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.
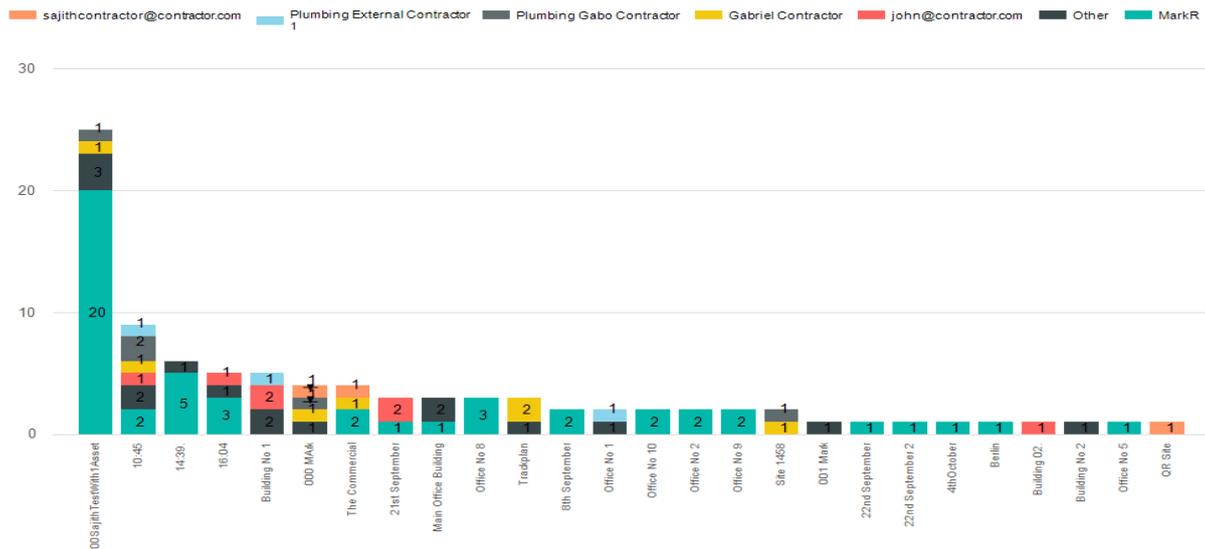
Work done for this Release.

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.

