



Release 26th March 2024

SUMMARY

Key Features & Improvements:

- Request Authorisations. Request can be sent to other users for authorisation.
- Planned Items Upload – Can upload planned items.
- Price Catalogue – a catalogue of services and prices to add to quotes.
- Sales Quotes – can now add multiple lines
- Forms – new question type “Display Image”
- Users - Set Password policies and MFA (multi factor authorization)
- Client Contracts – A new users tab so client users can be managed more easily.
- Resource Availability. If resource is “Off Duty” it will warn you when sending a job
- Reports – Schedule output of Report file to be sent by FTP
- Reports – Some filters now offer multi-select: priority, regions and sites
- Message Box – more tags for identifying incoming emails

- App - Type & Priority as required fields when creating a job.
- App – Choose to show or hide the codes for the site, location, asset in dropdowns.
- App – Can set the QR code for a site or location by a scan from the mobile device.
- App – Asset Visibility. Asset details are more visible on the jobs and job tasks.
- App - Site comments and warning note appear on job page and new job page.
- App - Warning message when completing a Job in the but there are still open tasks
- App – Scan a site / asset’s QR code to raise a request within the request module
- App – Resource’s comments to appear on job in Manager module

Versions:

Main Web Application v23.9.0

Mobile App v1.3.2 (NEW)

Old Manager App v12.3.0

Old Resource App v12.5.0

Old Request App v2.3.3

Please note all app improvements and fixes are being made to the New Mobile App. We suggest you move to the new app and away from the old apps as soon as you can.

Release timetable

Date and Time of Release	Which Servers
26/03/2024 From 9pm (GMT)	app.trackplanfm.com d**o.trackplanfm.com h*****b.trackplanfm.com
27/03/2024 From 11am (GMT)	app2.trackplanfm.com app4.trackplanfm.com axxxk.trackplanfm.com app3.trackplanfm.com s****y.trackplanfm.com

Coming Soon in Future Releases:

- Planned Maintenance improvements – Q2 2024
- Upload Centre improvements – Q2 2024
- App – free text search for resources – Q2 2024
- Auto selection of resource and job distribution /throttling – Can combine the two existing methods of auto selecting a resource based on job type, site, region etc. Q2 2024
- SFG20 integration– Comprehensive library of Planned maintenance schedules and checklists. Q3 2024
- User Delegation – A user can delegate their access to another user when on holiday (for example) Q2 2024
- Job Notes – More options when sending a note by email.

- Resource Contracts – can set multiple contracts for each resource with timeframes, sites and assets covered etc. Q3 2024
- Job Request ratings. Clients can rate the job once complete. Q3 2024
- Devices and Meter Readings, with Charts, Thresholds and PPM driven by readings. (2024)
- Room and Asset Booking (2024)
- Graphs and charts for Form results (2024)
- View and interact with PDFs and image. Great for seeing your assets on floorplans etc. (2024-2025)

Work done for this Release.

Request Authorisations.

Why is it useful?

An updated version of our request authorisation feature is now live. This version allows the request to be sent to a specific user or team for authorisation before it is approved and turned into a reactive job.

Details:

A request can be automatically sent to a Team or user for authorisation by using the Advanced Job Routes.

After the first authorisation, a request can be sent on for a second or third level of authorisation if required.

<https://caf.fm/article/request-authorisations/>

Planned Items Upload.

Why is it useful?

A quicker and easier way to associate your sites, locations, sub locations or assets to your existing planned schedules and set the due dates, resource and assigned user.

Details:

A new upload can be found in Settings – Upload centre. The template is called Planned Items.

Points to note:

- Planned Schedules must be on the system first.
- Site and Location must be specified if you are updating an item for location.
- Site, Location and Sublocation must be specified if you are updating an item for sublocation.
- For asset items, there is no need to specify site, location and sublocation.

<https://caf.fm/article/upload-centre/>

Price Catalogue.

Why is it useful?

Set a predefined list of prices for services. These can be selected from the price catalogue when preparing a contractor quote or sales quote.

Details:

The catalogues can be updated in the Finance area. It can also be uploaded to the system via our upload centre in the settings area.

You can have multiple catalogues for different contractor and clients. You can set cost and sales prices.

You can set the default catalogue for each resource and each client contract.

Prices can then be added from the catalogue to a contractor or sales quote. You will still be able to add lines to a quote with free text and your own prices!

Sales Quotes – can now add multiple lines

Why is it useful?

Before this release you could only add one headline sales value. Now you can break your sales quote into multiple entries.

Details:

For those of you already using sales quotes, you will still be able to easily add a sales quote as before with one overall sales value. But you can now add additional sales lines if you wish.

Note, when printing the sales quote to PDF, the multiple sales lines will appear in a well-presented table.

Forms – new question type “Display Image”

Why is it useful?

This complements the existing question type “Display Text” where you can add explanatory text to a form to help users during form completion.

In a similar fashion, “Display Image” lets you add an image to a form to help users during form entry. For example, an image of a piece of equipment.

Details:

You can add multiple “Display Image” questions to a form.
They will appear in forms on the main application and in the app.

Users - Set Password policies and MFA (multi factor authorization)

Why is it useful?

To improve security around user access in the application

Details:

You can set password policies and enable multi factor authentication for groups of users:

- Force strong passwords
- Force password change every x days
- Lock account if over x failed login attempts - Client can set the limit.
- MFA user by user (using email SMS or both).
- enforce login by Single Sign On only

Client Contracts - Users Tab.

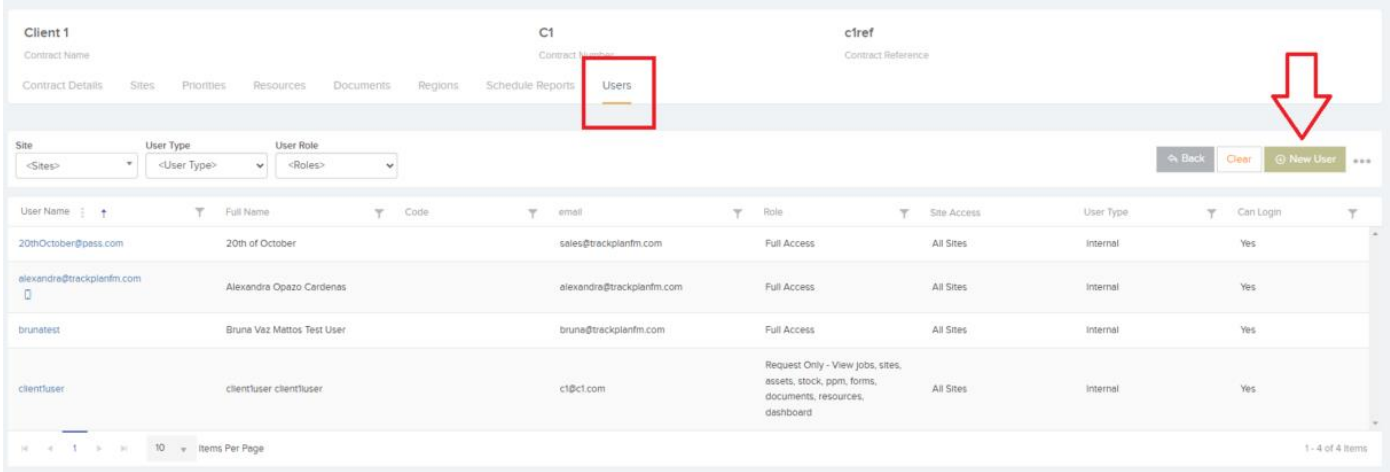
Why is it useful?

A quick and easy way to manage all users on specific client contracts.

Details:

From the new users tab you can view a list of all users associated to that contract. Clicking the any user will take you to the user’s details page.

You also have the ability to create a new user for that client contract by clicking ‘New User’.



