptions (checks).
- View mobile event log.

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Order Alerts

There is an overview of Responsive Jobs showing jobs which are overdue or approaching overdue. This can also be run as a stand-alone enquiry on a large monitor in the office for all admin staff to see and monitor. In addition there is an automated SMS text follow up to the assignee for overdue urgent jobs.

Management of Exemptions

Exemptions can be requested for jobs which are delayed and these are messaged to Kāinga Ora via the interface. An Exemption Report is available to help manage these.

Operational Reports

There is a wide range of operational reports which can be used to help manage the orders as they flow through the system, enabling supervisors and admin staff to identify potential issues and areas of under-performance.

Manual Orders

Manual orders can be entered into the system either using job codes with their own set of manual rates or via a free-form entry screen. The free-form manual entry can also be used for Progress Claims/Invoices based on the percentage of work completed. The system holds records of the claims and allows addition of variations to quotes.

TradesMan App

DBS TradesMan is an Android App for use by Employees and Sub-contractors. The App uses a "responsive" design format which scales up or down to accommodate the size of the device from the smaller old iPhones to the largest tablet. The App was purpose-built for the DBS Job Tracking Suite and is highly specialised towards the Kāinga Ora Maintenance Contract requirements. This allows seamless information flows between the App, the Portal and the Kāinga Ora Interface.

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The App notifies the user when a job is dispatched to them via the notification on the device. A reminder SMS is also sent if the user fails to respond by opening the App and viewing the job within a designated time-frame.
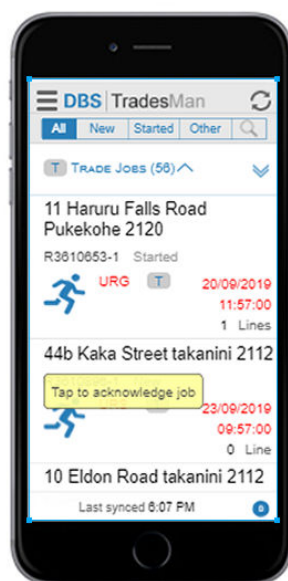
The home screen of the App displays a list of jobs assigned to the user. The user taps on a job to display further details and to take actions such as Start Job, Decline, Card Left, Add Comments and Photos. They can also drill into the Job lines. According to the job type and status they can edit lines or add new lines, selecting from a list of standard Locations and Job Codes.

Declining or No Accessing a job requires entry of mandatory questions such as Decline Reason or No Access Reason. Completion of a job requires entry of a mandatory Outcome and where appropriate, details such as: Other Trade Required.

The App synchronizes information with the Portal regularly. Changes in status etc. are sent more or less immediately (as appropriate) to the Kāinga Ora Interface.

The App is able to function when the user is out of internet coverage, for instance in a remote location or within a building that has a wireless shadow. Updates accumulate until coverage is regained and are synced at the earliest opportunity. Note the App must be started within coverage so as to get its initial jobs data from the portal server.

Note that while a job is assigned to a mobile user, only restricted updates can take place on the Portal. When not assigned to a mobile user, all aspects of the job can be updated via the Portal.

Optionally the App can be used to request exemptions and variations and make appointments.

Sub-Contractor Functions

Sub-contractors can access the Portal with a restricted set of functions that allows them to manage their own work orders. They can view a full list of their current orders, select individual orders and view all details.

Once they have selected a job, they can add job lines, exclude unused lines and complete the job. They can also enter notes and upload documents and reports relating to the job.

They can enter time spent, enter "card left" details and email job details.

Sub-contractor jobs are automatically invoiced to Kāinga Ora by the portal and Buyer Generated Tax Invoices a generated for them. The sub-contractor can see which jobs are awaiting invoices and which have been invoiced.

Sub-contractors can reassign jobs within their own team. Sub-contractor' own trades can also log into the Portal, but they have restricted functions such as not being able to see any rates for jobs.
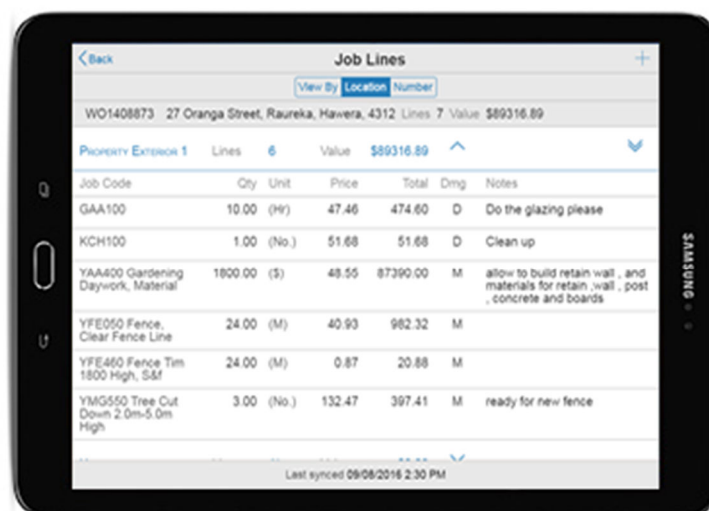
Subcontractors also have access to the Mobile Apps and they can re-assign work to their trades in the TradesMan App.

Scope Jobs

Scope Jobs are also received via the Kāinga Ora Interface. The processing of Scope jobs is more complex than Responsive or Planned Jobs, as the work has to be scoped on site by a scoper and is subject to approval by Kāinga Ora before the work proceeds.

Scope jobs can be scoped via the TradesMan App or directly through the Portal. In the TradesMan App jobs to be scoped have these additional functions:

- Lines can be entered and updated.
- Location, Job Code and Quantities can be entered to give the costs.
- Damages can be flagged.
- Lines can be viewed by Location or Job Code.
- Optionally, variations can be requested.

Quality Assurance

The QA function was developed specifically to optimise performance and compliance with the Kāinga Ora contract. It enables a team of QA inspectors to run an inspection regime, starting by selecting the jobs in each Area which the QA team will inspect.

Individual inspectors can start the QA process on their designated jobs and then assess each line in the job according to criteria such as **Work to Standard** and **Invoice Accuracy**.   This function can be carried out directly in the Portal or via the Quality Assurance App.

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Surveys

Inspectors can also do a **Customer Survey** and/or a **Health and Safety Survey**. The questions for these surveys are configurable within the Portal.

An optional add-in allows for surveys to be notified direct to tenants via SMS and completed via self-service.

Corrective Action

For jobs which are found in need of corrective action, there is a facility which allows the QA inspector to **Send Letters** to the responsible area manager, stating the issue and required **Corrective Action**. These letters can be emailed automatically from the Portal.

The inspector can then follow up the **Corrective Action Requests**, and re-inspect, making a record of the outcome of the re-inspection and if necessary requesting a second action.

Various reports and enquiry screens are available to help track performance and KPIs:

- **QA Totals** gives an overview by Area and or QA User of the number of lines selected for QA, the number QA completed and the number of H & S checks completed.
- **QA Results** gives overviews by Priority and Trade of the Percentage pass rates etc.
- **HR Analysis** gives a list of the individual Trades' H&S performance.
- **SVR Extract** creates an SVR spreadsheet for sending to Kāinga Ora.

A new optional add-in allows the for the automatic generation of Corrective Action Requests as order. which are dispatched to the contractor via their portal or the app, rather than sending letters.

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Performance Management Functions

The Quality Team and Contract Management Team use these tools to monitor compliance with KPIs.

- The **Performance Report** enables monitoring of Timing KPIs.

- **Invoices with Double Dips** shows invoices with possible duplicate job codes and allows drill down into the individual invoice job details.
- **Double Charges** shows invoices with duplicate job codes at the same property.
- **Job Code Quality Report** shows jobs by Job Code allowing investigation of issues relating to a Job Code.

Management Functions

The system provides a variety of management and budgeting reporting functions:

- Management Dashboard
- Sales Report
- Performance Report
- Planned Forecast
- Scope Figures
- Planned Budget

Accounting Functions

The system provides basic AR functions such as **Sales Report**, **Debtor Summary** and **Remittance Enquiry**. Please discuss with us your needs with respect to extraction of this data into your accounting software.

Admin Functions

The system provides numerous forms for maintaining master data such as Job Codes, Job Types, Areas, Public Holiday Dates, Double Dip Codes, Scopers for Auto-Dispatch etc.

About DBS

DBS is a software development and systems integration consultancy based in Auckland, NZ. We're approaching our 20th year in business and we have a successful track record of building integrated systems that really work for a number of iconic NZ businesses.

DBS PBMC Contract Management System

We have been providing specialised software and services to Kāinga Ora maintenance contractors since 2003. We re-engineered our software in 2014 to meet the requirements of the new Kāinga Ora PBMC specifications and added Mobile Apps to our Portal in 2015.

Outside NZ we have customers in South Africa, USA, South Korea and the UK, mainly in the Engineering and Construction sectors where we specialise in interfacing project scheduling software with the Plant Maintenance and Project Management modules of SAP.

The Future

We aim to be the software provider of choice for Kāinga Ora Maintenance Contractors. We are continually enhancing continue enhancing the software, with input from our expanding customer base. We will be upgrading the Kāinga Ora Interface as soon as possible to integrate with the 2020 PBMC Contractor Interface Specifications.

About The Portal

Our Portal software is the backbone of many different software systems that we have built.

We never like to build the same function twice, so we insist on building modular, scalable software which can be adapted and used in different scenarios. Key functions like Security and Access, the CRM Database, the B2B Message Processing Engine are used across a number of different client's systems and have been hardened through years of use in real life. The benefit for you is that nearly everything we will provide you has been tried and proven over multiple installations.

Since no two customers are identical, our Portal is also very flexible, allowing us to quickly respond to changes and additions required by each customer.

Illustrating the diversity of our client base, here are some of our better known clients in NZ, all of whom use our Portal, albeit in very different industries and applications.

- **Air New Zealand Engineering Services** (Engineering Customer Portal interfacing with SAP)
- **Navman Wireless NZ** (Engineering Change Management interfacing with ERP)
- **Realestate.co.nz LTD** (Property Advertising Content Management)
- **Prestige LTD** (PBMC Maintenance Contract Management)
- **Spencer Henshaw LTD** (PBMC Maintenance Contract Management)

Some of the above clients have been with DBS for over a decade. Underlying this is an attitude to service that places the customer first and a willingness to respond quickly and **effectively** to support requests.

System Requirements and Installation Options

The DBS Portal can be installed on any recent Windows operating system. It requires Microsoft SQL Server 2014 or later, IIS and a Java Server. DBS can supply and install this software if required. Preferably the software should be installed on dedicated private servers: one server for the application and one for the database. This may be hosted on-site or off-site.

For all clients we insist that you maintain a test instance of the software, where changes and updates can be reviewed, and for training.

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End users can access the system through any standards-compliant browser, such as Chrome, Firefox or Internet Explorer. Mobile users must have an Android device, with a reasonably recent OS version.

Installation and initial configuration of the Portal must be carried out by DBS, in consultation with your IT people.

Please discuss with us your needs in terms of installation, cutover from previous systems, training, support, interfaces and enhancements.

Contact Us

For further information please contact:

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