



Release 19th May 2021

### Recently Done

- Edit Assets in Manager App
- PPM Certificates - document tags and workflow and contractor dashboard
- Purchase Orders can now include Tax Rates (e.g. VAT)
- Microsoft Single Sign On – New User options
- App email activation improved
- Bug fixes

### Coming Soon

- In Manager App, only relevant sites are shown to that user
- Edit Assets in Resource App
- 6 new miscellaneous / custom fields for assets
- Job Note Types improved
- PPM - next planned job driven by hours of operational usage
- Create “Further Work” / New Job from existing job
- Improved notifications for overdue dates on sites, assets and contractors
- Big improvements to assets, stock and purchase orders for more manufacturing-oriented clients

**Manager App on v10.1.0 (New Release)**

**Resource App on v10.0.0**

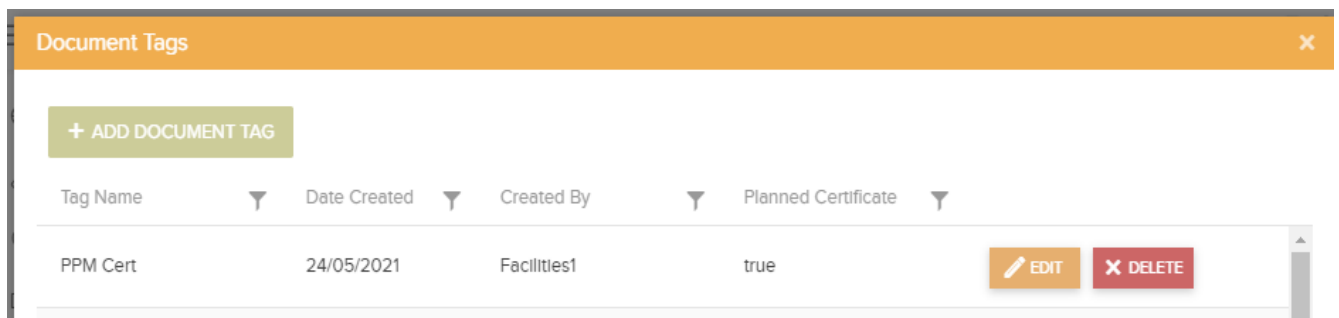
# Work done for May 19<sup>th</sup> 2021 Release

## Recently Done - Main Changes

Edit Assets in Manager App – Important new feature for users using the Manager App. Asset details can now be edited. Great for updating Asset status, Asset location, comments etc when out on site. Just click the pencil icon in the bottom right corner of the Asset details page, make your changes and save.

PPM Certificates – A great new addition to the PPM side of things. A 2-step process here.

1. In the document manager click on 'Document Tags' and create a new tag, example PPM Cert and set Planned Certificate to true.



2. When creating or updating a Planned Schedule we now have a new setting '*Planned Certificate must be uploaded before completion*' This can be set to ensure that a document with tag type Planned Certificate is attached to the planned jobs from the schedule before completing them.

Purchase Orders – Another 2-step process here.

1. In the Finance area click on '*Tax Rates*'  
In there you can set all your different Tax/Vat rates and set the default rate.

Tax Rates

Set-up your own tax rates here and set a default rate

2. When adding stock or Non-stock now to the Purchase Orders it will calculate the tax amount and gross amount. These new amounts can be then added to the confirmation email and also will appear on the Purchase order PDF.

Cost	Total	Tax Rate	Tax Rate Desc.	Tax Amount	Gross Total
20.00	200.00	13.5%	13.5%	27.00	227.00
20.00	200.00			27.00	227.00

Total cost, Tax Amount & Gross Total now can be seen on the Purchase Orders main list.

## Microsoft Single Sign On – A new feature in the settings area.

### Single Sign On Settings For Microsoft

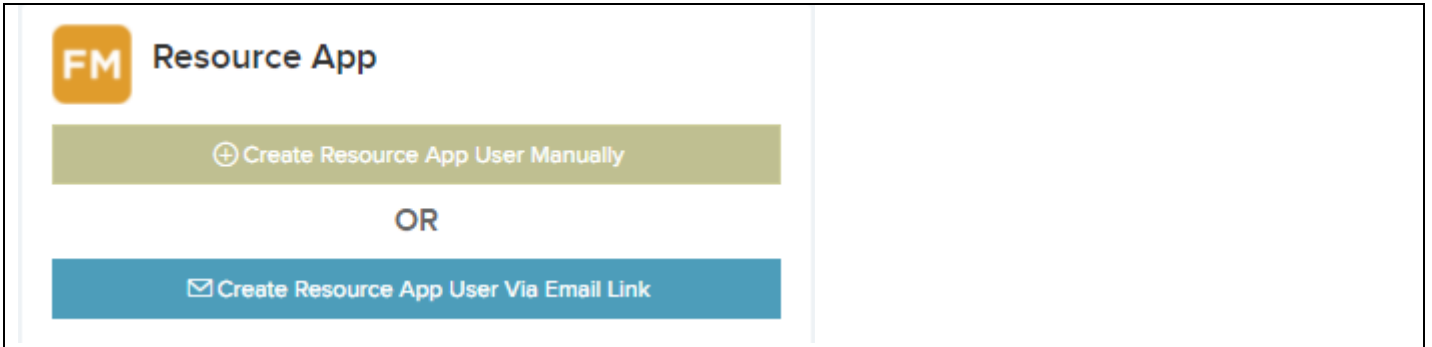
Allows you to set up single sign on (SSO) Settings for Microsoft

In this new area you have 2 new settings.

