Job Manager

Customer Release Notes

Version 9.1.0

Work Hub enhancement for van stock and warehouse stock.

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Job Manager Version 9.1.0

Development of Job Manager Version 9.1.0 is now complete and was released in December 2022. This document contains a summary of what's new.

Version 9.1.0 is primarily focused on refinement and iteration of the stock module based on user feedback. Along side this a number of fixes and improvements to the rest of the application have been made to improve the product for all users.

What's new

This section describes the new or improved features we have introduced in this release, plus priority fixes.

Stock Improvements

NEW	JM-20434 Allow users to cancel unprocessed transfers.
NEW	JM-20506 New Stock Enquiry page
NEW	JM-20438 Remove Legacy Stock enquiry page and code.
NEW	JM-20510 merge vans and Warehouses menu options.
NEW	JM-20511 Create Supplier catalogue area
NEW	JM-20512 add process to allow for over-receipting
NEW	JM-20519 Add ability to print off Stocktake sheet.
NEW	JM-20520 allow manual entry of stocktake recording time in CC.
NEW	JM-20521 Create stock transfer for multi-items in a single process.

NEW	JM-20555 Add a switch to exclude reserved stock from replenishment calculation
NEW	JM-20660 Add switch to select online / Paper based stock takes.
NEW	JM-20937 Link Supplier catalogue data to material code preferred supplier and cost fields.
NEW	JM-20507 Add ability to change the location type for a stock location
NEW	JM-20508 Add a warning at job completion to check if stock has been correctly recorded if no stock usage recorded.
NEW	JM-20509 Rename and move stock levels screen.

General Improvements

NEW	JM-20071 Asset Popup now has Summary Panel Split into Two Column View
NEW	JM-19723 Errors reported to jclient should not have a log reference if no actual log message is generated.
NEW	JM-20262 Resource Criteria - Remove need for operative to have had / have a Job assigned to appear in the list.
NEW	JM-20399 Create FMS config Screen.
NEW	JM-20439 Create a standard "reset criteria" button to all search pages with criteria.
NEW	JM-20820 Create / Update notification of job changes to send updates to a jobs scheduling details.
NEW	JM-20886 add location + accuracy to status changes in CC.
NEW	JM-20887 Update Webservice API to include location + accuracy for status changes in GetJob
NEW	JM-20347 Upgrade or replace Log4J

Fixes

FIXED	JM-20377 Cannot add stock usage to a job in Control Centre
FIXED	JM-20405 JM Control Centre Saved Search Issue
FIXED	JM-20495 JM / Work Hub / Cost Calculations spanning multiple days incorrect
FIXED	JM-20499 Unable to update gas safe number of operative
FIXED	JM-20586 Child job line Photos not displaying in PDF Documents
FIXED	JM-20595 Show no results if no jobs at same location as an asset.
FIXED	JM-20786 Add some indexes to JM to improve the performance
FIXED	JM-20597 Performance - Improve resource search.

A closer look

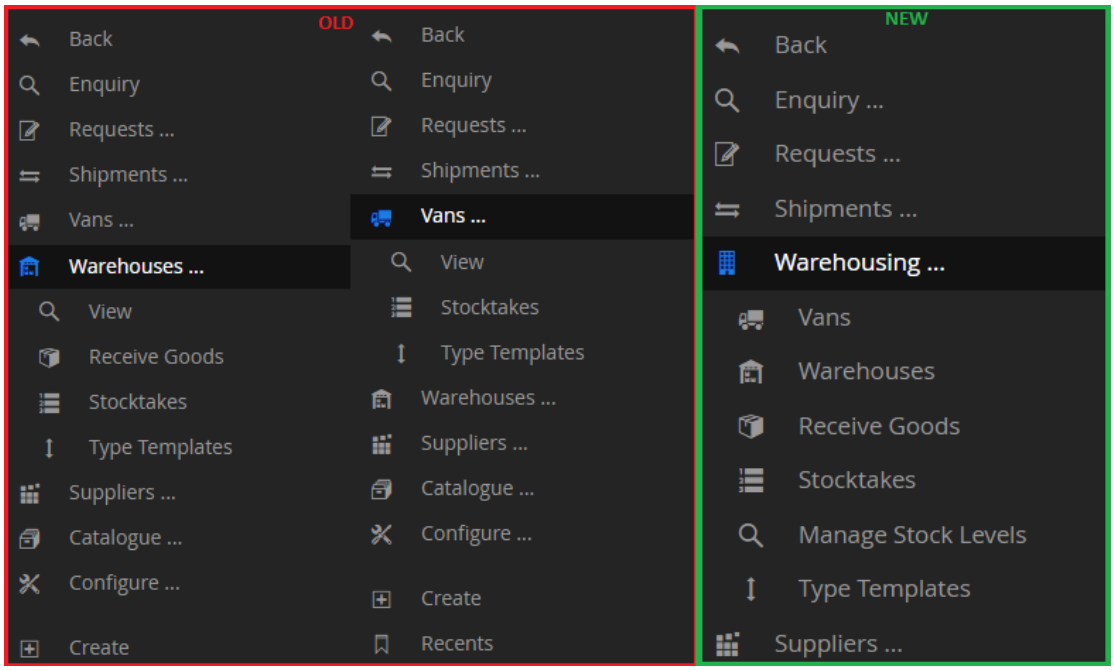
This section provides extended information on key features.

Stock System Enhancements

Following on from the new stock systems introduced in V9.0.0 several changes and improvements have been made based on user feedback to further refine the process of managing stock within Job Manager. In the Section we will describe the changes made in a bit more detail.

merge vans and Warehouses menu options.

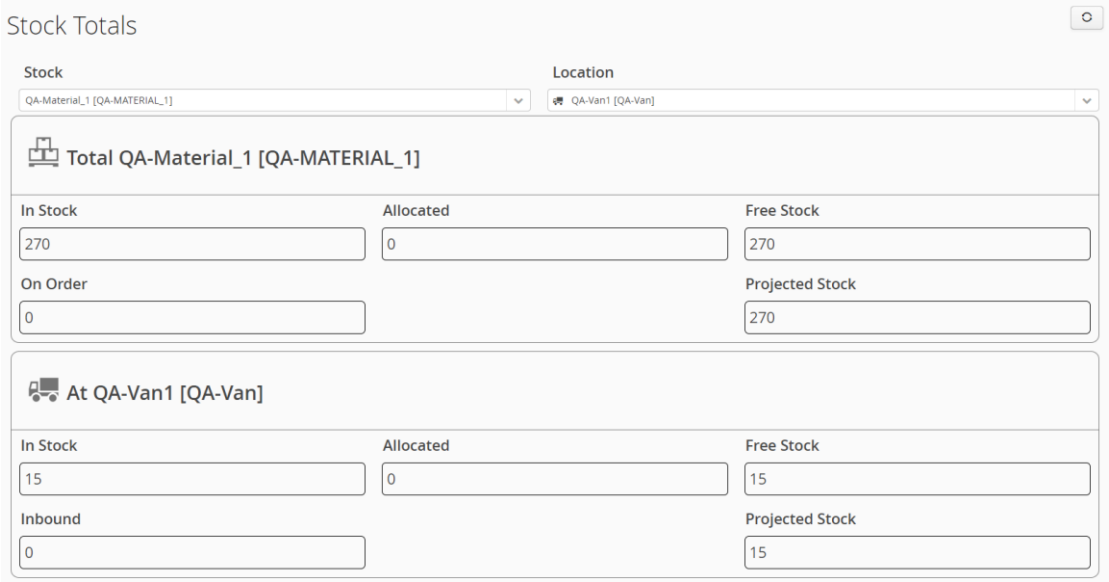
It was noted that the menu options for both Vans and Warehouses effectively were duplicating themselves. We've taken the decision to restructure these menu options a little to make it more streamlined and reduce needless duplication.



New Stock Enquiry page

The existing 'Stock Enquiry' page wasn't particularly well named, its purpose was more focused around managing stock levels and its ability to look up stock details was a secondary function of the screen.
We've moved the existing screen into the warehousing section and renamed it to 'Manage stock levels' which better represents it's intended function.

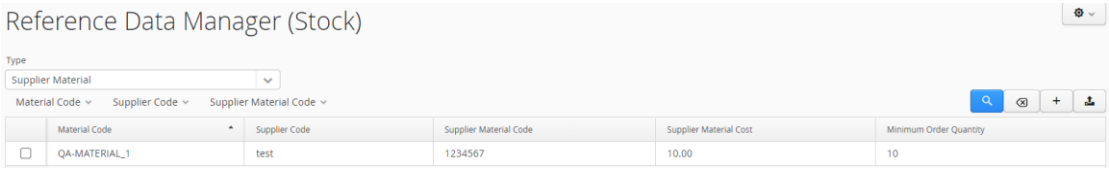
Additionally, we have added a new Stock Enquiry page which in the place of the old enquiry page. The new Enquiry page is specifically aimed for users making an actual enquiry into where a certain stock item is held within the business.