User Name	Full Name	Code	email	Role	Site Access	User Type	Can Login
20thOctober@pass.com	20th of October		sales@trackplanfm.com	Full Access	All Sites	Internal	Yes
alexandra@trackplanfm.com	Alexandra Opazo Cardenas		alexandra@trackplanfm.com	Full Access	All Sites	Internal	Yes
brunatest	Bruna Vaz Mattos Test User		bruna@trackplanfm.com	Full Access	All Sites	Internal	Yes
clientuser	clientuser clientuser		c1@c1.com	Request Only - View jobs, sites, assets, stock, ppm, forms, documents, resources, dashboard	All Sites	Internal	Yes

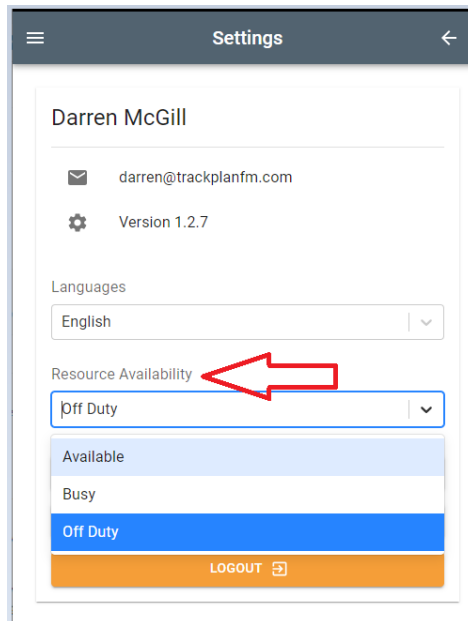
Resource Availability - If resource is "Off Duty" it will warn you when sending a job

Why is it useful?

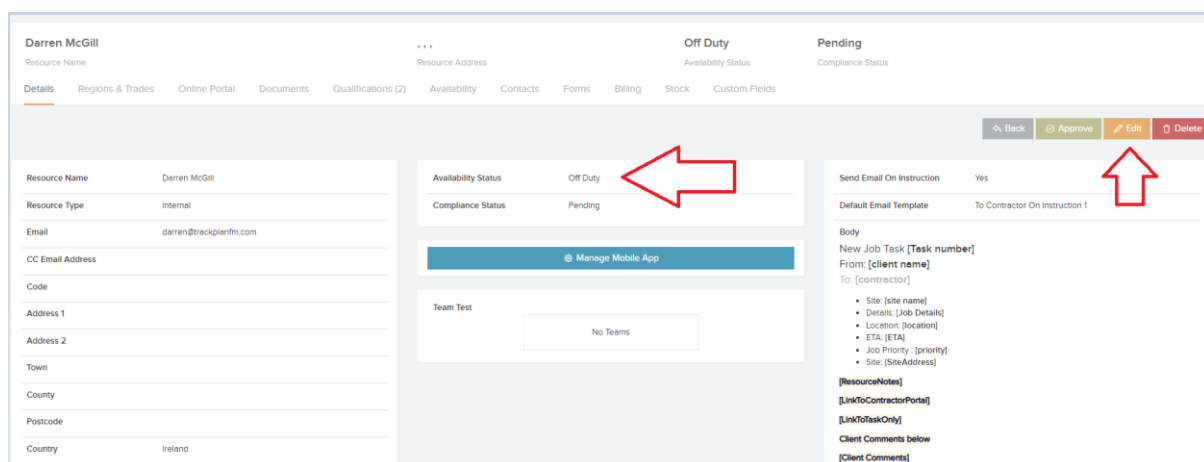
These additional new features regarding Resource availability will give better visibility and warnings to avoid instructing resources who are either busy or off duty.

Details:

The resource can set their status on the Resource app module in the settings area.



A user on the system can set the resource availability on the Resource details page. Just edit the page, select from the dropdown and click save.



We now show a warning when the resource is being selected on the resource list from the main job page. "The resource is off duty. Continue?"

Reports – Schedule output of Report file to be sent by FTP

Why is it useful?

You can send excel files generated from our reports area automatically by FTP to your own servers. For example, for import into your own systems.

Details:

We offer 3 FTP protocols:

- FTP
- FTPS
- SFTP

Reports – Some filters now offer multi-select: priority, regions and sites

Why is it useful?

More flexibility when applying filters on the reports

Details:

We have many filters in the reports area. Up until this release you could only select one option from each of the filters.

We have now enabled multi-select for 3 of the most important filters: Priority, Regions and Sites.

Needless to say, you will be asking us to make more of them multi-select!!!

