

# Trackplan

Release 21st July 2021

## Recently Done

- Multiple Resources on Planned Schedules
- Stock and Storage Areas on both Apps
- Better stock reorder level email notifications
- Purchase Order Authorisation Levels
- Planned/Reactive Filter on Jobs Tab list in Asset Area
- Resend email on Job Notes
- Job Budget column on Job List
- Improved Filters in Documents Tab for Sites, Locations and Assets
- 'Completed' jobs and Hours Worked Column added to asset lists
- Extra filters in Reports Area for job status, priority, sublocation
- Kendo Grid Filter Indicator
- New Asset Stock tab in the Asset Details Page

## Coming Soon

- Can design your own Form PDFs for printing forms.
- Approving requests on Manager App
- Requestor App for remote users to create requests (including ability for user to scan QR code from camera and create request even with no app installed)
- Multi language versions of Trackplan
- An API for Trackplan

*Manager App on v10.4.0 (New Release)*

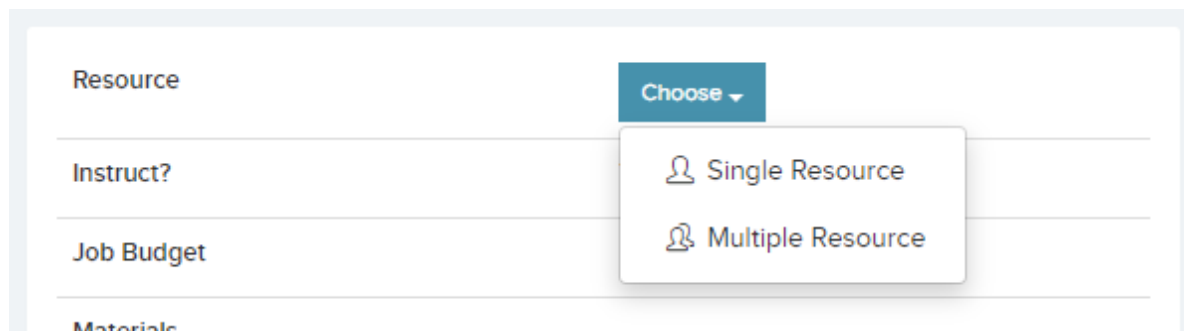
*Resource App on v10.4.0 (New Release)*

# Work done for July 19th 2021 Release

## Recently Done - Main Changes

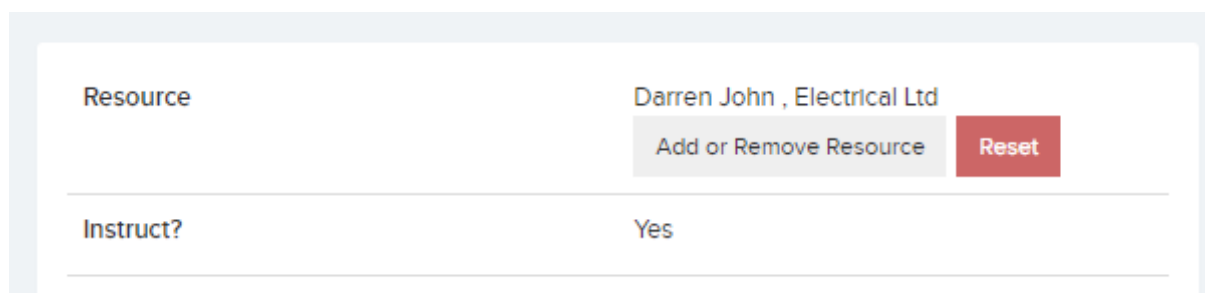
**Multiple Resources on Planned Schedules** – An exciting new feature here lets the user add multiple resources to Planned Schedules.

From the Planned Schedules Details page, the 'Choose' button lets you select either Single or Multiple Resource as per below.



The screenshot shows a form with fields for 'Resource', 'Instruct?', 'Job Budget', and 'Materials'. A blue 'Choose' button is positioned over the 'Resource' field. A dropdown menu is open, showing two options: 'Single Resource' with a person icon and 'Multiple Resource' with a group of people icon.

Choosing Multiple will bring up the Resource select list. Check the desired number of resources and exit the pop-up. All new Resources are added to the schedule. You can always remove any or reset and start again.



The screenshot shows the 'Resource' field populated with 'Darren John , Electrical Ltd'. Below the field is a button labeled 'Add or Remove Resource' and a red 'Reset' button. The 'Instruct?' field is set to 'Yes'.