Create Supplier catalogue area

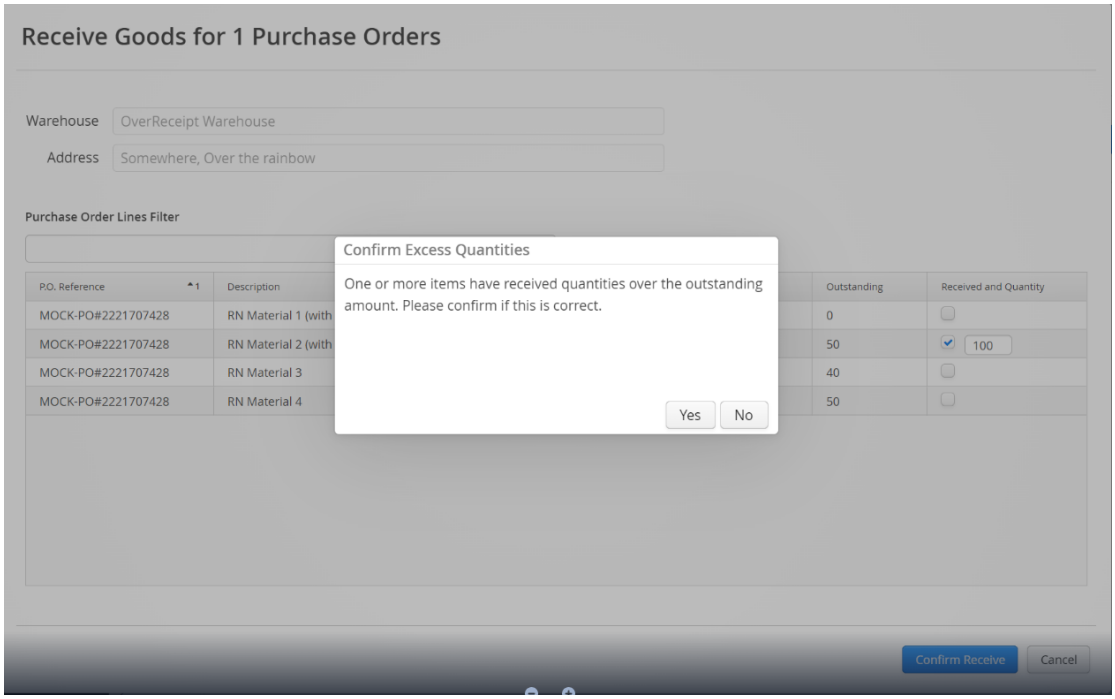
Within the Item catalogue we added the ability to set a preferred supplier for an item, this could be used to feed into a purchasing system to dictate who should supply this item by default. What this didn't do was allow a reference to any other suppliers that may be able to provide the item and their respective pricing.
We've now added a supplier catalogue area which allows users to link items to a supplier and set specific costings for the item per supplier allowing for much more flexibility when purchasing.

Note: the preferred supplier area on the item listing is now a dropdown selection of the linked suppliers, so this will require setting up supplier catalogues before selecting preferred suppliers of an item.



