

mFM User Guide

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1 mTick Overview

mTick is a tick sheet app that enables surveyors to carry out paperless site valuations accurately without having to return to the office.



Updated valuation data is automatically transferred to the surveyor's back end system via a direct mobile link, making it an extremely time-efficient tool. It also eliminates the possibility of errors that rekeying of information can bring and allows the QS to focus on his key tasks as opposed to administration.

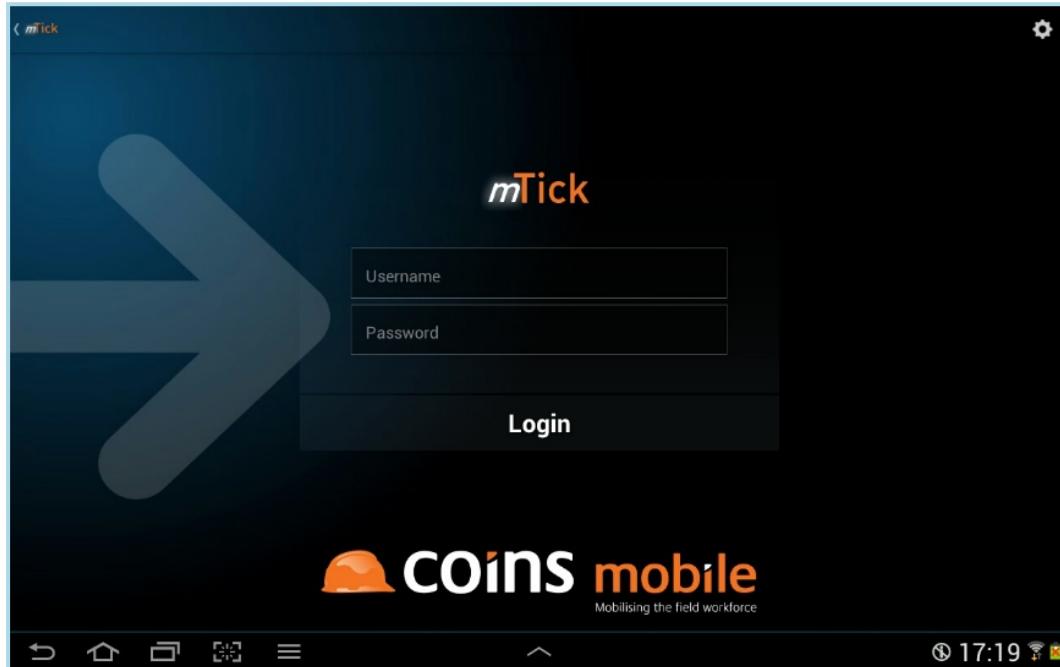
Available for both Android and iOS based mobile devices, mTick allows the user to view the value of a plot or site against current pay stages, in near real time. This is because the data stored on mobile devices can be sent back to COINS or other system as soon as a mobile connection is established, so that accurate forecasts against budget can be provided and confident decisions made about pay stages.

mTick is full of functionality, providing surveyors with all the site information they need from maps and directions to plot details such as materials (including photographs and notes), cost period and payments. Data can be entered or edited to prove the value of the site at any one point in time and there is even an area where surveyors can manage their own workload by creating a 'to do' list.

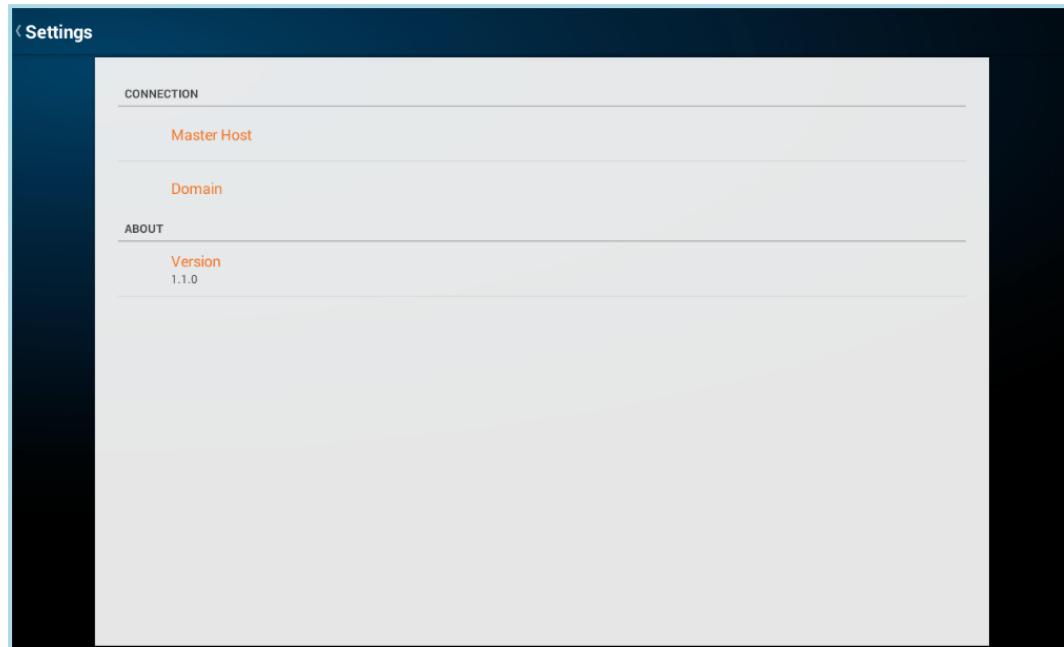
Implementing mTick can help improve the efficiency of the valuations process, saving money whilst minimising errors and improving subcontractor payment assessments.

2 Log In

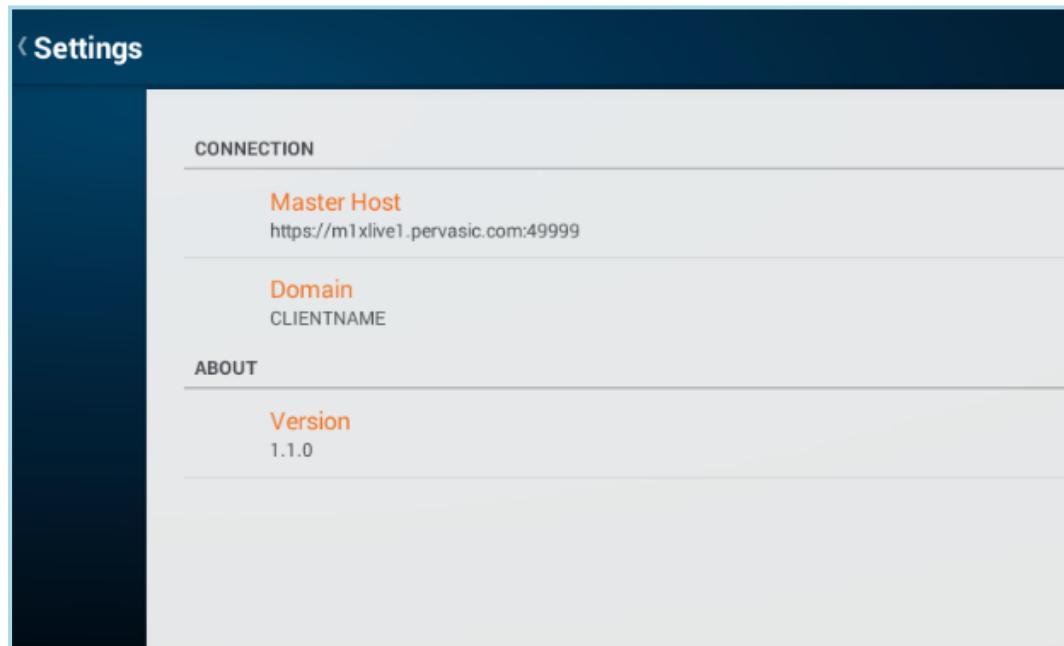
Locate and open the mTick application from the device application menu. The login page will be displayed prompting the user to enter the Username & Password.



From the setting menu (cog) the user will be able to configure the application settings ('Master Host' and 'Domain').



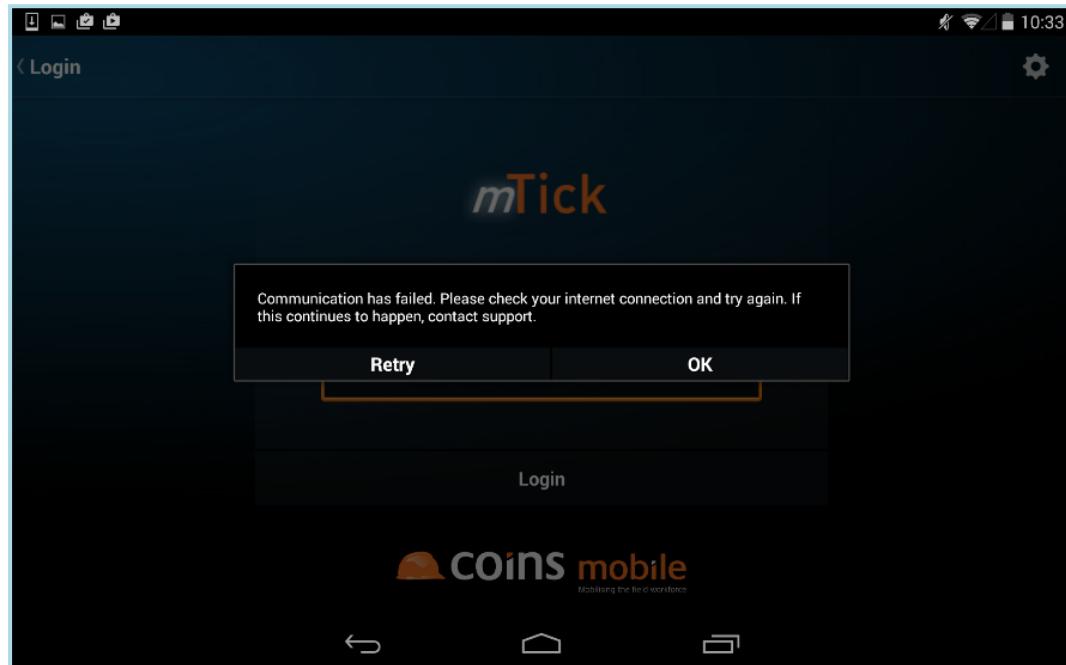
Information to be provided by Device Admin



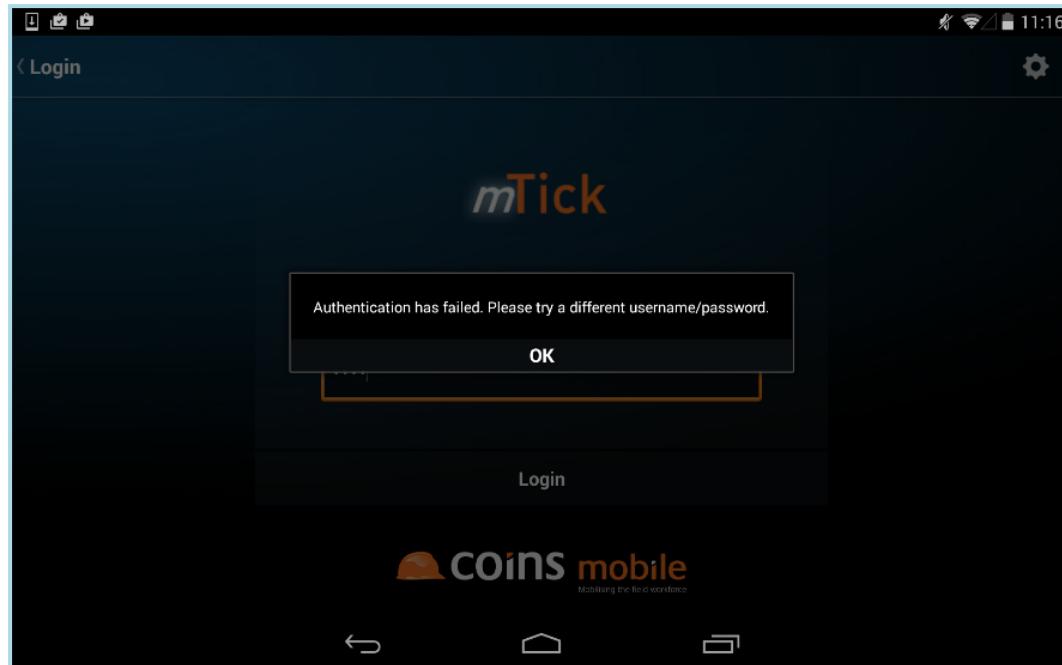
- 'Master Host' is an editable field and will need to be set before the user can begin to use the app.
- 'Domain' is also an editable field and will need to be set and pointing to the correct domain.

- 'Version' is read only and will always display the current version of the application.

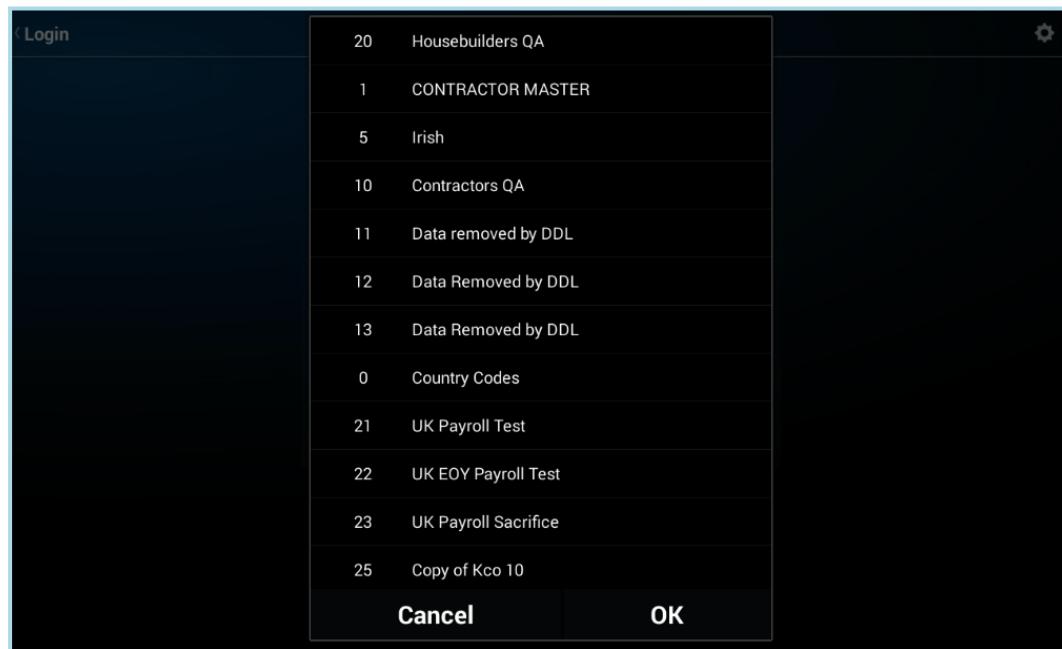
If any of the configurations are incorrect, then the following error will be displayed to the user when they try to login.



If the incorrect username or password have been entered then the following error message will be shown.



Once authenticated, the user can select a KCO from a list if they are not defaulted to one already in System setup on COINS.



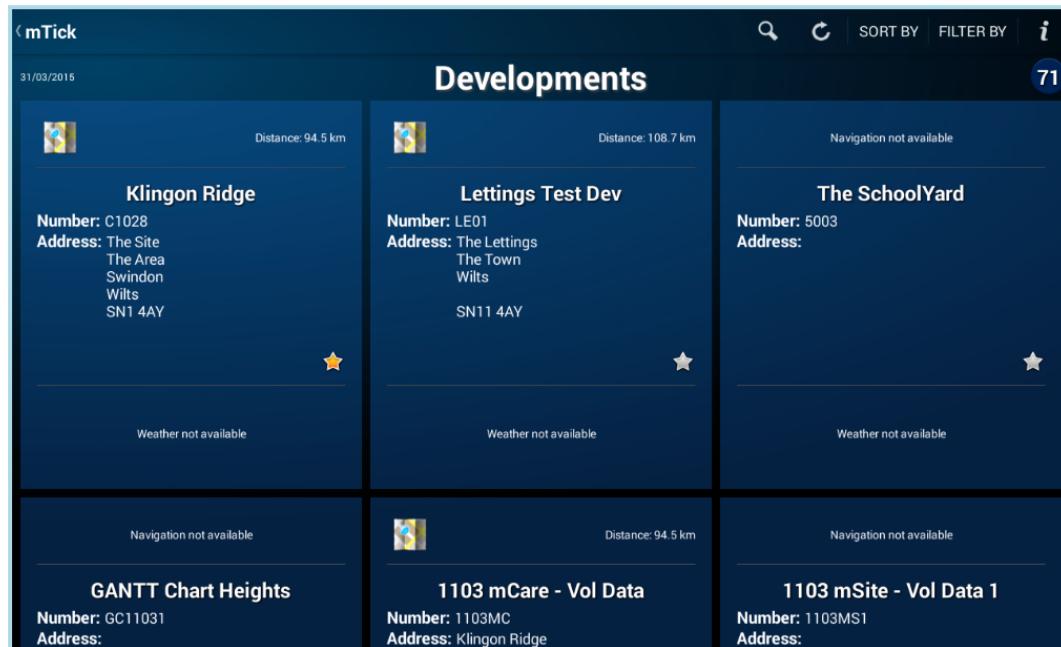
User will then be prompted to select the 'Cost Period' before proceeding to the Developments screen.

The 2 most recent 'Cost Periods' will be displayed.



3 Developments

On the Developments screen user will be able to see all the developments provisioned for them to see from the security module.

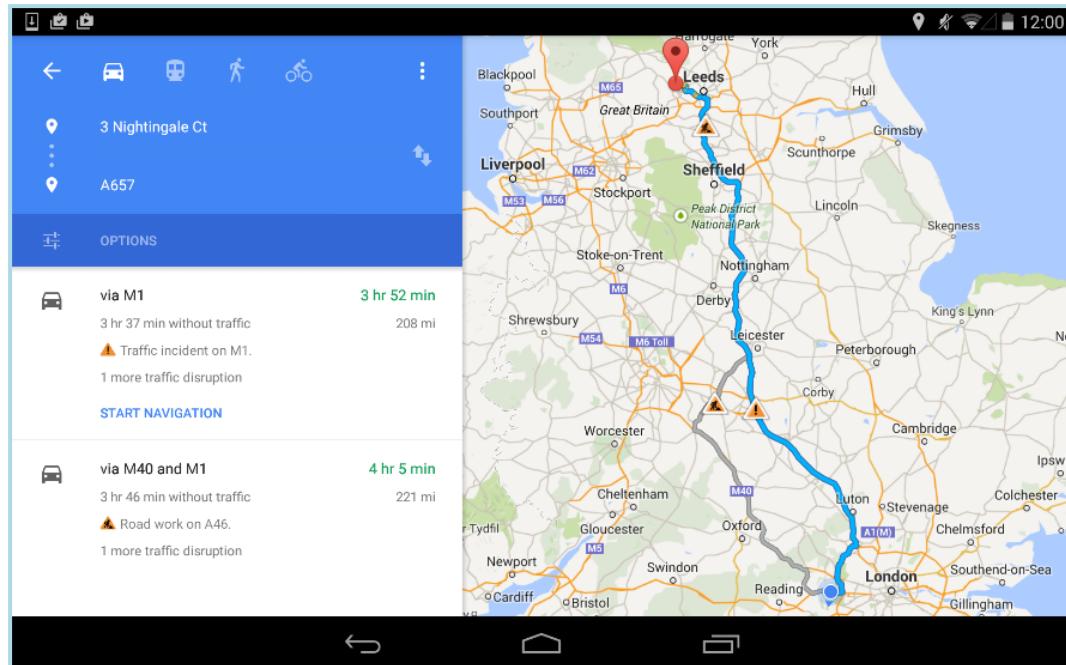


The details of each development include name of site, contract number, address and users distance to the site.

Users can filter by favourites and sort by the name, number and distance. More information in section with features.

Tap on 'Star' to choose 'Favourites'. The application will cache data for that site.

By clicking the maps icon, users can navigate or get directions from the current location to the development location.



The Developments data can be cached however this will be large and it is advisable to only cache required developments for the day.

Klingon Ridge	Lettings Test Dev	The SchoolYard
Number: C1028 Address: The Site The Area Swindon Wilts SN1 4AY	Number: LE01 Address: The Lettings The Town Wilts SN11 4AY	Number: 5003 Address: [empty]
GANTT Chart Heights	1103 mCare - Vol Data	1103 mSite - Vol Data 1
Number: GC11031 Address: [empty]	Number: 1103MC Address: Klingon Ridge Enterprise Heights Swindon	Number: 1103MS1 Address: [empty]

Clicking back on this screen will log out the user.

Note: All screens have a refresh and a search options. The refresh will force the application to get data and the search allows search over the screen content.

4 Plots

Within a Development, the user will see the Plots on site.

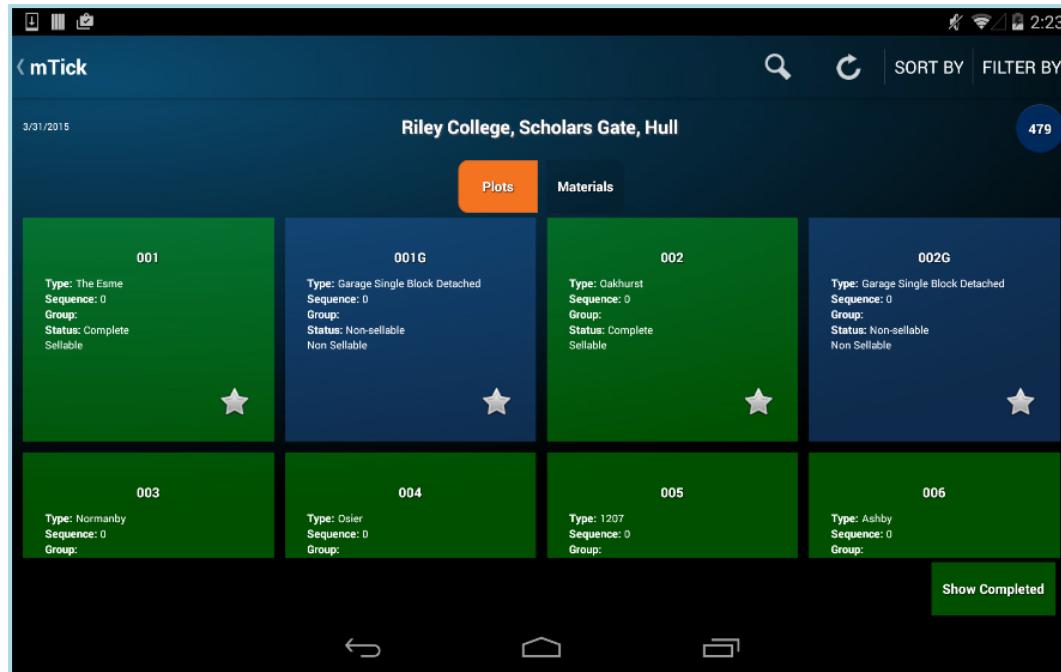


The following plot information is available to the users to view and utilise features like sort and filter by. More information in section with features.

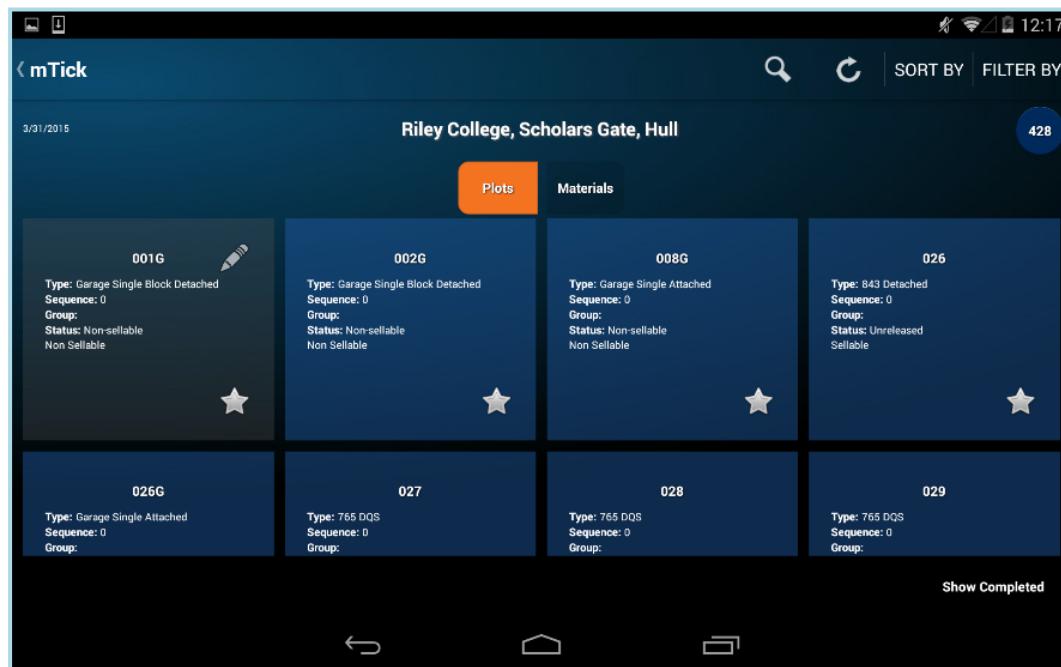
- Type
- Sequence
- Group
- Status

Tap on 'Star' to choose favourite plots. The application will cache data for that plot

Tap Show Completed to see the 'legally completed' plots.



The dark background on Plots suggests the plot has cached data as user has either previously accessed it or has starred it. This will allow user to continue working if there is a loss of internet connectivity on device.



To get to the Developments, the user must tap the back or mTick home button.

5 Materials

Within a Development site, the user can also see the Materials on site.

The screenshot shows a list of materials for the project 'Meadowfield Lane (Dev)'. The materials listed are:

- 011-01-0007 CR 1vvv UOP: EA Price: £165.00 Qty: 11.0 EA
- 01A02 Aggregates - Ballast All In UOP: M3 Price: £10.00 Qty: 9.0 M3
- 01B01 Bricks and Blocks UOP: NO Price: £45.00 Qty: 99.0 TH
- 01B01 Bricks and Blocks UOP: TH Price: £25.00 Qty: 0.0 TH
- 01B01 Bricks and Blocks1 UOP: EA Price: £100.00 Qty: 0.0 TH

The interface includes standard mobile navigation icons at the bottom.

Materials are shown in a list and their quantities are editable.

The screenshot shows a list of materials for the project 'Riley College, Scholars Gate, Hull'. The materials listed are:

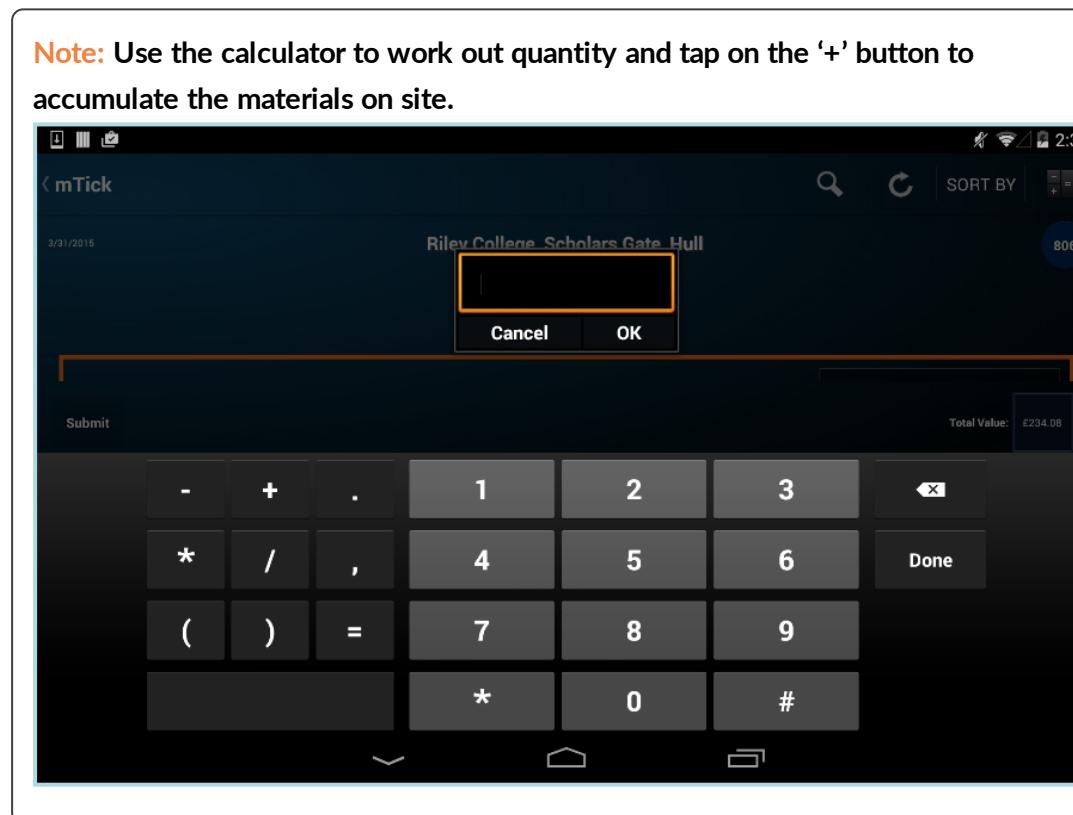
- 0405-0060 Telehandler 14m - TO RELACE ORDER NO UOP: NO Price: £234.08 Value: 234.1 Qty: 1.0 WK
- 0405-0071 Telehandler Road Tax Weekly Hire UOP: NO Price: £3.50 Value: 0.0 Qty: 0.0 WK
- 0405-0072 Mechlock Weekly Hire UOP: NO Price: £17.60 Value: 0.0 Qty: 0.0 WK

A 'Submit' button is visible at the bottom left, and a 'Total Value: £234.08' summary is at the bottom right. The interface includes standard mobile navigation icons at the bottom.

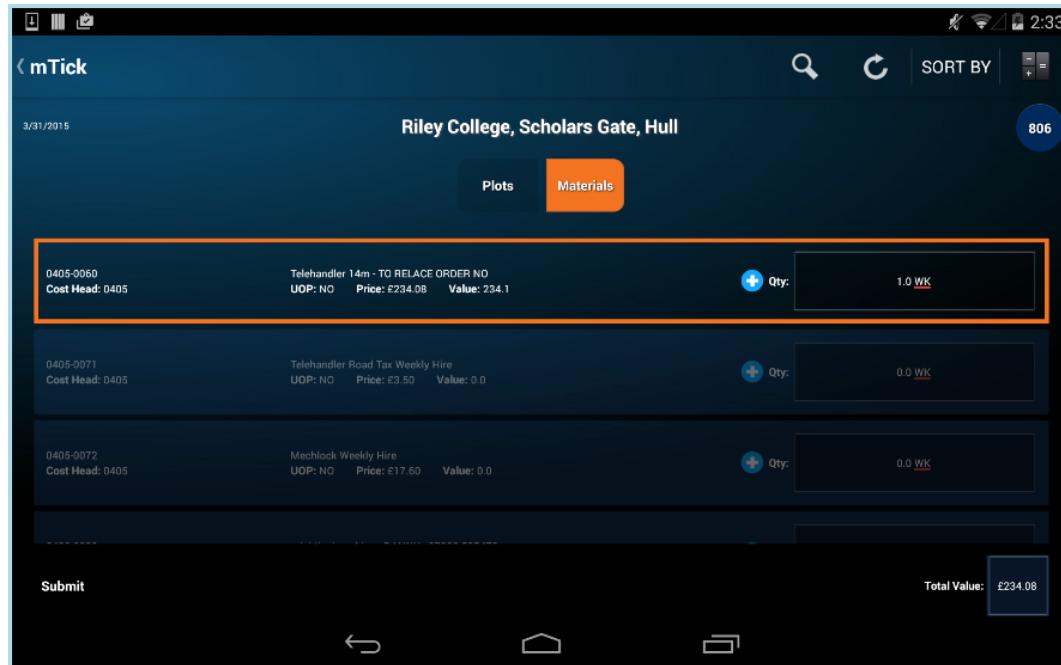
Materials will display the following details:

- Commodity
- Cost Head
- Description
- UoP
- Price
- Value
- Quantity (current)

Selected material will be highlighted.



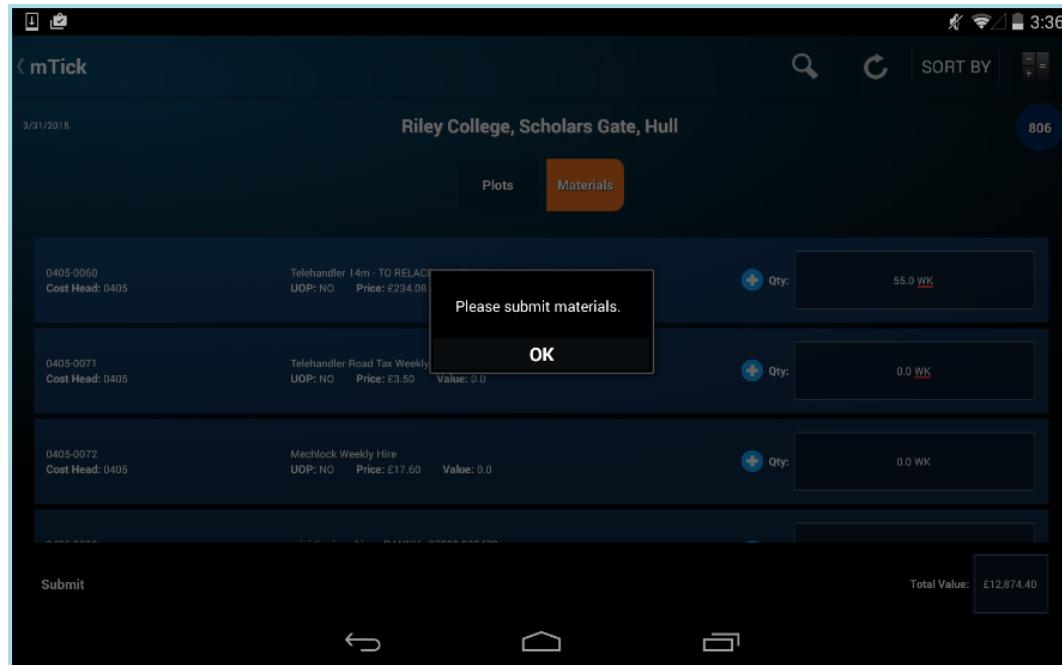
If the user taps to add a quantity, an input dialog will appear.



Once the input has been confirmed, the user can continue to enter more materials and view the 'Total Value' of materials on site.

After materials have been entered, they must be submitted by tapping 'Submit' button before leaving this screen.

If the user tries to exit this screen without submitting data then the following error message will be prompted.



This is a check to prevent user from losing the information captured on application.

6 Tick Groups

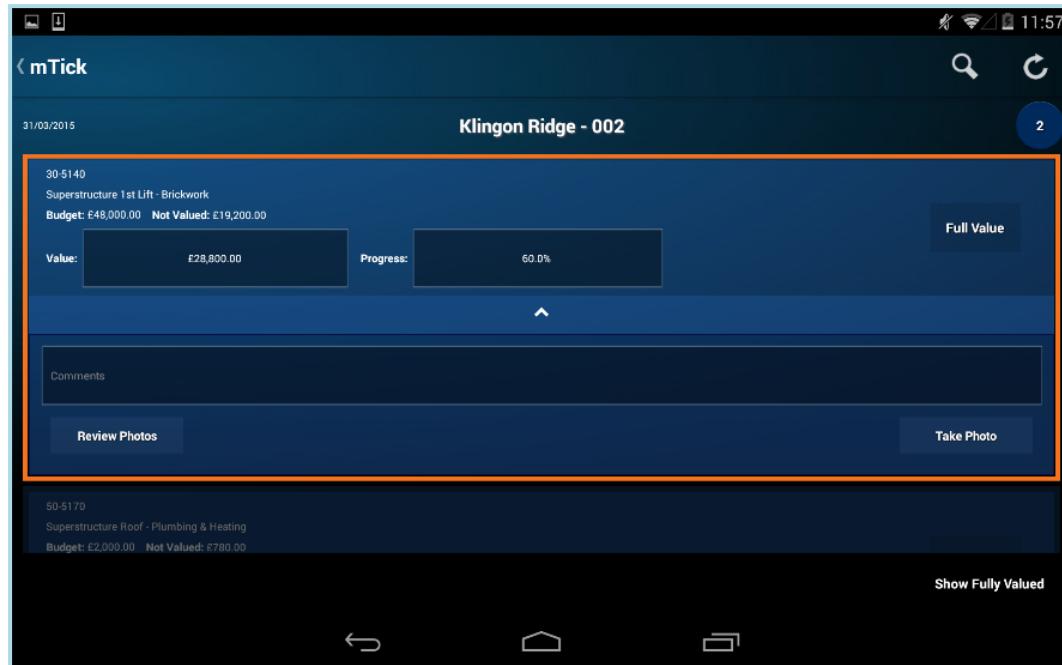
Within a Plot, the user will be able to perform valuations on Tick Groups and/or payment stages.

