

# Trackplan Resource App Introduction

The Trackplan apps use PWA technology, which allows you to save a web application directly to the home screen of your mobile device, and use like any other app.

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When you have successfully saved the Trackplan Resource / Contractor app to your device, you are free to sign in using your resource user login information:



Email

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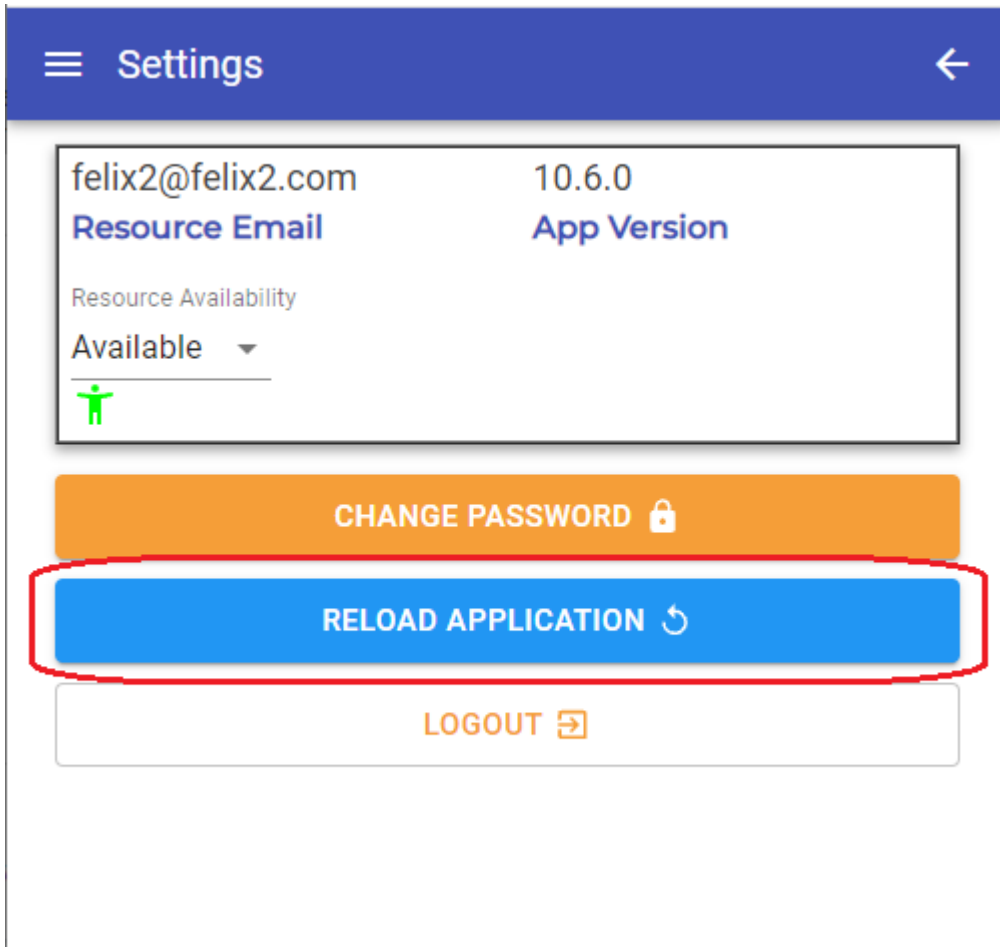
Password

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**LOGIN**

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When you first open the app, you may have to sync to the main application. To do this, first ensure you have an internet connection, go to Settings and click Reload Application:



If you do not have access to an internet connection, the app will sync once you re-connect at a later time. Syncing the Resource app to the main application will make sure all jobs and other information will be up to date.

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The main home screen of the Resource app will display the Job Task List. This list will show all jobs / job tasks that have been assigned to the user login information used to sign in:

2315-005

Completed

**Details:** Job Task 2  
**Site:** Building No 1 r4  
**Location:** Floor 1  
**Sub-Location:** Kitchen  
**Address:** O'Connell Ave, Limerick, N 8, Limerick, Limerick, B90 8AG  
**Contact:** Declan Murphy  
**Expected:** Feb 11, 2020 3:00 PM

2315-004

Completed

**Details:** Job Task 1  
**Site:** Building No 1 r4  
**Location:** Floor 1  
**Sub-Location:** Kitchen  
**Address:** O'Connell Ave, Limerick, N 8, Limerick, Limerick, B90 8AG  
**Contact:** Declan Murphy  
**Expected:** Feb 11, 2020 3:00 PM

