System-Wide

NEW: Console Link

A new link can be defined to appear to the left under the Console, intended for any client-specific resource pages. Contact your Client Manager to find out more information.

CHANGE: Custom form printing

When tabs are printed from a custom form, there will now be extra line breaks introduced before the start of each tab to distinsuigh it.

Also, when detail tables are printed (e.g. Work Readings, Purchase Materials), the table name will no longer be printed. It is recommended that a custom title be added to the form instead.

The following field types should also print correctly on custom form reports: custom text & multiline text fields as well as hard-coded text.

NEW: Help Page

The **Help** menu will now direct you to two separate references: AwareManager Help (newly redesigned!) and AwareManager References (a list of all quick references).

CHANGE: Launch Page redesign

A newer, simplified launch page will accompany this release. In conjunction with this, we will be looking to rework our documentation so it is more readily available outside of this page. Please contact your Client or Account Manager if you are in need of any references or links previously accessible via the launch page.

Reminder to Chrome users*: Google is no longer supporting the Java applet. All Chrome users will need to switch to another browser.*

FIX: Recordsets

For clients not utilizing File Management, an exception was preventing them from running their stored recordsets. This has been resolved.

For more on File Management, please contact your Client Manager.

FIX: Search-based Recordsets

Search-based recordsets previously ran a search based on existing criteria before initiating the search window, often resulting in a notice about too many records being returned before the user could enter their criteria. Opening these recordsets (after their creation) will now produce the search window first.

CHANGE: Spell Check

A new Spell Check library has been implemented with a more expansive built-in dictionary. Misspelled words will be represented with a red underline. Right-clicking on the word will bring up suggestions, pressing F7 will bring up all dictionary options.

Note: You must be using a local install in order to save words to your dictionary.

CHANGE: SQL Exports

This new feature allows you to store reports that pull out detailed information not readily available from standard capsule lists. In particular, it can be used to link information across capsules (e.g. Work and Time or Work and Readings) in a list format that can be copied to another application, such as Excel. You can access any reports via a **SQL Exports** menu that you will see along the top of your AwareManager screen.

Contact your Client Manager if you are interested in learning more about the types of reports that can be defined for your organization.

CHANGE: Java Security Certificate

This suite includes the renewed signed Java security certificate.

Administration

FIX: Contact Import

This operation has been adjusted to prevent duplicate imports across divisions.

CHANGE: Divisions *Time Zone Offset*

This offset can now be defined up to 1 decimal place (for those time zones which are off by ½ hour).

CHANGE: Permission Mobile Fields

You can now define free-form options for *Work Person* and *Assigned To* as part of the **Mobile Fields** for a Permission record. Note the ability to access these options via Mobile will be in a future release.

CHANGE: Permissions Time Access

Access to the new Time External tab has been added to Permissions.

Agreements

NEW: Coverages

This capsule now has a field to link a *Coverage Trigger*. This value will default on any new coverage details of the given type added to an Insurance record.

NEW: Insurance Coverages

The Coverages detail line now has additional columns:

- Coverage Trigger – indicate the trigger you want to dispatch as a reminder for the specific policy
- Emailed – indicates whether the trigger dispatched for the selected policy

Communication

NEW: Email History

This capsule now has a field called *Related Record Files*. If the email was dispatched from a Work, Purchase, or Visitor Trigger that was set to include linked files from the originating record, the names of these files will be listed.

Financial

CHANGE: JDE Export Format
This format has been updated to include new column details and export in a .csv format.

CHANGE: MRI Export
The MRI Export format has been adjusted to remove an extra *Description* as needed.

NEW: PeopleSoft 2 Export
A new PeopleSoft format was created to export posted Work transactions.

CHANGE: Sage/Guardian Export Format
This format has been updated to include additional transaction details.

FIX: Work Transactions
When running the Export operation from within Work Transactions, you can press 'Delete' to clear out the default file name and it will not remove the highlighted transaction records in the list.

CHANGE: Yardi 3 Export
The Yardi 3 Export format has been adjusted to include Windows line breaks

Inventory

CHANGE: Material Types
A *Mobile Text* field was added to the **External** tab of the Material Types capsule. This will allow users to define the text they want to appear for each Material Type (up to 100 charcters) to be available within a future release of AwareManager Mobile.

A *Web Text* field was also added to the **External** tab of the Material Types capsule; allowing users to define the text they want to appear for each Material Type (up to 100 characters) on other external applications.

CHANGE: Material Usage Report
This report now allows you to specify a date range for which to indicate the starting quantity on hand and ending quantity on hand.

CHANGE: Materials
A *Mobile Text* field was added to the **External** tab of the Materials capsule. This will allow users to define the text they want to appear for each Material (up to 100 charcters) to be available within a future release of AwareManager Mobile.

