

Trackplan^{FM}

Release 23rd November 2022

SUMMARY

Key Features & Improvements:

- New Dashboard Component – ‘Open Jobs by Status’
- New Dashboard Component – ‘Reactive Jobs by Priority’
- New Report – ‘Site Job Summary’
- New Report – ‘Resource performance by Job Priority’
- Dashboard components with data grids now have the option to export data to excel
- Bug fixes 🐛

Main Application v22.5.0

Manager App v11.5.3

Resource App v11.5.3

Request App v2.2.1

Coming Soon in Future Releases:

- Grouped Job Type feature
- Contract improvements – status, types etc.
- Main asset photo to show on asset details page
- 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: New Dashboard Component – ‘Open Jobs by Status’

Why is it useful?

This new Dashboard Component can be found on the Default dashboard and is a quick way of seeing the number of all reactive and planned jobs per status. Each number clicked will bring you the filtered job list.

Jobs by Status		
Status ↑	# Reactive Jobs	# Planned Jobs
Approved	0	0
Authorised	0	0
Cancelled	0	0
Complete	5	0
Contractor Confirmed Complete	12	0
Instructed	125	3
More Work Required	0	0
On Hold	0	0
Pending	17	1
Rejected By User	0	0
Re-Opened	0	0
Requires Auth.	0	0
User Confirmed Complete	0	0

Knowledgebase link:

Item 2: New Dashboard Component – ‘Reactive Jobs by Priority’

Why is it useful?

Another new Dashboard Component that can be found on the Reactive Dashboard. This will show you the number of reactive jobs created, open & overdue per priority. Once again, clicking on any number will direct you to the main job list.

Jobs by Priority			
Priority Name ↑	# Created Jobs	# Open Jobs	Overdue Jobs
2 hour response	14	11	11
Low	15	14	14
No 2 priority	8	7	7
Normal	1	1	1
One Week	8	7	6
Tres Urgent	2	2	2
Urgent	0	0	0

Knowledgebase link:

Item 3: New Report – ‘Site Job Summary’

Why is it useful?

This new report can be found in the Reports module and will give you a list of all your sites with reactive & planned, created, completed, open and overdue jobs.

Site Job Summary - Site Job Summary														
Site Name	Site Code	Region	Site Type	Contract	Reactive Jobs				Planned Jobs					
					Created	Completed	Open	Overdue	Created	Completed	Open	Overdue	Overdue Statutory	
Building No 1	BNO1	Generic Region	Normal site		100	3	96	7	0	0	0	0	0	0
Building No 2	BN2	Generic Region	Normal site		2	0	1	0	0	0	0	0	0	0
Main Office Building	MOB01	Generic Region	Normal site		1	0	1	1	0	0	0	0	0	0
Building Number 3	Number3	Generic Region	Normal site		2	1	1	0	0	0	0	0	0	0
Site 77	s77	Generic Region	Offices		1	0	1	1	0	0	0	0	0	0

Knowledgebase link:

Item 4: New Report – ‘Resource performance by Job Priority’

Why is it useful?

Another new report which can also be found in the Reports Module and will give you a breakdown of all tasks, instructed, completed, open, started on time and completed on time by priority.

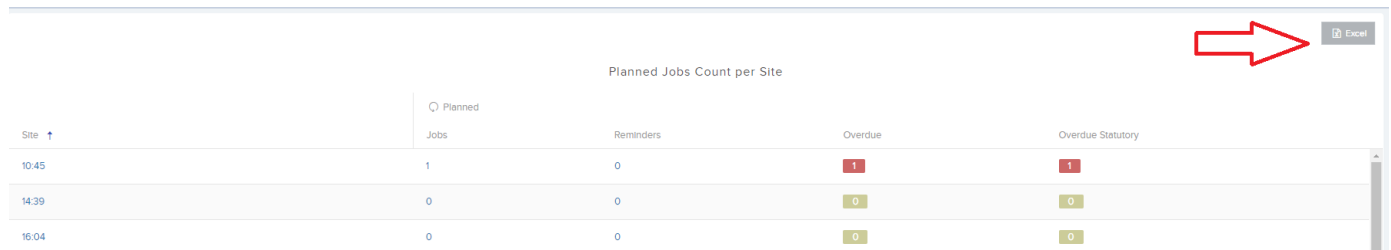
Resource Performance By Priority								
Resource	Resource Type	Reactive / Planned	Priority	Job Tasks Instructed	Job Tasks Completed	Open Job Tasks	Job Tasks Started On Time	Job Tasks Completed On Time
John McGill	Contractor	Reactive	2 hour response	3	2	1	0	1
John McGill	Contractor	Reactive	No Priority Selected	3	0	3	0	0
Total				6	2	4	0	1

Knowledgebase link:

Item 5: Dashboard components with data grids now have the option to export data to excel

Why is it useful?

This very useful feature allows you to export data from all grids on all dashboards. Simply click the new 'Excel' button in the top right of any grid and it will automatically open an excel spreadsheet.



The screenshot shows a data grid with the following structure:

Site ↑	Planned Jobs	Reminders	Overdue	Overdue Statutory
10:45	1	0	1	1
14:39	0	0	0	0
16:04	0	0	0	0

An 'Excel' button is located in the top right corner of the grid, indicated by a red arrow.

Knowledgebase link: