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PAPERLESS INSPECTION SOLUTIONS

Making your business go modern

June Whitepaper

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INTRODUCTION

The contemporary workplace is full of technology and advanced machinery. But having an inefficient and ineffective management system in place can limit your business; however cutting-edge your facility or assets may be. The top organisations are therefore choosing to implement paperless inspection solutions within the workplace. Mobile devices, running with inspection applications, are transforming management, compliance; reducing costs, improving efficiency and ensuring effective supervision of company facilities and assets.

Merging the common mobile device with paperless applications is a direct way to improving business performance. It is important that organisations understand their own requirements that need to be met, in order to select the right solution. Choosing the right inspection application likewise highlights the need to choose the right mobile device for the task, be that smartphone or tablet, iOS or Android etc. Chief amongst the criteria should be the ability to customise an inspection solution to your organisation's unique requirements. This could be meeting industry standards, the ability to access data offline or the opportunity to provide instant quality reporting to management and other stakeholders.

By automating your systems you are removing the guess work, simplifying processes, all whilst ensuring compliance when and where required. This white paper will take you through the process of understanding how the technology of paperless inspection applications benefits the user, and those around them.

Topics covered include:

- ! Benefits of Paperless Inspection Applications
- ! Understanding modern business priorities and needs
- ! How to choose the right software application for your needs
- ! How to choose the right mobile device for your application

Offering many benefits to everyone involved – from the customer to your back office, your technicians/inspectors/field service personnel and other stakeholders – automation will allow for immediate, timely and accurate results.

BENEFITS OF PAPERLESS INSPECTION APPLICATIONS

Introducing a paperless inspection application can offer your business a range of benefits such as increased business productivity and employee productivity, through to a decrease in response time.

Among the key benefits of paperless inspection applications is their ability to automate inspections and provide accurate data, reports and trends. Automation simplifies processes, streamlines tasks and ensures compliance throughout an organisation. By implementing an automated mobile strategy and solution, businesses have seen increases in core areas of productivity, employee and customer satisfaction and wider cost reductions.

The partnership between automation, paperless inspection applications and powerful databases, offers outstanding opportunities for businesses development; not just immediately, but also long-term. Examples include:

Minimising risk:

- ! Removal of manual data entry to minimise potential human errors and time delays
- ! Process visibility will diminish opportunities for errors, no matter the scale
- ! Prioritise corrective actions by risk level
- ! Keep data safe and accessible with cloud or in-house storage
- ! Understanding functions delivering real value and those that require improvement. By creating an actionable list from this information, potential issues can be solved before they arise

Ensuring compliance:

- ! Ensure compliance with industry standards
- ! Clear audit trail
- ! Guarantee procedures and policies are followed
- ! Simplified compliance activities

Easier Database Access:

- ! Store and access information electronically from a central cloud or in-house server
- ! Allow for quick implementation and instant 24/7 access to data no matter your location
- ! Increased knowledge for inspectors through access to historical records, reference material, other factual data ensuring more efficient and timely operation
- ! Greater direct access via back-end database entry, giving technicians and inspectors greater flexibility
- ! Business Intelligence and other organisational systems can be interfaced with the inspection database, allowing trending, in-depth analysis and dynamic reporting.

Process Management and Improvement:

- ! Elimination of manual data entry will free up resources, time and save money
- ! Increased visibility of processes that may not be linked to wider areas of the business. In turn, this allows for better work flow, reduced downtime as well as the ability to mitigate potential risks to the organisation
- ! Prioritise actions in accordance with business needs, technician/inspector availability or other business requirements
- ! Technicians/inspectors and office staff use the same application to maintain data integrity
- ! Standardise processes, documentation, forms to ensure the information collected provides the required level of detail
- ! Control and implement processes as required to take the company into the future
- ! Tasks prioritised dependent on location, urgency, legal requirements and Service Level Agreement (SLA)
- ! Visibility and transparency throughout process
- ! Automate workflow management ensuring all stakeholders' expectations are met and/or exceeded

Prompt Action:

- ! Ability to make immediate and informed decisions
- ! See where inspectors or technicians are to ensure prompt customer service and rescheduling when required
- ! Technicians and inspectors have access to historical records to ensure the right solution can be implemented immediately and with minimal hassle
- ! Tasks can be completed on the spot
- ! Dynamic data collection resulting in opportunities for change in real-time
- ! Instant, accurate information at the touch of a button
- ! Prompt response time – customers and other stakeholders now expect to be kept informed and provided with prompt and accurate advice and solutions. Those unable to offer this will simply be left behind
- ! Automatic corrective actions can be actioned in real time

- ! Making faster, better educated decisions
- ! Progress tracking

Performance and Delivery:

- ! Deliver optimal service while complying with industry standards, relevant procedures and policies
- ! Make instantaneous decisions based on comprehensive and real-time data
- ! Optimise employee schedules based on locations, skill sets and SLAs
- ! Tasks can be completed on the spot, resulting in less repeat calls
- ! Real-time results data for increased visibility and forward planning
- ! Constant measurement of performance and processes promoting continual improvement
- ! Increased business intelligence – Data can be easily extracted and presented in a meaningful way

UNDERSTANDING MODERN BUSINESS PRIORITIES AND NEEDS

Before you begin to delve into the several paperless inspection applications, it is important to understand where your business is positioned. It is likewise important to consider how and where you envisage your business developing and growing in the future. This is a process that is crucial in assisting you in choosing the optimal product or service for your organisation.