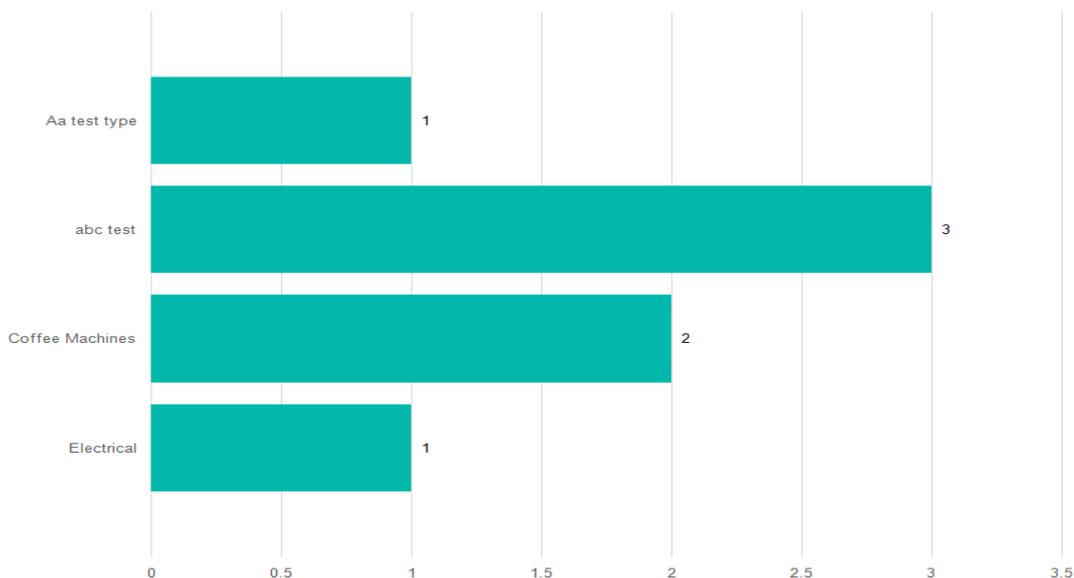### 1. Jobs Instructed by Site and Resource
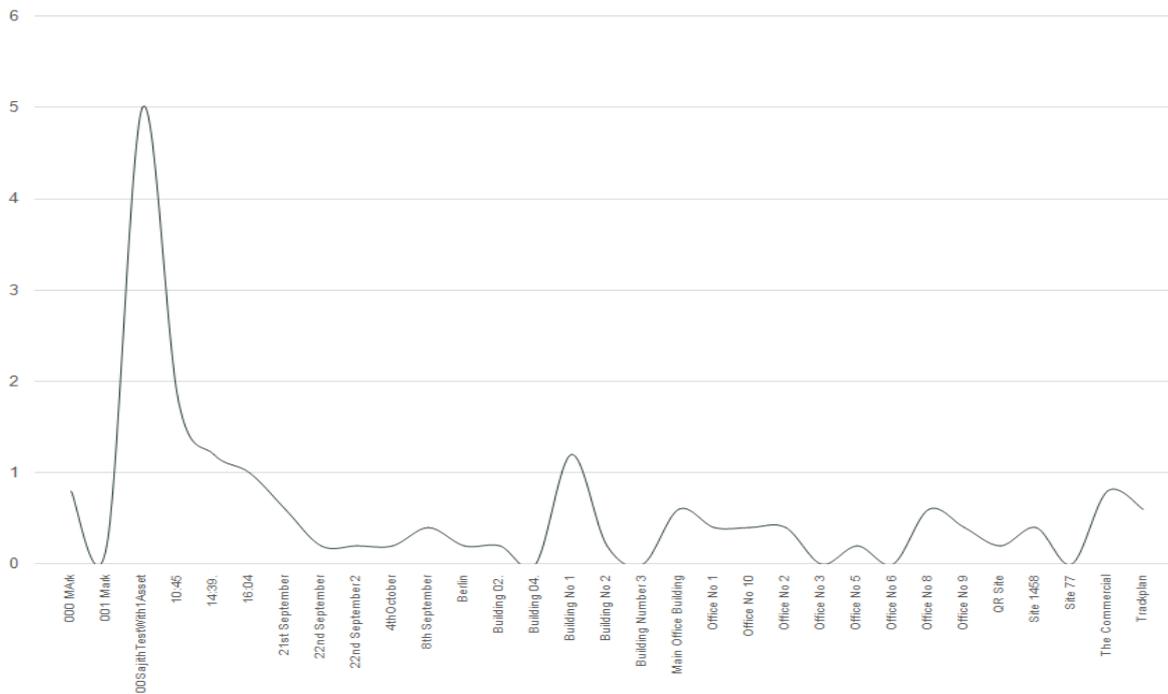
Jobs Instructed by Site and Resource - May 2023

2. Jobs Instructed by Job Type for Resource

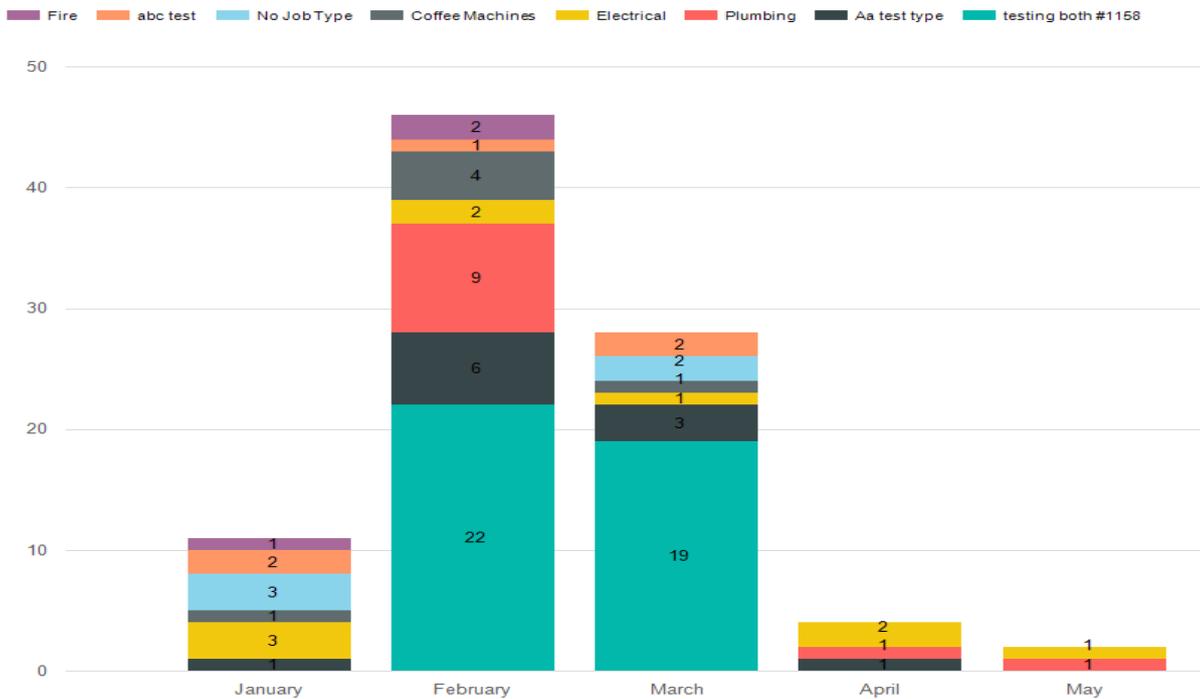**Jobs Instructed by Job Type For Resource Gabriel Contractor - May 2023**

3. Average Jobs Instructed.
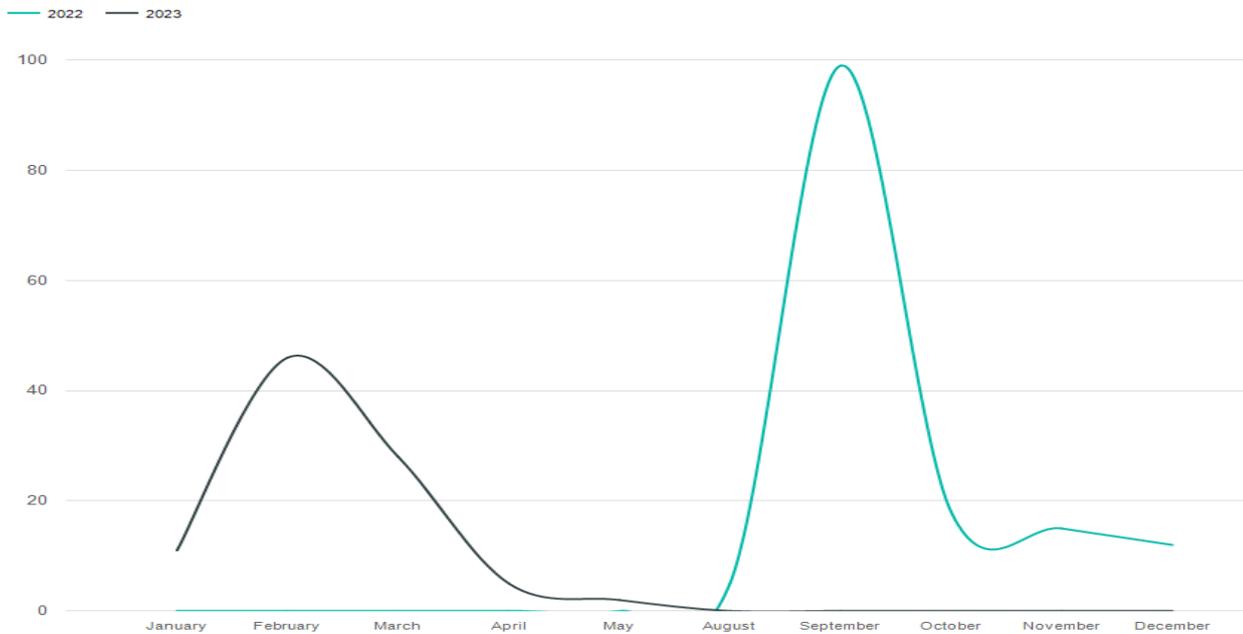

Average Jobs Instructed - May 2023

4. Jobs Instructed by Job Type (Monthly)
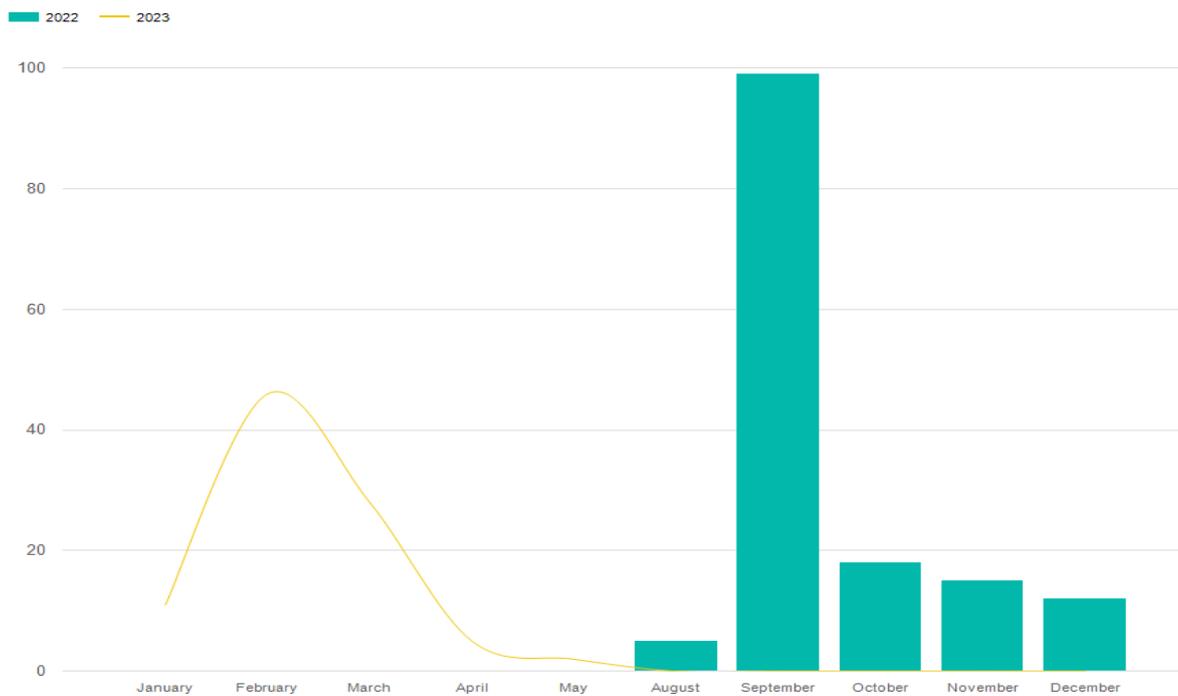

Jobs Instructed by Job Type (Monthly) - May 2023

5. Jobs Instructed Per Year (Last 3 Years)

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

