

Trackplan^{FM}

Release 11th May 2023

SUMMARY

Key Features & Improvements:

- Reports – 6 new reports.
- Dashboards - Teams dashboard.
- Dashboards - New component “Open jobs aged profile”
- New look and improvements for Manager App & Contractor Portal.
- Users - Job Type Groups. Restrict Job Types by User.
- Planned Schedules - Set expected start and complete date and job priority for jobs.
- Contractor Portal - Record Visit Details.
- Job & Task custom PDF designer for Job Worksheets and Job Reports.
- Quotes & Tasks - Cancellation quote cancels task and vice versa.
- Sites - Allow Address and GPS Coordinates to be recorded for locations.
- Job Throttling for Advanced allocation of jobs to contractors.
- Users - Delay sending emails to Users.
- Bug fixes and performance improvements in all applications.

Main Application v23.3.0

Manager App v12.0.0

Resource App v12.2.0

Request App v2.3.0

Coming Soon in Future Releases:

- API - **work started**.
- Projects, Client Contracts. We are breaking out the current Contracts area in Finance to satisfy different needs and make clearer. For example, you will be able to enter manage a new refurbishment “project” and enter costs directly against it and send the project for approval. Any many enhancements to Client Contracts - **work started**.
- Merge the Manager App, Resource App and Request App into one app - **work started**.
- Job Alerts – many improvements - **work started**.

- Devices and Meter Readings, with Charts, Thresholds and PPM driven by readings.
- Room and Asset Booking.
- QR Codes for electronic forms.

Work done for this Release.

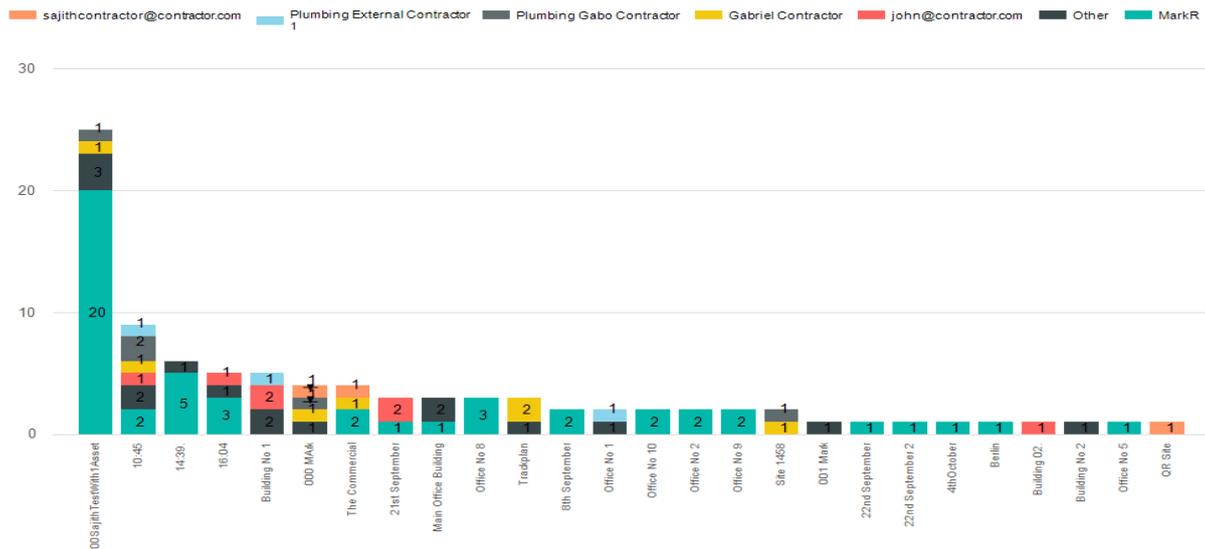
Item 1: 6 new reports.

Why is it useful?

Some fantastic new reports to monitor and keep track for jobs per Resource, site, and job type. See below for examples.

