



# 24.0 Release Notes

01 March 2024

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## Summary

Release Date: February 2024

Version: 24.0

## New Features

### Content Review

**Available: For Knowledge Management Users (Chargeable consultancy recommended)**

Flo10's Content Review feature offers a structured method for assessing and validating content to ensure adherence to compliance standards. Content may include various elements such as documents (e.g., policies), images, videos, external websites, or Flo10 pages.

The system keeps a record of content reviews, which are conducted within designated review periods. Users assigned responsibility for content review will receive reminders as the review date approaches, prompting them to initiate the review process. During the review, users can evaluate and verify their content.

### Reminders

- 6 You have 6 overdue tasks
- 4 You have 4 suggestions to respond to
- 2 You have 2 content items to review

Selecting the reminder will access the dedicated content review page for the assigned user. A traffic light system is employed to quickly identify the status of content, indicating whether it is up to date, due for review, or overdue.

Content Review Tasks											
Item Type	<input type="text" value="None"/>										
Title	<input type="text" value="None"/>										
Reference	<input type="text" value="None"/>										
Status	<input type="text" value="None"/>										
Responsible User	<input type="text" value="Jayne Squires"/>										
Sort by	<input type="text" value="Due Date"/>										
Direction	<input type="text" value="Ascending"/>										
<input type="button" value="Apply"/> <input type="button" value="Reset"/>											
Review Tasks											
ITEM TYPE	LINK	REFERENCE	CURRENT VERSION	TITLE	RESPONSIBLE USER	STATUS	REVIEW PERIOD	REVIEW DATE	EARLIEST REVIEW START	NOTES	
Flo10 Page	View Item	None	None	Review posts - are they being utilised	Jayne Squires	Up to Date	Quarterly	26 Dec 2023	11 Dec 2023	Change channels on posts if required	
Flo10 Page	View Item	None	None	ISO 14000 Policy	Jayne Squires	Up to Date	Half-yearly	1 Feb 2025	2 Jan 2025	Check all posts display ok prior to next release	
Document	View Item	ABC-123-001	5.0	Tracker User Guide	Jayne Squires	Up to Date	Half-yearly	20 Mar 2024	5 Mar 2024	Please check against latest software release	
Flo10 Page	View Item	None	None	OpenAsset and Sharepoint connections	Jayne Squires	Due	Weekly	5 Oct 2023	28 Sep 2023	Check if paging is added to OpenAsset Grid	
Procedure	None	None	None	Check Carpark signs	Jayne Squires	Overdue	Quarterly	1 Sep 2023	1 Sep 2023	Lines on parking bays are visible	

Responsible users possess the capability to either review the content themselves or reassign it to another user.

History		
DATE	UPDATE	USER
2 Jan 2024	Website is currently down and unable to download update	 Jayne Squires
2 Jan 2024	Status changed to Under Review	 Jayne Squires
20 Sep 2023	Policy made obsolete.	 Jayne Squires
20 Sep 2023	please check	 Jayne Squires

The content review page will always display the latest record; however, a comprehensive history and version history for each content task is accessible for reference.

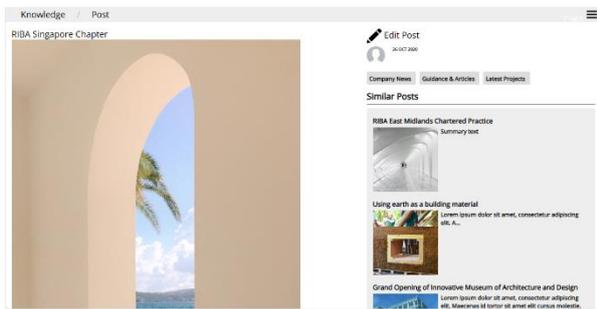
# Feature Enhancements: Knowledge Management

## Appearance & Controls

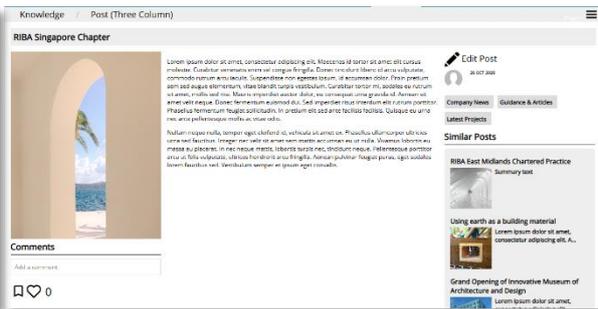
### Post Page

The default post page has been updated with a user-friendly 3-column layout, designed to showcase more content without requiring excessive scrolling. Post creators now have the flexibility to choose a page layout (2 or 3 column) on a post-by-post basis, tailoring the display to their specific content needs. This update provides a seamless and customisable experience, ensuring an optimal presentation for every post.

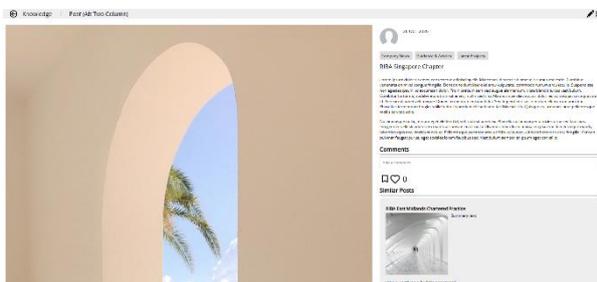
2 Panel Layout



3 Panel Layout (Default)

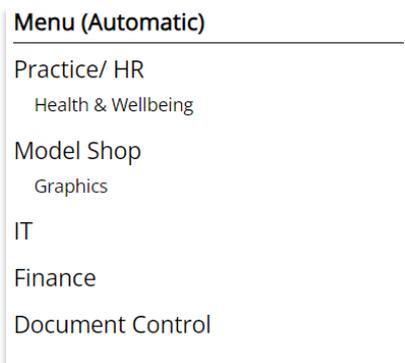


Alt 2 Panel Layout



### Automatic Menu Panel

The purpose of this panel is to facilitate navigation by automatically generating a navigation menu. The navigation menu of links will be generated automatically based on subpages. You have the flexibility to configure the depth to a specified level, ensuring that, for instance, a depth of 3 will exclude the display of any subpages at level 3 or above.



## People Panel

The People Panel provides users with the capability to add individuals to a page. Each panel, at a minimum, will showcase their profile photo, name, and a direct link to their staff record. This feature supports the addition of multiple people to each panel.

Furthermore, users can choose from three distinct display options, offering flexibility in how information is presented.