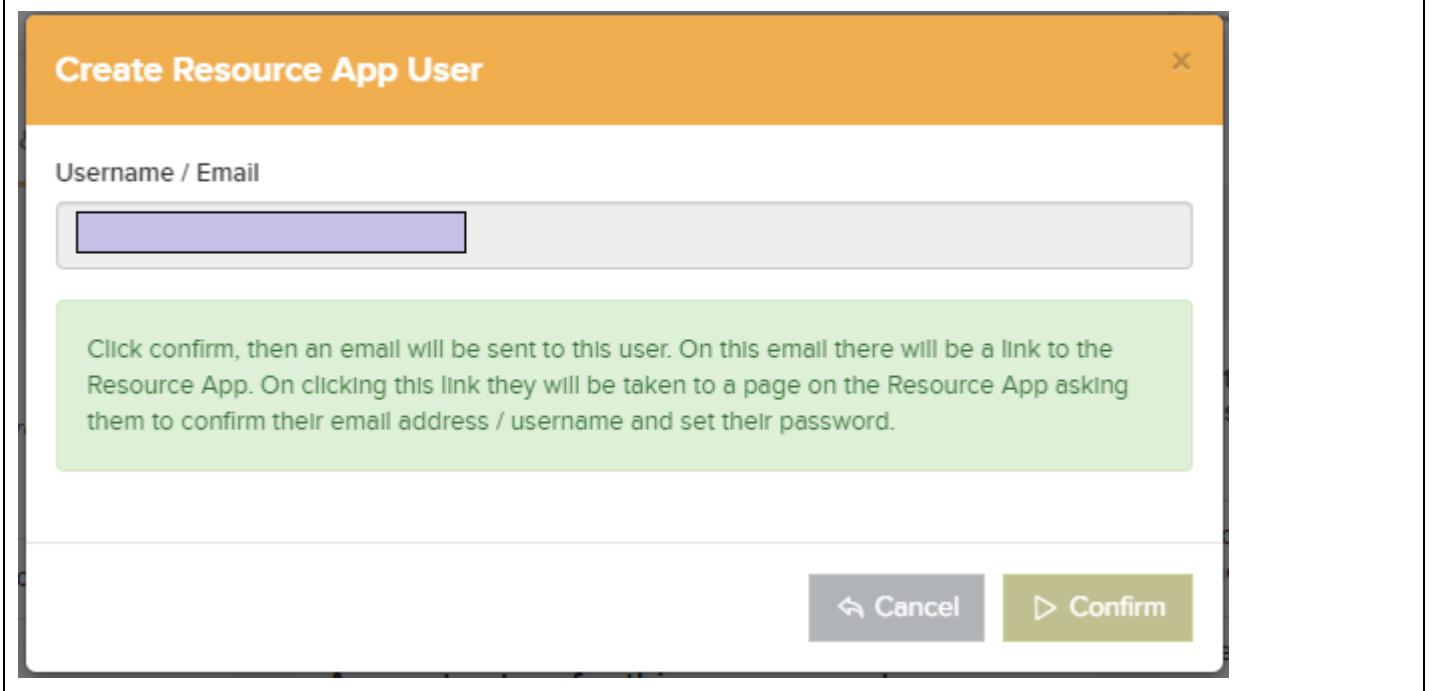
1. SSO Behavior - Set the behaviour of the system when an unregistered Trackplan user signs in for the first time using single sign on. This will either create an account for that user or not.
2. Default User Role – From the dropdown you can set the default role for all new users.

Tenant Id / Corporate Id	<input type="text"/>
SSO Behaviour	Do Not Create Account <span>▼</span>
Default User Role	Requests Only - Restricted <span>▼</span>

App email activation – Improvements here to make it easier to set up users/resources for the manager app and resource app.



Click on 'Create Resource App User Email Link'  
Check the Email, and click Confirm.



## Bug Fixes

Job Calendar – Quick link using “Group by Assigned User” not working – now fixed

Job Request List and PPM items list not working. Now fixed

PPM tab on asset details page not showing items. Now fixed.

Dashboard – Printing PDFs not rendering some of the charts well. Fixed.

## Coming Soon

In Manager App, only relevant sites will be shown to that user if they are on restricted site access.

Edit Assets in Resource App – As seen in the Manager App now, we are working on bringing this new important feature into the Resource App.

6 new miscellaneous / custom fields for assets – Like in the Location Details and Sublocation Details pages you have 6 miscellaneous fields to capture more information about that location or sublocation. These fields will be brought into the Asset details soon.

Job Note Types improved – Fixes and improvements to this area so that this feature is more intuitive and useful.

PPM - next planned job driven by hours of operational usage – A very important feature coming soon which has been asked for by clients and prospects.

Create “Further Work” / New Job from existing job – Another feature that will benefit a lot of users. The new job will be linked to the originating job.

Improved notifications for overdue dates on custom field forms for sites, assets and contractors – Notifications are always important so we plan on improving this very soon.

Big improvements to assets, stock and purchase orders for more manufacturing-oriented clients – Driven by existing clients and prospect. We have got great feedback and ideas to improve these areas.