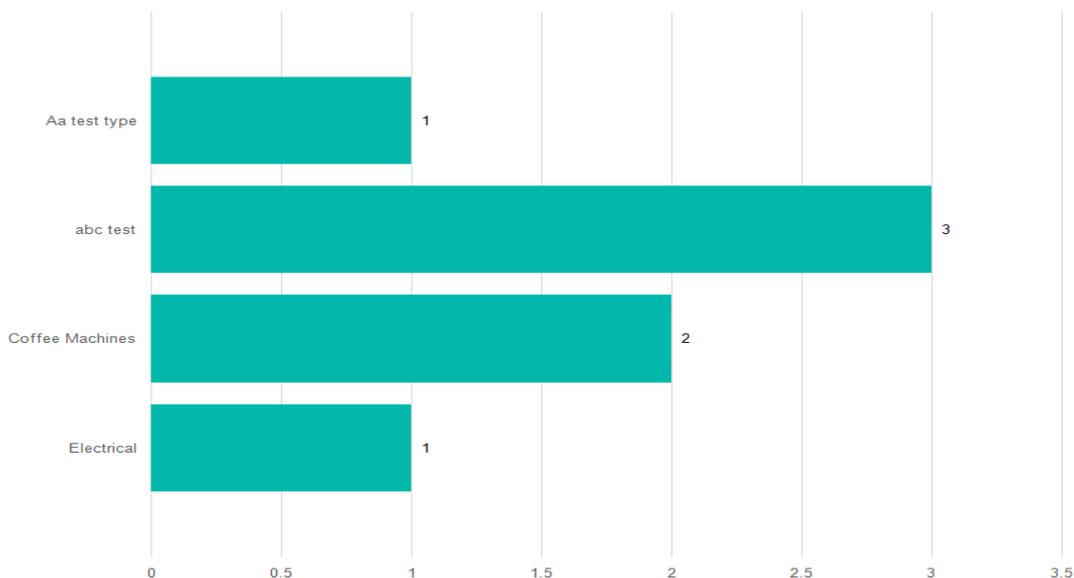
1. Jobs Instructed by Site and Resource

Jobs Instructed by Site and Resource - May 2023



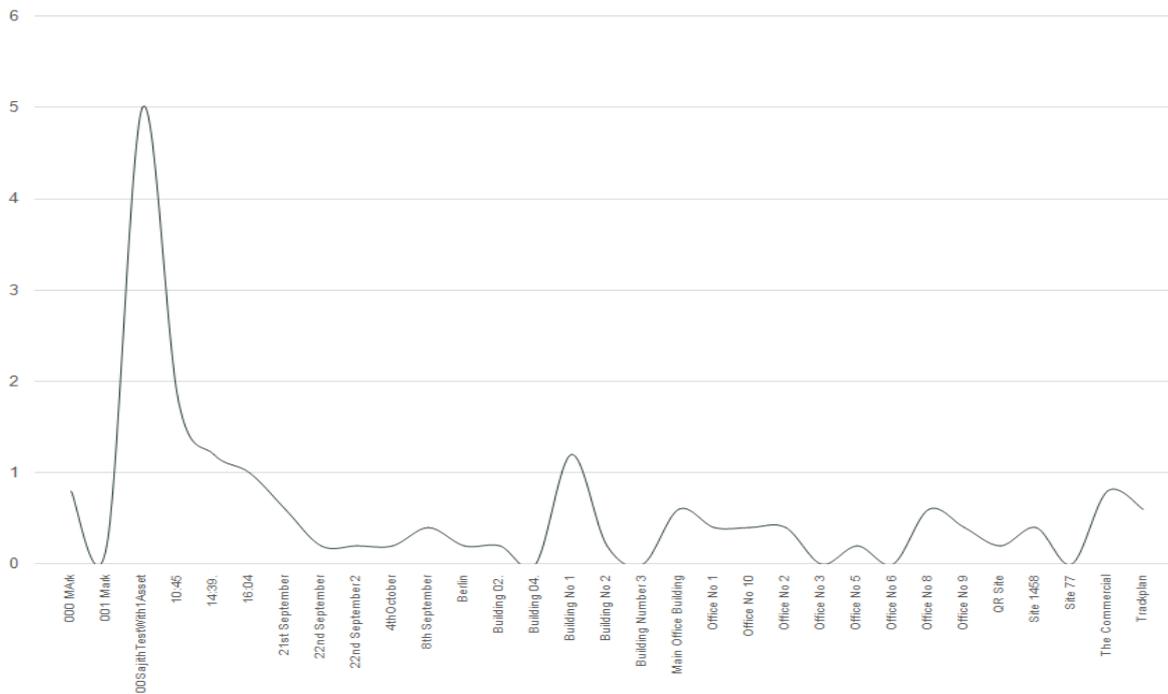
2. Jobs Instructed by Job Type for Resource

Jobs Instructed by Job Type For Resource Gabriel Contractor - May 2023



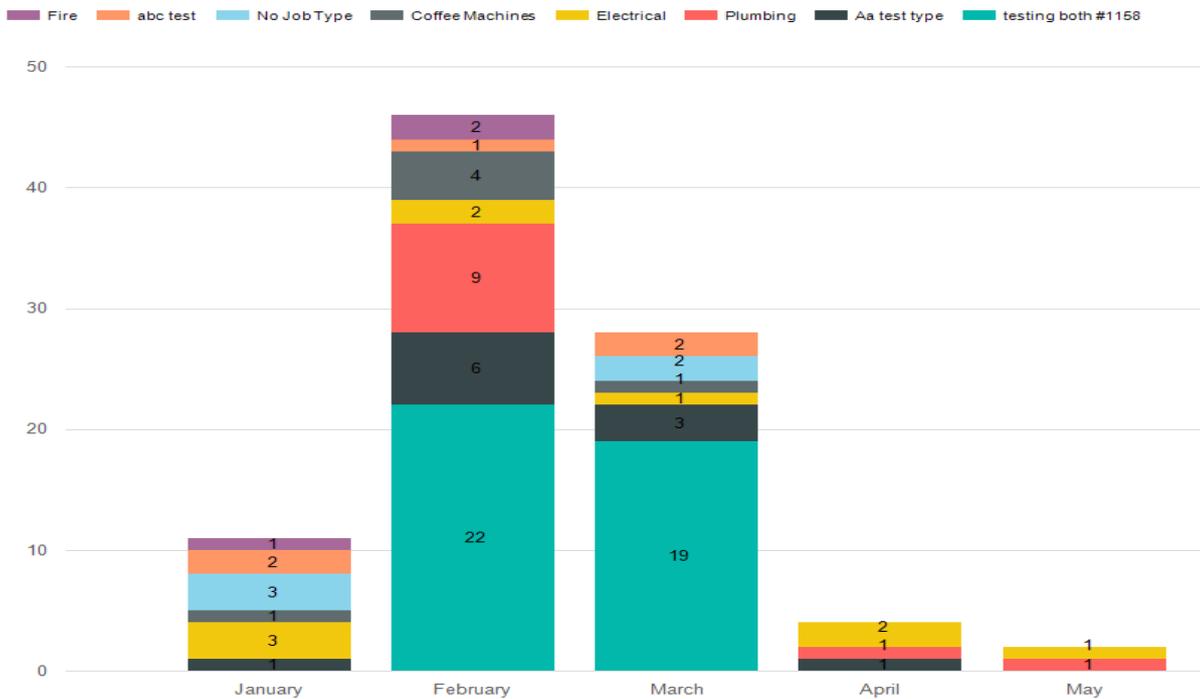
3. Average Jobs Instructed.