The Tick Group details include the group number, description, budget and amount not valued.

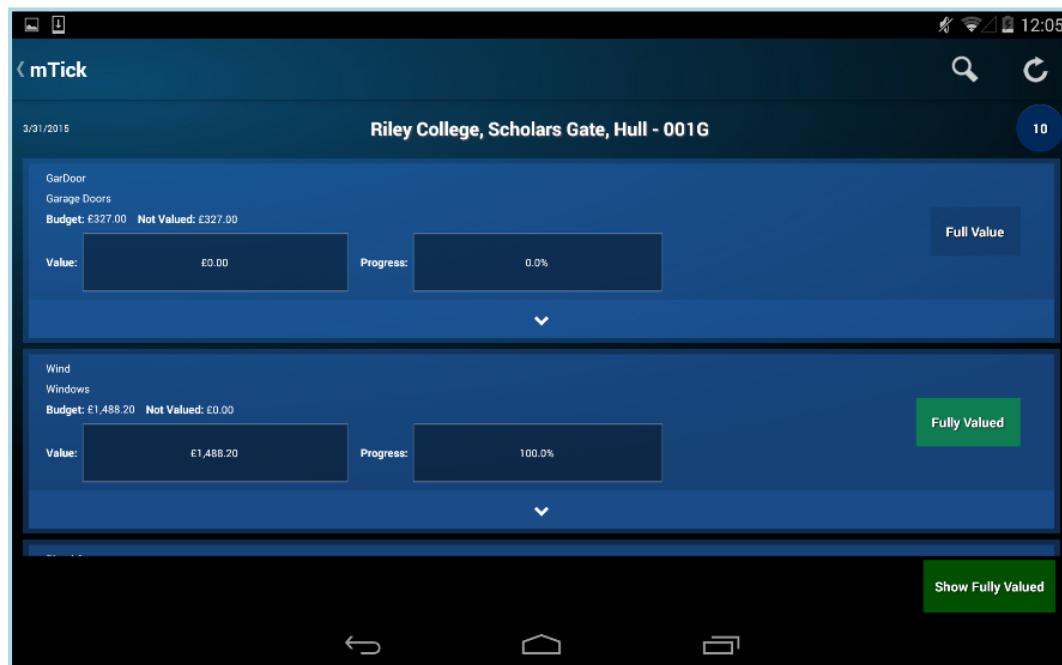
A selected Tick Group is highlighted with orange border.



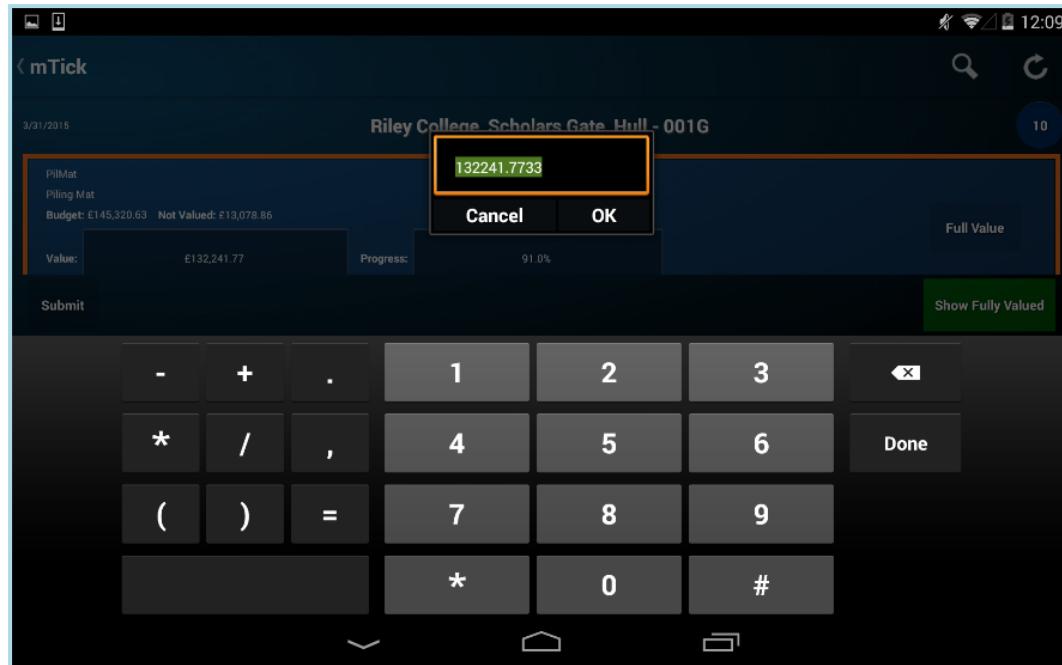
Tapping on the 'white arrow' allows to show or hide comments and photo options.



The Show Fully Valued button, allows the user to see the 'Fully Valued' Tick Groups highlighted in green.