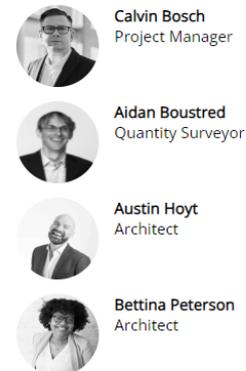
People - Horizontal contact portraits



People - Horizontal square portraits



People - Vertical circle portraits



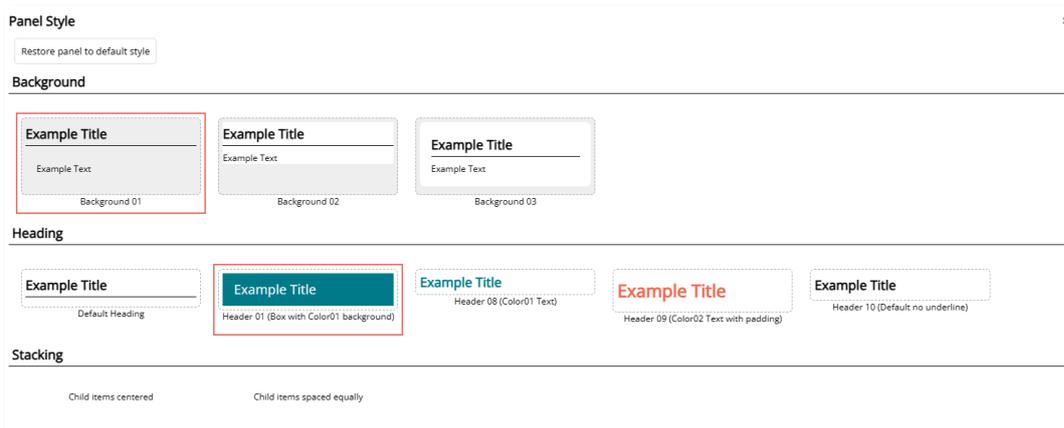
## Style Controls

**Additional controls available: Consultancy required to migrate existing styling. This will provide the ability to create styles and edit the colour pallet.**

CMS administrators now have the flexibility to modify styling for individual panels. By navigating to the edit panel, you will find new options to customise the panel style. Explore a range of standard styles that integrate with your site's overall design.

### Styling Options



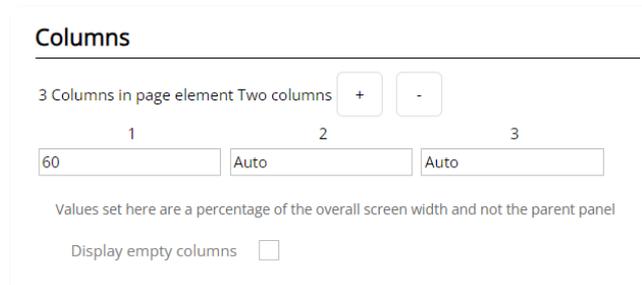


## Column Widths, Page Margins and Panel borders

The ability to control the column widths, page margins and panel borders has been introduced. Previously, this level of control was only available through Flo10 staff members.

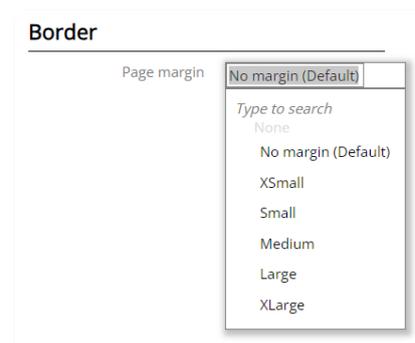
By default, panels on a page are structured with equal sized column widths. However, this new feature will grant administrators the ability to customise individual column widths based on a percentage of the page.

When setting a size for a particular column, the remaining columns will automatically adjust, distributing the available space equally.



These controls can also be used to add additional columns without the need to add a new structure panel.

Administrators will have the flexibility to adjust page margins, creating content indentation on both sides of the page. The size of these margins is entirely customisable, ranging from extra-small to extra-large, giving users the flexibility they need.



Similarly, administrators can now manipulate panel borders with greater precision. This includes the adjustment of outer, inner, and upper borders for each structure panel. The available size options for panel borders range from extra-small to extra-large, providing extensive control over the visual presentation of their content.

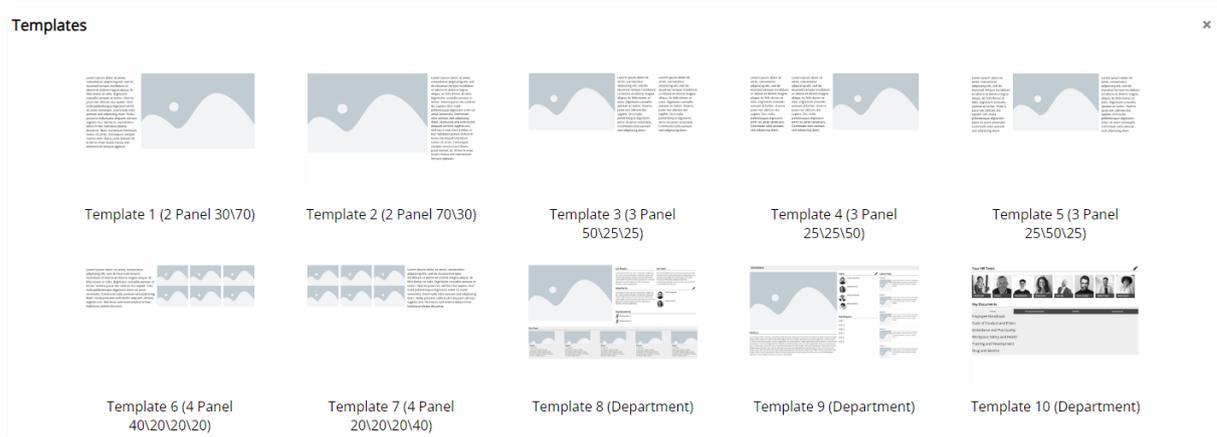
### Border

Outer border	XSmall (Default)
Upper border	Large
Inner border	XSmall (Default)

These options are designed to enhance the layout by introducing strategic spacing.

## Template Suite

When creating a new page, users now have the ability to choose from a variety of Flo10 templates or their own custom site templates. Additionally, each template can have an image attached, enhancing the visual experience during the selection process.



## Reference Panel

Selected panels can now be shared across pages. With this update, the New Reference panel can now be placed on a page and reference another panel, enabling the display of the same configured panel on multiple pages.

This enhancement is designed to streamline change management by enabling a single change to be applied across multiple pages, improving efficiency and consistency across your site.

# Search

## Search Logging

The complete search activity of users is now being recorded, encompassing both quick searches and full searches. This logging process captures the search text, applied filters, and the ultimate destination page or post.

Search History		Favourite Search Terms		
SEARCH TEXT	TAG	INSTANCES		
29 Nov 2023 08:41:10 Searched "Brick" Set Tag as filter "Brickwork" Clicked Post "Brick Facade"	brick	34		
29 Nov 2023 08:41:07 Quick Search "Brick"	road	7		
29 Nov 2023 08:40:38 Set Tag as filter "New Build" Searched "school" Clicked Project "P7445 - Bermondsey School"	brickwork	7		
	sustain	5		
	watford	4		
	test	4		
	sustainable	4		

Users can access a dedicated Search History page within their profile to conveniently review their previous search log.

## Improved Search Results

The improved search results encompass a broader range of items, including Posts, Pages, Events, Projects, Documents, and Links. Each item category can be further explored and filtered.