— 2022   — 2023

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

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

■ 2022   — 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://cafm.fm/article/dashboard-views/
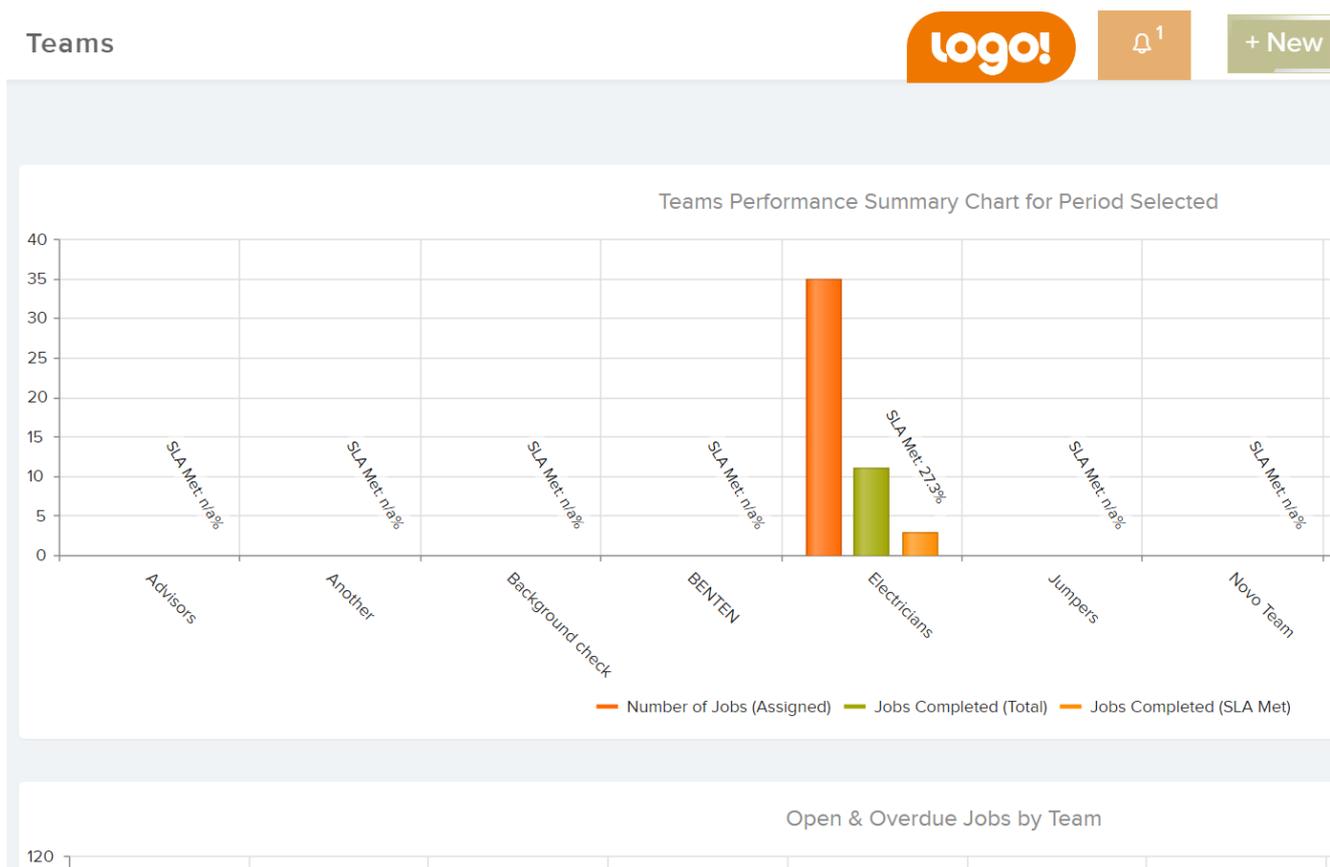
Item 3: Dashboards - New component "Open jobs aged profile"