Average Jobs Instructed - May 23



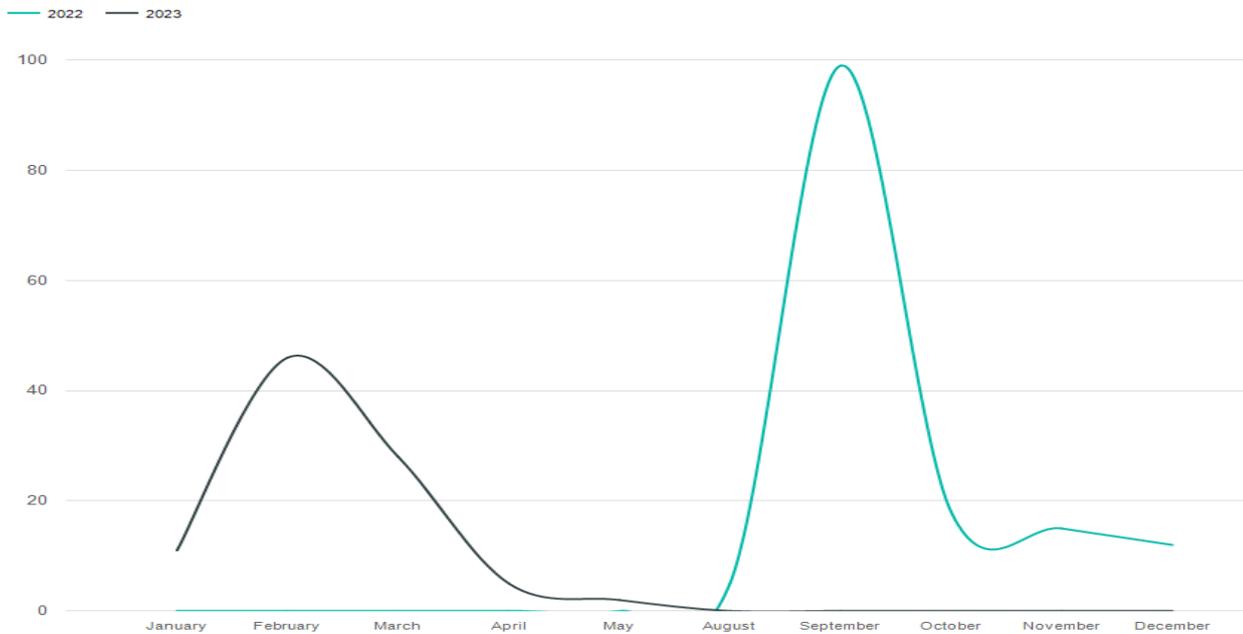
4. Jobs Instructed by Job Type (Monthly)

Jobs Instructed by Job Type (Monthly) - May 2023



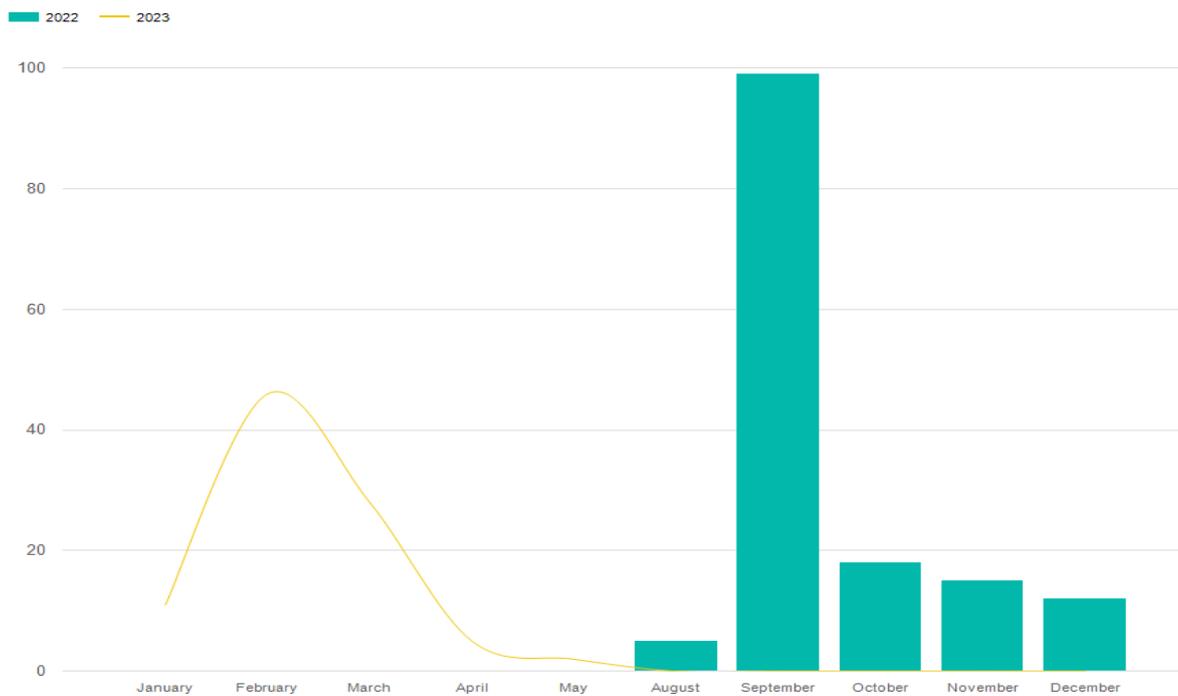
5. Jobs Instructed Per Year (Last 3 Years)

Jobs Instructed Per Year (Last 3 Years) - May 2023



6. Jobs Instructed Per Year (Last 3 Years) - Bar Chart

Jobs Instructed Per Year (Last 3 Years) - Bar Chart - May 2023



Each of these reports also has a tab for the data supporting each report.

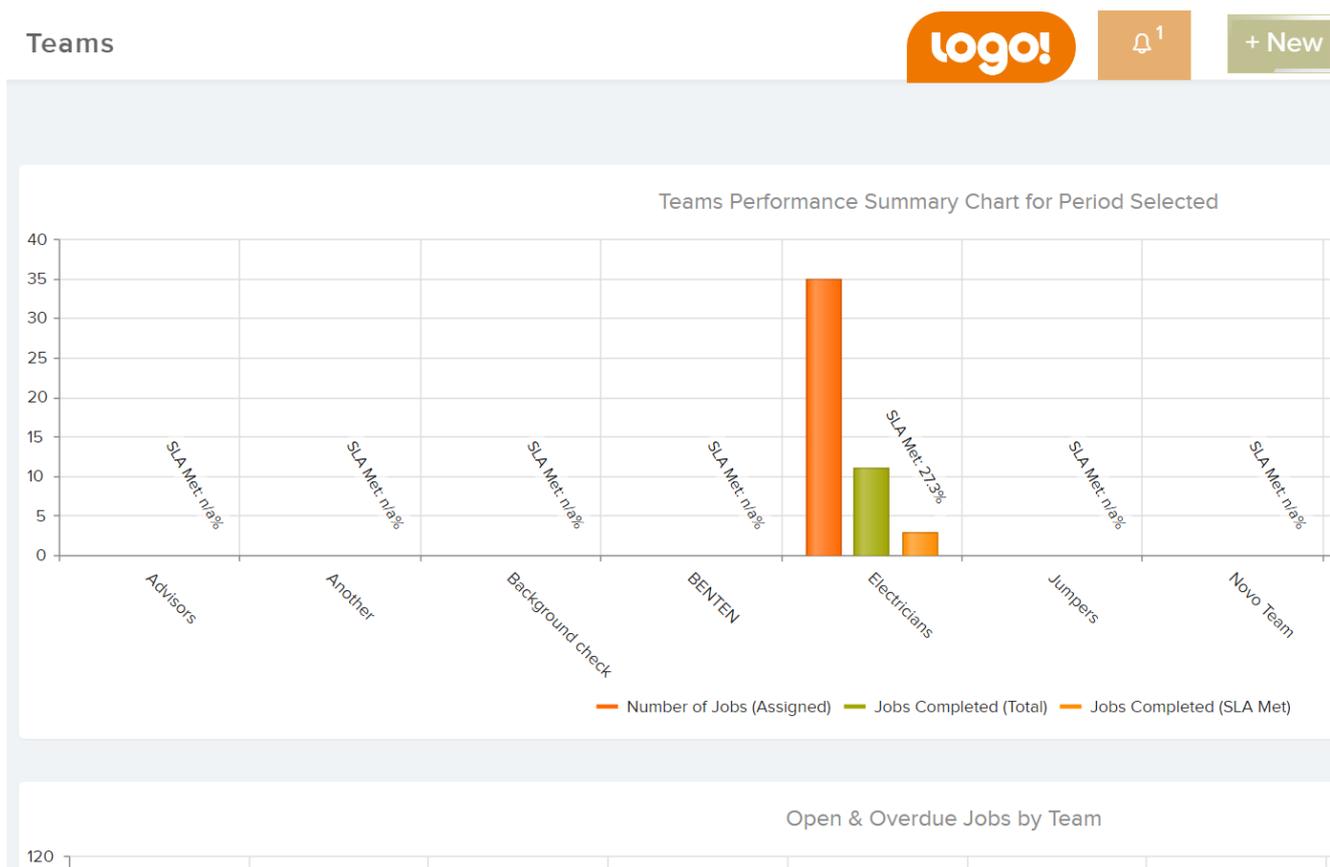
And these 6 reports consolidated into one report as well – See report “Jobs Instructed Consolidated”

Item 2: Teams dashboard

Why is it useful?

A great way to keep track of job status and performance for each team. Two new bar charts and 2 new grids.

- Teams Performance Summary Chart for Period Selected
- Open & Overdue Jobs by Team
- Teams Performance Summary
- Teams Summary Grid



Knowledge base link:

<https://caf.m.fm/article/dashboard-views/>

Item 3: Dashboards - New component “Open jobs aged profile”

Why is it useful?

Allows you to see the open jobs by job priority and how old the jobs are.

This new component can be found on the Default dashboard and the Reports dashboard in the Dashboard menu. You can also add it in to your own custom dashboards that you design in Settings -> Dashboard Designer.

You can drill down into the cells to view the list of jobs.

Open Jobs Aged Profile

Job Priority	0-5 Days	6-15 Days	16-30 Days	31-60 Days
No Priority Selected	0	0	0	0
Planned	2	1	2	49
2 hour response	1	0	0	9
Low	0	0	1	4
No 2 priority	0	0	1	3
Normal	0	0	0	0

Item 4: New look and improvements for Manager App & Contractor Portal

Why is it useful?

In the Manager App, the job, asset and site page look much better mirroring recent work in the Resource App. And job, asset and site data can be downloaded for offline use.

The Contractor Portal design has also been improved on the job task page and related pages. Works better as well when on a mobile or tablet.

Manager App – new look

The screenshot shows the Manager App interface for Job No. 1060. At the top, there is a dark blue header bar with a hamburger menu icon on the left, the text "Job No. 1060" in the center, and a back arrow icon on the right. Below the header, the main content area is white with rounded corners. It features a card with the following information: "Address" with a red location pin icon and three dots, "Contact: Gabriel Espinoza Rojas", and "Telephone: +50658867421". Below this card, there are two side-by-side cards. The left card displays "1002@test.com" and "Resource" in blue text, with an orange "RESET" button (containing a refresh icon) and a blue "ADD ANOTHER RESOURCE" button (containing a person icon). The right card displays "Sajith Sageer" and "Assigned To" in blue text, with an orange "RESET" button (containing a refresh icon). Below these two cards is a wide, light blue button with a checkmark icon and the text "COMPLETE JOB". At the bottom, there is a white card with a teal document icon, the text "Job Forms", and a downward-pointing chevron icon on the right.

Manager App – offline use

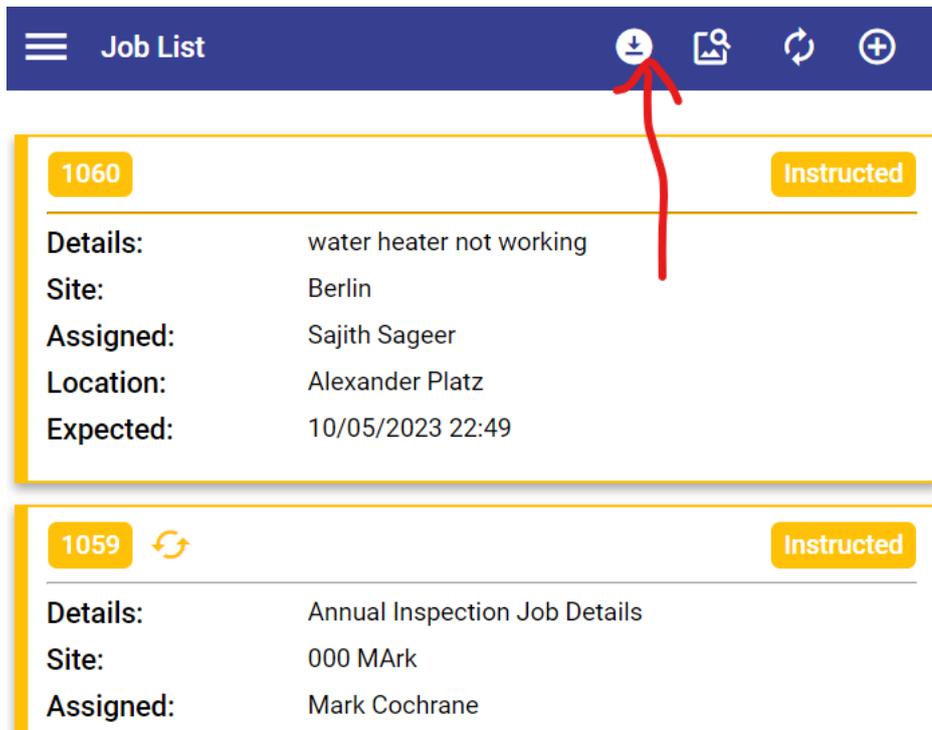
Job List

1060 Instructed

Details: water heater not working
Site: Berlin
Assigned: Sajith Sageer
Location: Alexander Platz
Expected: 10/05/2023 22:49

1059 Instructed

Details: Annual Inspection Job Details
Site: 000 MARK
Assigned: Mark Cochrane



Contractor Portal – improved design

logo! Options

1059-001 Instructed

Job Task Number Status

000 MARK Annual Inspection Job Details

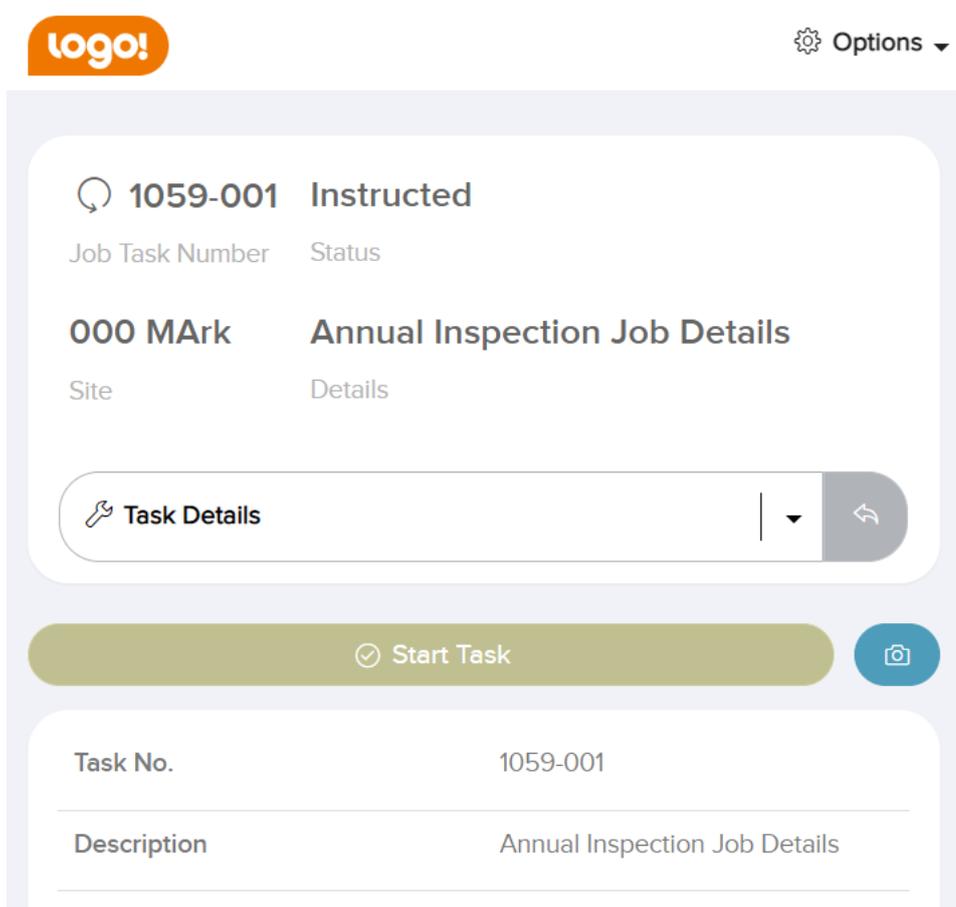
Site Details

Task Details

Start Task

Task No. 1059-001

Description Annual Inspection Job Details



Item 5: Job Type Groups

Why is it useful?

A very useful feature. You can now set up job type groups and allocate a user to a job type group, so this user can have their own restricted group of job types to select from when creating a request or job.

Settings -> Job Type Groups

The screenshot shows the 'Job Type Groups' settings page. At the top, there is a navigation bar with the 'logo!' in an orange circle, a notification bell with '1', a '+ New' button, the email 'mark@trackplanfm.com', and a user profile icon. Below the navigation bar, there is a '+ ADD JOB TYPE GROUP' button on the left and a 'Back to Settings Menu' button on the right. The main content is a table with four rows, each representing a job type group. Each row has a 'Name' column, a 'Job Types' column with an edit icon, and two action buttons: 'EDIT' and 'DELETE'.

Name	Job Types		
HR Department	Electrical,Fire,Plumbing		
Sales Department	Fire,new test,Aa test type,Plumbing		
IT Team	Electrical		
Developers Team	Fire,new test		

At the bottom of the page, there is a yellow bar with a 'Help' icon and text.

Settings -> Users -> User Details -> General Settings

User General Settings

The screenshot shows the 'User General Settings' form. It has a section titled 'Job Workflow Settings' with several dropdown menus:

- Can Jobs Be Assigned To This User: No
- Can Assign Jobs: To All Users
- Access To Jobs: All Jobs
- Can only view resources and teams for their teams: No
- Can Authorise Jobs: No
- Can Approve But Not Complete Job: No
- Can Approve Contractor Quote: No
- Job Type Group: HR Department

Knowledge base link:

<https://cafmm.com/article/job-type-groups/>

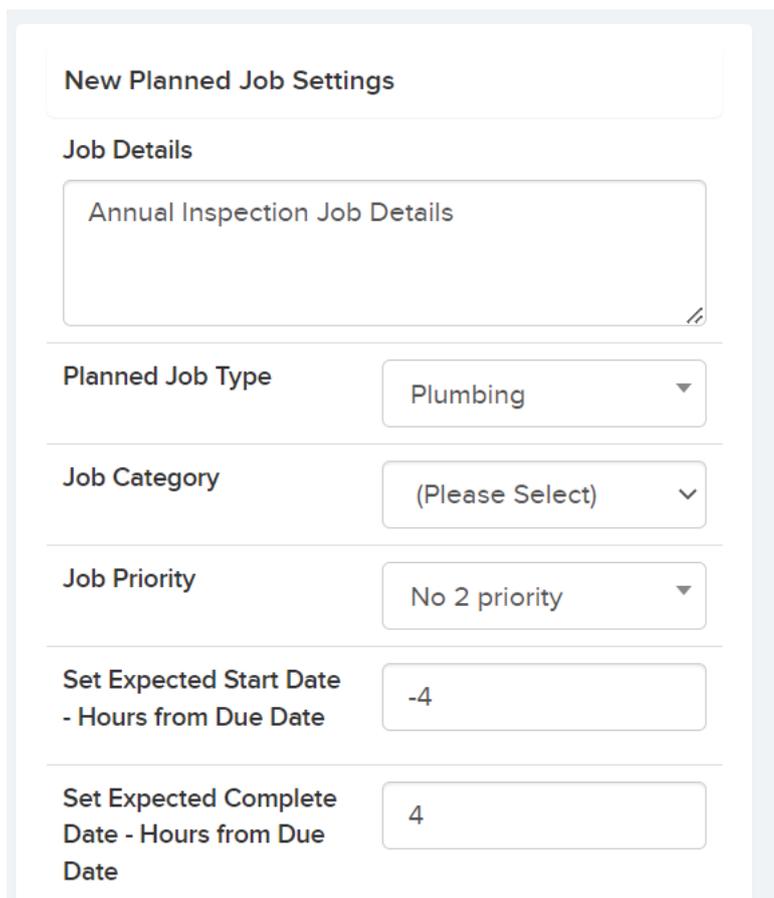
Item 6: Planned Schedules - Set expected start and complete date and job priority for jobs.

Why is it useful?

You also now have the ability to set the expected start and expected end date on the planned schedule in relation to its due date. This will enable you to set a "window" for the contractors doing the work.

With this new feature you can now set a priority for each planned schedule, so that planned jobs created from the planned schedule will inherit this priority which will then be visible on the job details page.

Planned Schedule Details Page



The screenshot displays the 'New Planned Job Settings' form. It includes a 'Job Details' section with a text area containing 'Annual Inspection Job Details'. Below this are several form fields: 'Planned Job Type' (Plumbing), 'Job Category' ((Please Select)), 'Job Priority' (No 2 priority), 'Set Expected Start Date - Hours from Due Date' (-4), and 'Set Expected Complete Date - Hours from Due Date' (4).

New Planned Job Settings	
Job Details	
Annual Inspection Job Details	
Planned Job Type	Plumbing
Job Category	(Please Select)
Job Priority	No 2 priority
Set Expected Start Date - Hours from Due Date	-4
Set Expected Complete Date - Hours from Due Date	4

Knowledge base link:

<https://caf.m/article/planned-schedules/>

Item 7: Contractor Portal - Record Visit Details

Why is it useful?

The second and final step in relation to Job Visits and Schedule of Rates. The resource / contractor now has the ability to record details of their visit to the job task and add additional people to the visit and review and amend start and complete dates and times.

These visits can then be reviewed and amended in the main application, and a visit cost is generated if you have set up a Schedule of Rates for that contractor.

logo!

The screenshot displays the Contractor Portal interface for recording visit details. At the top, there is a header with the job task number '1037-001', site '14:39', status 'Completed', and details 'Test'. Below this, there are navigation tabs: 'Task Details', 'Visits' (which is active), 'Documents (4)', 'Assets (1)', 'Forms', 'Time Records (1)', and 'Back'. The main content area shows a table of visits with columns for Visit Number, Job Task, Priority, Total Hours, # People, Visit Status, Visit Comments, and Start. A single visit is listed with Visit Number 1, Job Task 1037-001 (Completed), Total Hours 1.00, # People 1, Visit Status Pending, and Start 18/04/2023 17:25. Below the table, there is an 'Add Person' button and a list of people added to the visit. The list has columns for Person Name, Type, Start Date, End Date, and Hours. One person, 'mark3', is listed as a Resource, added on 18/04/2023 17:25, with an end date of 18/04/2023 18:25 and 1 hour. The person's name is marked as 'Edited'.

Visit Number	Job Task	Priority	Total Hours	# People	Visit Status	Visit Comments	Start
1	1037-001 Completed		1.00	1	Pending	--	18/04/2023 17:25

Person Name	Type	Start Date	End Date	Hours
mark3	Resource	18/04/2023 17:25	18/04/2023 18:25	1 Edited

Knowledge base link:

<https://caf.m/article/schedule-of-rates/>

Print Job and Job Task and Choose PDF Template.

The screenshot shows a software interface for job management. At the top, it displays 'Job No.: 1059'. A dropdown menu titled 'Select a PDF Template' is open, listing several options: 'mark v2', 'mark v3', 'New Gabo PDF template KK', 'New PDF template', 'New PDF template', 'New PDF template', and 'werwerwerwr'. Below the dropdown, a blue bar highlights the option 'Use default PDF Template'. The background interface shows job details for job number 1059, including 'Job Details', 'Assigned To: Mark Cochrane', 'Resource: MarkR', and 'Instructed Task: 1059-001 Instructed'.

Resources -> Resource Details -> Set PDF Template for Job Worksheet and Job Completion Report

The screenshot shows the 'Resource Details' configuration page. It features several settings for PDF template selection:

- Default Risk Assessment Form:** A dropdown menu currently set to '(Please Select)'.
- On Instruct Create PDF Job Worksheet:** A checkbox is checked, and the dropdown menu is set to 'mark v2'.
- On Task Completion Create PDF Job Report:** A checkbox is checked, and the dropdown menu is set to 'Use default PDF Template'.
- Default Rate Card:** A dropdown menu currently set to '(Please Select)'.

Knowledge base link:

<https://caf.m/article/job-task-custom-pdf-designer/>

Item 9: Cancellation of a quote with the same task number cancels the task and vice versa.

Why is it useful?

A useful new feature for clients who request contractor quotes. Once you send a job to a contractor as a quote job the system automatically creates a task and quote with the same number – example 40-001.

Now, if you decline that quote it will automatically cancel the task saving you time.

Knowledge base link:

<https://caf.mfm/article/job-quotes-and-estimates/>

<https://caf.mfm/article/jobs-and-job-tasks/>

Item 10: Allow Address and GPS Coordinates to be recorded for locations.

Why is it useful?

Very important feature for clients who manage apartment blocks. Now, if you have each apartment as a location in Trackplan you can capture the full address on the location details page.