The screenshot shows a search results page for the term "health". At the top, there are filters for Documents (2), Events (1), Links (3), Pages (2), Posts (5), and Projects (2). The search results are organized into several sections:

- Promoted Results:** A star icon next to "New Health and Safety Policy".
- Pages:** Includes "Health and Safety" (04 MAR 2024, Owner: Jayne Squires) and "24.0 Testing" (26 SEP 2023, Owner: Jan Thome).
- Events:** "Health and Safety Compliance for Construction" (01 NOV 2023, CPD).
- Projects:** "Distribution Centre, Northampton" (21 OCT 2021, TEST4, Healthcare In Progress) and "Midway Health" (30 MAY 2021, P7400, Healthcare Completed).
- Links:** "Health and Safety at Work etc Act 1974" (On page: Health and Safety) and "Health and Safety Policy" (On page: Health and Safety).
- Posts:** "Health Check" (04 DEC 2023, Owner: Aidan Boustred, Free health screening available on 1st March 2024) and "New Health and Safety Policy" (13 OCT 2023, Owner: Aidan Boustred).
- Documents:** "Health and Safety Policy" (04 MAR 2024, On page: Health and Safety) and "Health and Safety Policy.docx" (04 MAR 2024, JAYNE SQUIRES).

Content can now be promoted, ensuring that key information stands out prominently in the results. This feature allows you to emphasize and showcase important details.

This close-up shows the "Promoted Results" section, which features a star icon and the text "New Health and Safety Policy".

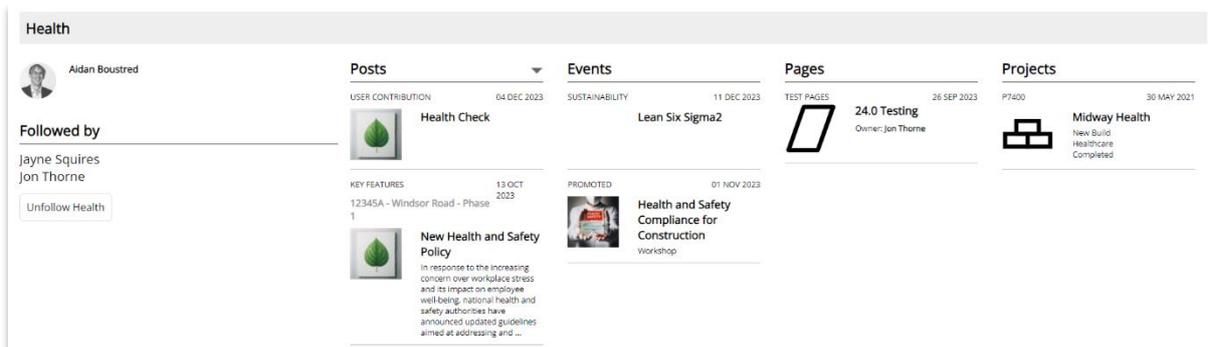
You also have the ability to drill down into search results for a more refined experience. These enhancements are accessible directly from the search results page.

For instance, when selecting "Posts" from the search results, you can access additional filters specifically tailored to refine your search within the realm of posts, helping you to find what you need with greater precision.



## Tag Page

The default configuration of the tag page has been enhanced to encompass a comprehensive selection of content. It now features Posts, Events, Pages, and Projects that are associated with the chosen tag.



## Events

### Display Options

Users can now choose from Six distinct presentation styles to display events on a page. Five new event panels have been introduced to offer flexible formatting for your event listings.

The **Events Calendar** will showcase events scheduled within the current calendar month. Users can navigate month by month to maintain a more focused view of upcoming events. Additionally, events you plan to attend will be highlighted in a teal colour for easy identification.

### Calendar

Mon	Tue	Wed	Thu	Fri	Sat	Sun
30	31	1	2	3	4	5
6	7	8	9 Lean Six Si...	10	11	12
13 Internation...	14	15 Leadership and Management Training		17	18	19
20 Diversity a...	21	22	23	24	25	26
27	28	29	30 Ethical Hacki... Health and ...	1	2	3

The **Events Grid** will now adopt a layout similar to that of regular posts, offering a consistent and familiar look. Furthermore, you have the option to limit the number of events displayed in the grid to a predefined quantity, providing greater control over your event presentation.

### Events Grid



**Leadership and Management Training**  
 Date From: 02 Nov 2023 09:30  
 To: 04 Nov 2023 16:30



**Health and Safety Training:**  
 Date From: 06 Nov 2023 09:00  
 To: 06 Nov 2023 15:00



**Lean Six Sigma**  
 Date From: 09 Nov 2023 10:00  
 To: 09 Nov 2023 11:00

The **Events Slideshow** features a layout that closely aligns with regular posts, ensuring a consistent and familiar appearance. The slideshow will automatically cycle through events, while users retain the option to manually navigate back and forth as they desire.

## Latest Events Slideshow

### Leadership and Management Training



**Scrolling Events** have a design similar to scrolling posts, including dates for a unified and recognisable look. The events displayed are limited to the specified quantity.

Diversity and Inclusion Training (20 Nov 2023 11:00 - 20 Nov 2023 12:30)

Health and Safety Traini

The **Suggested Events** layout aligns with that of the Latest Events Panel. This display will present events that have been tagged with the followed tags of the individual user.

### Suggested Events

Ethical Hacking and Cybersecurity

Electrical Safety and Standards Compliance

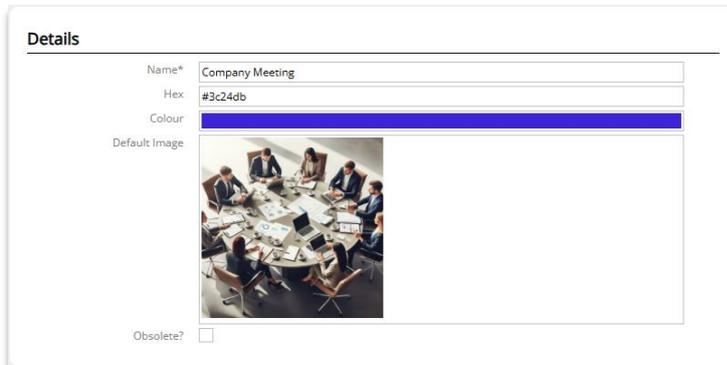
*Please note, if events have an image attached, then these images will be displayed.*

## Download Events

The ability to include a downloadable option when adding events has been introduced. When enabled, users can download the event as an .ics file, which can be effortlessly opened and added to their calendars.

## Event Types

In alignment with Event displays, events now feature the option to configure a default image based on the event type. This image will be used if no other image is attached. Additionally, users have the ability to designate a specific colour for each event type, enhancing the visual representation on the event calendar



The screenshot shows a 'Details' form with the following fields:

- Name\***: Company Meeting
- Hex**: #3c24db
- Colour**: A blue color swatch corresponding to the hex code.
- Default Image**: A photograph of a group of people in a meeting room.
- Obsolete?**: An unchecked checkbox.