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

Manager App – offline use

Contractor Portal – improved design
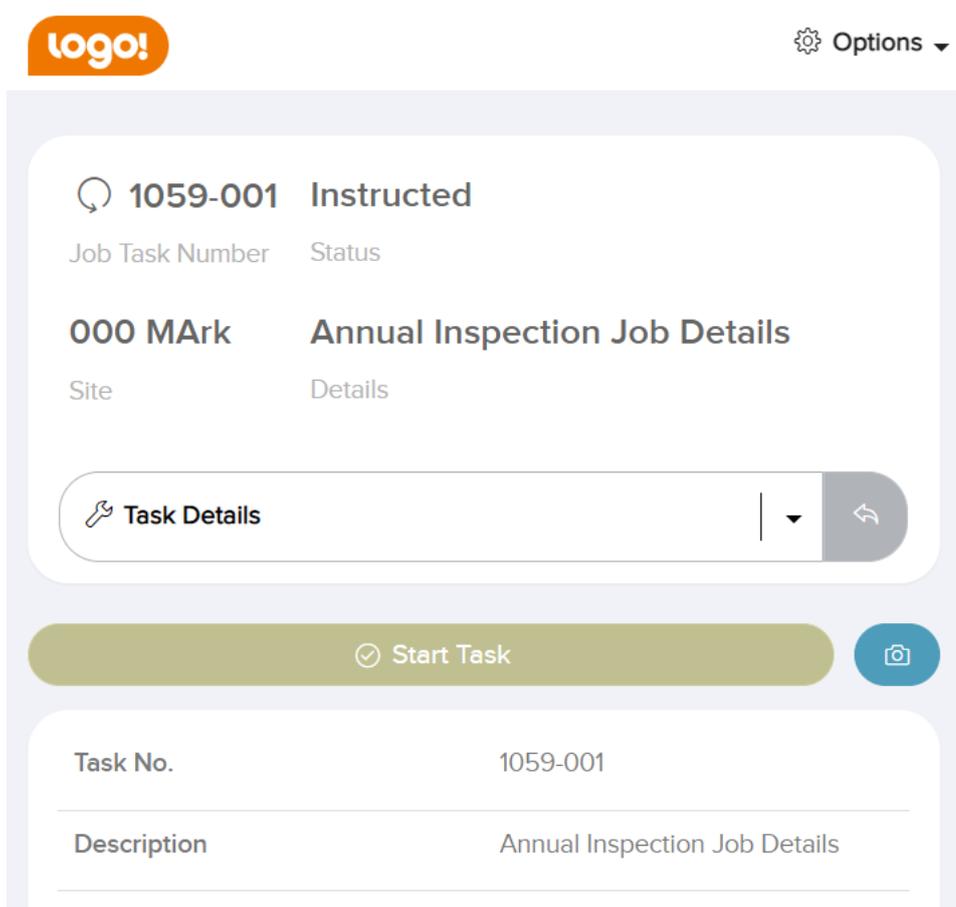
Item 5: Job Type Groups