Obtaining feedback from all staff that may use the software will ensure you hold a complete picture before shortlisting features you would like to see. Features required will differ between departments, as will the importance of each feature to the department's day-to-day activities and Key Performance Indicators (KPI's).

Before shortlisting the key features you think you require, try to map out your complete business process from start to finish, including in-field processes and reporting requirements. You may wish to consider some of the following points:

- ! Who will use this software, where and how will they use it?(e.g. office, in the field, client site, remote location)
- ! How important are offline capabilities?
- ! What platform and devices will the software run on?
- ! What are your top three priorities for software functionality?
- ! How will you measure Return on Investment (ROI)?
- ! Where is your revenue coming from today?
- ! What will be the cost and time saving?
- ! What areas would you like to improve? Why?
- ! Is there any other software that you will need to integrate? (e.g. ERP, asset management, OHS, payroll)
- ! How would you prefer the data to be stored? (e.g. in-house, Cloud)
- ! What other applications are currently in place?
- ! How important is data security, transparency and reporting?
- ! What are your *must have* and *nice to have* features?

CHOOSING THE RIGHT SOFTWARE APPLICATION FOR YOUR NEEDS

By understanding what your organisation sees as a business priority or need, it will be easier to select the right software solution for your business. In choosing the right paperless inspection application, you should narrow down the key functionalities you require from your software and provider. Make sure to consider prerequisite information such as safety forms, hazard reports, site plans, manuals, standards, technical drawings and job history. Also important to keep in mind is how your employees capture the data currently and what the preferred method would be. Things to consider might include:

Software:

- ! On and offline access
- ! Customisable functions (e.g. checklists)
- ! Cross platform solution (e.g. Android/iOS)
- ! Cloud/In-house server based
- ! Flexibility
- ! Painless integration with existing corporate applications
- ! Easy to navigate
- ! User friendly
- ! Assign inspections based on work flow
- ! Access to job information
- ! Data capturing methods
- ! Corrective actions
- ! Scheduling
- ! Speech to text capabilities
- ! Reporting capabilities
- ! Unlimited forms and transactions
- ! Ability to take and edit photos
- ! Storage of multiple process documents, manuals drawings and standards
- ! Business Intelligence

Software Vendor/Provider:

- ! Flexibility
- ! Prompt integration
- ! Comprehensive training
- ! Ongoing support
- ! Support across multiple platforms and devices
- ! Regular software updates to stay ahead of the game
- ! Take time to understand business needs
- ! Local presence
- ! Proven Experience

The final step of the process will include drawing up some questions you would like to ask the software providers. Understanding their experience in the field, their product specifications and how the product will fit are crucial for your success. Many organisations will offer a complimentary demonstration of their product or even a proof of concept trial; this is a great way to gain a better understanding of features and benefits that may assist and grow your company toward a very successful future.

CHOOSING THE RIGHT MOBILE DEVICE FOR YOUR APPLICATION

Choosing the correct hardware for your inspection software is vital in order to perform rigorous and effective inspections. As the software is adjusted to match the requirements of the business, consideration of the mobile device must be given in order to complement the inspection software and allow inspectors to optimise their time spent performing inspections.

Organisations should understand and consider the ramifications of their choice of mobile device. Cost analysis is a useful tool to analyse whether a mobile device will benefit a business and allow comparisons to alternatives. When deciding which mobile device will be most appropriate for your business however, there are a whole host of factors that need to be considered:

- ! **Consumer vs. Enterprise** – If the device needs to be made for industrial use
- ! **Rugged vs. Non-Rugged** – If hardware is suitable for use in a range of environments
 - **Cost Saving**
 - **Access to Harsh Environments**
 - **Productivity**
- ! **Company Policies** – Preference and previous experience in similar hardware
- ! **Standard Features** – What specifications for the device are necessary
 - **Screen Size**
 - **Industry Grade Wi-Fi**
 - **Ease of Use**
 - **Accessories**
 - **Life Span**
 - **Touch Screen**
 - **Speech-to-Text**
 - **Camera Ability**
 - **Mobile Device Size**
 - **Storage**
 - **RFID and Barcodes**

Consumer vs. Enterprise:

There are numerous reasons for your business to consider opting for a commercial/enterprise grade device. Durability, security, maintenance support and hardware features all benefit a business through time and cost savings.