2315-006

Completed

**Details:** Job Task 3  
**Site:** Building No 1 r4  
**Location:** Floor 1  
**Sub-Location:** Kitchen  
**Address:** O'Connell Ave, Limerick, N 8, Limerick, Limerick, B90 8AG  
**Contact:** Declan Murphy




Selecting any job on the list will open the **Job Task Details** page which display all relevant information for that job / job task:



Job Task No.  
732-002



Apartment 21 ap21   
**Site**

Instructed  
**Status**

**Location**

**Sub Location**

Carpentry  
**Job Type**

**Job Subtype**

Sep 22, 2021 4:01 PM  
**Expected Start**

Sep 22, 2021 6:01 PM  
**Expected Complete**

Normal  
**Priority**


Resource Compliance Job TEST  
**Description**

''

**Address** 

**Contact**

**Telephone**

 ACCEPT



Job Task No.  
732-002



Job Task Forms

ADD FORM

| Name           | Status  |  |
|----------------|---------|--|
| Meter Readings | Pending |  |

ADD PHOTO

No Photos Taken From App

Photos Sent To App



ADD DOCUMENT

No job task documents

ATTACH STOCK

**+** SELECT ASSET

No Assets Attached

**+** CREATE EXPENSE

No expenses

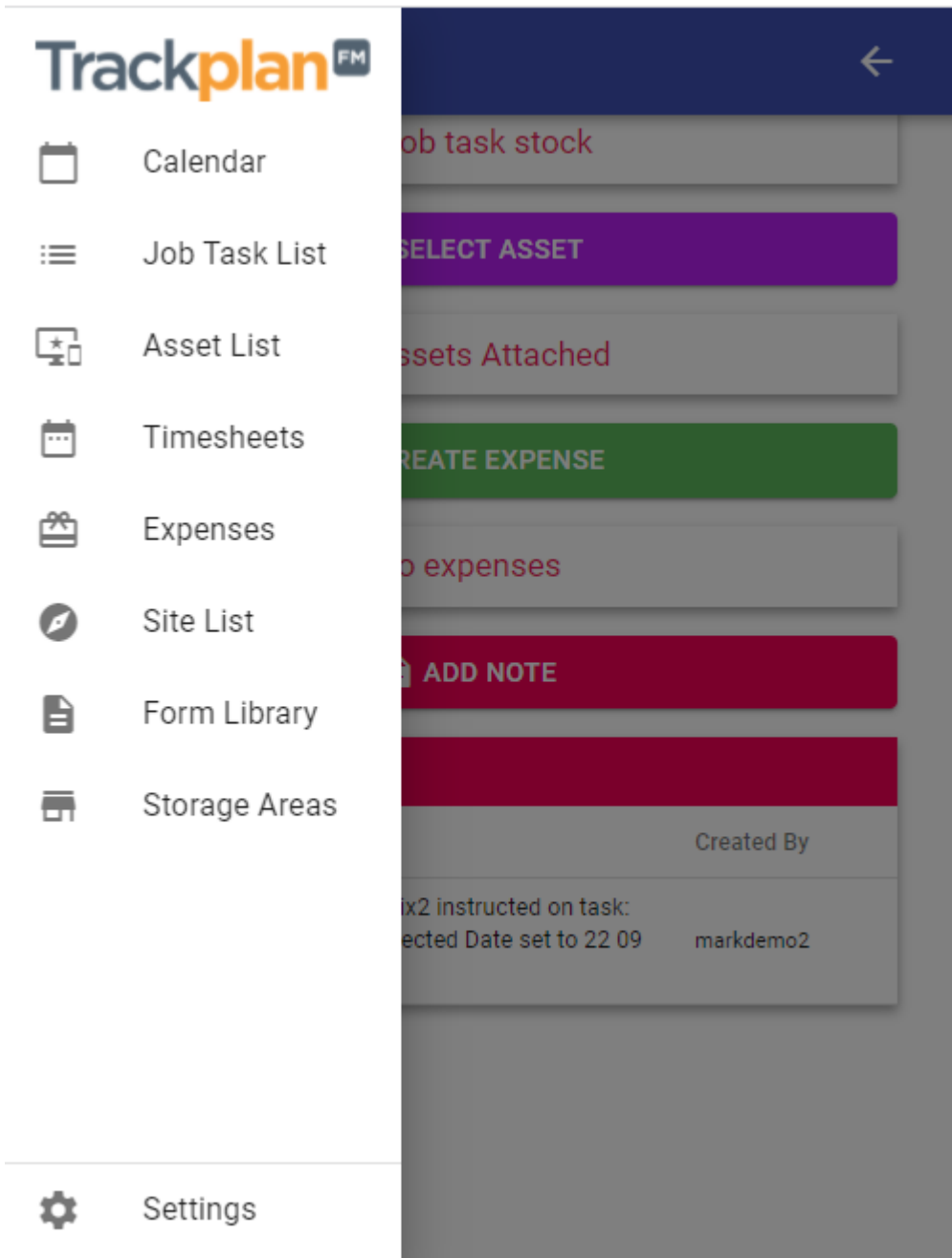
**+** ADD NOTE

**Job Task Notes**

| Date Added              | Note   | Created By |
|-------------------------|--|------------|
| 4:03 PM<br>Sep 21, 2021 | Resource Felix2 instructed on task:<br>732-002. Expected Date set to 22 09<br>2021 16:01 | markdemo2  |

This icon will open the sidebar menu:

 Job Task List  



From here you can see all available features and options from within the Resource app;


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The + icon on the Jobs List view will allow you to create a new job from within the app. You will be taken to the *New Job* page where you will be asked to fill out the new job form:

☰ New Job ←

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New Issue Details

**Site** 

Select... | ▾

**Location**

Select... | ▾

**Sub Location**

Select... | ▾



Select Job Type ▾

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No Job SubTypes ▾

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**Self Deliver Job Task**

 ADD PHOTO  SUBMIT

You are required to fill in the “New Issue Details” and “Site” information, you can then give more information if needed such as the location / sub-location within a site, and job type / sub-type. You can also add photos to this job, if needed to give more information about the job itself. Photos can be uploaded from the device, or taken through the camera feature in-app.


Before you submit the job, you have the option to “Self Deliver”, which means this new job will automatically be associated with you, and you can get on with completing the task immediately after creating. When you are ready,



select *Submit*:

**New Job**

New Issue Details

**Site** 

Select... | v

**Location**

Select... | v


**Sub Location**


Select... | v

Select Job Type | v

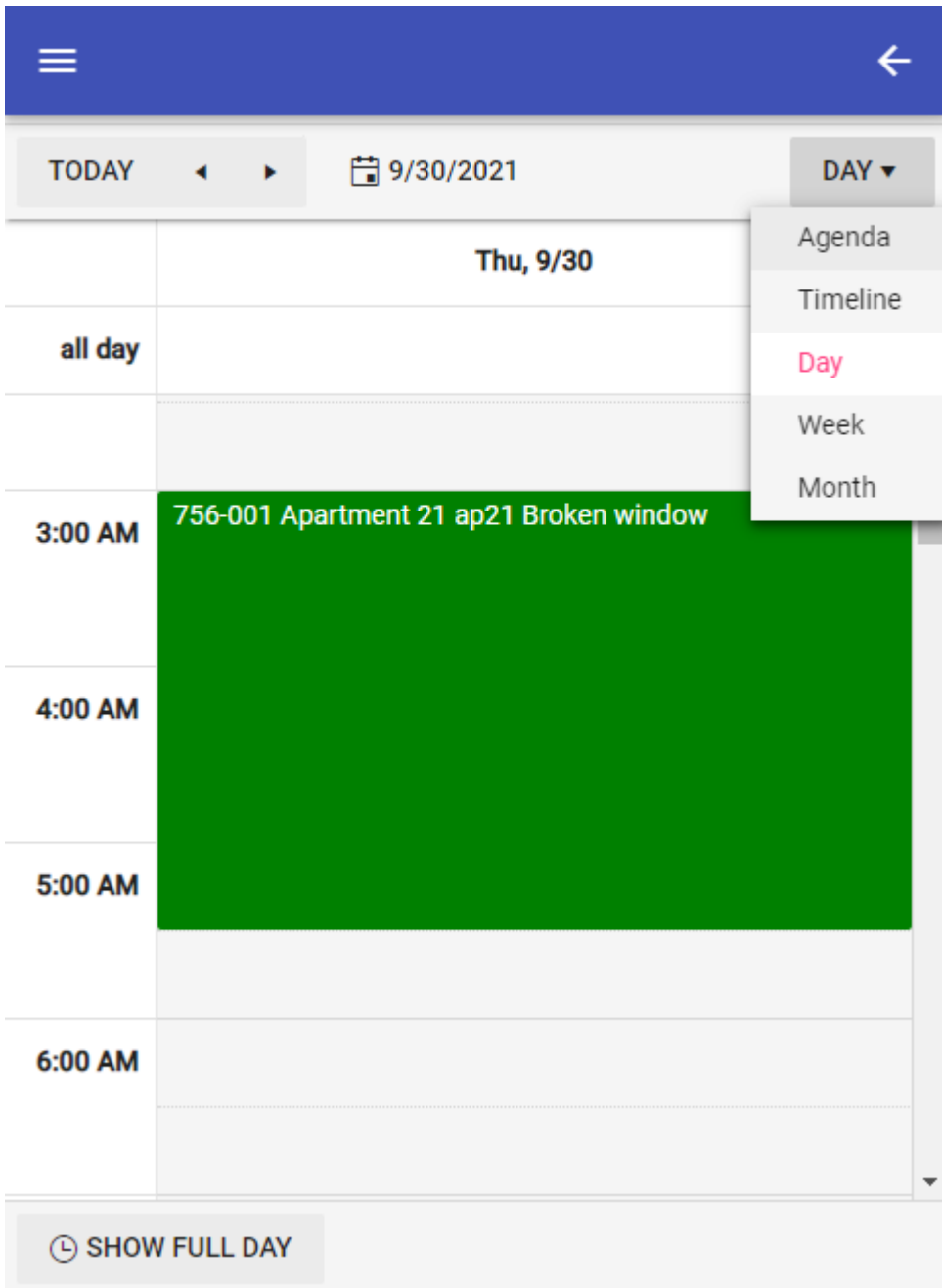
No Job SubTypes | v

**Self Deliver Job Task**

 ADD PHOTO

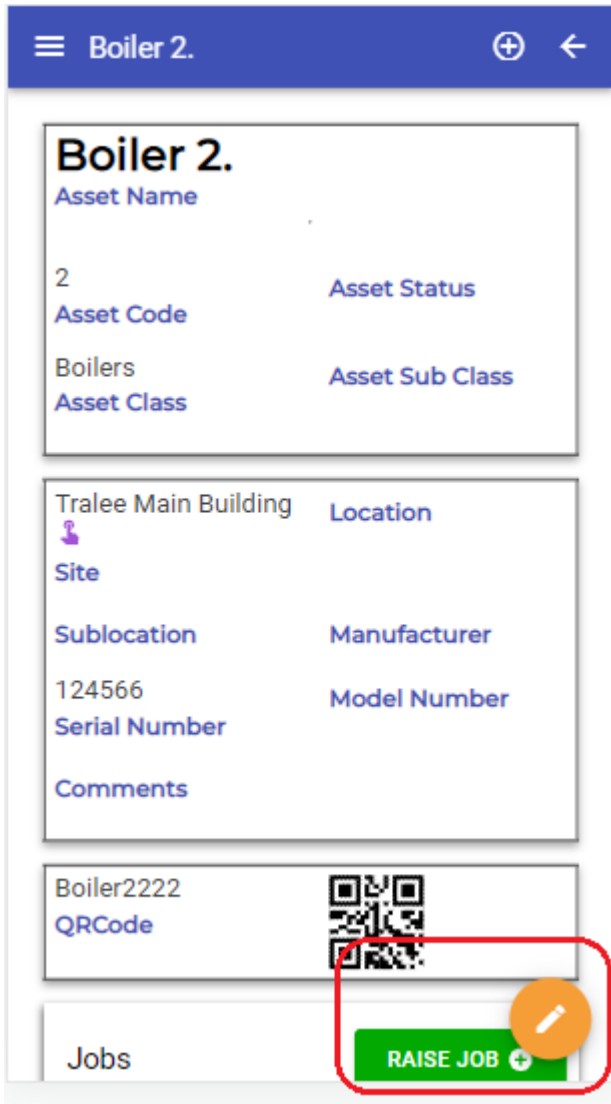
 **SUBMIT**

The **Calendar** can be view by day, week, month, agenda or timeline.



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The **Assets List** provides a list of all the assets. You can create a new asset by clicking on the + icon in the top right of the screen. Clicking on any asset will bring you to the Asset Details page where you can view all information about that asset, edit the details, generate a QR code for that asset or Raise a new Job against that asset.