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

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

Knowledge base link:

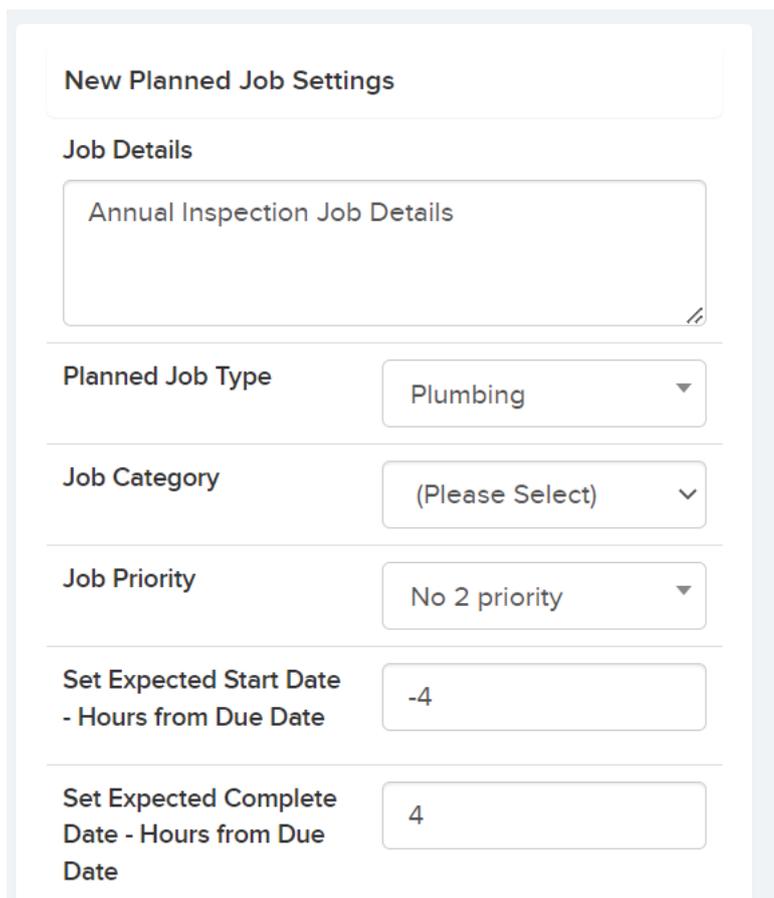https://cafm.fm/article/job-type-groups/

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

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://cafm.fm/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 compete 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.

Knowledge base link:

https://cafm.fm/article/schedule-of-rates/

Item 8: Job & Task custom PDF designer for Job Worksheets and Job Reports.

Why is it useful?

This new feature allows the user to create their own custom design for the Job Details PDF (and its associated Job Worksheet), the Job Task PDF (and its associated Job Completion Report). There are over 40 tags available to be added to a custom PDF template.

Settings -> Job Settings

Print Job and Instruct Job Worksheet PDF

PDF Template for Printing Job and Job Instruct Worksheet

mark v2

PDF Template Editor

? Help

Print Job Task and Job Task Completion PDF

PDF Template for Printing Job Task and Job Completion Report

mark v3

PDF Template Editor

? Help

PDF Designer

PDF Manager

logo

mark v3

▷ Save   Delete   New   ↶ Back

Template Name   mark v3

B *I* <u>U</u> abc ≡ ≡ ≡ ≡ ☰ ⋮≣ ⋮≣ ⋅≣ ⋅≣ x₂ x² ⊞ </> Form

(inherited font) ▾   (inherited size) ▾   A ▾   ◊ ▾   Dynamic Tags ▾

JOB TASK PDF TEMPLATE

[AcceptedDate]
Accepted date of the task
[ArriveAtHome]
Arrived at home date of the task
[Assets]
Assets of the job
[AssignedToUserName]
Name of the assigned user of the job
[ClientLogo]
Your company logo from Settings -> General Settings area.
[ClientOrderNo]
Order Number of the job

[JobDetails]

[JobEmail]

[JobNumber]

[JobResource]

[JobScheduleName]

[JobStatus]

Print Job and Job Task and Choose PDF Template.