## Filter By Tags

Introducing enhanced filtering for event panels! All event panels are now tag friendly. For instance, on a marketing page, you can set up an event panel to display only those events tagged with 'Marketing' or 'Sustainability'. Allowing you to tailor your content effortlessly.



The screenshot shows a 'Tags' form with the following elements:

- Tags**: A section header.
- Type tag**: A text input field.
- Suggest**: A button next to the input field.
- Marketing**: A tag with an 'x' icon to remove it.
- Sustainability**: A tag with an 'x' icon to remove it.

## Additional Fields including CPD points and Web Link

### Details

Name*	<input type="text" value="None"/>
Event type*	<input type="text" value="None"/>
Learning method	<input type="text" value="None"/>
Provider	<input type="text" value="None"/>
CPD Points	<input type="text" value="None"/>
Hours	<input type="text" value="None"/>
Image	<input type="text" value="None"/>
Details	<input type="text" value="None"/>
Web Link	<input type="text" value="None"/>
Location	<input type="text" value="None"/>
Postcode	<input type="text" value="None"/>
Start date	<input type="text" value="None"/>
Start time	<input type="text" value="None"/>
End date	<input type="text" value="None"/>
End time	<input type="text" value="None"/>
Timezone	<input type="text" value="None"/>
Attendance deadline	<input type="text" value="None"/>

Additional fields can now be recorded for an event, encompassing the following:

- Learning Method - Choose from eLearning, Event, Training Course, or Workshop
- Provider – Specify the event or course provider
- CPD points – Total of CPD points earned upon attendance
- Hours – Record the total number of hours associated with the event
- Web Link – Insert a URL to provide a direct link to an online course or resource
- Time zone – Specify the time zone for global events

## Attendance confirmation status

### Attendees

	CONFIRMED	STATUS
<input type="text" value="Jayne Squires (M+M)"/>	<input checked="" type="checkbox"/>	<input type="text" value="Attended"/>
<input type="text" value="Aidan Boustred (M+M)"/>	<input type="checkbox"/>	<div style="border: 1px solid #ccc; padding: 5px; width: fit-content;"> <input type="text" value="None"/>  <input type="text" value="Attended"/>  <input type="text" value="Cancelled"/>  <input type="text" value="No Show"/> </div>

The events attendance recording has been enhanced by introducing a status feature, which is also reflected in the events attendance report.

## Attendance and CPD Reports

From the Events page, an administrator now has access to two new reports.

Events								Reports
NAME	EVENT TYPE	LOCATION	START DATE	START TIME	END DATE	END TIME	ATTENDEES	Events Attendees CPD Global Report
Ethical Hacking and Cybersecurity	Training	None	30 Nov 2023	09:00	30 Nov 2023	10:00	1	
Electrical Safety and Standards Compliance	CPD	None	27 Nov 2023	09:00	27 Nov 2023	12:00	1	

The **Event Attendees Report** provides a comprehensive overview of attendance for each event. Administrators can use filter options to focus on Specific user, Attendance Status and within designated time frames, allowing for a more tailored analysis of event participation.

Events								
Contact	<input type="text" value="None"/>							
Attendance Status	<input type="text" value="None"/>							
Date From	<input type="text" value="1 Jan 2023"/>							
To	<input type="text" value="31 Dec 2023"/>							
	<input type="button" value="Apply"/> <input type="button" value="Reset"/>							
NAME	START	END	CONTACT	STATUS	CPD POINTS	RATING	FEEDBACK	
Ethical Hacking and Cybersecurity	30 Nov 2023	30 Nov 2023	Jayne Squires	No Show	None	None	None	
Electrical Safety and Standards Compliance	27 Nov 2023	27 Nov 2023	Jayne Squires	Attended	4	10	Group discussions were valuable, and interacting with peers enhanced the learning experience	
Leadership and Management Training	24 Nov 2023	24 Nov 2023	Jayne Squires	Attended	6	7	Adding more hands-on exercises could enhance practical application.	
Company Year End 23 update	20 Nov 2023	20 Nov 2023	Jayne Squires	Attended	2	10	Great update	
Company Year End 23 update	20 Nov 2023	20 Nov 2023	Jon Thorne	Attended	2	None	None	
Company Year End 23 update	20 Nov 2023	20 Nov 2023	Sonny Bramley	Attended	2	None	None	

The **CPD Global Report** offers a broader perspective by displaying attendance for all events, encompassing both Flo10 events and manual records with assigned CPD points. The flexible filter options enable administrators to refine results based on specific users, events, or designated time frames, facilitating a more detailed examination of professional development activities.

## Events

Contact	Jayne Squires (M+M)								
Event	None								
Date From	1 Jan 2023								
To	31 Dec 2023								
Show CPD Notes?	<input type="checkbox"/>								
	<input type="button" value="Apply"/> <input type="button" value="Reset"/>								
The report will only show CPD entries with points assigned.									
<b>Events</b>									
NAME	START	END	CONTACT	STATUS	CPD POINTS	HOURS	RATING	FEEDBACK	
Electrical Safety and Standards Compliance	27 Nov 2023	27 Nov 2023	🔍 Jayne Squires	Attended	4	4	10	Group discussions were valuable, and interacting with peers enhanced the learning experience	
Leadership and Management Training	24 Nov 2023	24 Nov 2023	🔍 Jayne Squires	Attended	6	6	7	Adding more hands-on exercises could enhance practical application.	
Company Year End 23 update	20 Nov 2023	20 Nov 2023	🔍 Jayne Squires	Attended	2	2	10	Great update	
Research AI within Architecture	8 Nov 2023	8 Nov 2023	🔍 Jayne Squires	Manually Created	2	2	None	None	
Alex explores academic journals gather information on the latest trends, technologies, and case studies related to green building materials.	3 Nov 2023	3 Nov 2023	🔍 Jayne Squires	Manually Created	2	2	None	None	
<b>TOTAL</b>					<b>16</b>				

## General Functionality Improvements

- Option to not display calendar icon on the latest events panel.
- Ability to duplicate an event (includes images and tags).

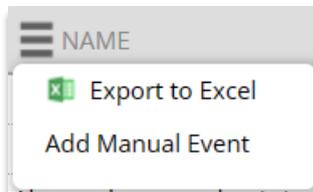
## Staff

### Events Tracking with CPD

A new events page is available on the user profile, enabling users to effortlessly monitor their attended events with automatic CPD point calculations. This enhancement is designed to provide users with a comprehensive tool to effortlessly track and manage all the events they have attended.

NAME	START	END	STATUS	CPD POINTS	HOURS	RATING	FEEDBACK
Company Year End 23 update	27 Nov 2023	27 Nov 2023	Attended	2	2	10	Great update
Research AI within Architecture	8 Nov 2023	8 Nov 2023	Manually Created	2	2	None	None
Alex explores academic journals gather information on the latest trends, technologies, and case studies related to green building materials.	3 Nov 2023	3 Nov 2023	Manually Created	2	2	None	None
Company quarterly update Q4	1 Nov 2023	1 Nov 2023	Attended	None	3	3	To sales focused
Leadership and Management Training	6 Sep 2023	6 Sep 2023	Attended	6	6	7	Adding more hands-on exercises could enhance practical application.
Electrical Safety and Standards Compliance	10 Aug 2023	10 Aug 2023	Attended	4	4	10	Group discussions were valuable, and interacting with peers enhanced the learning experience.
Company quarterly update Q3	9 Jun 2023	9 Jun 2023	Attended	None	4	10	Good Update
Company quarterly update Q2	7 Apr 2023	7 Apr 2023	Attended	None	None	7	Good to see what other areas of the business have achieved
<b>TOTAL</b>				<b>16</b>			

In addition to the automated tracking, we understand that there may be instances where users want to record events that might not be catalogued within Flo10. We have included a manual record feature. This empowers users to add events independently, ensuring that their CPD records remain comprehensive and up to date.



The feature includes filtering options for different time frames, and users can export the results to Excel for convenience.

*Note: The user events page is only displayed for the active user or administrator*

### Project Experience Links

The Project Experience panel has been enhanced to link user experience directly to live projects. All experiences are now consolidated into a single list, with Flo10-linked projects easily identified by the inclusion of a project icon.

PROJECT	ROLE	NOTES	SECTOR	URL
London Road Phase 2	Worked on	Lead Engineer and Project Management	engineering	 dev.flo10.com/Default.as...
 Windsor Road	PM	PM across multiple disciplines	Commercial	None
 Watford School	PM	Phase 1 to completion	Education	None

In the Edit Record section, users will now encounter two tables.

The first table presents the manual experience option, now enhanced to include the ability to add a URL.

The second table, labelled "From Linked Projects", is linked to Flo10 projects, enabling users to associate any relevant projects with their profile page. The projects available for selection are those to which the user has been assigned as a member in Flo10.

Project Experience				
PROJECT	ROLE	SECTOR	NOTES	URL
London Road Phase 2	Worked on	engineering	Lead Engineer and Project Management	<a href="https://dev.flo10.com/Default.aspx">https://dev.flo10.com/Default.aspx</a>
<input type="button" value="Add"/>				

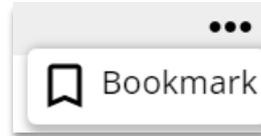
  

Project Experience (From Linked Projects)			
PROJECT	ROLE	SECTOR	NOTES
Windsor Road	PM	Commercial	PM across multiple disciplines
Watford School	PM	Education	Phase 1 to completion
<input type="button" value="Add"/>			

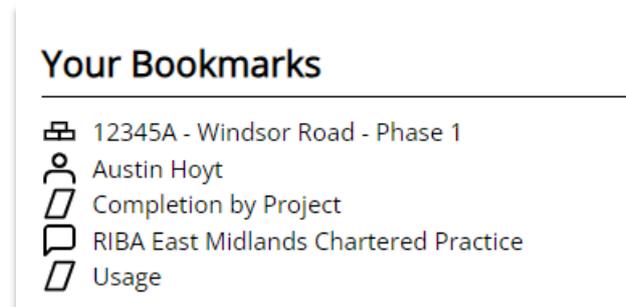
## Reading List

### Bookmark Pages and display in reading list

Users can now bookmark their favourite pages by accessing ... on the top right-hand corner of the page.

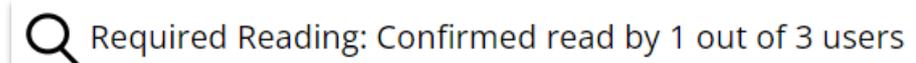


All bookmarks are accessible from the users reading list page and the type of page being identified by the different icons.



### Summary of who has read required reading from within a post

**Available: For Knowledge Management Users**



CMS Administrators can now access the reading list summary report within a post, if the post has been required reading.

## Security

### Custom System Rights

This advanced capability empowers you to manage security and access control within your Flo10 environment. Custom System Rights provide granular control over page-level and panel-level access.

The Standard Flo10 System Rights are now locked down. This action restricts any modifications, including renaming or deletion, to these fundamental rights, ensuring the integrity and reliability of your application's core components. A padlock symbol will now be displayed alongside locked System Rights.

System Rights		
NAME	ROLES WITH THIS	LOCKED
 Administer Content Review	1	
 Administer task types	1	
 Advanced CMS	1	
 Edit all pages	1	
 Edit all posts	1	
 <input type="text" value="Edit Marketing Page"/>	1	

Users now have the capability to apply their custom system rights not only via the "Advanced" option within the Page Edit interface but also directly to a panel from the details options.

**Advanced** ▼

---

Locked

*No in-page editing*

Use item name

*Name of project appears in breadcrumbs*

Is Template

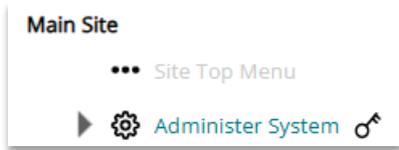
*In list to copy when creating a new page*

System Right

*User must be in a system role with this right*

### Display Secure pages

All pages and panels are accessible to all users by default unless they have been assigned a specific System Right. To identify secure pages within the site structure, simply look for the key icon – it signifies enhanced security.



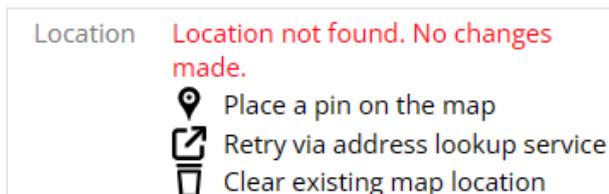
To view the specific System Right assigned to a page, simply click on the page to display its “Advanced” options. This action will reveal the assigned access rights, providing users with valuable insights into the page's access permissions.

# Maps

## Geocoding

Project maps has been expanded to locate addresses from around the world. By default, Flo10 will seamlessly continue to prioritise UK postcodes for address lookup without requiring any user intervention.

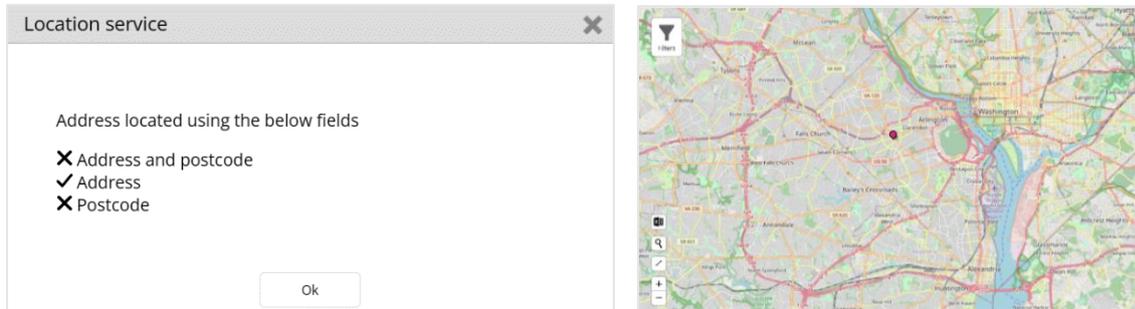
However, in cases where a postcode match is not available, if the address is outside of the UK, or if you simply wish to be more specific, users now have the choice to use the location service for precise address identification.