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**Timesheets** will open the timesheets page. From here you can view all timesheets that have been logged, and their status i.e. "Pending", "Submitted", "Approved".





☰ Timesheets ←

|                  |                              |                            |         |
|------------------|------------------------------|----------------------------|---------|
| Pending Status   | Mar 9, 2020<br>Start Period  | Mar 15, 2020<br>End Period | Current |
| Pending Status   | Mar 2, 2020<br>Start Period  | Mar 8, 2020<br>End Period  |         |
| Pending Status   | Feb 24, 2020<br>Start Period | Mar 1, 2020<br>End Period  |         |
| Submitted Status | Feb 17, 2020<br>Start Period | Feb 23, 2020<br>End Period |         |
| Pending Status   | Feb 10, 2020<br>Start Period | Feb 16, 2020<br>End Period |         |
| Pending Status   | Feb 3, 2020<br>Start Period  | Feb 9, 2020<br>End Period  |         |
| Pending Status   | Jan 27, 2020<br>Start Period | Feb 2, 2020<br>End Period  |         |

Each timesheet will have information about jobs and tasks that have been carried out, specifically the hours logged for each job task. When a time sheet has been submitted it will appear on the list as status of "Submitted", each timesheet can be viewed by simply selecting it:

| Submitted Status | Feb 17, 2020<br>Start Period | Feb 23, 2020<br>End Period |           |             |
|------------------|------------------------------|----------------------------|-----------|-------------|
| Task Number      | Travel Start                 | Start Task                 | Left Task | Arrive Home |
| Castle View cc8  | 10:15 AM<br>Feb 19, 2020     | 2:15 PM<br>Feb 20, 2020    |           |             |

If a timesheet has a status of "Pending", it has not yet been submitted, and if selected, will appear with these icons next to each task logged. This icon allows you to edit the times for each task:

| Pending Status  |  | Mar 9, 2020<br>Start Period            |  | Mar 15, 2020<br>End Period             |  |
|---|--|--|--|--|--|
|  | <b>2315-006</b><br><i>Building No 1 r4</i> | <b>10:18 AM</b><br><i>Mar 11, 2020</i> | <b>10:18 AM</b><br><i>Mar 11, 2020</i> | <b>10:20 AM</b><br><i>Mar 11, 2020</i> | <b>10:21 AM</b><br><i>Mar 11, 2020</i> |
|  | <b>2335-001</b><br><i>Building No 1 r4</i> | <b>10:14 AM</b><br><i>Mar 11, 2020</i> | <b>10:14 AM</b><br><i>Mar 11, 2020</i> | <b>10:14 AM</b><br><i>Mar 11, 2020</i> |  |
|  | <b>2315-005</b><br><i>Building No 1 r4</i> | <b>10:14 AM</b><br><i>Mar 11, 2020</i> | <b>10:14 AM</b><br><i>Mar 11, 2020</i> | <b>10:14 AM</b><br><i>Mar 11, 2020</i> |  |
|  | <b>917-001</b><br><i>Head Office r1</i>    | <b>10:01 AM</b><br><i>Mar 11, 2020</i> | <b>10:01 AM</b><br><i>Mar 11, 2020</i> | <b>10:02 AM</b><br><i>Mar 11, 2020</i> | <b>10:02 AM</b><br><i>Mar 11, 2020</i> |

 **SUBMIT TIMESHEET**

Selecting the pencil icon will bring you to the *Edit Time Records* view, where you can change the times if needed, and provide a reason for the edit:

### Edit Time Records

Travel Start

Arrive On Task

Left Task

Arrive Home

Reason for Edit

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**Expenses** will open the expenses view, where you can view and manage all expenses that have been created. Expenses will

appear in the list with the status of either "Pending" or "Submitted":

The screenshot shows a mobile application interface for managing expenses. At the top is a blue header bar with a menu icon on the left, the word "Expenses" in the center, and a back arrow on the right. Below the header is a green button with a white plus sign and the text "+ CREATE EXPENSE". The main content area displays a list of three expense items, each enclosed in a white box with a thin grey border. Each item has a title, a description, and a table of details.

| New Expense 3 |         |         |            |
|---------------|---------|---------|------------|
| Description   |         |         |            |
| Mar 11, 2020  | Pending | 150     | 2250.00    |
| Date Created  | Status  | # Units | Total Cost |

| New Expense 2 |         |         |            |
|---------------|---------|---------|------------|
| Description   |         |         |            |
| Mar 11, 2020  | Pending | 200     | 5000.00    |
| Date Created  | Status  | # Units | Total Cost |