- Message Box – more tags for identifying incoming emails

Why is it useful?

Incoming emails from requestors and contractors and other systems can create jobs and requests via the message box.

We are adding more tags to appear in the email body, which can help identify key additional information about the job or request.

Details:

Tags include: location, job contact details, job priority, job type

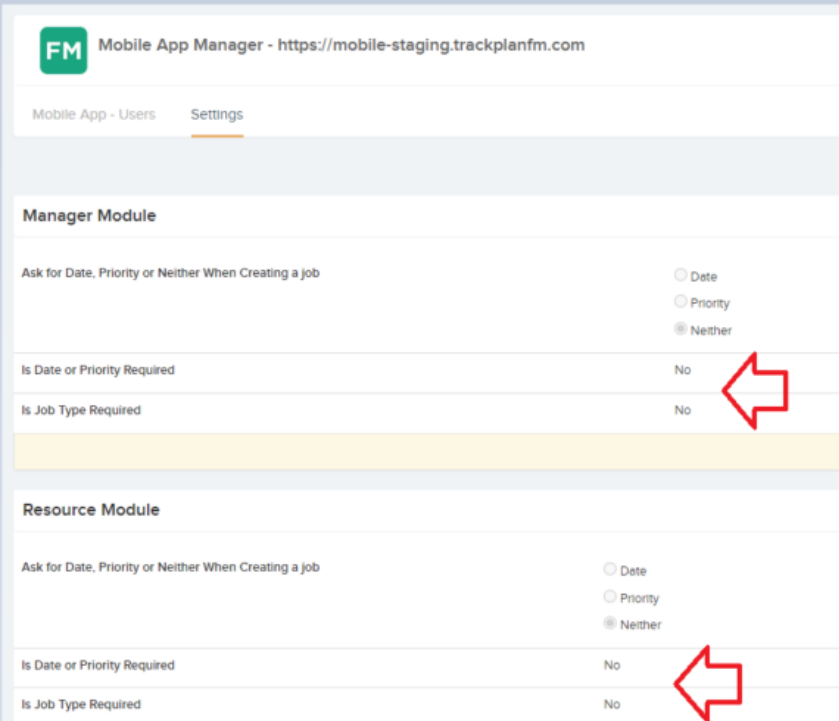
App - Type & Priority as required fields when creating a job.

Why is it useful?

Another useful feature to stop jobs getting created without a specific type or priority thus saving time for helpdesk users and ultimately giving management better reporting information and figures.

Details:

These new settings can be found in Settings – App Manager – Settings.



The screenshot shows the 'Mobile App Manager - https://mobile-staging.trackplanfm.com' interface. It features a navigation bar with 'Mobile App - Users' and 'Settings'. The main content is divided into two sections: 'Manager Module' and 'Resource Module'. Each section has three settings:

- 'Ask for Date, Priority or Neither When Creating a job' with radio buttons for 'Date', 'Priority', and 'Neither' (selected).
- 'Is Date or Priority Required' with a 'No' value, highlighted by a red arrow.
- 'Is Job Type Required' with a 'No' value, highlighted by a red arrow.

The 'Resource Module' section has identical settings, with the 'Is Date or Priority Required' and 'Is Job Type Required' values also highlighted by red arrows.

App – Can set the QR code for a site or location by a scan from the mobile device.

Why is it useful?

We already have this for assets on the manager and resource apps and clients find it very useful if they already have an old QR code assigned to an asset. They can walk around with their mobile, open the asset on the app, edit it and scan the old QR code. This will associate that QR code to that asset.

This new feature extends this architecture to sites, locations, and sub locations.

Details:

There is a new setting in Settings – App manager, for each app user.

'Can Update QR Codes' – if this is set to Yes then a pencil icon will allow the user or resource to edit the Trackplan QR code and associate a new code.