Job No.: 1059

Select a PDF Template

mark v2

mark v3
New Gabo PDF template KK
New PDF template
New PDF template
New PDF template
werwerwerewr
Use default PDF Template

Job No.	10
Job Details	✎
Annual Inspection Job Details	
Job Type	Plumbing
Sub Type	
Job Status	Instructed

Assigned To	Mark Cochrane	✎
Resource	MarkR	🔧
	👤 Re-Allocate	
Instructed Task	1059-001 *Instructed*	

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

Default Risk Assessment Form	(Please Select) ▾
On Instruct Create PDF Job Worksheet	☑ mark v2 ▾
On Task Completion Create PDF Job Report	☑ Use default PDF Template ▾
Default Rate Card	(Please Select) ▾

Knowledge base link:

https://cafm.fm/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://cafm.fm/article/job-quotes-and-estimates/

https://cafm.fm/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:

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   logo!   🔔1

Job Throttling

Enable Job Throttling for Resource Selection   Yes

Resource	Regions	Ranking
All Resources	<Select>	<Select>

+ ADD RULE

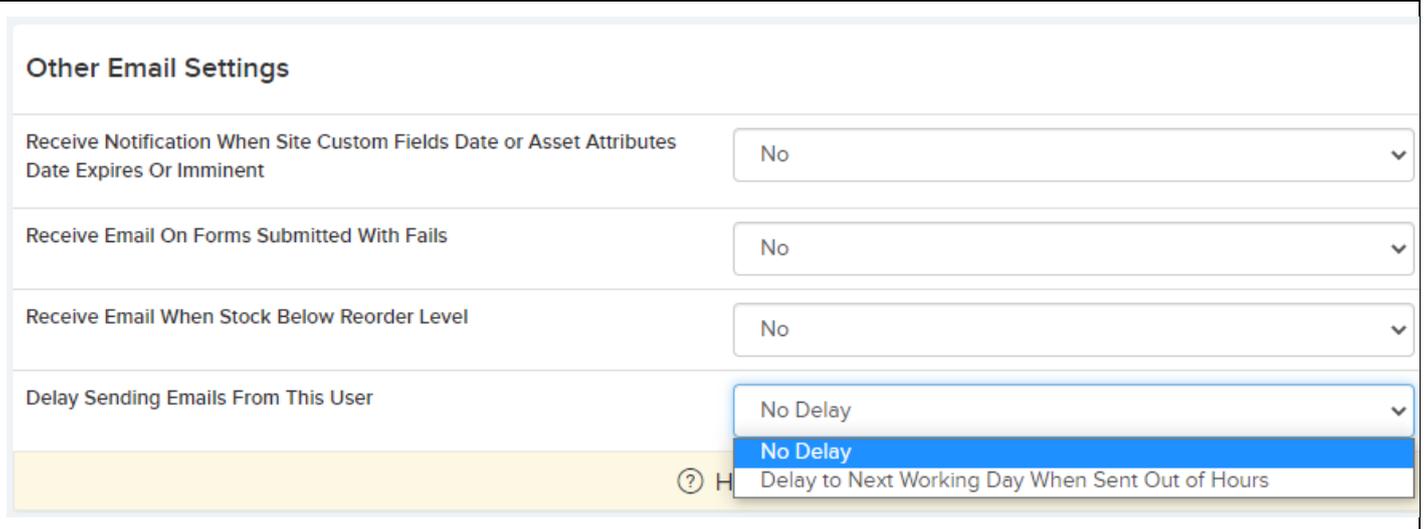| ID	Resource	Ranking	Region	Current Cycle		Limits Per Cycle	
				# Recommendations	# Jobs	Max Recommendations	Max Jol
2	Elec Daniel Resource	Grade 1	All their regions	2	2	2	3
3	Plumbing Gabo Contractor		All their regions	0	0	2	3
4	mark Resource	Grade 1	Ennis Road	0	0	7	10

|◄ ◄ 1 ► ►| 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.

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	No Delay

No Delay
Delay to Next Working Day When Sent Out of Hours

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