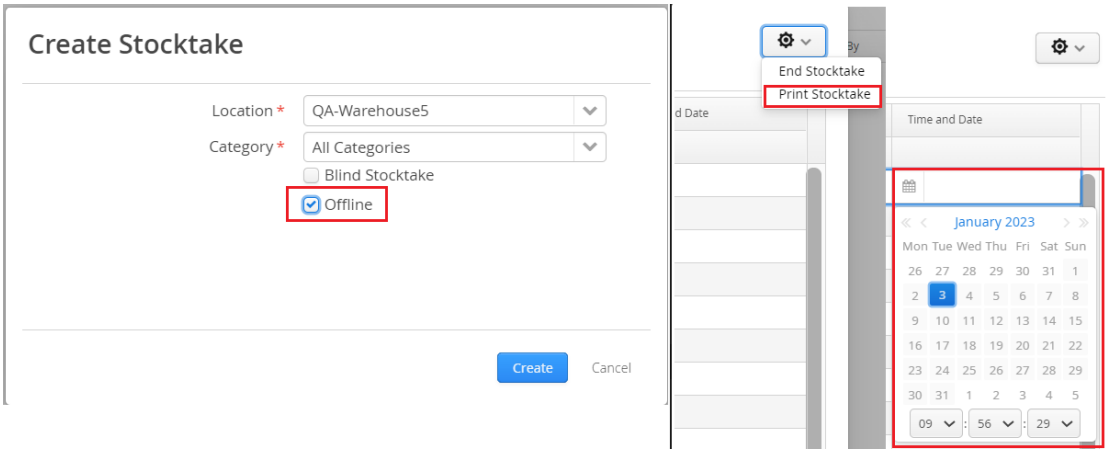
add process to allow for over-receipting

On occasions when a supplier delivers too many of an item there was no way to handle this within JM. We have now added the ability to over receipt an item line, allowing users to properly book in everything that arrives and have no instances of stock in the business that are not accounted for in the system.



Add switch to select online / Paper based stock takes

For warehouse workers that do not have access to a handheld device to carry out stock takes we have added the ability to manage stocktakes on paper. In this process the stock take can be created then printed off as a list to be filled with both the amount recorded and the date and time the recording is done. This can then be entered into control centre and the stocktake will complete in the same way as if it were all done on a device.



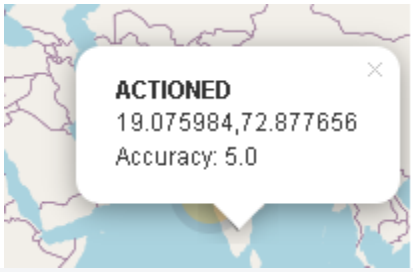
General Improvements

Upgrade or replace Log4J

Whilst Job Manager was largely unaffected by the Log4J security incident last year it has prompted us to bring our libraries up to date to ensure that the application is as secure as it can be and meets both our internal and our customers external compliance requirements.

add location + accuracy to status changes in CC.

Whilst it was recorded by the device, we were not making full use of the location and accuracy readings taken when changing a job status. This is now fully integrated and is visible within CC and available via the GetJob API call.



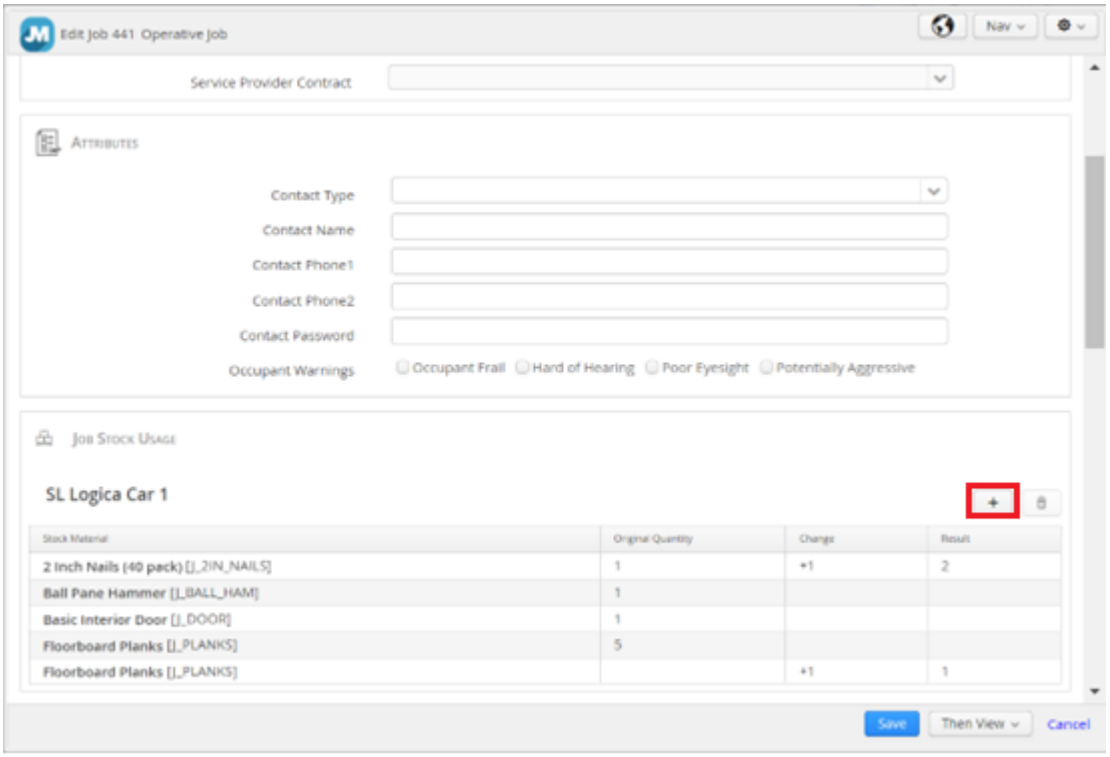

```
137            <jm:statusHistory>
138               <jm:id>2147483982</jm:id>
139               <jm:statusCode>WITH_OPERATIVE:ACCEPTED</jm:statusCode>
140               <jm:userName>OPER</jm:userName>
141               <jm:effectiveDateTime>2022-11-01T14:20:50Z</jm:effectiveDateTime>
142               <jm:transactionDateTime>2022-11-01T14:20:50Z</jm:transactionDateTime>
143               <jm:location>
144                  <jm:latitude>51.507351</jm:latitude>
145                  <jm:longitude>-0.127758</jm:longitude>
146               </jm:location>
```