Knowledge base link:

The screenshot shows the 'Location Details' page in the Trackplan system. The page is titled 'Apartment 20' and 'Building No 2'. It features a navigation menu with options like 'SubLocations', 'Planned Schedules', 'Assets', 'Documents', 'Forms', and 'Contacts'. The main content area is divided into several sections:

- Location Name:** Apartment 20
- Code:** BNO2-SF
- Site Name:** Building No 2
- Contract:** Not Selected
- Location Type:**
- Department:**
- Assigned User:** Not Selected
- Team:** Not Selected
- Address 1:** Apartment 20
- Address 2:** 46/47 Catherine St,
- Town:** Limerick
- Country:** Ireland
- Postcode:** V94 T2V3
- Contact:**
- Email:**
- Telephone:**
- Fax:**
- Jobs:** 0
- Overdue:** 0
- # Non Compliant:** 0
- # Open Requests:** 0
- Latitude:** 52.661
- Longitude:** -8.628
- Google Map Site Link:** Site Map Link
- Map:** A Google Map showing the location of Apartment 20 at 51 Catherine St, Limerick, V94 275Y. The map includes a street view and a list of nearby businesses like 'The Glen Tavern', 'Jasmine Palace', and 'Luigi's Traditional Fish and Chips'.

Item 11: - Job Throttling for Advanced allocation of jobs to contractors.

Why is it useful?

There are two ways in which you can set up rules which will intelligently allocate a job to a resource (contractor or engineer):

- Settings -> Advanced Job Routing (based on job type, site, priority, days or the week)
- Settings -> Resource Advanced Allocation Rules (based on trades and regions and resource ranking)

To the second one we have added "Job Throttling". This is to spread out the allocation of work more evenly between contractors.

It is not for the faint hearted! It is for those of you who have 1000s of jobs every month across many sites and contractors. Contact us for advice on setting up.

Settings -> Resource Advanced Allocation Rules

Resource Advanced Allocation Rules



Job Throttling

Enable Job Throttling for Resource Selection Yes

Resource: Regions: Ranking:

+ ADD RULE

ID	Resource	Ranking	Region	Current Cycle		Limits Per Cycle	
				# Recommendations	# Jobs	Max Recommendations	Max Jobs
2	Elec Daniel Resource	Grade 1	All their regions	2	2	2	3
3	Plumbing Gabo Contractor		All their regions	0	0	2	3
4	mark Resource	Grade 1	Ennis Road	0	0	7	10

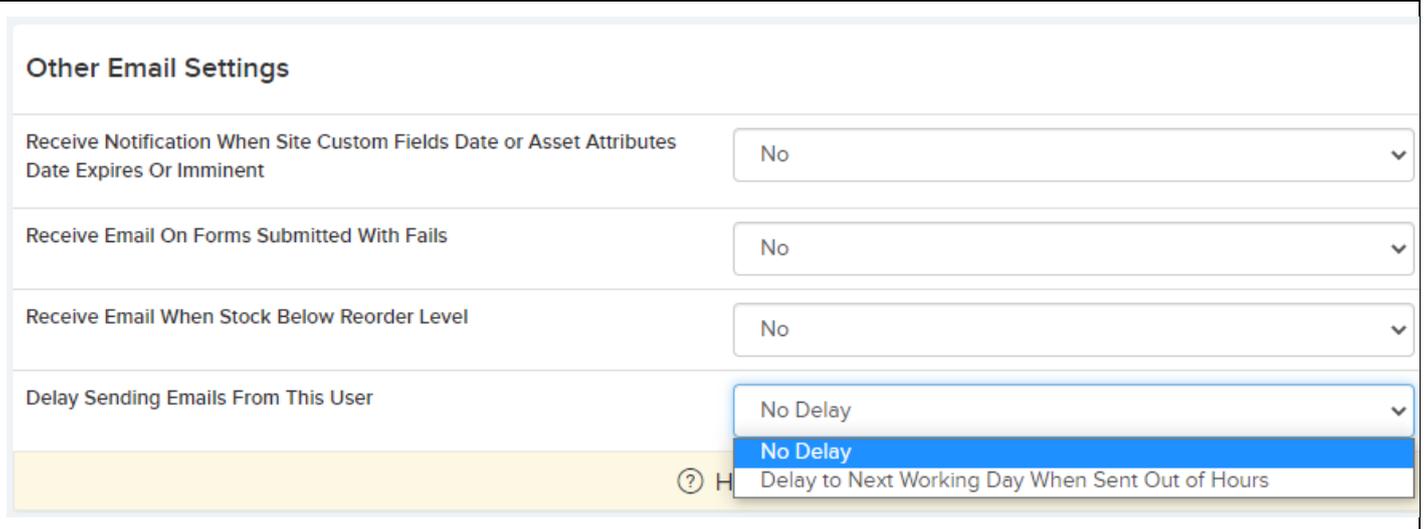
10 Items Per Page

Item 12: Delay sending emails to Users.

Why is it useful?

For each user we have added a new setting so that emails generated from their actions (for example a security guard raising a new request at 3am) can be delayed until the start of the working day.

When "Delay to Next Working Day When Sent Out of Hours" is selected, emails sent from this user out of working hours will delay until the next day's working hours.



The screenshot shows a settings interface titled "Other Email Settings". It contains four rows of settings, each with a label and a dropdown menu. The first three rows have "No" selected. The fourth row, "Delay Sending Emails From This User", has a dropdown menu open showing three options: "No Delay", "No Delay", and "Delay to Next Working Day When Sent Out of Hours". The second "No Delay" option is highlighted in blue. A yellow tooltip is visible below the dropdown menu, containing a question mark icon and the text "H".

Other Email Settings	
Receive Notification When Site Custom Fields Date or Asset Attributes Date Expires Or Imminent	No
Receive Email On Forms Submitted With Fails	No
Receive Email When Stock Below Reorder Level	No
Delay Sending Emails From This User	<ul style="list-style-type: none">No DelayNo DelayDelay to Next Working Day When Sent Out of Hours