Trackplan FM

Release 22nd October 2022

SUMMARY

Key Features & Improvements:
- New 'Resource Performance' report.
- New 'Job Summary and Performance by Priority' report.
- New columns related to job and task performance for the Job List and the report - "Jobs Report - All Columns".
- New columns related to job and task performance for the Job Task list and the report - "Job Tasks showing Job Information".
- Can now view open and overdue jobs based on when the contractor completes the task with a new setting.
- Cost and Sales screen with mark-up %s improved.
Trackplan main application version v22.2.0
Manager App on v11.3
Resource App on v11.3
Request App on v2.1

Coming Soon in Future Releases:
- **Grouped Job Type feature**
- **Contract improvements – status, types etc**
- **Main asset photo to show on asset details page**
- **More reports and dashboard components, resource performance by priority etc**
- **Contractor portal work – Accepting task, declining task, rescheduling task**
- **Devices and Meter Readings, with Charts, Thresholds and PPM driven by readings**

Work done for this Release

Item 1: Resource Performance report
Why is it useful? This new report has been added in the Report module and will help management keep track of how their engineers and contractors are performing This report shows tasks instructed, completed, open tasks and SLA performance, hours on site. **Resource Performance** (table below) **Knowledgebase link:**

Resource Performance

Resource	Resource Type	Job Tasks Instructed	Job Tasks Completed	Open Job Tasks	Job Tasks Started On Time	Job Tasks Completed On Time	Hours Travelling	Hours On Site
BurhanR	Contractor	8	1	7	3	1	0	0
Daniel Resource	Internal	3	0	3	0	0	0	0
External Contractor 1	Contractor	1	0	1	1	0	0	0
John	Contractor	78	1	77	0	0	-0.57	0.56
John McGill	Contractor	6	2	4	0	1	0.71	1.13

Item 2: New 'Job Summary and Performance by Priority' report.

Why is it useful?

This new report reports on job performance by priority. Includes columns like:

- Jobs Completed Within Expected Complete Date

Priority Name	Total Jobs Created	Jobs Started Within Expected Start Date		Jobs Not Started Within Expected Start Date		Jobs Completed Within Expected Complete Date		Jobs Not Completed Within Expected Completed Date	
		Number	Percentage	Number	Percentage	Number	Percentage	Number	Percentage
2 hour response	9	2	22.22	7	77.78	2	22.22	6	66.67
Low	7	3	42.86	4	57.14	1	14.29	6	85.71
No priority	6	3	50.0	2	33.33	1	16.67	4	66.67
Normal	1	0	0	1	100	0	0	1	100
One Week	3	0	0	3	100	0	0	3	100

Knowledgebase link:

Item 3: New columns related to job and task performance added to report - "Jobs Report - All Columns" and the Job list.

Why is it useful?

Multiple Columns added here to give better reporting on resources. Task accepted, Task started, Task Completed, Job creation to complete (Hours), Job creation to start (Hours), Traveling time, Hours on site, Start vs Expected start, Complete vs Expected complete.

In the column configurator add these columns to the job list.

In the reports list, look for the report "Jobs Report - All Columns"
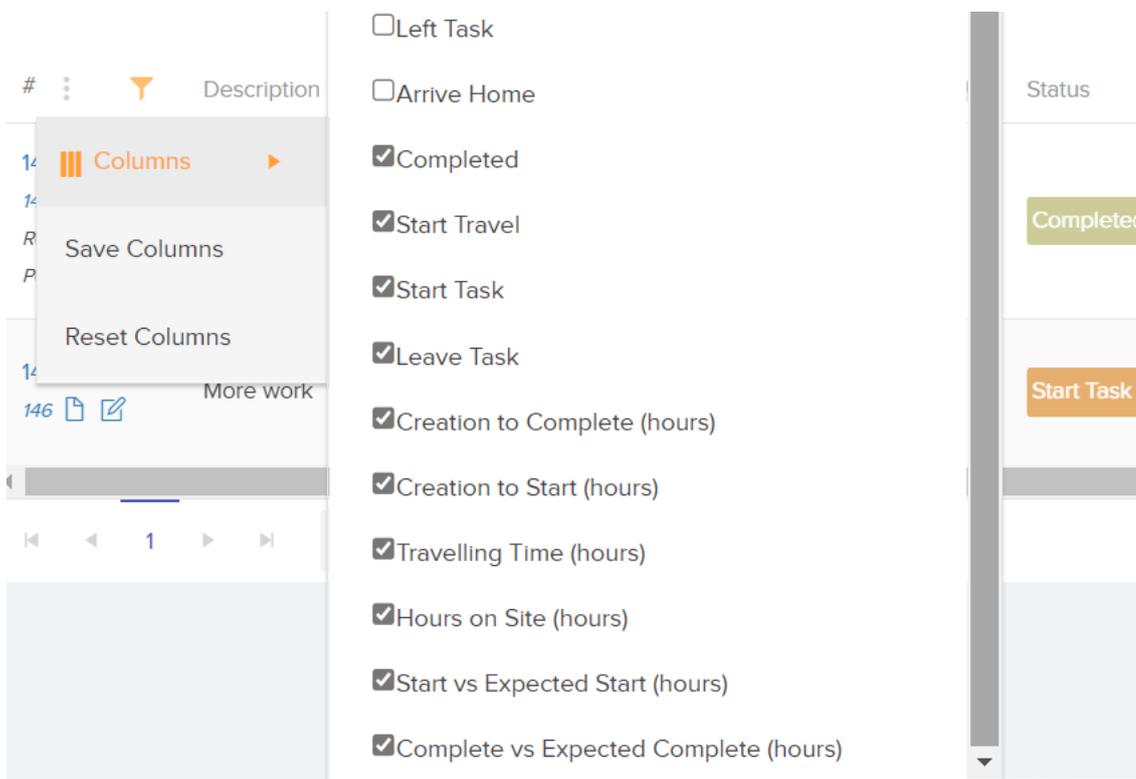

Knowledgebase link:

Item 4: New columns related to job and task performance added to the job task list and the report - "Job Tasks showing Job Information"

Why is it useful?

More new columns here for better reporting. Expected complete, Start Travel. Start Task, Leave Task, Creation to Complete, Job Creation to Start (Hours), Traveling time, Hours on Site, Start vs Expected Start, Complete vs Expected complete.

In the column configurator add these columns to the job task list.

In the reports list, look for the report "Job Tasks showing Job Information"

Knowledgebase link:

Item 5: Can now view open and overdue jobs based on when the contractor completes the task with a new setting.

Why is it useful?

A very important new feature/setting which can be found in Settings→Job Settings → Other Settings → Overdue Jobs Measured by. We have 2 options here.

If this is set to Instructed Task Complete Date, then the overdue and open property of jobs will be based on when the job's instructed task is completed by the resource (as opposed to when the overall job is completed). This impacts:

- the Overdue property and performance filter on the job list.
- It also impacts the open and overdue properties on the site list, asset list and dashboards
- the performance filter in the reports area

Knowledgebase link:

Item 6: Cost and Sales screen with mark-up %s improved.

Why is it useful?

For clients who have enabled sales values to be entered alongside job costs (Settings -> Job Settings -> Finance Settings -> Include Sales in Costs and Quotes)

The add and edit cost screen has been improved to work well with mark-up %s which can be set by each contract in the Finance -> Contracts area.

Knowledgebase link: