Trackplan FM

Release 6th June 2024

SUMMARY

Key Features & Improvements:
- Planned Schedules redesign, improvements and add items to schedules more easily - Upload Centre – Big Improvements. Can see history of previous uploads plus more. - Resource Page – redesigned and KPIs added. - Client Contracts – redesigned, sales budget added, KPIs added, controls added. - Site Page – redesigned and more Calculated areas and capacities improved - Job and Task new KPIs – First Time Fix and Attendance on Time - Form QR Codes – Can now print QR codes associated to forms. - Sites, Locations and sublocations – more control over deletions - Printing Dashboards – PDF generated now much better. - Auto resource selection for new jobs – can combine both methods with throttling - Job Note – Sending Emails. Can select job creator, assigned user and job contact. - New Form Setting - Can choose to NOT send form to resource when job instructed - New job – can assign the Client Contract's contact as the job contact. - Users Delegations – User can delegate their role to another user for a time period. - User Audit Trail – History of user actions now visible in Settings area. - Job Calendar and quotes grids – new filter added for Projects. - Job Tasks Report – new columns: job number, statuses, sub type, region, contract - Job Cost Report – Finance codes and resource codes added. - Job Page – can add a custom weblink for a job by editing job or using Message Box - Job Page – The collapsible panels remember the state for the last time used. - SMS Messages – Now supports all characters. SMS shortened with weblink.

- Reports – new report added for Contractor Quotes.
- Reports: Cost and Sales Stage filters. Previous 12 months added to date filters.
- Reports - SFTP – filename and authentication by private key
- QR codes – Printing QR codes. Grid filters now work.
- Message Box – New tags for job description and teams.
- Message Box - New action rule for Approve Contractor Quote
- Pending Job Requests Report – Can choose from name and email address.
- Authorisation Bands for Purchase Orders, Quotes and Projects – Improvements
- Sales Quotes – Can easily add Job Contact when sending sales quotes by email.
- Sales Quotes – Can now added item from price catalogue when creating new quote
- Planned Schedules – Can now select job sub-type as well as job type.
- Planned Schedule Weekend setting – Can now include Friday, Saturday, or Sunday.
- App – Can ask for project and job category on new job screen.
- App – Edit asset can Scan QR code quickly to associate to new QR code.
- App - Documents now display according to the public / private setting
- App – Free text search now available when finding a resource.
- App – Request app – Can make photos mandatory on new request.
- App – Request app – Can ask for priority or expected dates.

Versions:

Main Web Application v23.10.0
Mobile App v1.4.0 (NEW)

Manager app: 12.3.0 (No changes)
Resource app: 12.5.0 (No changes)
Requestor app: 2.3.3 (No changes)

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

https://cafm.fm/article/how-do-i-get-the-apps/

Release timetable	
Date and Time of Release	**Which Servers**
06/06/2024 From 9pm (GMT)	app.trackplanfm.com app2.trackplanfm.com app4.trackplanfm.com
07/06/2024 From 9pm (GMT)	app3.trackplanfm.com s****y.trackplanfm.com axxxxk.trackplanfm.com
10/06/2024 From 9pm (GMT)	d**o.trackplanfm.com h*****b.trackplanfm.com

Coming Soon in Future Releases:
- Google Single Sign On. Q3 2024 - SFG20 integration – Comprehensive library of Planned maintenance schedules and checklists. Work starting May 27th, 2024. Completed in Q3 2024 - Resource Contracts – can set multiple contracts for each resource with timeframes, sites and assets covered etc. Q3 2024 - Devices and Meter Readings, with Charts, Thresholds and PPM driven by readings. Q3 2024 - Spaces – To offer infinite hierarchy of locations within each site. Q3 2024 - Stock Requests and Assignment of Storage Areas to users and resources. Q3 2024 - Room and Asset Booking (Q4 2024) - Graphs and charts for Form results (Q4 2024) - Job Request ratings. Clients can rate the job once complete. Q4 2024 - View and interact with PDFs and image. Great for seeing your assets on floorplans etc. (2025)

Work done for this Release.

Planned Schedules redesign, improvements and add items to schedules more easily

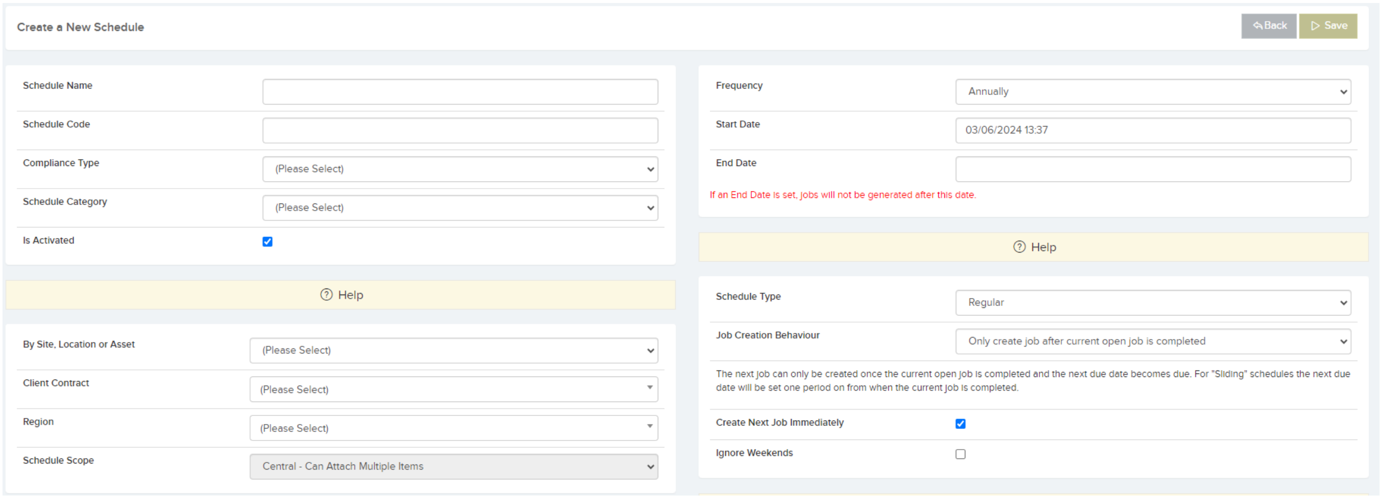
Why is it useful?

We have simplified the Planned Scheduled Details screen and added multiple tabs along the top of the screen to improve visibility and ease of use of our Planned Maintenance Module.

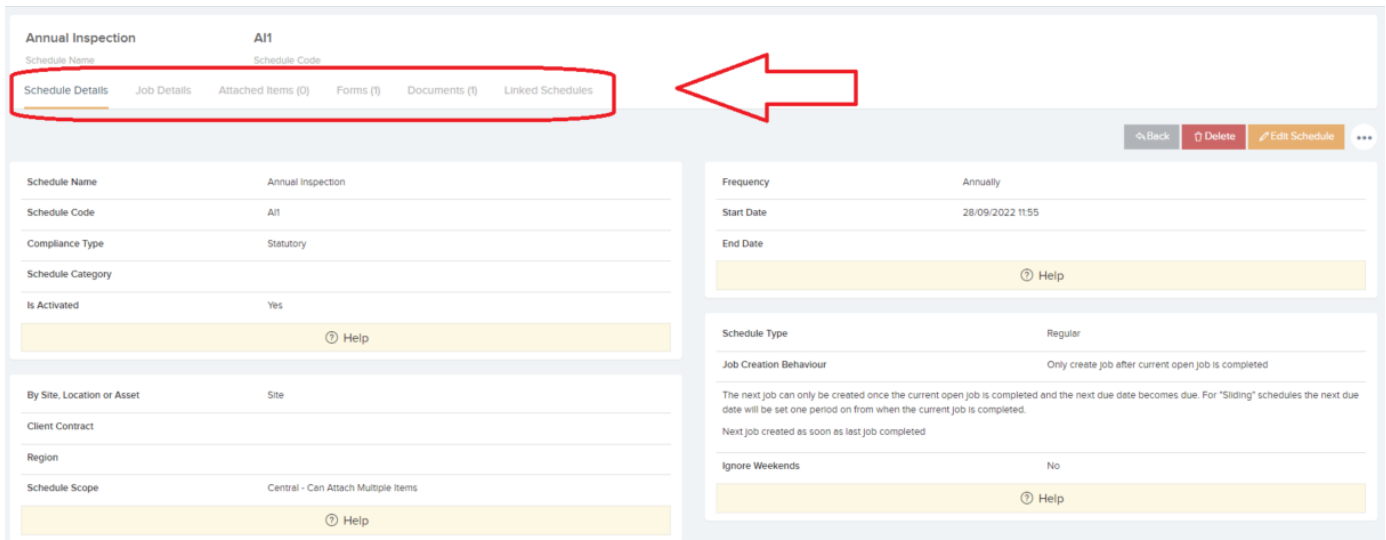
On the items tab you can see all the sites, locations or assets attached to the schedule and quickly add a new item to the schedule.

Details:

Create, Edit and details screen reduced to 2 columns.



Individual tabs to help build and manage your Planned Schedule.



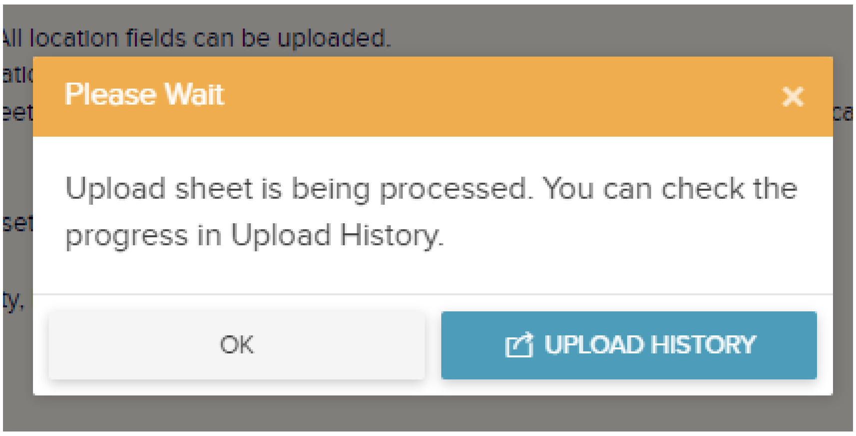
Upload Centre – Big Improvements. Can see history of previous uploads plus more.

Why is it useful?

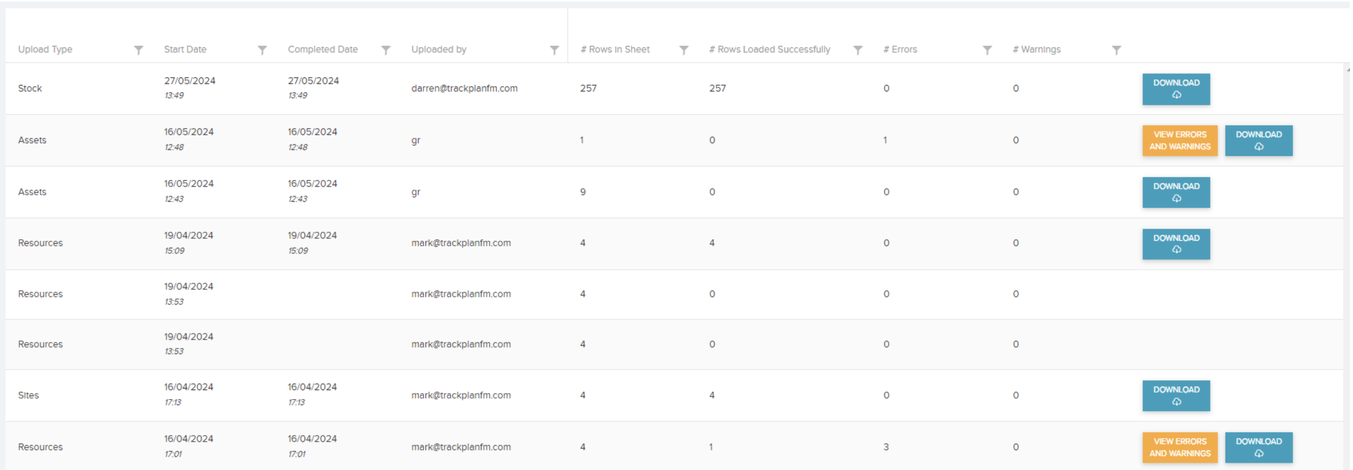
As our Upload Centre is getting used more and more. We have made improvements so users can now have better visibility on errors and history of all uploads on their system. And see the spreadsheets used in previous uploads.

Details:

No more loading screen. You can now keep using the system and your items will be loaded in the background.



Check progress, view errors & warnings and download data easily from the new Upload Details list. A notification will also be sent to the user when upload is complete.



Upload Type	Start Date	Completed Date	Uploaded by	# Rows in Sheet	# Rows Loaded Successfully	# Errors	# Warnings	
Stock	27/05/2024 13:49	27/05/2024 13:49	darren@trackplanfm.com	257	257	0	0	DOWNLOAD
Assets	16/05/2024 12:48	16/05/2024 12:48	gr	1	0	1	0	VIEW ERRORS AND WARNINGS DOWNLOAD
Assets	16/05/2024 12:43	16/05/2024 12:43	gr	9	0	0	0	DOWNLOAD
Resources	19/04/2024 15:09	19/04/2024 15:09	mark@trackplanfm.com	4	4	0	0	DOWNLOAD
Resources	19/04/2024 13:53		mark@trackplanfm.com	4	0	0	0	
Resources	19/04/2024 13:53		mark@trackplanfm.com	4	0	0	0	
Sites	16/04/2024 17:13	16/04/2024 17:13	mark@trackplanfm.com	4	4	0	0	DOWNLOAD
Resources	16/04/2024 17:01	16/04/2024 17:01	mark@trackplanfm.com	4	1	3	0	VIEW ERRORS AND WARNINGS DOWNLOAD

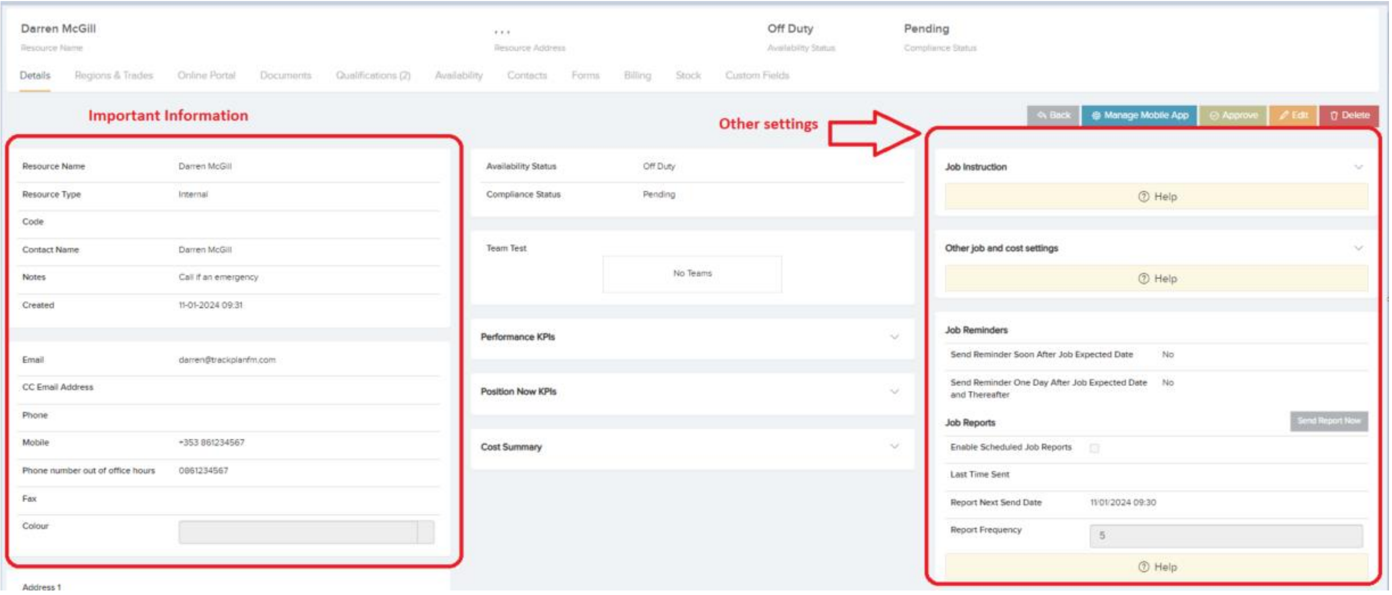
Resource Page – redesigned and KPIs added.

Why is it useful?

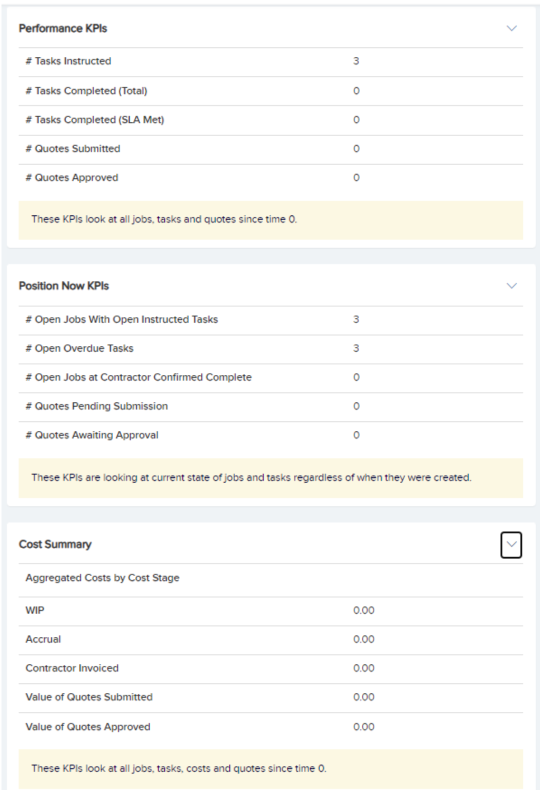
The redesign of the Resource details makes the most important details clearly visible on the screen and other setting hidden in a collapsible panel.
And useful KPIs have been added in relation to that resource

Details:

Redesigned Details screen.



KPIs added to keep better track of contractor performance.



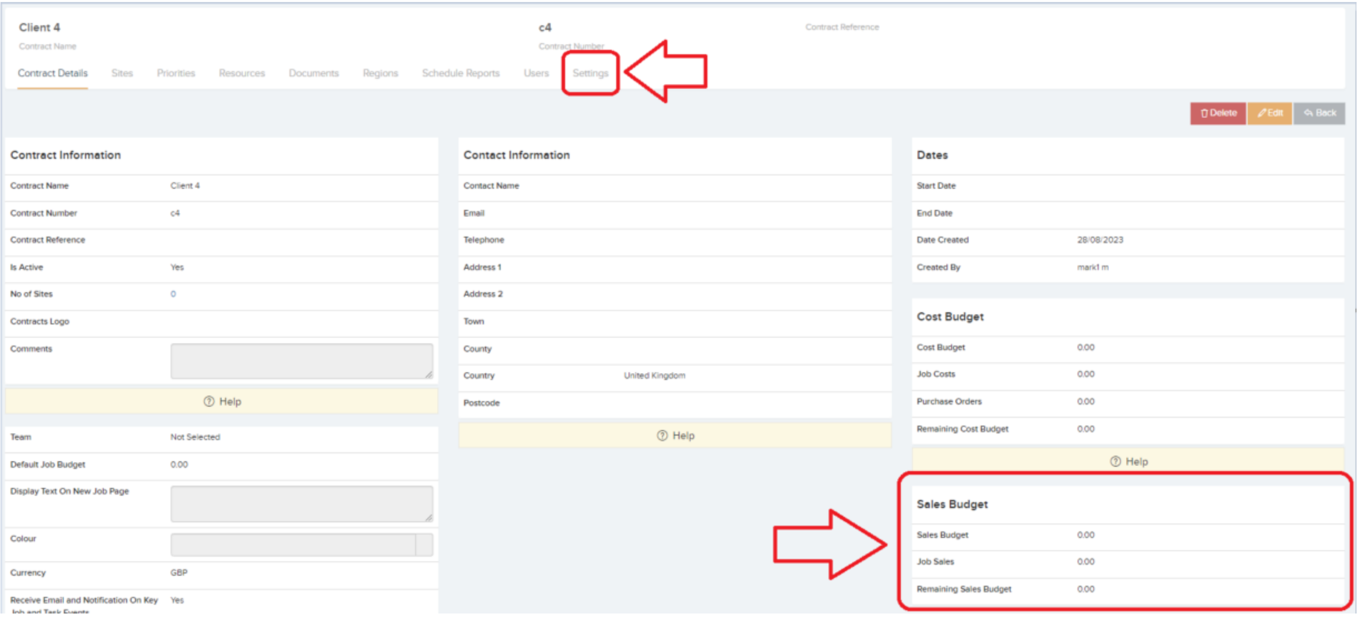
Client Contracts – redesigned, sales budget added, KPIs added, controls added.