  

| New Expense  |         |         |            |
|--------------|---------|---------|------------|
| Description  |         |         |            |
| Mar 11, 2020 | Pending | 100     | 2000.00    |
| Date Created | Status  | # Units | Total Cost |

Each expense item in the list can be viewed by selecting one from the list. This will show all the information for this expense, you will have the option to add a document, and you can also edit or submit a "Pending" expense:

|                            |                                       |
|----------------------------|---------------------------------------|
| New Expense<br>Description |                                       |
| Pending<br>Status          | Mar 11, 2020 10:07 AM<br>Date Created |
| 20.00<br>Unit Price        | 100<br>Units                          |
| Supplier Name<br>Supplier  | 2000.00<br>Total Cost                 |

No job task documents.

 ADD DOCUMENT

 SUBMIT EXPENSE

 EDIT EXPENSE


From the main expenses list, there is an option to *Create Expense*:

+ CREATE EXPENSE

This will take you to the *Create Expense* page where you can populate the form with the relevant information:

## Create Expense

|               |
|---------------|
| Description   |
| Supplier      |
| Quantity<br>0 |
| Price<br>0    |

 ADD DOCUMENT

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The **Site List** provide a list of all sites. Clicking on any site will take you to the Site details page where you can view all information about that Site, view Locations within that site, view all Job Tasks associated to that site or Raise a Job against that site, view and create an asset for that site.