The service performs location checks in the following sequence:

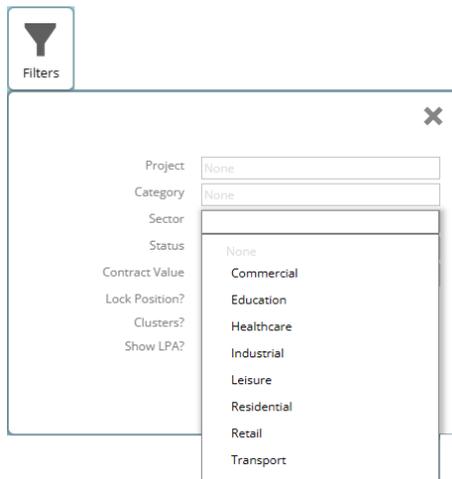
1. Address & Postcode
2. Address
3. Postcode

When a match is found, a dialogue is presented to the user, clearly indicating which fields were used for the successful match.



Please be aware that this service relies on address lookup and, as a result, may not be able to locate addresses that include terms such as "Suite...", "Room...", "Floor...", "Building...", and similar descriptors

## Filter by Sector



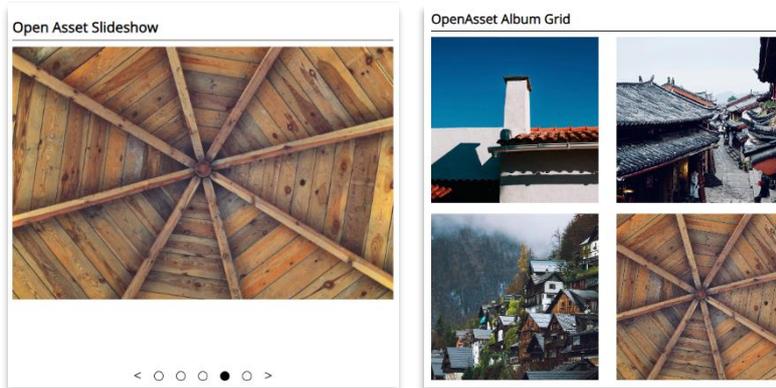
We have introduced a new filter that enables you to filter your map project locations based on your predefined Sector list.

## Integrations

### OpenAsset: Specify Album

**Requirement: Must already have OpenAsset integration configured**

OpenAsset panels can now be configured to display images from a specific album. This can be displayed either in a slideshow or grid.

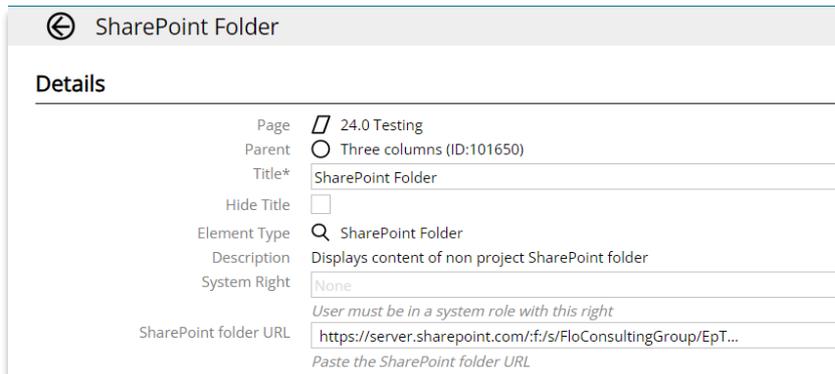


These panels can be displayed on any Flo10 page.

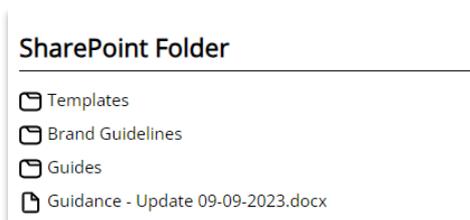
### SharePoint: Folders link to non-project folders via URL

**Requirement: Must already have SharePoint integration configured**

A URL can now be inserted into the SharePoint folder panel to list the contents of a SharePoint folder.



The SharePoint panel can be displayed on any Flo10 page. It will list the contents of the URL only. To access the content, users will be navigated to SharePoint.



## Feature Enhancements: Tracker

### Configuration

#### Customise Default Tracker buttons

Users now have increased flexibility in configuring Task Types, with more options for customising default buttons' and creating new buttons.

#### Options

Add Option
Edit Default Buttons

Configuration of this section may need to be done by Flo10. Options offer alternative ways for users to complete or progress the task.

When creating new buttons users now have enhanced control, allowing for precise customisation of actions. This includes the ability to set the Type, decide whether the user should be prompted for notes, and determine if the task window should close upon selection.

Edit Task Option	
Task Type	Cost Estimation <i>Which type of task is this an option for</i>
Name	Complete Design Only <i>Visible text on the button</i>
Type	Completed <i>What type this option corresponds to</i>
Option Code	A <i>A unique code for this option (e.g. A, B, C)</i>
Show Notes?	No <i>When user clicks this option, should a notes box pop up?</i>
Close Window?	Yes <i>Close the task window automatically after this has been selected</i>

Additionally, users can now edit default buttons, opting to either hide the button or rename it according to their preferences.

Edit Default Buttons		
Use this to configure the appearance of the default option buttons that appear on a task. This only affects tasks of this type.		
Note that hiding buttons could leave the user with no way to progress a task.		
STANDARD NAME	CUSTOM NAME	HIDE BUTTON
Complete	None	<input checked="" type="checkbox"/>
Set to Not Applicable	Not Required	<input type="checkbox"/>
Reopen	None	<input type="checkbox"/>
Add Progress Update	None	<input type="checkbox"/>

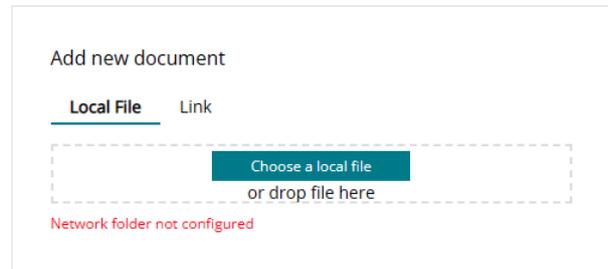
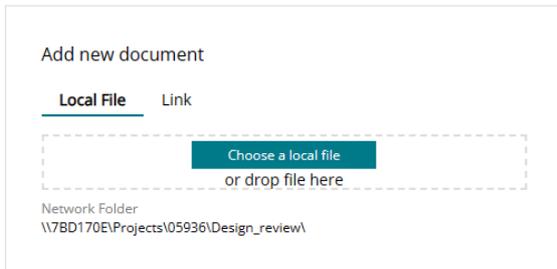
*Note: These options are specifically applied to the edited task and do not affect other tasks.*

# Documents

## Show upload path on Tasks

When a task is set up to automatically upload documents to SharePoint or a Network drive, users will now see the displayed upload path. This provides clear information about the specific location where the document is being filed.