Why is it useful?

The redesign will help users view and update key information with regards to the client contract. We have also added useful KPIs and enabled settings for workflow and notifications around the client contract.

Details:

New Design. (3 columns instead of 2, Sales Budget fields and Settings tab added)



KPIs added.

KPIs	
# Job Created	0
# Job Completed	0
Aggregated Costs by Costs Stage	
WIP	0.00
Accrual	0.00
Invoiced	0.00
Aggregated by Sales Stage	
WIP	0.00
Accrual	0.00
Invoiced	0.00

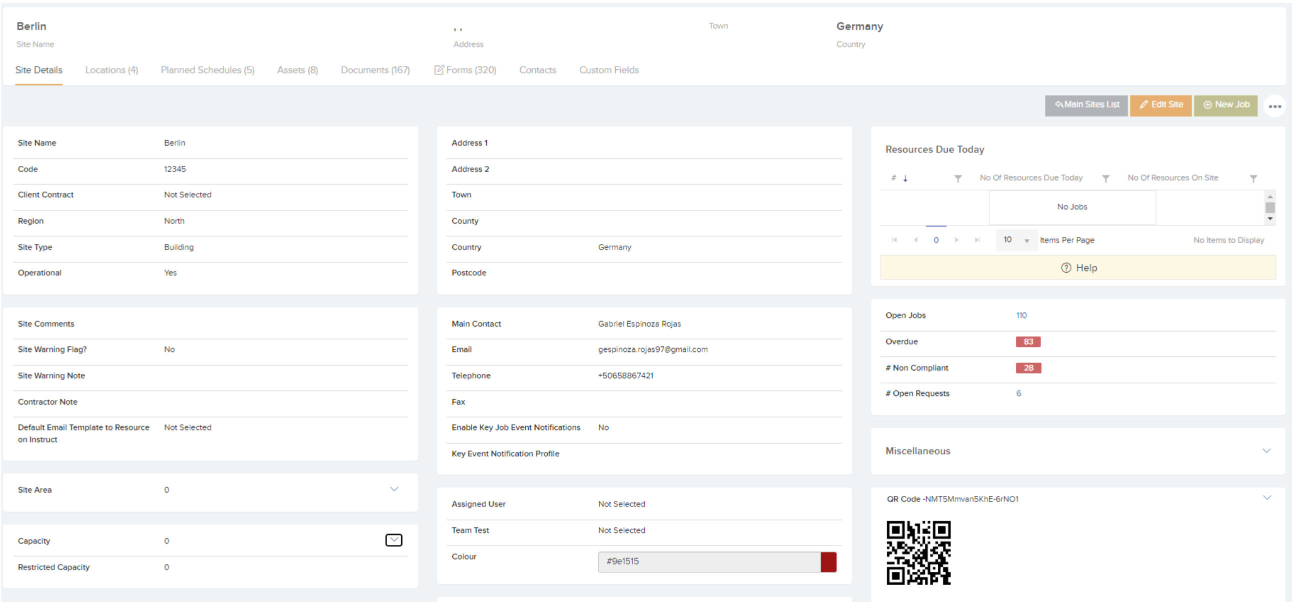
Site Page – redesigned and more Calculated areas and capacities improved

Why is it useful?

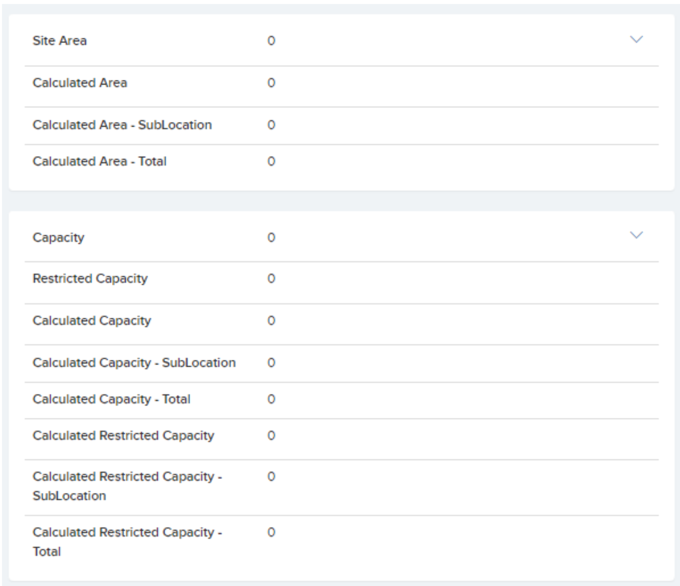
The site page has had a redesign to better present key site information to the user. We have also improved and extended the calculation of areas and capacities from locations and sublocations.

Details:

Site Details screen.



Calculated areas and capacities improved.



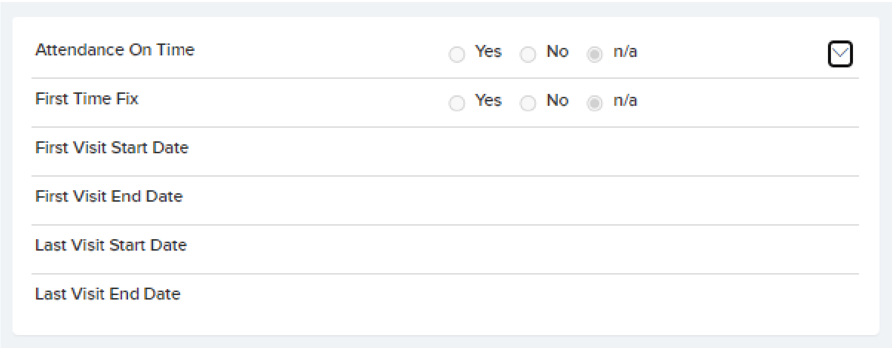
Job and Task new KPIs – First Time Fix and Attendance on Time

Why is it useful?

Gives clear and accurate KPIs on the job details screen and the job task details screen. These are automatically updated when a task is started, or a job or task is completed from the app or portal. They can be overridden and edited by the user in the main application.

Details:

New KPIs dropdown.

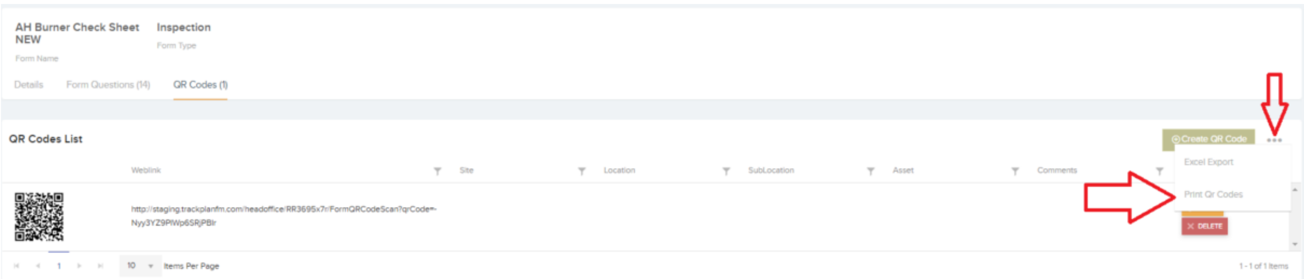


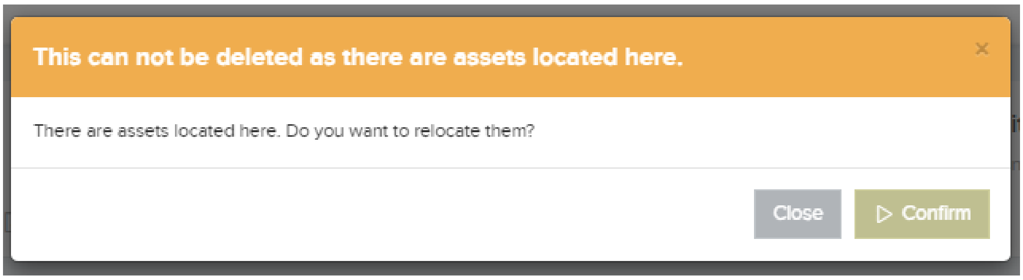
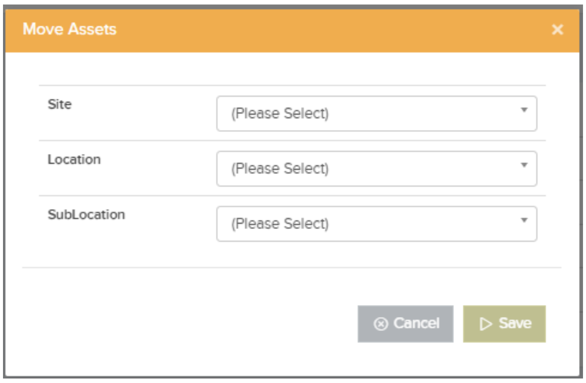
Form QR Codes – Can now print QR codes associated to forms.

Why is it useful?

A simple feature added here so users can easily print the QR code for the electronic form.

Details:



Sites, Locations and sublocations – more control over deletions
Why is it useful? Introducing better controls over deletion of sites. It will help maintain good data and support data integrity on the apps and QR codes or locations and assets.
Details: New warning notes example.  Ability to relocate your assets to a different site, location & sublocation. When deleting an site or location. 

Printing Dashboards – PDF generated now much better.
Why is it useful? Many clients want to print the dashboards to PDF which can then be circulated. We have greatly improved how this PDF looks.
Details: Example Reports Dashboard. https://cafm.fm/wp-content/uploads/2024/03/Dashboard-dashboardreport-5.pdf

Auto resource selection for new jobs – can combine both methods with throttling

Why is it useful?

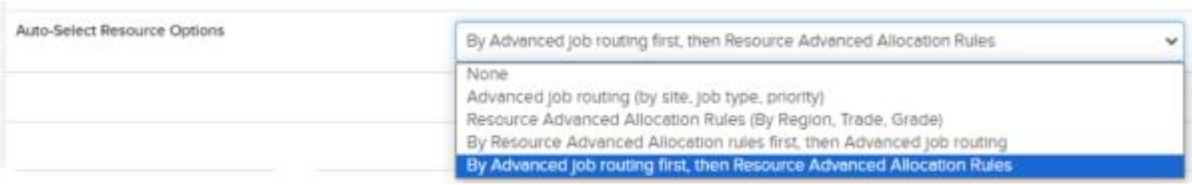
There are two ways to auto select a resource when a job is created based on job type, site, region etc. You can now combine both these methods and choose which one takes priority.
The "job throttling" can now be turned on for both of these methods. Throttling allows you to more fairly distribute work between your resources. It is an advanced feature!

Details:

There are two types of auto resource selection that a client can use:

- Advanced job routing (job type, site, days of week). Most popular and easy to use.
- Resource Advanced Allocation Rules - by Trade, region, grade. More complex to set up but equally powerful.

In Settings – Job Settings – New Job Settings, you choose which combination of these auto resource selection methods you want to use.



In Settings – Resource Job Throttling, you can set the rules for how the "job throttling" works across your resources.

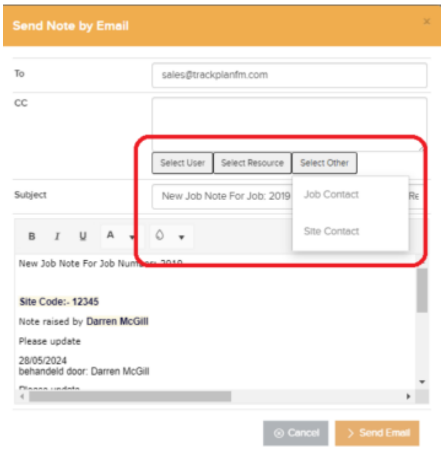
Job Note – Sending Emails. Can select job creator, assigned user and job contact.

Why is it useful?

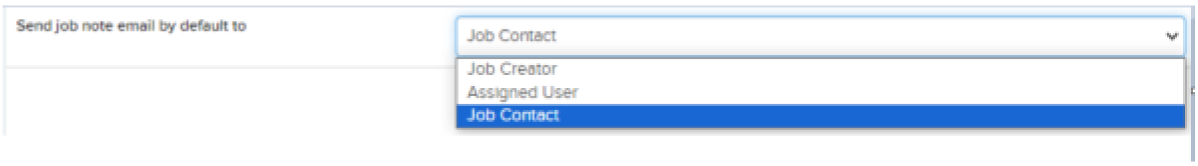
This will definitely save time for a user when sending job notes by email. You now have multiple options to select a user, resource, site contact or job contact.

Details:

When sending a note via email.



Note, In Settings – Job settings – Other Settings, you have the option to set your default email address when sending a job note by email.



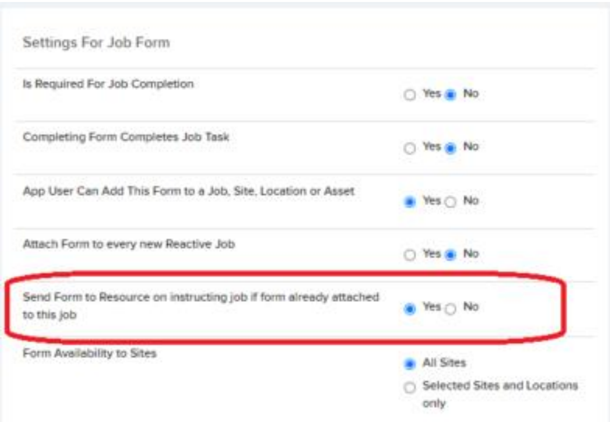
New Form Setting - Can choose to NOT send form to resource when job instructed

Why is it useful?

This new feature will 1) eliminate unnecessary forms getting sent to the Resource when instructing a job and 2) make sure necessary forms, already attached to a job will automatically be sent to the resource.
It works in conjunction with the form setting “Attach form to every new job”. So for example, you could design and attach a “satisfaction” form to every new reactive job, but not make sure that it does not also get sent to the contractor!

Details:

New settings in the form designer.



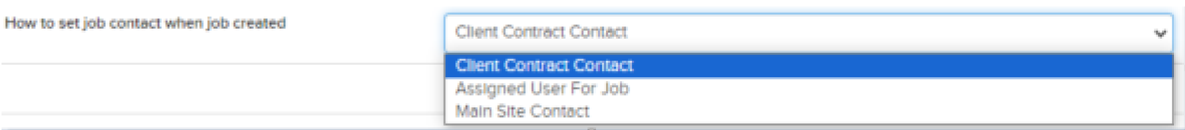
New job – can assign the Client Contract’s contact as the job contact.

Why is it useful?

This new feature will impact our FM clients using the Client Contracts module and will be a great addition so the relevant client contact information will be attached to the new job as the job contact.

Details:

A new option to an existing dropdown in Settings -> Job Settings.



Users Delegations – User can delegate their role to another user for a time period.

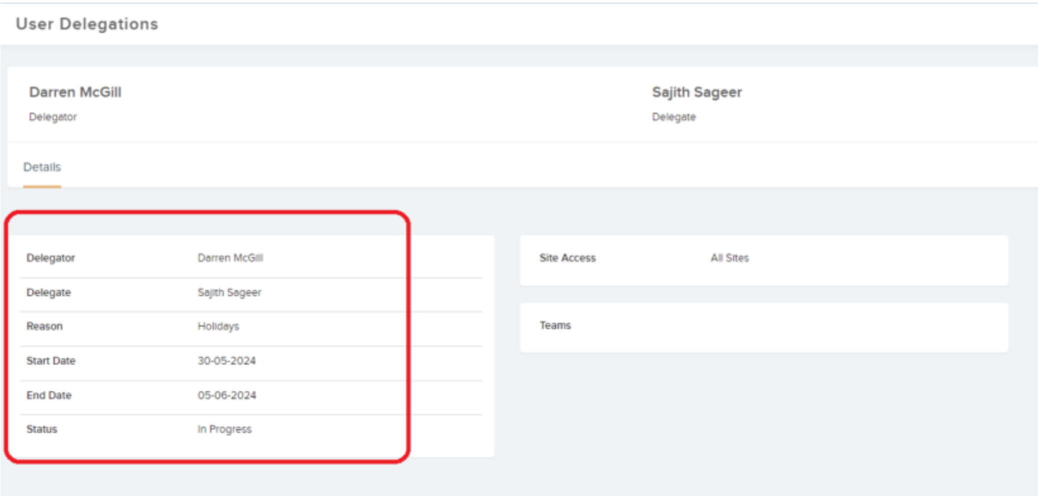
Why is it useful?

When a user is going on holiday, they can delegate their role to one or more other users on the system for a defined period of time. When the other user logs in they will then be invited to login as themselves or as the person who has delegated their role!

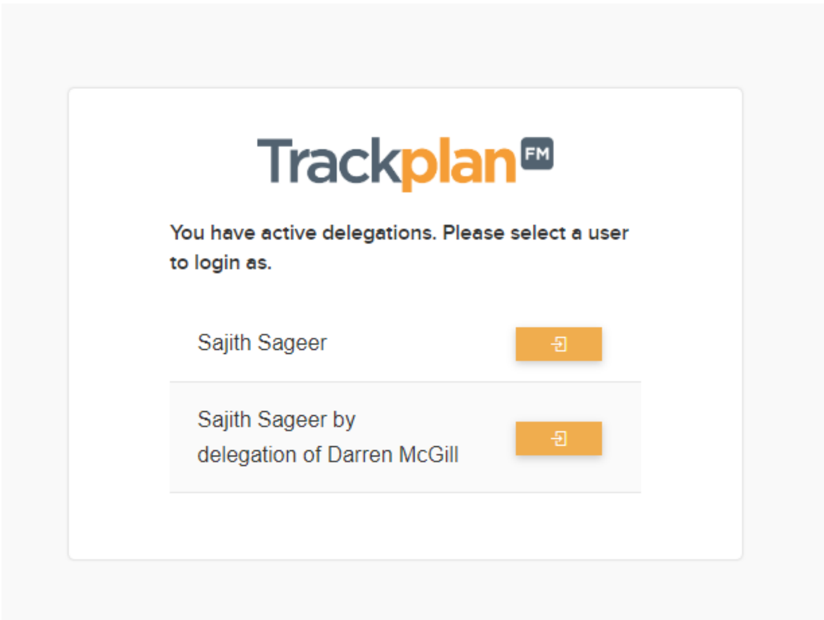
Details:

Only users with Full Access can access this new feature in Settings – User Delegations.

Create a new delegation by assigning the Delegator & Delegate.



With the dates provided Sajith can log into the system and will be given an option to choose who he wants to login as.



A new user is created behind the scenes (User = sajith@trackplanfm.com by delegation of Darren McGill).

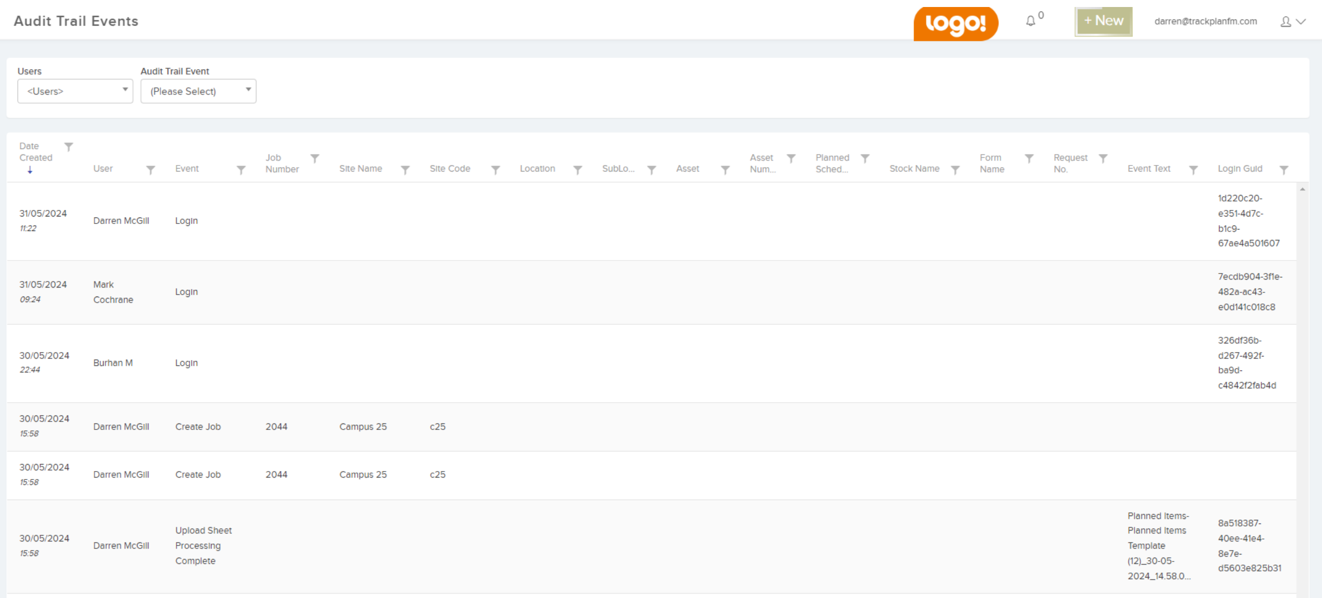
User Audit Trail – History of user actions now visible in Settings area.