Expanding the Planned Schedule will give you a list of all Sites, Locations or Assets attached to that schedule. It will also reveal the 'Default Settings' dropdown. The Multiple Resources selected will show here. If you would like to update existing planned items with the new resources simply check the 'Override' button and activate the item again by switching it off and on again.

Resource

- × Electrical Ltd -
- × Darren John -

Override

and then tick it. The default settings you have set here,  
Notes: The override checkbox must be ticked for that def configuration page.

Turn Item Off and On [here](#)

If Email reminders are set up for a planned schedule, all Resources will get the notification/reminder. There will also be a spreadsheet attached. It will include the schedules as tabs on the sheet with each sheet showing the jobs for the schedule.




Also, on Planned schedules the Edit/Update Schedule now supports changing of By Item field - Site, Location or Asset.

**Stock and Storage Areas on both Apps** – An exciting feature here for clients wanting to manage stock levels.

Storage Areas and their stock levels can now be managed on the Manager App and Resource App.

From the Apps you can:

1. Adjust the stock level at a storage area as per screenshots below
2. Scan a QR Code for a storage area and get routed to that storage area

Stock Name	Stock Quantity		
Feta	30		
Batteries	100		

### Add Batteries

Current quantity of Batteries : 100

How many Batteries do you want to Add ?

Quantity

All very good features when out on site or on the factory floor to keep track of stock from your mobile device.

**Better stock reorder level email notifications** – Improvements to email notifications here.

Users can now set email recipients that will receive an email when a certain stock item falls below the reorder level. This works for both stock on a storage area level (When the stock in that storage area falls below the reorder level) and for the stock item (includes the overall stock count between all the areas.)

A default reorder level and email recipients can be set for a storage area so when a new stock item is added to the storage area it will inherit those default values.

**Purchase Order Authorisation Levels** – A major addition to our Purchase Order Module here. You can now set up Confirmation Bands based on PO Value and attach users to a certain band, meaning that a user can only authorise certain POs in their band.

All this can be set up in 'Purchase Order Settings' in the Settings Area.

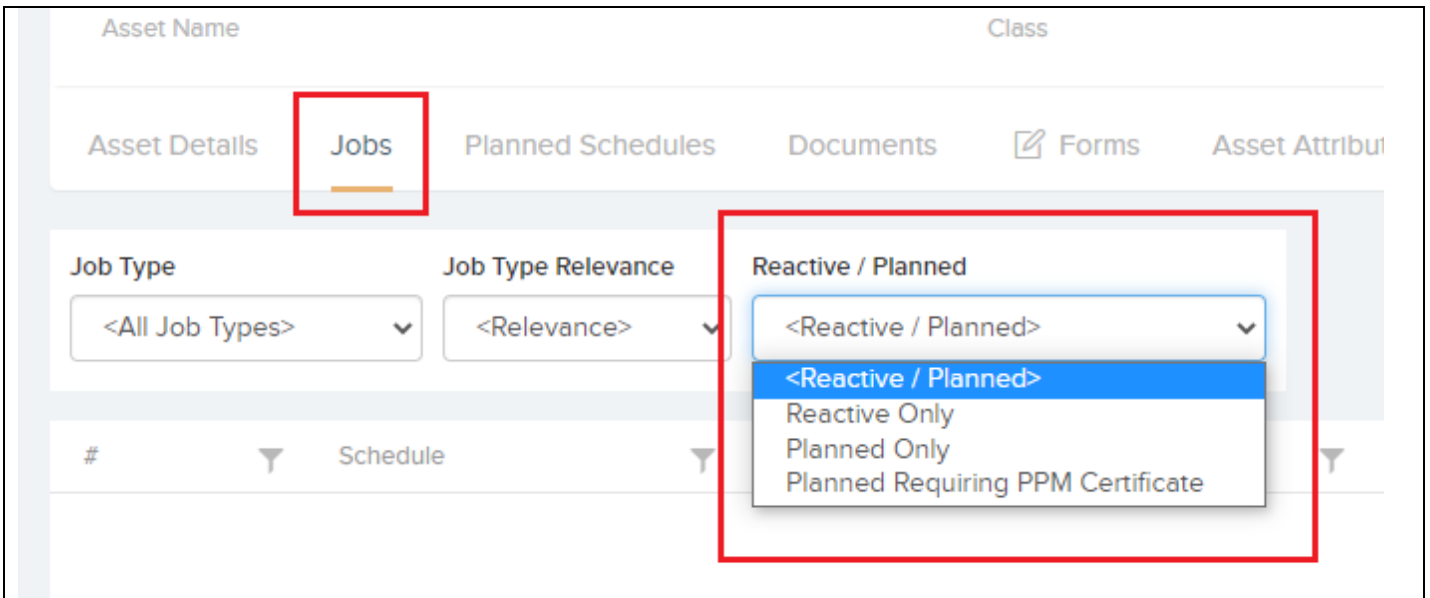
6 fields to fill out when adding a new Confirmation Band:

1. Name - Name of the Confirmation Band
2. From Value - Any purchase order greater than this amount and lower than To Value will need to be confirmed by users in this band
3. To Value - Any purchase order with a value less than this amount and greater than the From Value will need to be confirmed by the selected users. Please Note that to set an open ended To Value set this field to 0.
4. Can confirm Lower Levels - This allows users in the particular band to confirm purchase orders in a lower band
5. Lower Band Confirmation Required - Lower band will need to be confirmed before the current confirmation band is confirmed.
6. Confirmation Users - Select the users that will need to confirm purchase orders in this band

In addition to this, Clients can now set their own PO number with a prefix and hide the PO number until confirmed.

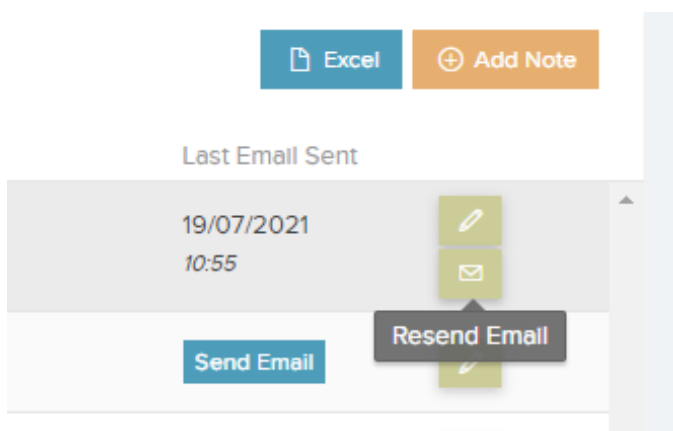
**Planned/Reactive Filter on Jobs Tab list in Asset Area** – A nice new Filter added here. This new filter gives you the ability to search for either Reactive Jobs, Planned Jobs or Planned Jobs requiring a PPM certificate.

A nice quick way to keep track of all different Jobs associated to that Asset.

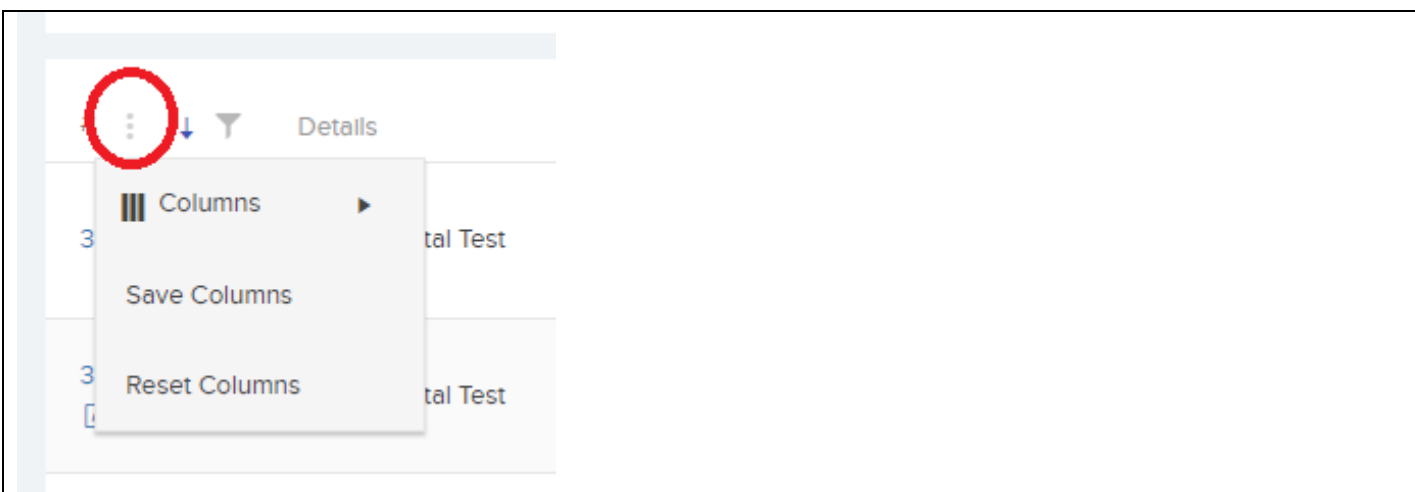


**Resend email on Job Notes** – A nice new additional feature to the Job Notes here. This is in the Job Details page and the Job Requests Details Page.