If no path has been configured for this task a message will be displayed to the user.



# Display

## Task Status displays Completed Late

If tasks are completed after the specified deadline date, the project tracker will now indicate their status as 'Completed Late'.

▼ Start Up <span style="color: green; font-weight: bold;">2</span>						
SU001	Fee Agreement Required	🔍 Aidan Boustred (M+M)	23 Aug 2021 to 27 Sep 2021 Deadline: 03 Sep 2021	Completed Late	📄 Fee Agreement	None
SU002	Fee Agreement Issued	🔍 Jayne Squires (M+M)	20 Nov 2023	Completed	None	None

# Reports

## Tracker Approval Report (Available on Request)

The Tracker Approval Report offers valuable insights into tasks that have already received approval and those currently pending approval. This report serves as a powerful tool for tracking the progress of tasks through the approval process, ensuring transparency and efficiency in project management.

Tracker / Approvals Report						
Task Type: <input type="text" value="None"/> Approver: <input type="text" value="None"/> Pending Only: <input type="checkbox"/> <input type="button" value="Apply"/>						
APPROVALS	SUBMITTED	APPROVAL STATUS	TASK	PROJECT	RESPONSIBLE	APPROVERS
	9 Jul 2021	None	🔍 Check client financials	📁 P7372 - Abode Phase 3	Technical Director	Aidan Boustred
	22 Jul 2021	None	🔍 Check client financials	📁 P0001 - Bristol University	Technical Director	Aidan Boustred
	26 Jul 2021	None	🔍 Planning	📁 P7373 - Black Barn	Technical Director	Aidan Boustred
	28 Jul 2021	None	🔍 Check client financials	📁 P7368 - Nottingham University Modern Languages Department	Technical Director	Aidan Boustred
	19 Aug 2021	None	🔍 Check client financials	📁 P7371 - Building Envelope R&D	Technical Director	Aidan Boustred
	5 Jul 2022	None	🔍 CDM Questionnaire	📁 P7373 - Black Barn	CMS Admins	Roger Hunt, Aidan Boustred, Alex Ponsford, Sonny Bramley, Matthew Nickerson, Jon Thorne, Calvin Bosch, Jayne Squires, Oli Collins, Leonid Citer, Dmitri S. Boudrine
	28 Nov 2023	None	🔍 Stakeholder Mapping & Communication	📁 P7373 - Black Barn	Sales Director	Matthew Nickerson

## Tracker Recent Activity Report (Available on Request)

The latest activity report offers a comprehensive overview of all tracker activities, making it easy to identify the most recent actions on a project. This feature provides a quick and efficient way to stay updated on project progress and monitor the latest activity.

**Tracker / Recent Activity**

**Tasks by Project**

- P7368 - Nottingham University Modern Languages Department**  
Tasks: 122 (3, 1, 1, 3) Latest action: Confirm Site Boundary & Ownership Actions: 206 (6, 10)
- P0001 - Bristol University**  
Tasks: 54 (7, 2, 4, 3) Latest action: Confirm appointment details Actions: 71 (6, 6)
- 12345A - Windsor Road - Phase 1**  
Tasks: 39 (2, 0, 6, 3) Latest action: BIM Strategy Actions: 52 (6, 15)
- P0002 - 453 Reading**  
Tasks: 21 (3, 1, 1, 3) Latest action: Detailed Design Review Actions: 44 (6, 5)
- P7373 - Black Barn**  
Tasks: 20 (1, 1, 3, 3) Latest action: Planning - Conditional Approval Actions: 31 (4, 15)
- P0027 - Starwood**  
Tasks: 19 (7, 0, 0, 3) Latest action: Cost Estimation Actions: 8 (7)
- P7370 - Northwood Lodge**

**Recent Actions**

- Check client financials P7372 - Abode Phase 3 Approved by Aidan Boustred on 26 Feb 2024
- Check client financials P7372 - Abode Phase 3 Submitted by Aidan Boustred on 26 Feb 2024
- Check client financials P7372 - Abode Phase 3 Reopened by Aidan Boustred on 26 Feb 2024
- Check client financials P7372 - Abode Phase 3 Approved by Aidan Boustred on 26 Feb 2024
- Planning - Conditional Approval P7373 - Black Barn Progress Update by Reger Hunt on 03 Jan 2024
- BIM Strategy 12345A - Windsor Road - Phase 1 Reopened by Jayme Squires on 15 Dec 2023
- Fee Agreement Issued 12345A - Windsor Road - Phase 1 Progress Update by Jayme Squires on 05 Dec 2023

## Tracker Initial Adoption Report (Available on Request)

The initial adoption report users to closely monitor the initial utilisation of the system This comprehensive report identifies both individual users and projects that exhibit the highest and lowest levels of activity. By offering insights into both user engagement and project dynamics, this report serves as a valuable tool for optimising system performance and promoting effective utilisation from the outset.

**Tracker / Recent Activity / Initial Adoption**

**Initial adoption of Tracker**

This page is to help you check on users' initial use of the system. Make sure that all the users have got to grips with the basic functionality and check that the system is being used as expected. You may need to follow up with training, or adjust some of the Task definitions.

**Most Active Users**

These users have carried out the most actions on tasks - they may be able to give feedback or guide other users.

- Jayne Squires Actions: 128 (17, 12)
- Aidan Boustred Actions: 102 (20, 20)
- Matthew Nickerson Actions: 83 (15, 17)
- Austin Hoyt Actions: 16 (4, 4)
- Dimitri S. Boudrine Actions: 7 (2, 1)
- Calvin Bosch Actions: 5 (1, 1)
- Jon Thorne Actions: 5 (1, 1)
- Sonny Bramley Actions: 3 (1, 1)
- Reger Hunt Actions: 1

**Most Active Projects**

The projects with the most actions on tasks - spot check to ensure they are being filled out correctly.

- P7368 - Nottingham University Modern Languages Department Actions: 206 (25, 20)
- P0001 - Bristol University Actions: 71 (10, 10)
- 12345A - Windsor Road - Phase 1 Actions: 52 (6, 15)
- P0002 - 453 Reading Actions: 44 (6, 5)
- P7373 - Black Barn Actions: 31 (4, 15)
- P7370 - Northwood Lodge Actions: 25 (4, 10)
- P7372 - Abode Phase 3 Actions: 9 (1, 1)
- P0027 - Starwood Actions: 8 (1, 1)
- P0025 - Port Royal Theatre Actions: 5 (1, 1)
- P0013 - Graceland School Actions: 4 (1, 1)

**Usage by User**

Use this to check if any users have never used key Tracker functionality.