Why is it useful?

In the settings area you can now see a history of most user actions while using the system.

Details:

This can be found in Settings -- Audit Trai and is filterable by User and Event.



Date Created	User	Event	Job Number	Site Name	Site Code	Location	SubLo...	Asset	Asset Num...	Planned Sched...	Stock Name	Form Name	Request No.	Event Text	Login Guid
31/05/2024 11:22	Darren McGill	Login													1d220c20-e351-4d7c-b1c9-67ae4a501607
31/05/2024 09:24	Mark Cochrane	Login													7ecdb904-3f1e-482a-ac43-e0d141c018c8
30/05/2024 22:44	Burhan M	Login													326df36b-d267-492f-ba9d-c4842f2fab4d
30/05/2024 15:58	Darren McGill	Create Job	2044	Campus 25	c25										
30/05/2024 15:58	Darren McGill	Create Job	2044	Campus 25	c25										
30/05/2024 15:58	Darren McGill	Upload Sheet Processing Complete												Planned Items-Planned Items Template (12)_30-05-2024_14.58.0...	8a518387-40ee-41e4-8e7e-d5603e825b31

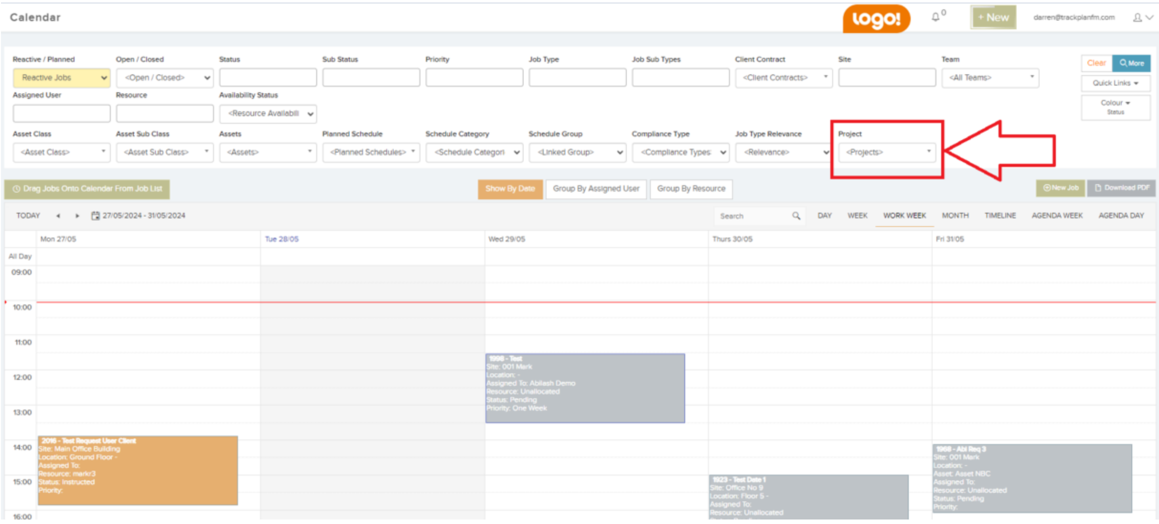
Job Calendar and quotes grids – new filter added for Projects.

Why is it useful?

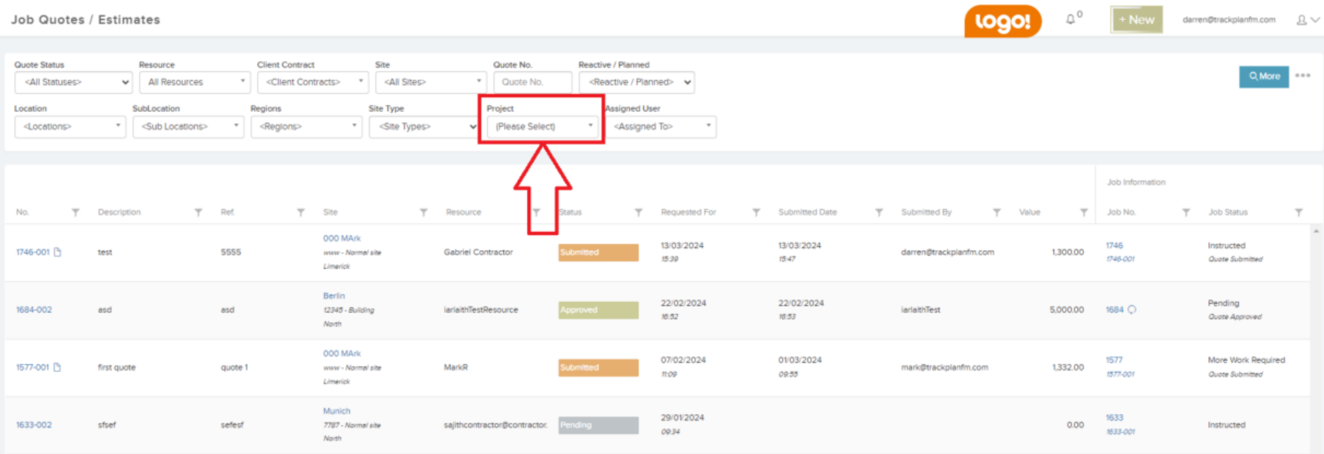
A simple new addition to the filters on both screens. This will help when a user wants to find jobs or quotes associated to a specific project.

Details:

Calendar View.



Job Quotes / Estimates view.



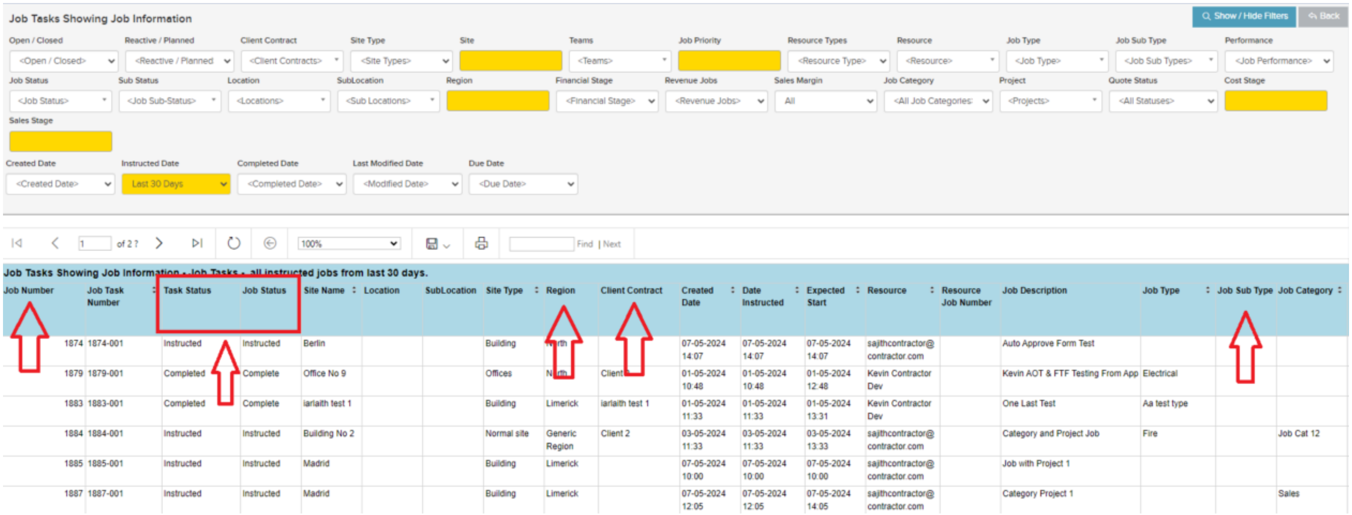
Job Tasks Report – new columns: job number, statuses, sub type, region, contract

Why is it useful?

New columns on the job task report for more meaningful reporting.

Details:

Job Tasks Showing job information example.



Job Tasks Showing Job Information - Job Tasks - all instructed jobs from last 30 days.

Job Number	Job Task Number	Task Status	Job Status	Site Name	Location	SubLocation	Site Type	Region	Client Contract	Created Date	Date Instructed	Expected Start	Resource	Resource Job Number	Job Description	Job Type	Job Sub Type	Job Category
1874	1874-001	Instructed	Instructed	Berlin			Building	North		07-05-2024 14:07	07-05-2024 14:07	07-05-2024 14:07	sajithcontractor@contractor.com		Auto Approve Form Test			
1879	1879-001	Completed	Complete	Office No 9			Offices	North	Client	01-05-2024 10:48	01-05-2024 10:48	01-05-2024 12:48	Kevin Contractor Dev		Kevin AOT & FTF Testing From App	Electrical		
1883	1883-001	Completed	Complete	iarlaith test 1			Building	Limerick	iarlaith test 1	01-05-2024 11:33	01-05-2024 11:33	01-05-2024 13:31	Kevin Contractor Dev		One Last Test	Aa test type		
1884	1884-001	Instructed	Instructed	Building No 2			Normal site	Generic Region	Client 2	03-05-2024 11:33	03-05-2024 11:33	03-05-2024 13:33	sajithcontractor@contractor.com		Category and Project Job	Fire		Job Cat 12
1885	1885-001	Instructed	Instructed	Madrid			Building	Limerick		07-05-2024 10:00	07-05-2024 10:00	07-05-2024 10:00	sajithcontractor@contractor.com		Job with Project 1			
1887	1887-001	Instructed	Instructed	Madrid			Building	Limerick		07-05-2024 12:05	07-05-2024 12:05	07-05-2024 14:05	sajithcontractor@contractor.com		Category Project 1			Sales

Job Cost Report – Finance codes and resource codes added.

Why is it useful?

Driven by multiple clients who export cost data into excel files on a daily, weekly and monthly basis. These new columns will help with data analysis and integrations into their own finance systems.

Details:

Finance codes can be set up in Finance – Finance codes. Now they will then show on the Job Costs Report - All Columns Report.
They will also be available as hidden fields on the main cost list in Finance – Job Costs.

The resource code can be set on the resource details screen and will help with mapping with your finance system.