A *Barcode* field was also added, to be used in barcode tracking of materials.

Note: AwareManager Mobile version 7 with Material Tracking is expected to be released in 2015 Q4. Material barcode scanning is expected to be included in a subsequent release.

A *Web Text* field was also added to the **External** tab of the Materials capsule; allowing users to define the text they want to appear for each Material (up to 100 characters) via other external applications.

Maintenance

NEW: Automatic Generation

You now have the ability to automatically generate Maintenance Work in AwareManager!
You must enable this feature under Maintenance Preferences and select the *Auto-generate Work* option on each Maintenance record you want to include. Once a day (around midnight), the system will generate all Maintenance Work that is scheduled to fall any day up to and including the current date. If you specify a *Generation Lead Time* under Maintenance Preferences, it will generate all Maintenance Work through that future time period.

E.g. If your Generation Lead Time = 0 days, when the automated generation is run on 4/10/15 it will generate all Maintenance scheduled through 4/10/15.

If your Generation Lead Time = 10 days, when the automated generation is run on 4/10/15 it will generate all Maintenance scheduled through 4/20/15

We recommend you contact your Client Manager to review your data before enabling this feature.

CHANGE: Equipment

The External tab has been updated with the following fields: *Latitude, Longitude, Altitude*, *Mobile, Update Location With Work*.

FIX: Last Maintained Date

When a Work record is set to Closed from an automatic timer update (as defined by Work Status), the associated date updates will now be correctly applied. The *Date Completed* from the Work record will update the following records:

- Maintenance *Last Maintained Date*
- Equipment *Last Maintained Date*

FIX: Maintenance Preferences

Access to Maintenance Preferences will now grant access to the **Extra** tab, where automatic generation settings are defined.

CHANGE: Maintenance Files

Files linked to a Maintenance record will now populate on any Work record generated from that Maintenance.

NEW: Refresh Equipment Data

This operation has been moved from the Maintenance capsule to Equipment. The following options have been added to it:

- (For Inactive Equipment) Make Maintenance Inactive – sets as *Inactive* any Maintenance linked to equipment that's been inactivated
- (For Inactive Equipment) Remove Equipment From Tasks – removes inactivated Equipment from any Tasks which linked to that Equipment under it **Records** tab. Note this will not remove the Equipment from existing Work records, but the equipment will not default on any new Work moving forward.

Purchases

CHANGE: Purchase Approval

Purchases totalling $0 can no longer be approved by any users; there must be an actual total amount entered.

CHANGE: Purchase Duplication

Any details contained within the Approvals tab of a Purchase record will no longer be duplicated when the record is duplicated. Tabbing through the *Purchase Type* will allow the appropriate approval thresholds to default without any prior approvals already filled in.

FIX: Purchase custom report

When materials are included on a custom Purchase form, they will no longer print in duplicates on the corresponding single purchase report.

Resources

NEW: Contact image

An *Image* field has been added to the Contacts capsule. In Edit mode, you can paste an image from your clipboard into this field, or cut/copy any image currently stored there. Note the maximum dimensions of the image are *width x height* 210 x 280 pixels.

CHANGE: Contacts

An *Image* field has been added to Contacts; images stored here will automatically populate on new Visitor records linked to the given contact (as the visitor).

CHANGE: Properties

The External tab has been updated with the following fields: *Latitude, Longitude, Altitude.*

CHANGE: Units

The External tab has been updated with the following fields: *Latitude, Longitude, Altitude.*

NEW: Vendor Properties tab

A Properties tab has been added to Vendors to list all properties in which the vendor is authorized to work. When adding or editing Work, the Vendor list will be constrained by those linked to the selected Property (or those not linked to any Properties).

Settings

CHANGE: Company Settings ***Time Zone Offset***

This offset can now be defined up to 1 decimal place (for those time zones which are off by ½ hour). Note this offset value will only apply in databases that do not use Divisions.

NEW: User Settings for Visitors

User Settings now has a new tab for **Visitors** that allows you to define the value the following fields default to on all new Visitor records entered directly in AwareManager jxt:

- *Organization* (Organization, Tenant, or Vendor)
- *Host* (Host or Contact)
- Visitor *Point of Entry*

Tasks

NEW: Instructions tab

This tab allows you to break out instructions into individual line items. If a Task with Instructions is linked to Maintenance, when Work is generated from the Maintenance these instructions will appear as a checklist against the Work record. The primary purpose of this checklist is to be able to check off items completed via the AwareManager Mobile applications.

Triggers

NEW: Coverage Triggers

This new trigger allows you to define an email which will dispatch x number of days (indicated by the *Lead Time*) prior to the expiration of the individual Insurance policy to which it's linked. Note the trigger can only reference details from the specific policy as well as the main Insurance record.