# Apartment 21

Site Name

ap21

Site Code

Normal site

Site Type

Main Contact

Telephone Number

Address

Generic Region

Region

Tralee

Contract

Town

ap21

QRCode



VIEW LOCATIONS 🏠

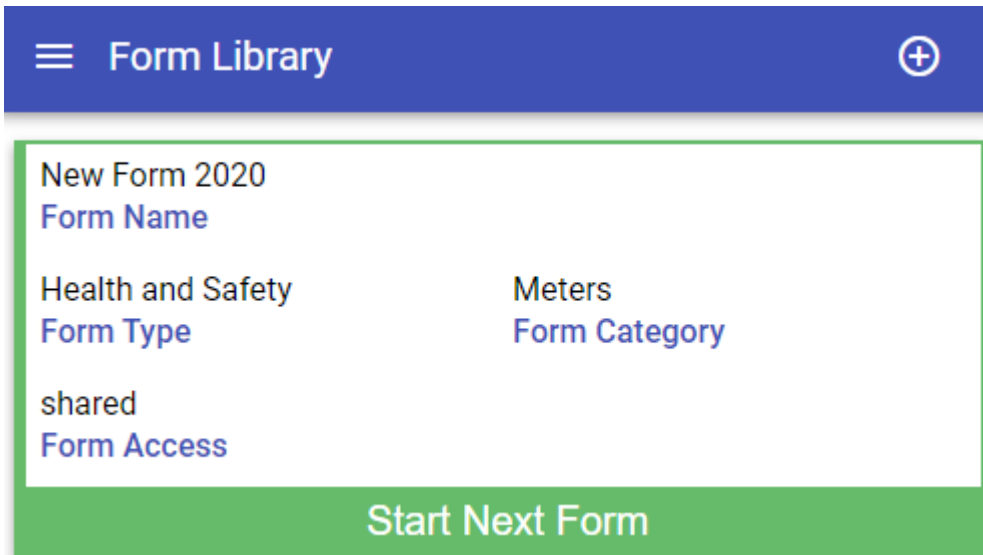
VIEW JOBS 🔧

RAISE JOB +

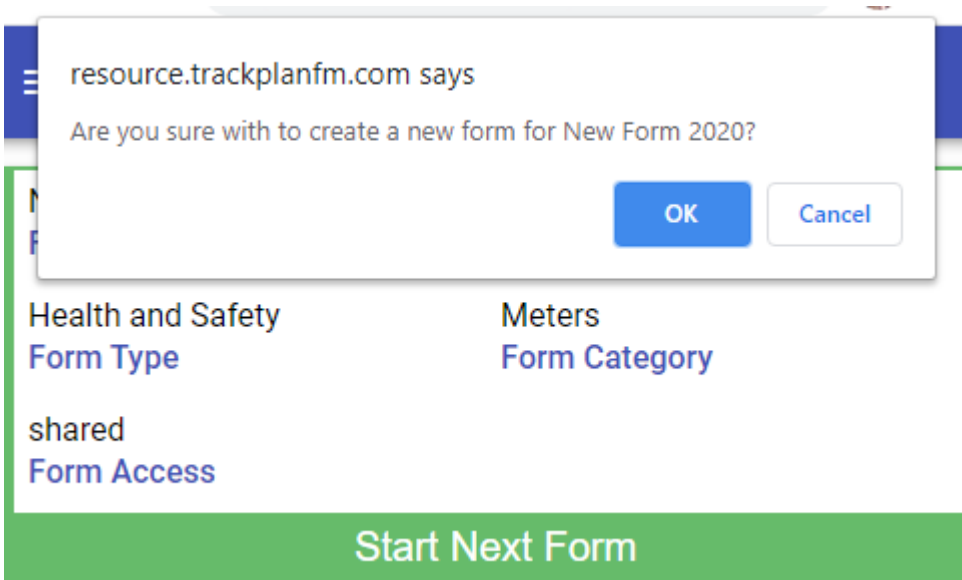
VIEW ASSETS 📄

CREATE ASSET +

**Form Library** will show the forms from the Form Library that are visible to the user you are logged in as:



Select *Start New Form* to fill out the relevant form you wish to use. A pop-up will appear asking you to confirm that you would like to start a new form:



Click *OK* and another pop-up will ask you to fill out the date, site, location, sub location or asset.

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Current Form Date

02/08/2022



Site

Select...



Location

Select...



Sublocation

Select...



Asset Name

Select...



 BACK

 CREATE FORM

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Now Select *Create Form* and you will be taken to a blank template for you to fill out. Once the form is completed, select *Submit*:

|                                   |                                      |
|-----------------------------------|--------------------------------------|
| New Form 2020<br>Form Name        | 2020-03-11<br>Form Date              |
| fred2@fred2.com<br>Last Update By | 2020-03-11 10:09<br>Last Update Date |
| Pending<br>Status                 |                                      |

 SUBMIT

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**Storage Areas** provide a list of all storage areas and Stock & stock quantities within that area. Stock can QR Codes can be generated from the main application and attached to storage area. Stock can be adjusted by clicking on either the Plus or Minus icons.

## Bin 25

Storage Name

bin25

Storage Code

Asset Name

Asset Code

Site Name

Site Code

Location Name

SubLocation Name

Default Stock Line

bin25

QRCode



Stock Name

Stock Quantity

Light Bulbs

6



Widget

5



Resources can also navigate to the Site, Location, Sub Location or Asset Details page to Add and Complete a form. Forms that appear in the 'Add Form' list are determined by a setting in the Form Designer. 'App User Can Add This Form to a Job, Site, Location or Asset' – If this is set to Yes, then an App User will have the ability to add this form to the Job, Site, Location, Sub Location or Asset.

# MH1 - Morriston Hospital

## Site Name

|                     |                         |
|---------------------|-------------------------|
| MH1                 | Retail - IGA            |
| <b>Site Code</b>    | <b>Site Type</b>        |
| bill                | 234234                  |
| <b>Main Contact</b> | <b>Telephone Number</b> |

a1 a2  
**Address**


|               |             |
|---------------|-------------|
| Swansea       | Swansea     |
| <b>Region</b> | <b>Town</b> |

**QRCode**

ADD QR CODE 

## Site Forms

 ADD FORM

| Name             | Form Type  | Status  |  |
|------------------|------------|---------|--|
| Inspection Sheet | Inspection | Pending |  |

If a Form has been designed in the Main application with repeatable sections you will see the 'Add Another' button at the bottom of that section. The Resource will then have the ability to navigate to view all sections and make changed is necessary.

☰ Form Details ←

Yes No N/A

RAISE JOB FROM FAIL

Additional Comments

Image

TAKE PHOTO

Current Entry: 1  
Total Entries: 1

+ ADD ANOTHER

JOB COMPLETION ▾

Navigating to any Site or Asset via the menu button the Resource has the ability to upload photos or documents. These files will then be available in the main application.

Arthur Street  
Region

Town

-  
MxsQrSaufd8DUup1BGd  
QRCode



No Forms

 ADD FORM

No Photos

 ADD PHOTO

No Documents

 ADD DOCUMENT

VIEW LOCATIONS 

VIEW JOBS 

RAISE JOB 