

Worklog Module - Product Outline

There is an increasing need for scheme operators have a robust system in place to monitor the timeliness of their activities. The Worklog Module is a central multi-user database enabling SIPP~Pro and SSAS~Pro users to record, monitor and analyse the types of workflows within their business to ensure that their clients are receiving an appropriate level of service.

The Module allows users to create their own standard library of origins, categories and sub-categories of work via the Preferences section of the system, which then cannot be amended by individual users without the appropriate level of security access. This ensures that consistent standards and descriptions of tasks are used by everyone, although a narrative description can be added to any type of task once created.

Each task type is given an expected duration (how long the task should take to do) and expected deadline (when the task should be completed by). Again, these are controlled in the central library of tasks, ensuring consistency across the business.

Tasks can be entered individually or on a bulk basis. Diary tasks can also be created, with a start date at some point in the future.

All users have access to all the records in the Worklog, meaning if any member of staff is absent for any reason, any other person can easily see what tasks that person has outstanding. Any task can be easily reassigned from one user to another.

A wide range of reports can be generated from the module. The duration and deadline defaults allow a firm to accurately monitor how long each task has taken to complete against the expected default and whether it was completed ahead or behind the expected deadline. This in turn allows significant management information (MI) to be derived in relation to whether tasks are being performed within agreed timescales, and if not, by how much they are failing to meet such timescales.