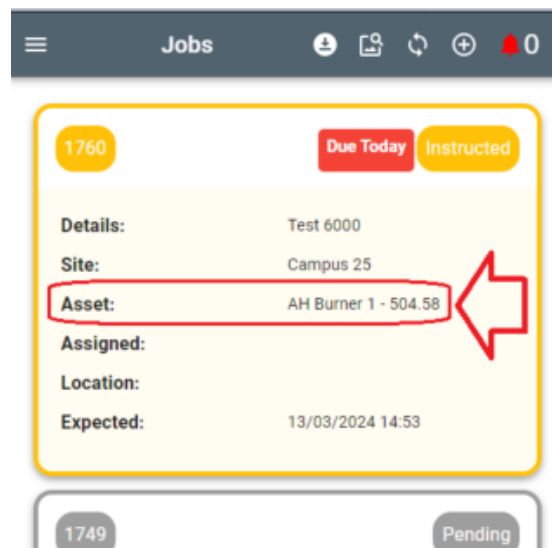
App – Asset Visibility. Asset details are more visible on the jobs and job tasks.

Why is it useful?

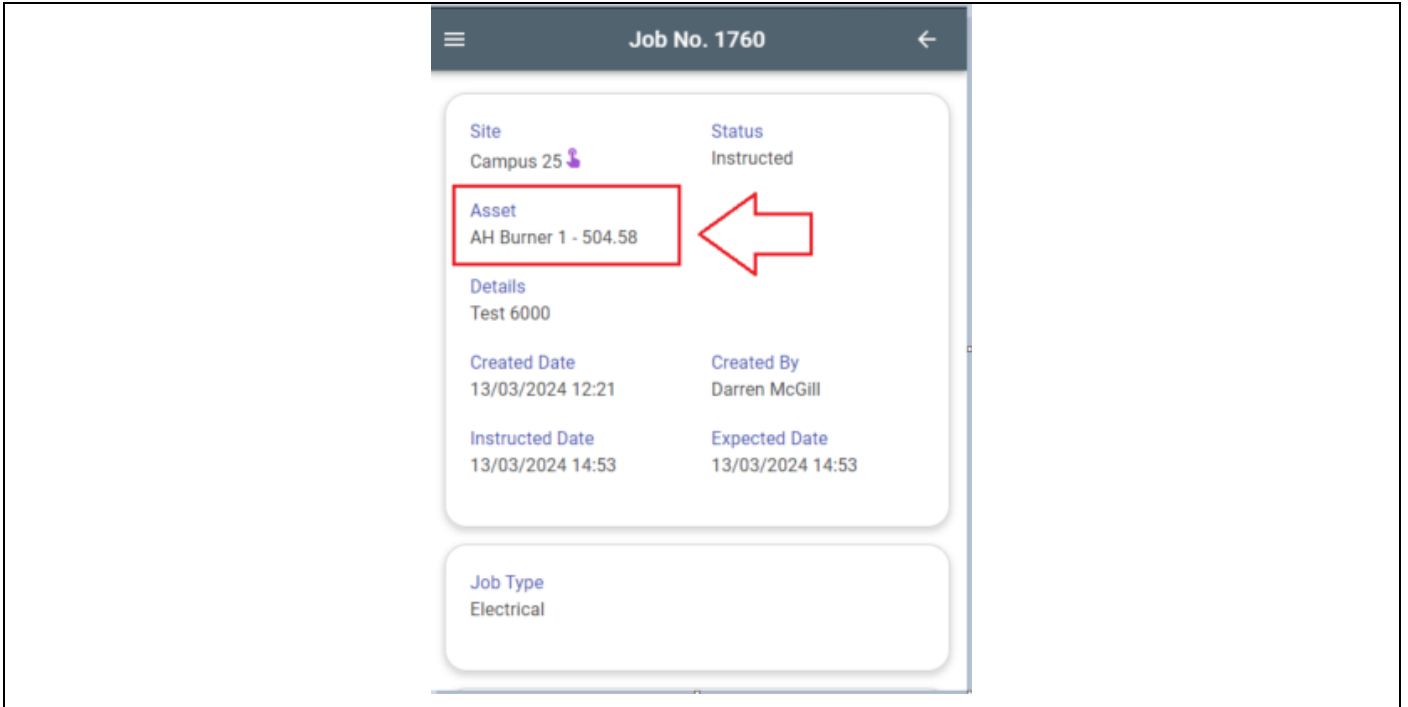
More visibility is always good, so having the asset name and code available on the jobs screens saves time. Of course, the asset is still attached to the job in the assets tab.