Fixes

JM-20377 Cannot add stock usage to a job in Control Centre

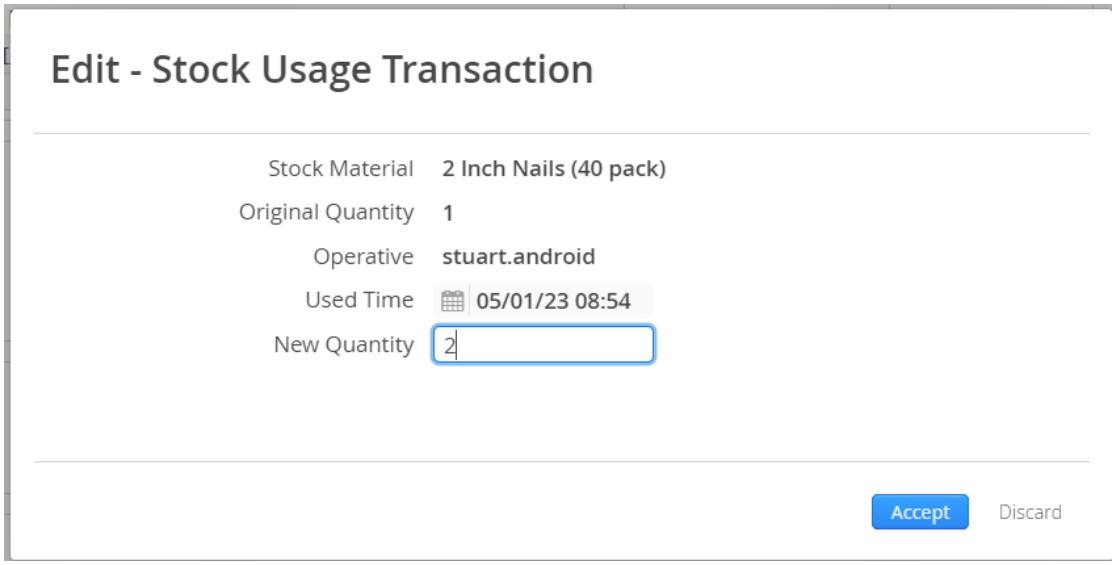
Both New transactions and editing the values of an existing stock transaction can now be managed through the control centre UI.