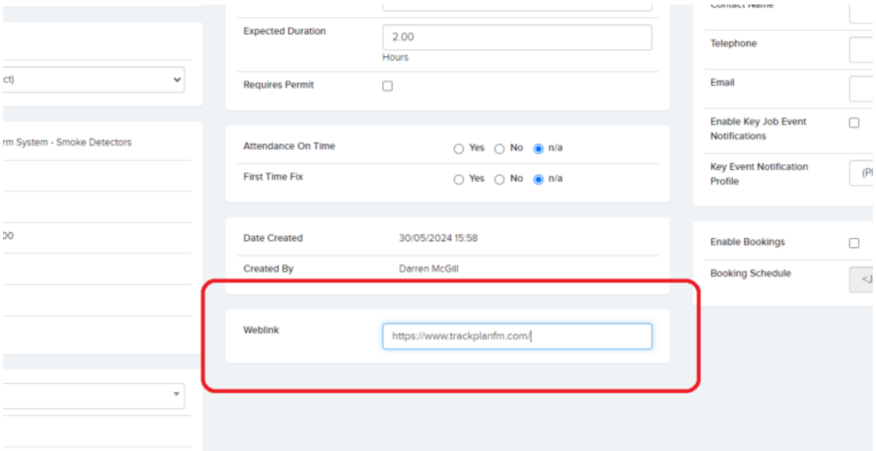
Job Page – can add a custom weblink for a job by editing job or using Message Box

Why is it useful?

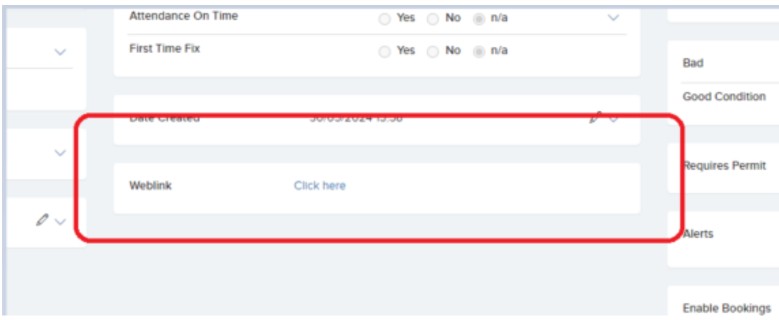
A useful feature driving by a number of clients who wanted a clickable link available to them on the Job details screen.

Details:

Edit the Job details to input the link.



Clickable link will show when saved.



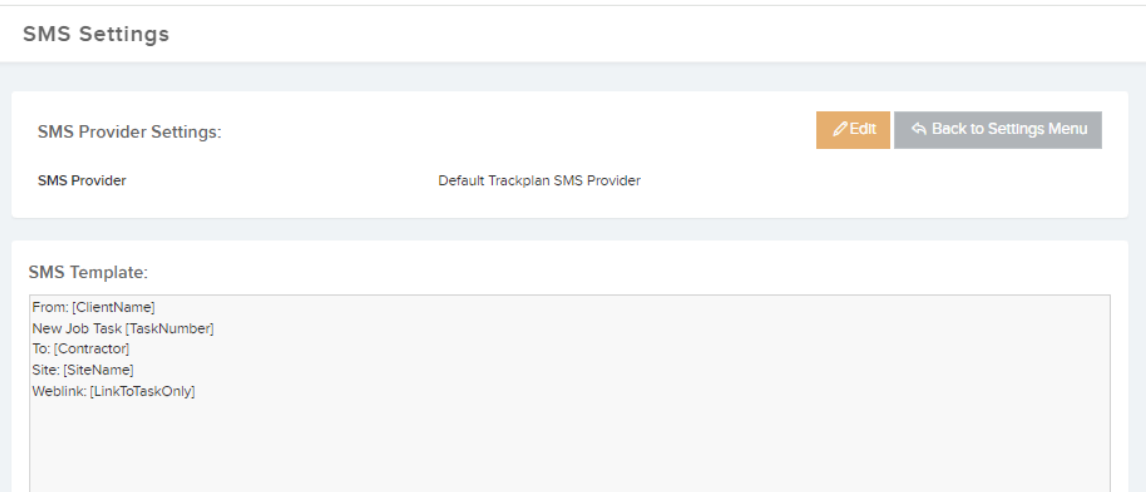
Job Page – The collapsible panels remember the state for the last time used.

Why is it useful?

It will remember how you last viewed the job page so you do not need to expand the same panel each time. We have also implemented this on other pages we have redesigned in this release.

Details:

When a user expands or collapses a panel the system will remember the last state of each panel so the next time they come back into that screen the panel will be visible.

SMS Messages sent to the resource – This now supports all characters. SMS shortened with weblink.
Why is it useful? All characters will now be sent correctly on the SMS message sent to the resource when instructing the resource. Also, the SMS message sent to the Resource has been shortened.   We still show the most important job information on the SMS message at the top. But have also added a weblink on the SMS so the Resource can click to access the job via the portal and see all the details of the job task. Most clients are using the default Trackplan account to send SMS messages. ***If any client would like to revert to the old version where the full job details are included on the SMS, then they will need to set up their own SMS account with either ESendex or WorldText.*** Please contact support@trackplanfm for more information on how to do this.
Details: New shortened SMS Template with link. 

Reports – new report added for Contractor Quotes.

Reports - new Cost and Sales Stage filters. Previous 12 months added to date filters.

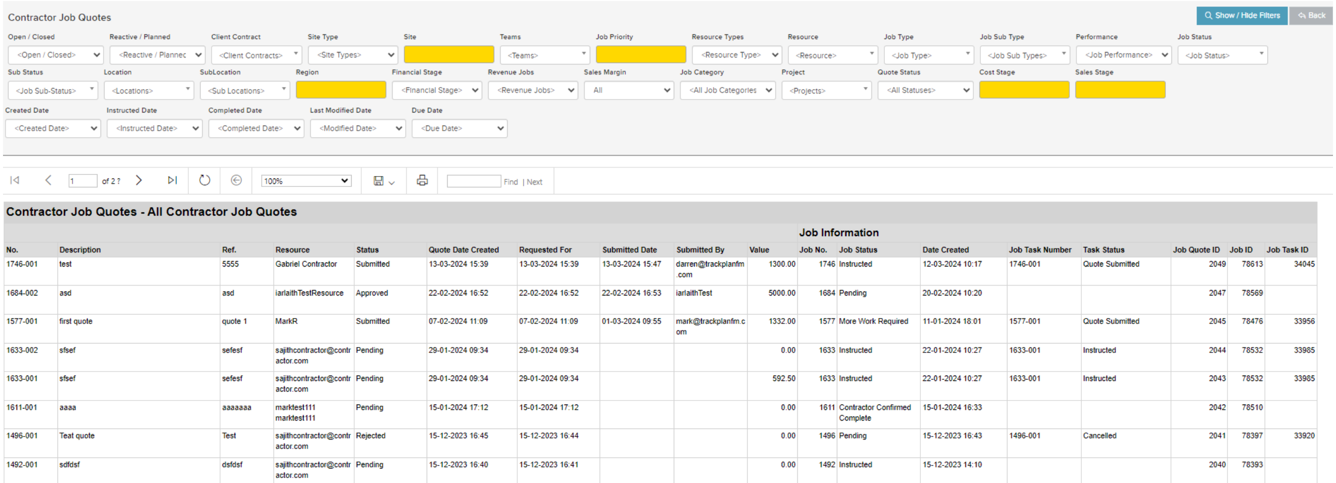
Reports - SFTP – filename and authentication by private key.

Why is it useful?

Always useful to have new reports added to our library of reports and also some new useful filters and improvements added.

Details:

New Contractor Job Quotes report - Shows all Contractor Job Quotes.



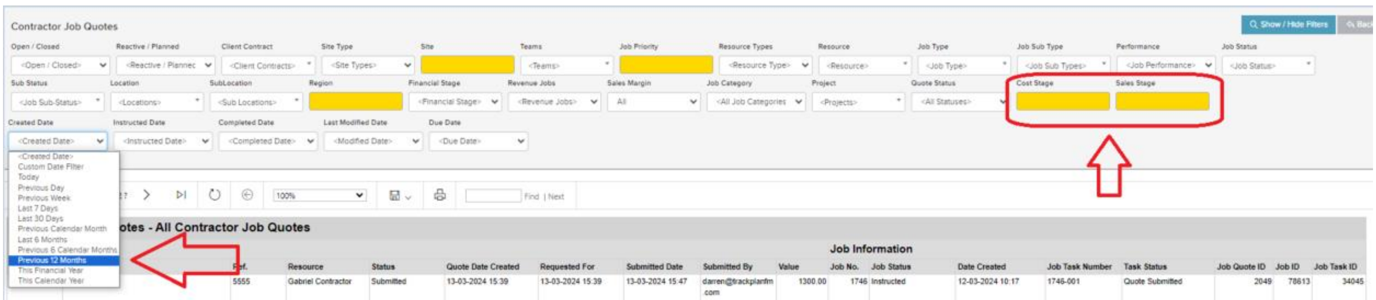
Contractor Job Quotes - All Contractor Job Quotes

No.	Description	Ref.	Resource	Status	Quote Date Created	Requested For	Submitted Date	Submitted By	Value	Job No.	Job Status	Date Created	Job Task Number	Task Status	Job Quote ID	Job ID	Job Task ID
										Job Information							
1746-001	test	5555	Gabriel Contractor	Submitted	13-03-2024 15:39	13-03-2024 15:39	13-03-2024 15:47	darren@trackplanfm.com	1300.00	1746	Instructed	12-03-2024 10:17	1746-001	Quote Submitted	2049	78613	34045
1684-002	asd	asd	iarlaithTestResource	Approved	22-02-2024 16:52	22-02-2024 16:52	22-02-2024 16:53	iarlaithTest	5000.00	1684	Pending	20-02-2024 10:20			2047	78569	
1577-001	first quote	quote 1	MarkR	Submitted	07-02-2024 11:09	07-02-2024 11:09	01-03-2024 09:55	mark@trackplanfm.com	1332.00	1577	More Work Required	11-01-2024 18:01	1577-001	Quote Submitted	2045	78476	33956
1633-002	sfsef	sefesf	sajithcontractor@contractor.com	Pending	29-01-2024 09:34	29-01-2024 09:34			0.00	1633	Instructed	22-01-2024 10:27	1633-001	Instructed	2044	78532	33985
1633-001	sfsef	sefesf	sajithcontractor@contractor.com	Pending	29-01-2024 09:34	29-01-2024 09:34			592.50	1633	Instructed	22-01-2024 10:27	1633-001	Instructed	2043	78532	33985
1611-001	aaaa	aaaaaaa	marktest111 marktest111	Pending	15-01-2024 17:12	15-01-2024 17:12			0.00	1611	Contractor Confirmed Complete	15-01-2024 16:33			2042	78510	
1496-001	Teat quote	Test	sajithcontractor@contractor.com	Rejected	15-12-2023 16:45	15-12-2023 16:44			0.00	1496	Pending	15-12-2023 16:43	1496-001	Cancelled	2041	78397	33920
1492-001	sdfdsf	dsfdsf	sajithcontractor@contractor.com	Pending	15-12-2023 16:40	15-12-2023 16:41			0.00	1492	Instructed	15-12-2023 14:10			2040	78393	