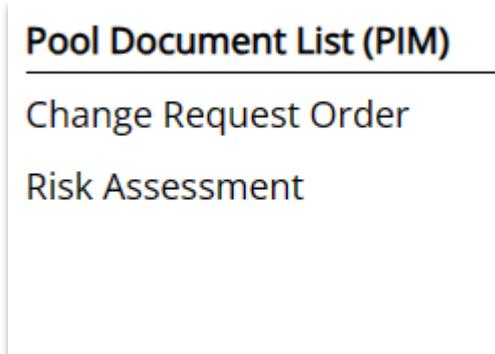
USER	CURRENT TASKS	CLOSED TASKS	ACTIONS ON TASKS	TASK DOCUMENTS
Matthew Nickerson	12	7	83	0
Calvin Bosch	1	3	5	6
Aidan Boustred	14	16	102	226
Austin Hoyt	4	5	16	0
Sonny Bramley	0	3	3	0
Alex Ponsford	1	0	0	0
Reger Hunt	0	0	1	9
Jon Thorne	0	1	5	1
Jayne Squires	7	7	128	1
Dimitri S. Boudrine	3	0	7	0

## Feature Enhancements: Deltek (PIM)

### Documents

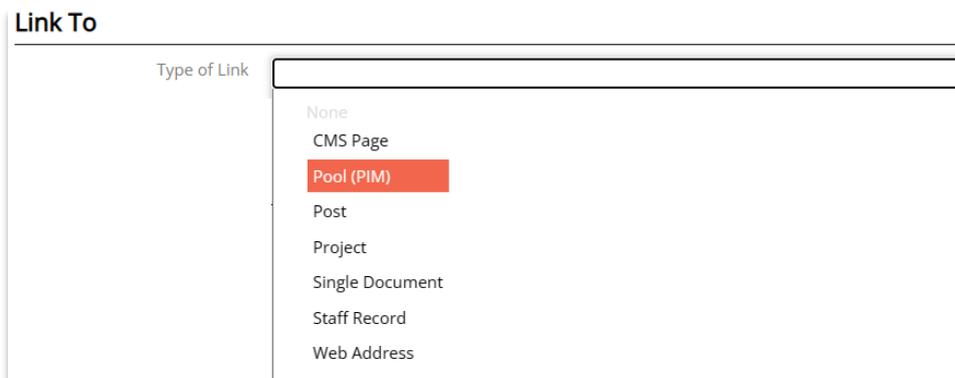
#### PIM Pool Document List

The new panel 'Pool Document List (PIM)' can be positioned on any page. It is designed to display all documents within a configured pool, presenting them in chronological order based on their published dates.



#### PIM Pool Links

Links can now be configured to link directly to a pool within the PIM DMS



## Minor Changes \ Fixes

- Events - Option to not display calendar icon on the latest events panel.
- Events - Ability to duplicate an event (includes images and tags).
- Usage Statistics: Ability to hide inactive users from results
- Usage Statistics: Ability to exclude owners' items from results (post and page owners)
- Quick search results are no longer limited to 10 items
- Reorder of panels on page edit – Structure Panels now appear first
- Unrelated panels not available – E.g. Project panels not available on Knowledge pages
- Panels are now identifiable in the page layout by icons
- Change logs available for projects
- Website link on project will now show URL
- New Link Type 'Cloud Stored Document', for use with SharePoint, google drive etc.
- Edit pencil for Projects, Events and Posts is now on the top left ribbon.
- Tracker Data available via the API
- HTML warning message to stop pasting of images

## Feature overview



Platform Details	
<b>PLATFORM</b>	
Designed for AEC professionals	✓
Cloud hosted in Azure, 99.99% uptime	✓
On-Premise option available	✓
Upgrades to latest version	✓
Unlimited support	✓
Dynamic page sizing for cross devices	✓
Cross browser compatibility	✓
1 TB storage included for cloud hosted	✓
365 Single Sign-On (SSO)	✓
<b>MOBILE</b>	
Home page - Posts	✓
Staff search	✓
Map	✓
Task Reminders	✓
Projects	✓
<b>CONNECTORS</b>	
CMap	✓
Deltek PIM	✓
Deltek VantagePoint	✓
DocuPing	✓
OpenAsset	✓
Newforma	✓
Microsoft SharePoint / OneDrive	✓
Microsoft Teams	✓
Microsoft network file shares	✓
Rapport3	✓
Social feeds	✓

Knowledge Management	
<b>CONTENT MANAGEMENT</b>	
Connected landing home page	✓
Smart site-wide search	✓
Task reminders	✓
Site management	✓

CMS editor for unlimited pages	✓
Upload documents or links	✓
Analytics	✓
Standard page layout templates	✓
Image banners (with auto scroll)	✓
Menus for display of content	✓
Latest projects feed	✓
Page delegation to specified users	✓
HTML web page editor	✓
Embed iFrames e.g. add Power BI reports	✓
Event Management including CPD data	✓
Auto suggest events based on followed tags	✓
Download events to calendar with related time zone	✓
Track event attendance	✓
Global CPD reporting	✓
Posts for news, articles, & guidance	✓
Post like, comment, bookmark	✓
Tagging system with management	✓
Auto suggested tags based on content text	✓
Follow tags	✓
Breaking news banner	✓
Display videos from YouTube & Vimeo	✓
Custom reporting e.g. KPI*	✓
Reading lists - assign content for reading	✓
Content Review – Ensure compliance	✓
Audit assigned read content/documents	✓
Add post ability to specific roles	✓
Feedback/Suggestions to administrators	✓
<b>PROJECTS</b>	
Project gallery & search	✓
Project Landing Page	✓
Key details (dates, contract value etc.)	✓
Internal Team - linked to Staff	✓
Posts e.g. Lessons Learned	✓
Image gallery	✓
Map display project location	✓
Layout can be configured	✓
Tag Projects	✓
Document Issuing summary	Requires DocuPing
<b>STAFF</b>	
Directory Search	✓
Profiles inc, skills, qualifications, expertise	✓

Display CV against staff member	✓
Initiate Teams chat or email	✓
Event and CPD tracking	✓
Linked project experience	✓
<b>PROJECT MAP</b>	
Dynamic key with colour coding	✓
Worldwide geo-coding	✓
Gazetteer address look-up	✓
Measure distance & draw shape area	✓
Zoom to street level	✓
Search Filters	✓
Set project locations by clicking on map	✓
UK LPA borough boundary lines	✓
Export results to Excel	✓

<b>Project Tracker</b>	
<b>TASKS &amp; FORMS</b>	
Administration - manage task sections & groups	✓
Link guidance & templates	✓
Progress updates on "long tasks"	✓
Related tasks	✓
Sub-tasks	✓
Upload documents to task	✓
Document routing to Network file shares	✓
Document routing to SharePoint	✓
Document routing to Deltek PIM	✓
View by task group e.g. Workstage	✓
View timeline chart	✓
<b>REPORTING</b>	
Stalled projects report	✓
Completion by project (RAG matrix)	✓
Task list by User	✓
Tasklist by Project	✓
<b>ADVANCED OPTIONS*</b>	✓
Additional fields on task form	✓
Mandate fields or document upload	✓
Approvals e.g. stage gateways	✓
Trigger tasks automatically	✓
Repeating reviews	✓
Auto assign responsibility to user	✓

Auto complete based on data from another system	✓
Automated deadline date	✓