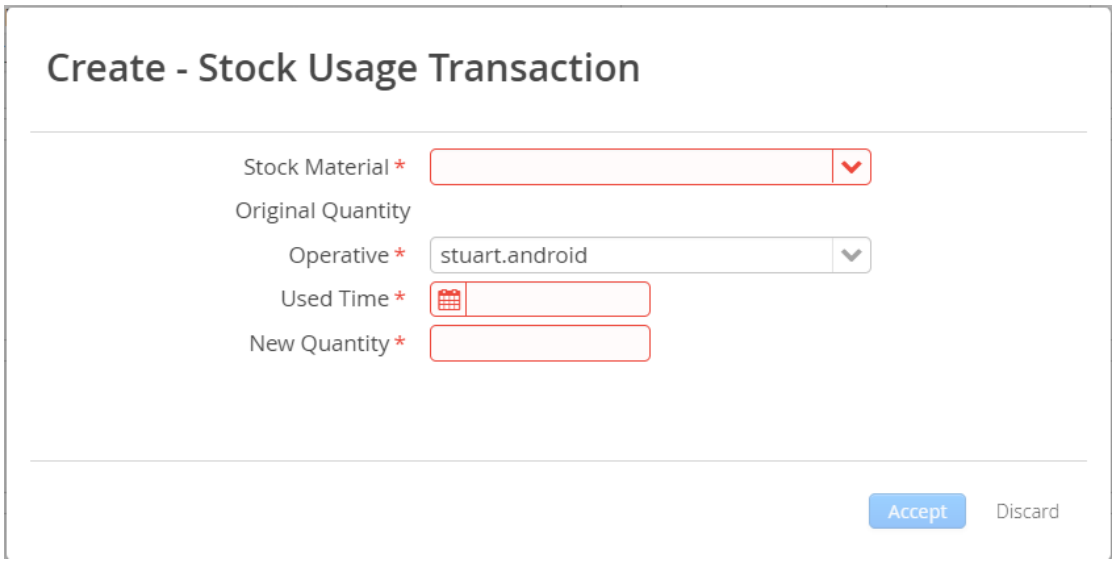
This can only be done up to the ACTIONED phase.



Users can see any adjustments that have been made (Row 1 in picture above shows an edit to an existing line, Row 5 is a new transaction added)

Users can also now select a transaction line from the stock usage table to edit or click the '+' to add a new transaction. This is followed up by one of the corresponding popup screens.





After any changes are made and the job is saved stock transactions will be created to ensure all stock levels within the system are correct.

JM-20405 JM Control Centre Saved Search Issue

When attempting to save searches in control centre with a specific sorting order set it would result in an error.
This has been corrected and the searches should now save correctly and preserver the sorting order as intended.

JM-20495 Cost Calculations spanning multiple days incorrect

When entering jobs that span 2 days or more cost calculations would be incorrect. This is due to the way time is sectioned into each date so it can be calculated against the day rate, in this instance the activity code was not being passed to the second period.
This has now been corrected and cost calculations for work of all durations should correctly be calculated.

JM-20499 Unable to update gas safe number of operative

For operatives that had a large number of Operative Communications records the query to return them could time out preventing the Operative screen from opening correctly.
The SQL for gathering the data shown on the Operative screen has been refactored to be more performant and avoid timeouts.

JM-20586 Child job line Photos not displaying in PDF Documents

In instances where images were added to a child job line of a job, these images were not displayed when creating a summary PDF. This was due to the way data is collected only expecting images to be contained within top level job lines.
This process has been extended to now include images from Child job lines.

Note: this extended function only applies to child job lines and not grandchild job lines etc.

JM-20595 Show no results if no jobs at same location as an asset.

When selecting ‘List all jobs at the same location in view jobs’ from the asset menu, if no jobs are found the search would return all jobs instead of none.
This has been corrected so that when there are no jobs to show, none are shown.

JM-20786 Add some indexes to JM to improve the performance

For customers with very large databases some queries were taking longer than expected due to a lack of indexing in some tables.
Indexes have been added in the appropriate places.

JM-20597 Performance - Improve resource search.

When running a report to show all jobs for a resource the report could take an extended period to complete if there was a large number of jobs.
The SQL processing this report has been modified and is now able to produce the resource reports significantly faster.

Release advisory

This section contains post-upgrade advice, workarounds, and changes to system requirements. It also includes internal only comments.

Update procedure

The product is upgraded in the standard way running the Job Manager installer.

Interactivity / Database schema changes / API changes

Database Schema Changes

There are a number of database schema changes at this release, mainly in the area of additional or modified tables for the stock system.

API Changes

Job Manager Web Service API

There is a **new** version of the API released with this product, and it's WSDL is named 9.1.0. It is located in the product at the following URL:

```
http://<server>:<port>/<appname>/webservices/JobManagerV9_1_0.wsdl
```

Job Manager Notification Web Service API

The JM Notification webservice API is unchanged with this Version.

Professional Services API

There are no new APIs for Professional Services at this release.

Changes affecting application operation and support

Please see the details in the rest of this document.

Contact us

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