Choosing the right device can mean:

- ! Increased IT time securing data on employee devices
- ! Reduced time training staff individually to suit their mobile software
- ! Consumer devices are often fragile and have a short product life cycle

Consumer mobile devices often provided businesses with a cost effective solution to complete inspections. These devices are often available at local retail outlets or through mobile carriers on a monthly plan. For many businesses, commercial/enterprise grade mobile devices are needed to effectively conduct inspections through the specific features that consumer goods aren't equipped with, such as:

- ! NFC (Near Field Communication) and RFID (Radio Frequency Identification)
- ! Extended battery life and ability to swap batteries
- ! Intrinsically Safe certifications (Zone 1 or Zone 2)
- ! Durability; i.e. IP (Ingress Protection) Sealing and shock resistance
- ! Ability to include accessories such as car mounts, lanyards, holsters
- ! Dedicated Bar Code Scanning; using a dedicated barcode scanner as opposed to the camera
- ! Service agreement and extended warranty

Rugged vs. Non-Rugged:

Inspections are often performed in the field and exposed to numerous elements which may damage or break the device. Consumer devices that are less robust such as smartphones and tablets are simply not made for harsh environments. Industrial grade mobile devices give inspectors a more durable option, and rugged cases can provide a further protection layer.

Inspectors opting for a rugged device can achieve:

- ! **Cost Saving:** A protected device simply last longer due to superior build quality and likely higher specifications.
- ! **Access to Harsh Environments:** Rugged devices provide employees the ability to use hardware in certain environments, such as extreme temperature or humidity areas.
- ! **Increased Productivity:** Equipping employees with durable hardware allows them to focus on the tasks and inspections at hand.

Company Policy:

Companies often have a culture and preference for operating systems and sometimes opt to use a certain brand and/or operating system to better sync the companies and employees workflows and operations. When a new mobile device is introduced into the company, time must be invested in training employees on how to use the device and recommended workflows. It must be acknowledged that employees may have existing experience and knowledge of certain hardware which allows the employee to begin inspections in the field earlier.

Standard Features:

Mobile devices differentiate with specifications and capabilities. Inspectors must consider what is needed for an effective inspection and consider how different features can optimise an inspection.

Device factors that should be reviewed are:

- ! **Screen Size:** How big the screen needs to be to best host the software and operate
- ! **Industry Grade Wi-Fi:** If the device is needed to connect to the internet constantly.
- ! **Ease of Use:** The ability for employees to learn and navigate the different functions of the hardware most effectively.
- ! **Accessories:** If the hardware has the ability to include additional features and be adjusted for a specific reason.
- ! **Life Span:** Roughly how long the device is expected to be in use before upgrades
- ! **Touch Screen:** Ability to draw and make notes on the screen (e.g. using gloves, or in harsh conditions)
- ! **Speech-to-Text:** Ability to create and store notes verbally
- ! **Camera Ability:** Zoom and high resolution imagery
- ! **Mobile Device Size:** The convenience and mobility working with the device; what is the best device size for the task
- ! **Storage:** Ability to store large files and databanks.
- ! **RFID and Barcodes:** Ability to read RFID and/or barcodes.

SUMMARY

In attempting to modernise organisational activities, it is vital to understand how changes can affect the way you operate. It fundamentally begins with analysing how you manage and maintain your activities and what your business priorities and needs are. Paperless inspection applications can be a powerful tool when partnered with a mobile device and can have a profound impact on any business. It is important to recognise the day-to-day activities and KPI for different departments. It is only by noting that a variety of features may be needed by different departments, and by obtaining feedback by the people who will be using the solution, that you can be sure that your making the right choice. Once the business requirements have been established, the right paperless inspection application for you can be chosen.

This then gives you the platform to decide which mobile device to partner it with. For many businesses consumer mobile devices may seem like the correct solution due to their accessibility and established awareness of the product, however; these products ultimately provide businesses with a range of obstacles and problems. Businesses must firstly identify the means of use for their inspections, determine clear expectations and consider what factors need to be adhered to. The correct choice of mobile device will ultimately have a huge influence on the productivity of employees; and so it is important that the correct mobile device for your inspection solution is chosen.

In choosing your paperless inspection solution, it's crucial to take several steps before arriving at the selection decision. Investing in any machinery, facility or asset is a long-term investment, and the system that manages and maintains this, is likewise an important investment. Following the steps of defining your business priorities and needs, selecting the right software application and thereafter mobile device, is the easiest way to ensuring the right choice is made. Paperless inspection solutions can help modernise your organisation, but only if you give selection process the time it deserves.

ABOUT PERVIDI

Created by Techs4Biz and launched in 1999, Pervidi was one of the founding solutions for in-field mobile data collection. Pervidi now has more than 10 000 users around the world using the software solution in 7 languages to optimise productivity on a daily basis.

With offices in Australia, Canada and the United States, Pervidi offers clients a customised, reliable and automated solution that saves both time and money. The user-friendly software has been designed to work across multiple devices with maximum flexibility in mind. Pervidi continues to be the most versatile, yet powerful, mobile application on the market.

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