Details:

On the job list in the app.



On the job details screen in the app.



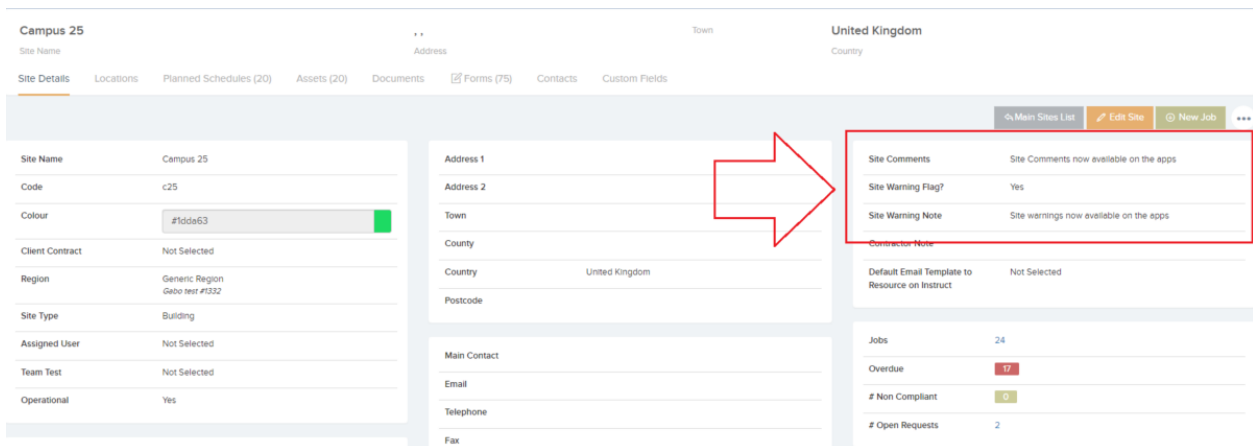
App - Site comments and warning note appear on job page and new job page.

Why is it useful?

This new feature will give the app users more visibility of important information and warnings about specific sites.

Details:

Site comments and site warning notes can be added to the site on the site details page.



When creating a job on the app:

On the site details page on the app:

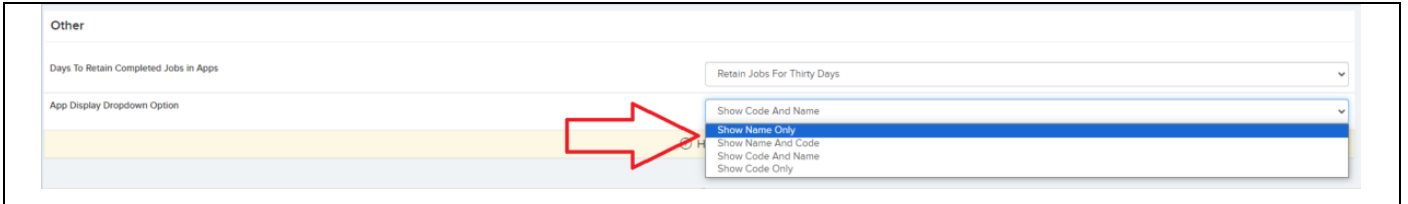
A new setting for the app to show/hide the site, location, sublocation & asset codes for all app modules.

Why is it useful?

Codes can be very important for some clients so now we have an option for the end user to be able to view the name and code in all mobile applications.

Details:

These new settings can be found in Settings – App Manager – Settings.



Warning message when a User tries to complete a Job in the manager module but there are still open tasks on the job.