Under Coverage Trigger Preferences, you can define the frequency (in days and hours) with which the system checks for all Coverage Triggers to dispatch.

NEW: "Include Record Files"

This option will now be available on all Work, Purchase, and Visitor Triggers. If selected, when the trigger is dispatched for a record, any files linked to that record (via the Files tab) will be sent as attachments to that email.
Note:

- These attachments will not be stored against Email History; only the file names will be referenced in the new *Related Record Files* field
- If the attachments on a trigger email are too large, the email may be rejected by your email server.

CHANGE: Visitor Trigger

Entered By has now been added as an option in 2 places:

- As a search range (meaning you can define a trigger to dispatch based on this value)
- As a *Recipient* option

FIX: Work Readings reference

When using the [Work.Detail:WorkReadings] reference to display all readings values, the correct capsule name will be displayed for each reading.

NEW: Work Triggers

Unit values can now be defined as part of Work Trigger criteria.

You can now use the [SurveyLink] reference to direct your end users to a survey for follow-up on the work they requested. The survey will be completed via the AwareManager Portal, but does not require a login.

Note: You must be upgraded to AwareManager Portal v2.2 to utilize this feature.

Visitors

FIX: Image field on custom forms

The Image field which appears on the standard Visitor form can now be added to (and resized on) custom forms.

FIX: Recurring Visitor *Entered By*

When a recurring Visitor record is re-generated via the Move to History operation (whether manually or automatically run), the original *Entered By* value will be retained on the new record.

CHANGE: Recurring Visitors *Expected Date*

If a recurring Visitor record is sent to history and a new recurring record is automatically generated in its place, the *Expected Date* of the new record will populate as the current date and the *Expected Time* will populate as the same time indicated on the previous record. This will ensure that all new recurring visitors will show up in the Visitor Console for the current day.

NEW: Visitor Badge format Large without Barcode 2.31" x 4"

You can now select a new badge format: Large without Barcode 2.31" x 4". This will print the following details: *Badge Letters, Expected Date, Visitor Organization, Destination, Image*.

CHANGE: Visitor Badge Preferences

The Visitor Badge selected under Badge Preferences will now print from the Visitor List as well as the Visitor Console.

CHANGE: Visitor Console

You can now sort the Visitor Console by any one column displayed. Click on a column title once to sort ascending; click on the same title again to sort descending.

If you have a Color Alert defined for a Visitor Status, any Visitor record linked to this status will be highlighted in this color within the Visitor Console.

You can now filter the Visitor Console list by First Name, Last Name, or Organization.

Any Record Access data restrictions assigned to a user will be applied within the Visitor Console.
For more information on Record Access, please contact Professional Services.

The Visitor list will now only refresh when the **Refresh** icon is pressed.

The Visitor Console now has a "duplicate" option ( ). Select one record and press this icon to duplicate all the details of the existing record. You will have the ability to duplicate the Visitor Roles and Reminders as well.

You can also define the default check-in/check-out statuses on a division basis. If none is defined for a division, it will default to the statuses stored under the Visitor Preferences (Console tab).

The **Check In** and **Check Out** buttons have been moved below the Visitor image for easier access.

FIX: Visitor Console

When selecting a record that has its Arrival Date/Time completed, the Check Out button now becomes enabled.

FIX: Visitor History Timer

The timer which moves records to Visitor History has been adjusted to correctly account for the *Expected Time Limit* value set. If a record has exceeded its *Expected Date* by the number of days specified, and the visitor was never recorded as arriving, the record will be moved to Visitor History when the timer goes off.

CHANGE: Visitor Triggers

You can now define a trigger to dispatch based on the *Full Name* of the Visitor.

NEW: Visitor Type Portal Fields

A **Portal Fields** tab has been added to Visitor Types. When the given type is selected during Visitor entry via the Portal (version 1.9+), the additional fields listed will appear.

Work

NEW: Automated Creation of Inventory from Work

You can now set this operation to run automatically for all Work at select Work Statuses. The timer is defined under Inventory Preferences, and then on any Work Status record of a closed type, you can select whether or not to include it in the timer. Once an hour, it will create Inventory records from Materials linked to Work records at the statuses indicated.

Note: Inventory will only generate for work of a Closed status type.

NEW: Automated Generate Work by Readings Exception

For each Division, under the **Work** tab, you can choose to make this operation run automatically on any saved work with readings for which limits are defined. You can additionally choose to include the readings details or *Description* and *Notes* from the original Work record. If this preference is set for a division, then every time a reading is saved on an existing Work record within that division, the system will check if an expcetion Work record should be generated. (Note this will not run on new Work records, only existing records being edited.)

CHANGE: Auto-Generated Work by Readings Exception

If the reading which created an exception was linked to an Equipment or Unit, the location details from the corresponding Equipment/Unit record will populate the new Work record generated. All other values will populate from the corresponding Maintenance record invoked by the exception; any remaining pertinent details will populate from the original Work record.