Cost and Sales Stage filters added. Every job is assigned a cost stage and sales stage by the system during its life. These show the current state of the job as either

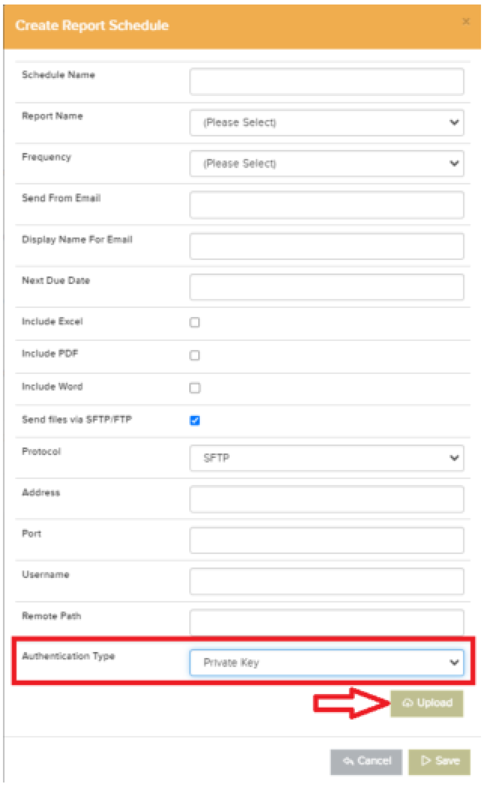
- WIP - work in progress – for jobs which are yet to be completed.
- Accrual – for jobs that have been completed but are yet to be invoiced.
- Invoiced – for completed jobs which have been invoiced by the contractor (or a sales invoice sent to the client).

Previous 12 months option added to the date filters.



SFTP – We recently added the ability for clients to schedule reports to be sent by FTP. The SFTP methods has been improved in this release.

- Filename sent by FTP made unique with the report schedule name + the date and time
- authentication by private key added as a protocol.



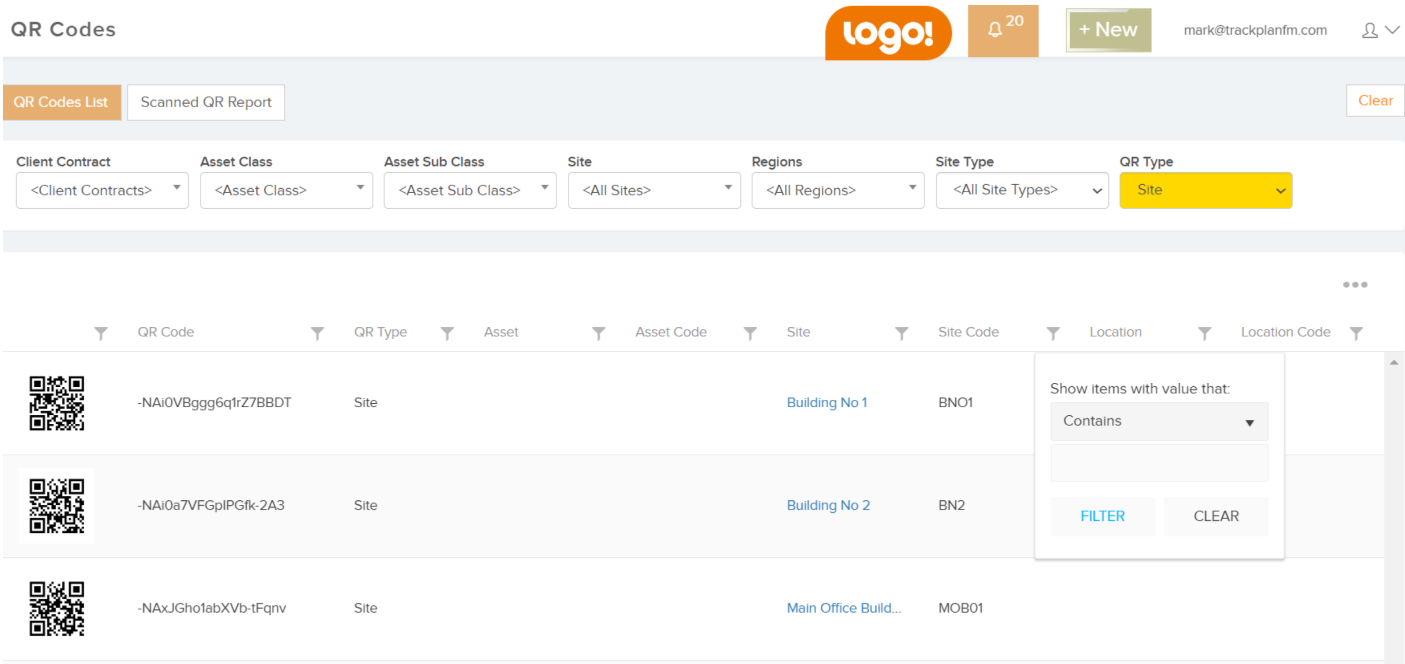
QR codes – Printing QR codes. Grid filters now work.

Why is it useful?

A fix made to help users choose exactly what QR codes they would like to select for printing when using the column filters within the grid itself.

Details:

Filter example.



Message Box - New tags for job description and teams.
Message Box - New action rule for Approve Contractor Quote.

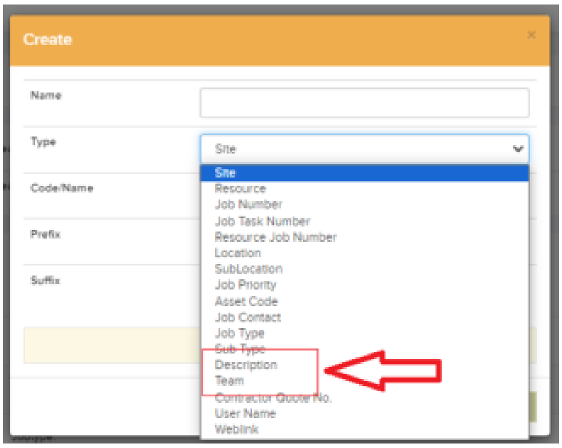
Why is it useful?

Useful new tags for clients using the new Message Box module.

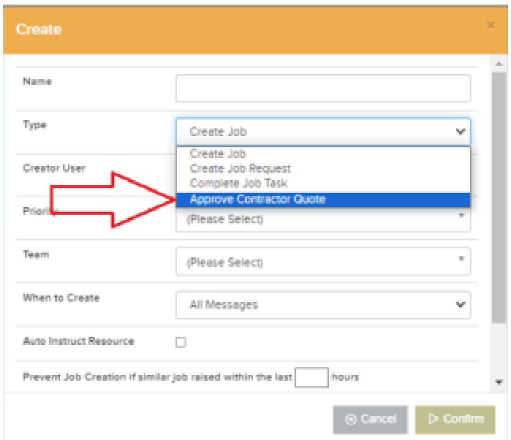
Details:

Job description and Team can now be brought in from an email received in the message box, and then associated to the incoming message and its associated job (if there is one). Set this up as an association rule.

There is also a new Action rule, so an incoming email can trigger the approval of a contractor quote. For advanced users only!



New Approve Contractor Quote Action Rule added.



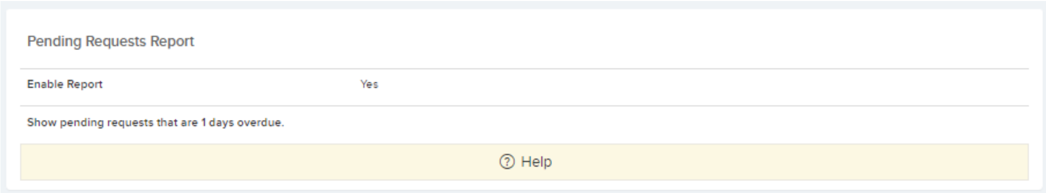
Pending Job Requests Report – Can choose from name and email address.

Why is it useful?

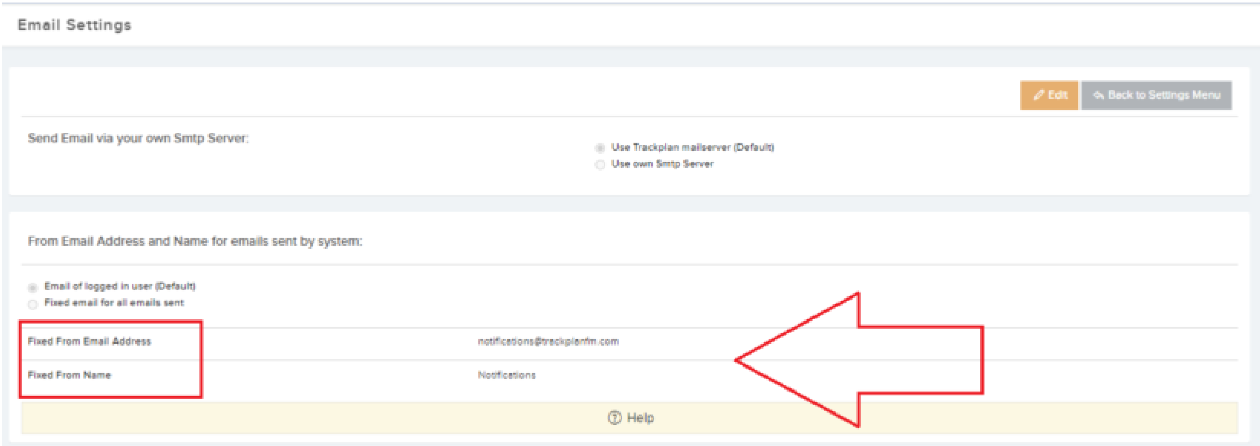
For any report getting sent, it is useful to have a dedicated FROM email address set. The Pending Requests Report in Settings – Job Requests will now take the Fixed name & email address in Settings -> Email Settings.

Details:

Request Report in Settings – Job Requests.



Email settings in Settings – Email Settings.



Authorisation Bands for Purchase Orders, Quotes and Projects – Improvements

Why is it useful?

A quick fix here for an existing feature to make sure there are no gaps between the authorisation bands set up.

Details:

Behind the scenes fixes and improvements.

Sales Quotes – Can easily add Job Contact when sending sales quotes by email.