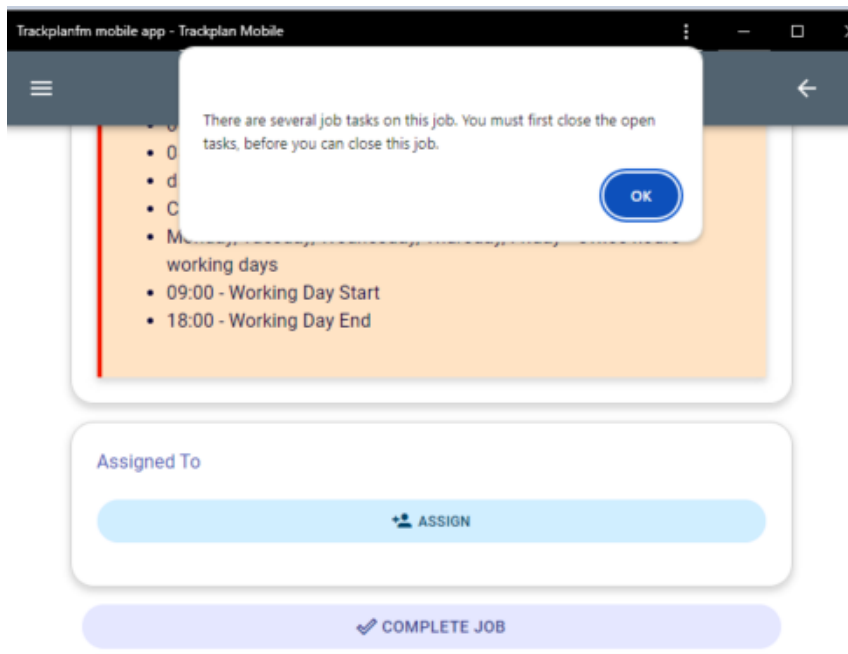
Why is it useful?

This new feature/warning message will stop jobs getting completed in the manager app module if there are multiple open job tasks on that job.

Details:

As you know, jobs can have multiple job tasks. The tasks are only visible in the main application so a user could complete a job on the manager app not knowing that there were some outstanding tasks.

This new warning message warns the user of open tasks.



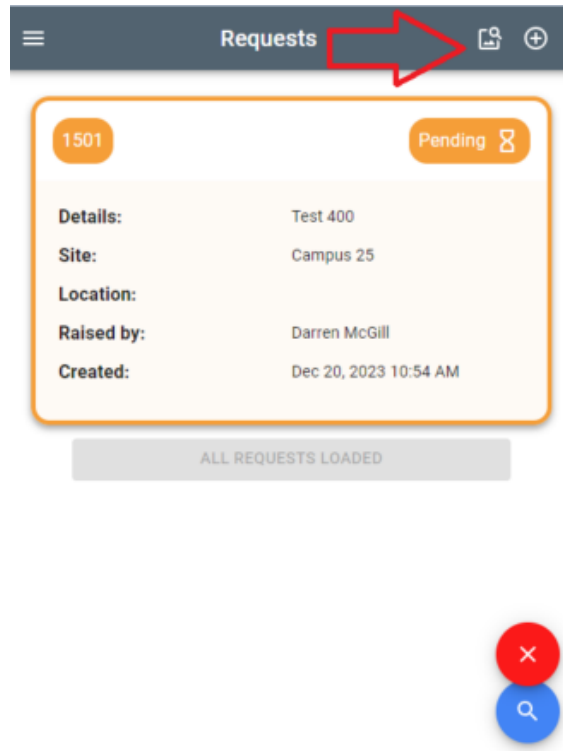
App – Scan a site / asset's QR code to raise a request within the request module

Why is it useful?

This new addition to the Request module of the mobile app gives the user the option to scan either the Remote request QR code or the original app QR code and raise a request.

Details:

Simple click the icon below in the app and your camera will open.



App – Resource’s comments to appear on job in Manager module

Why is it useful?

A useful feature to give you more visibility on important resource information on the mobile Manager app.

Details:

For each resource you can create a customised message with some important information, like their phone number, email address, working hours etc. (This is done on the Resource details page - *Customised Message on Job Pages*).

This message will now show on the job screen on the Manager app .



Resource
Darren McGill

↶ RESET

👤 ADD ANOTHER RESOURCE



Resource important details

- - Phone No
- 0861234567 - Phone number out of office hours
- 0861234567 - Mobile
- darren@trackplanfm.com - Email
- Call if an emergency - Notes/Comments of the resource
- Monday, Tuesday, Wednesday, Thursday, Friday - Office hours working days
- 09:00 - Working Day Start
- 18:00 - Working Day End

Assigned To

👤 ASSIGN

✔ COMPLETE JOB