If your system is configured to include readings details on Work generated from a reading exception, the time value from the readings will now be included in these details.

CHANGE: Automatic Refresh

This feature now has an option to play a bell sound when new records are retrieved.

CHANGE: Cross-Capsule Work Search

From the Work Search window, there is a new “Contact” option under the Cross-Capsule search. This allows you to enter Contact-based search criteria specifically for searching on the Work *Entered By* value.

FIX: Duplicate Work

The freezing that was reported when duplicating Work (custom form in particular) has been resolved.

When duplicating work and including Readings, the time values will clear out from the previous values.

CHANGE: Duplicating Work

When duplicating Work via the Duplicate icon or the **Duplicate Work** operation, if the Task(s) are included for duplication, the corresponding Task instructions will also be duplicated (via the **Instructions** tab).

When duplicating Work, if you choose to duplicate Readings, the *Values, Notes, Dates*, any Exceptions selected will be cleared out.

CHANGE: Equipment Constraints

During Work entry, the Equipment list will initially be constrained by *Equipment Type* and *Property/Unit*. If there are no Equipment records that match the location criteria, it will then just contrain the Equipment list by *Equipment Type*. If no Equipment Types match, it will show the entire Equipment list, sorted alphanumerically by *Code*.

CHANGE: Generate Work by Readings Exception

For Work generated from a readings exception, the details of the reading which caused the exception (Reading, Title, Value, Date, and Notes) will be displayed in the *Notes* field of the new Work record.

NEW: Instructions tab

This tab stores the instructions generated from the linked Maintenance Task. For each instruction you will see a *Done* checkbox as well as *Date, Time, Contact*, and *Notes.* When an item is checked off, the *Date, Time,* and *Contact* details will be populated; the *Notes* may be edited at any time.

CHANGE: Lenel integration

For those clients who have integrated their Visitor Console with Lenel systems, allowances have been made to allow blank spaces to be passed in with Visitor names.

CHANGE: New Records Timer

This feature was removed from the Work Preferences. Clients looking to receive a notification when new records are input should use the Automatic Refresh option from the Work Operations menu. Contact your Client Manager if you have any questions on this feature.

CHANGE: Print Invoices Report

The report search window now includes the option *Include Work Person*. If selected, the name of the linked Work Person/Work Contact will display in between the “Bill To” and “Unit” values.

CHANGE: Property Type constrains Property

When adding or editing Work records, the *Property* value will be constrained based on the *Property Type* value specified. If no value is specified, it will still default based on the selected *Property*.

CHANGE: Readings Exception additional information

When new Work is generated via a readings exception, the following details from the reading which triggered the exception will populate in the *Notes* field of the new Work record: *Reading, Title, Value, Date,* and *Notes*.

CHANGE: Readings Time

When Readings values are defined against a Work record, a timestamp will now be recorded along with the date stamp. Both values will remain editable from within the desktop application (Work as well as Work Readings Detail Viewer). Note that date/time details must be manually edited via the Work Readings Detail Viewer.

FIX: Refresh Recordset

A fix has been applied for this feature to update the current list correctly.

CHANGE: Revision History

For all Revision History changes recorded against Work records, the *Work Status* value at the time of the revision will also be recorded in a new *Status* column. (Note this column will appear across all capsules, but will only apply to Work.)

CHANGE: Single Work Report with Instructions

If **Instructions** are present on a Work record, they will print below the Readings section on the Single Work Report.

FIX: Statement Report

The "each" detail has been removed from the material section of this report to clean up the presentation of details.

CHANGE: Task defaults

When a task defaults on a new Work record, any readings associated with that task will also default. This applies to work added via the Work capsule as well as via the Create Work operations found under Purchases and Inventory.

If a Work Type is linked to a Task with Instructions, when a Work record of that type is manually added via the desktop application, the Task and its associated Instructions will populate on the Work record.

NEW: Time

A new External tab has been added containing the fields *Latitude, Longitude,* and *Altitude*.

CHANGE: Time Summary Report

When sorted by Contact, this report will now cut off the Contact *Code* and *Name* with "…" if they have too many characters to fit in the allotted space.

FIX: Time Total Cost calculations

If you enter a Time record with no *Start* and *End Times* (only *Total Time*) the *Total Cost* will now calculate correctly, and the *Hourly Cost* will not clear out when tabbed through.

CHANGE: Time Type multipliers

Time Type multiplier values can now be defined up to 6 decimal places in order to address rounding issues with calculating costs/charges using only 4 decimal places.

CHANGE: Work Expanded Report

A new option was added to this report to include Images. If selected, all images linked to the selected Work record(s) via the **Files** tab will be printed below the other Work details.