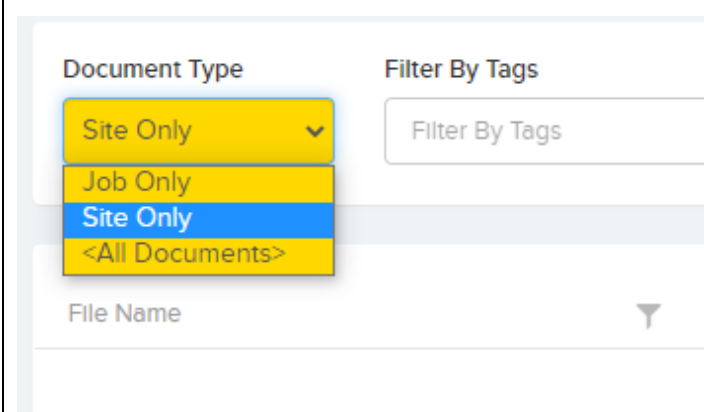
As per screenshot below, if the Job Note has never been emailed the 'Send Email' will appear. If the email was sent the 'Resend Email' button will appear.



**Job Budget column on Job List** – Just a small but important feature for some Clients here. The Job Budget is now available in the Job List. It is a hidden field so you can find it via the 3 dots in the top left corner of the grid.



**Improved Filters in Documents Tab for Sites, Locations and Assets** – Another nice new filter added here to help the user distinguish between different documents. You can now view all documents, documents attached to that site or documents attached to a job on that site leaving it very easy to locate documents at any time.



**‘Completed’ jobs and Hours Worked Column added to asset lists** – New columns in a number of grids here.

On the Main Asset List, we have added ‘Completed’ for reactive and planned Jobs. The number is a link and will bring you to the Jobs List so you can view all completed jobs.

It has also been added to the 2 grids on the Asset Dashboard. The Asset Summary and the Site Asset Summary.

Once again, the number is a link and will bring you to the Jobs List so you can view all completed jobs.

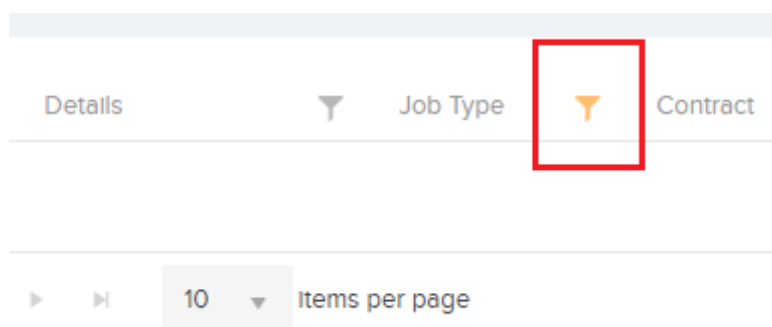
**Extra filters in Reports Area** – Driven by clients and prospects we have added 4 new important filters to the Reports Area

1. Job Priority
2. Job Status
3. Sub Status
4. Sub Location

All very important filters to make life that little bit easier to pull reports on a weekly basis.

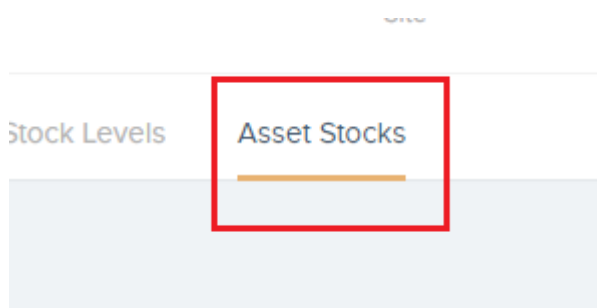
**Kendo Grid Filter Indicator** – A simple visual difference here.

Once you filter a grid using the built-in filters at the top of any grid the Icon will change colour now to indicate that a filter is in play as per screenshot below.



**New Asset Stock tab in the Asset Details Page** – A nice new stock grid to keep track of stock associated to an asset.

This list shows the stock held by that particular asset. To add stock, click "ADD" and choose the stock from the pop-up list.





+ ADD STOCK

Stock Name



Stock Code



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