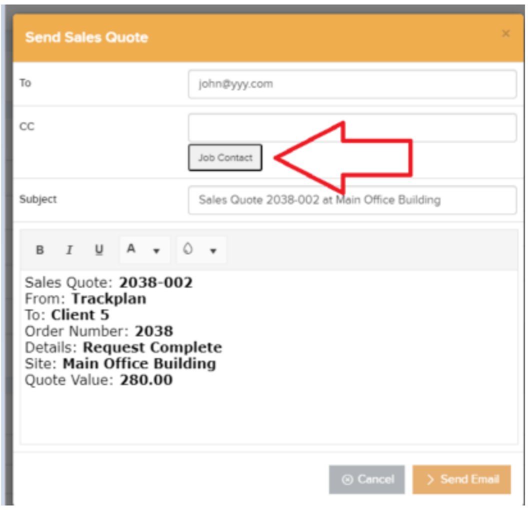
Sales Quotes – Can now added item from price catalogue when creating new quote.

Why is it useful?

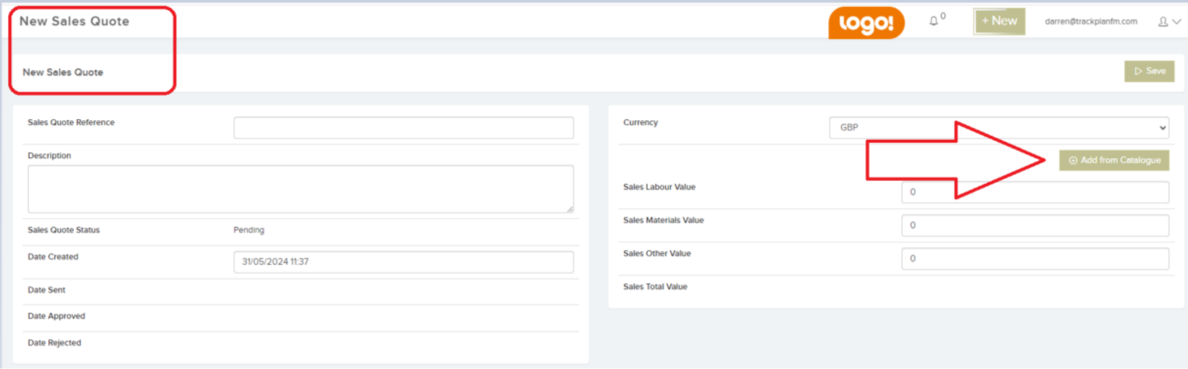
Two good features to help users send sales quotes to the correct person and easily add the correct items, already priced from the price catalogue module.

Details:

Easily add Job Contact when sending sales quotes by email if there is a job contact on the job.



Ability to add an item from the Price Catalogue when create a New Sales quote. (Before you could only add an item when the sales quote was created)



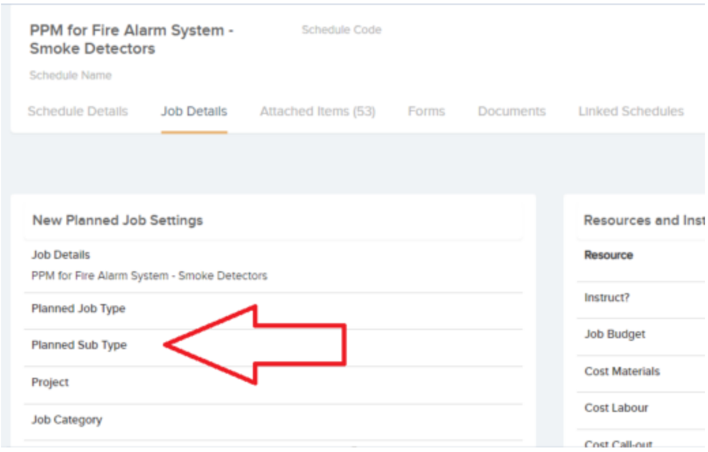
Planned Schedules – Can now select job sub-type as well as job type. Planned Schedule Weekend setting – Can now include Friday, Saturday, or Sunday.

Why is it useful?

Two useful additions to the Planned Maintenance module. Ability to add a Job Sub Type for reporting and also the ability to configure your weekends.

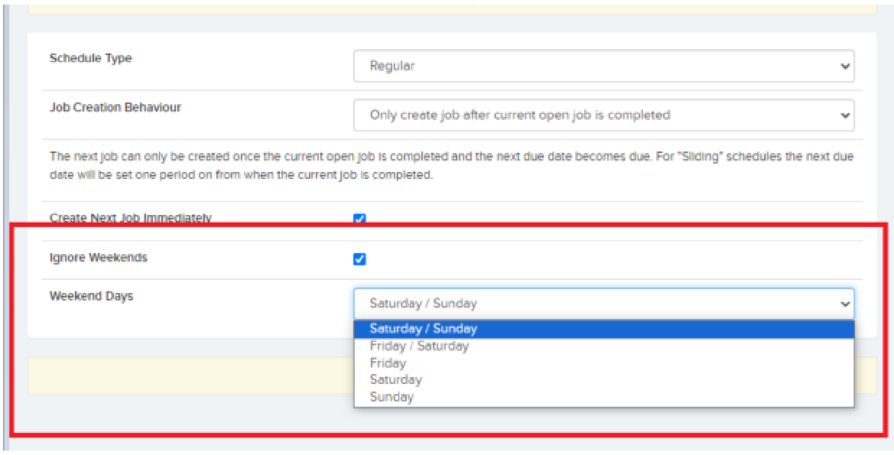
Details:

Sub Type added.



Weekend configuration.

By default, this will take what you can configured in Settings – General Settings



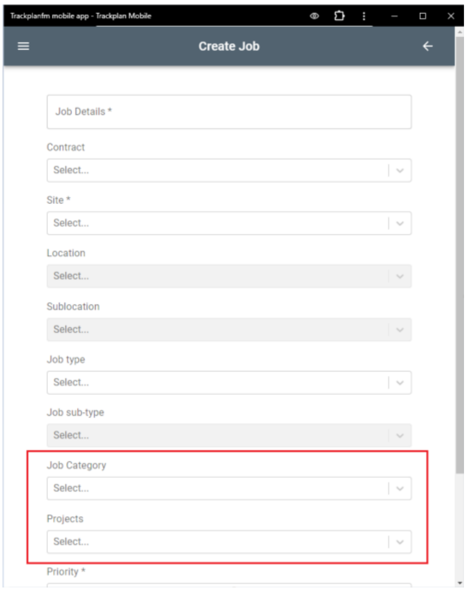
App – Can ask for project and job category on new job screen.
App – Edit asset can Scan QR code quickly to associate to new QR code.
App - Documents now display according to the public / private setting.
App – Free text search now available when finding a resource.
App – Request app – Can make photos mandatory on new request.
App – Request app – Can ask for priority or expected dates.

Why is it useful?

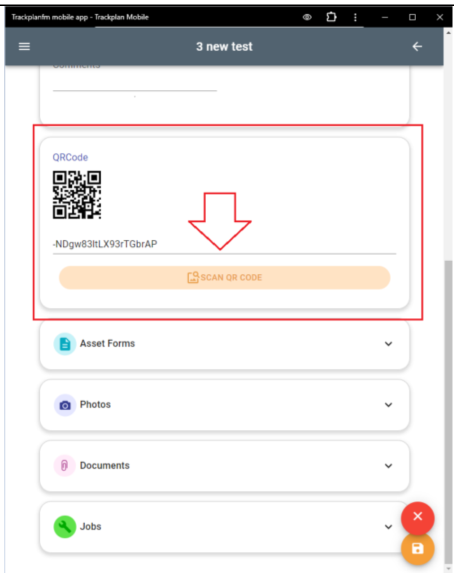
All these new features will enhance user experience on all modules of our mobile app.

Details:

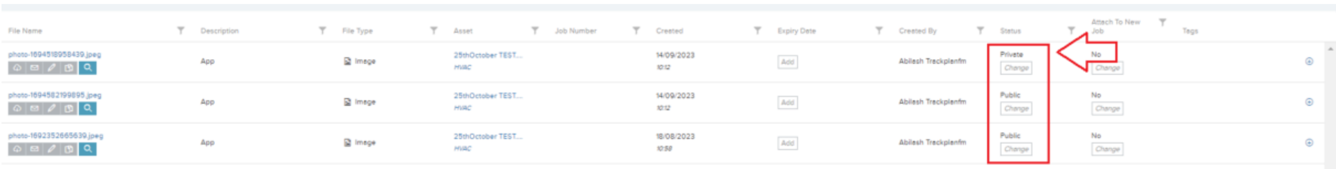
Project & category dropdown available when creating a new job on the manager module. Customisable in Settings – App Manager – Settings.



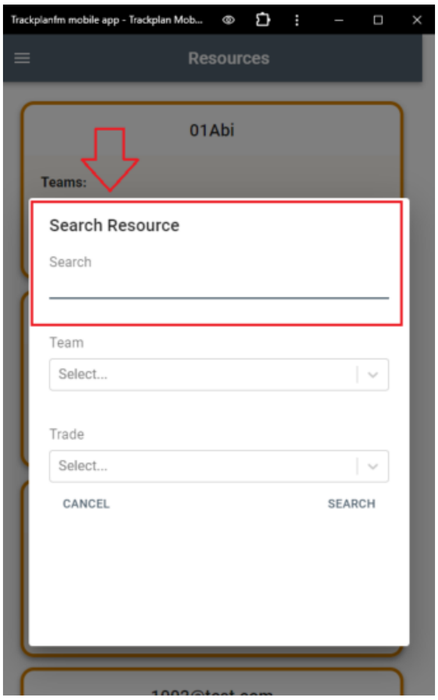
Scan QR code quickly to associate to new QR code in the Manager & Resource App modules.



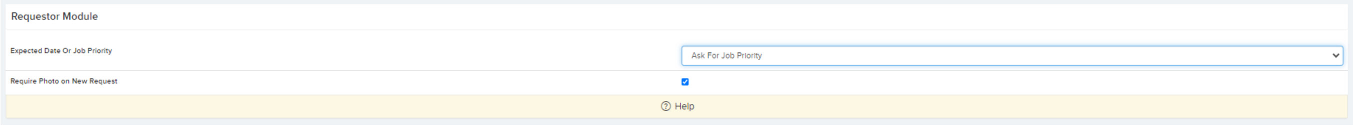
Public/Private document settings now considered on all App modules.



Find a Resource easily with Free text.



Can now make photos mandatory when a user is creating a new request. Can also ask for either Job priority or expected dates.
Customisable is Settings – App Manager – Settings.


Requestor Module
Expected Date Or Job Priority
Ask For Job Priority
Require Photo on New Request
Help