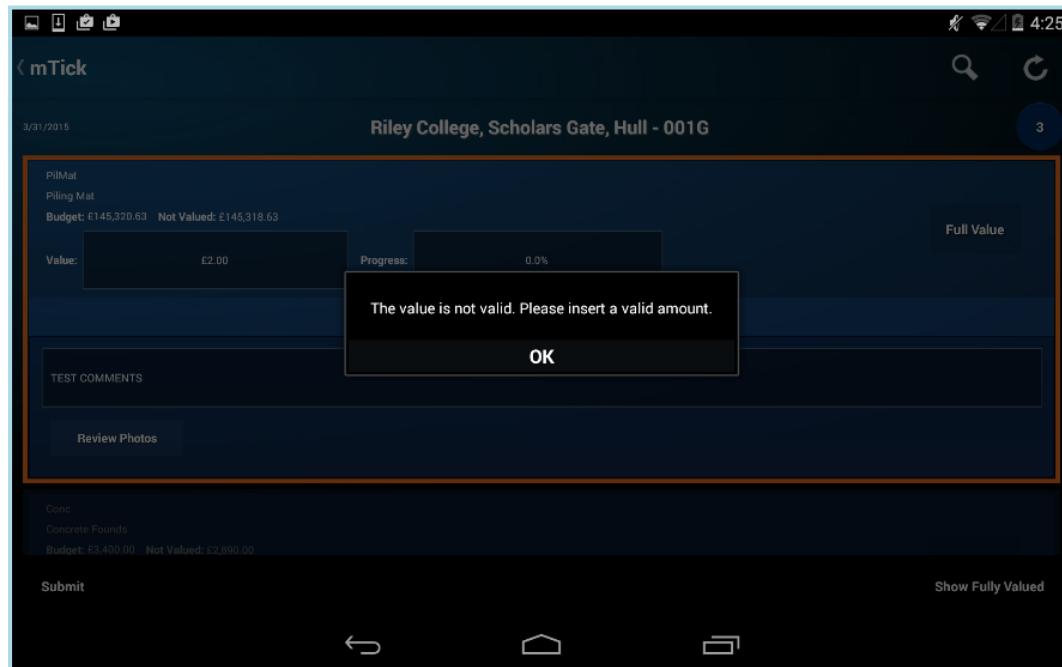


Users can change the 'Value' in price or update the 'Progress' in percentage.

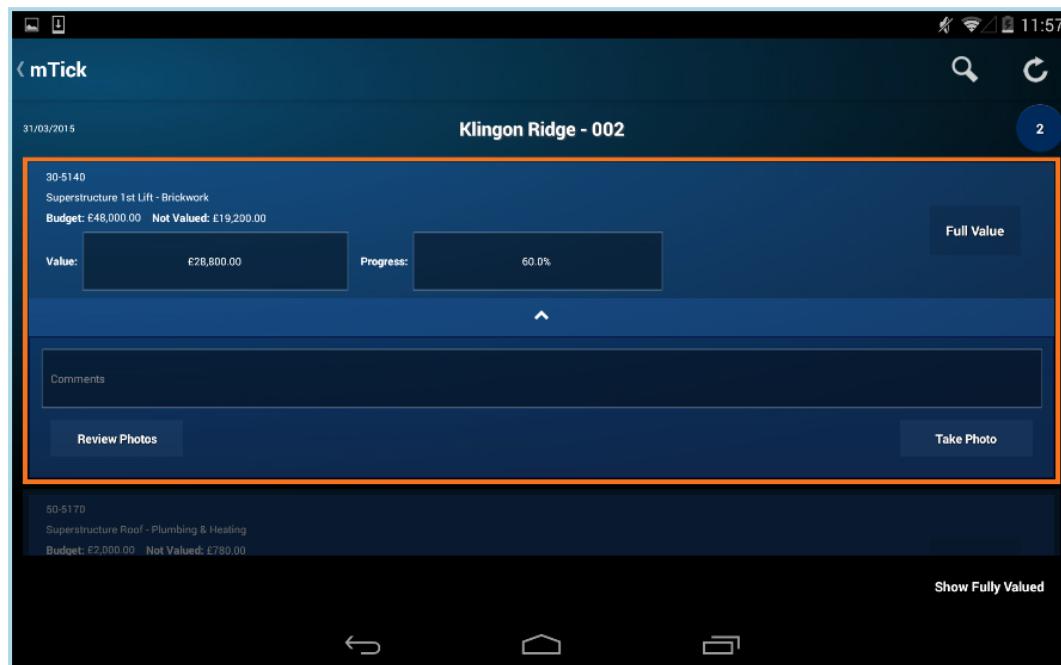


Note: Value and Progress are co-dependent, when one is changed, the other is automatically updated based on the budget.

The user will be prevented from entering a 'Value' that is greater than the budget.



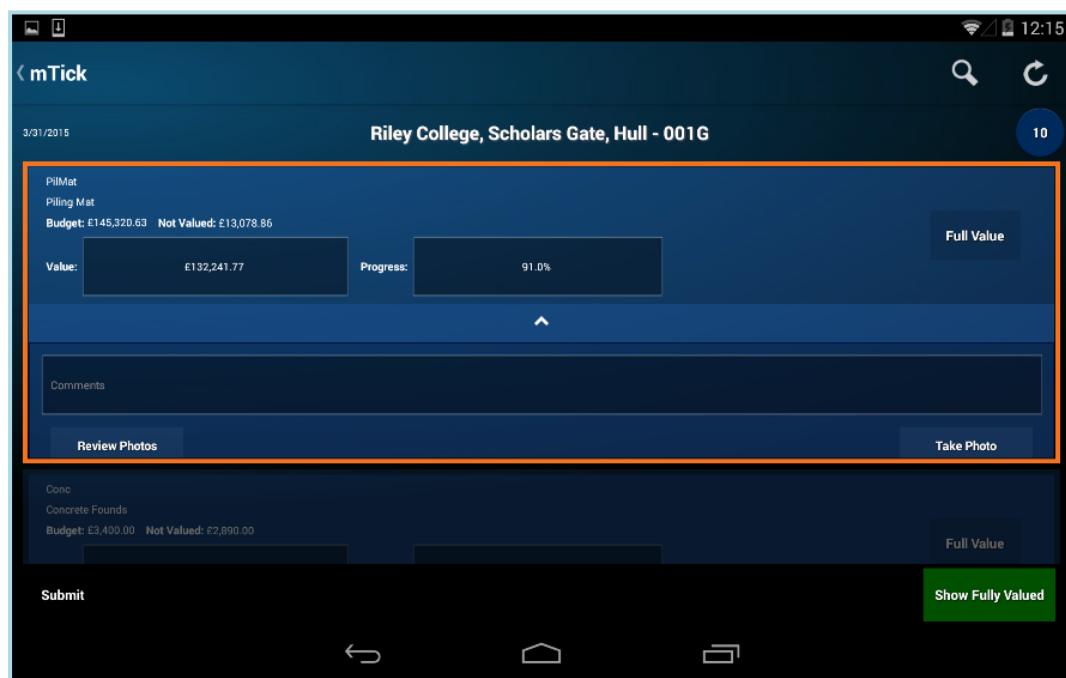
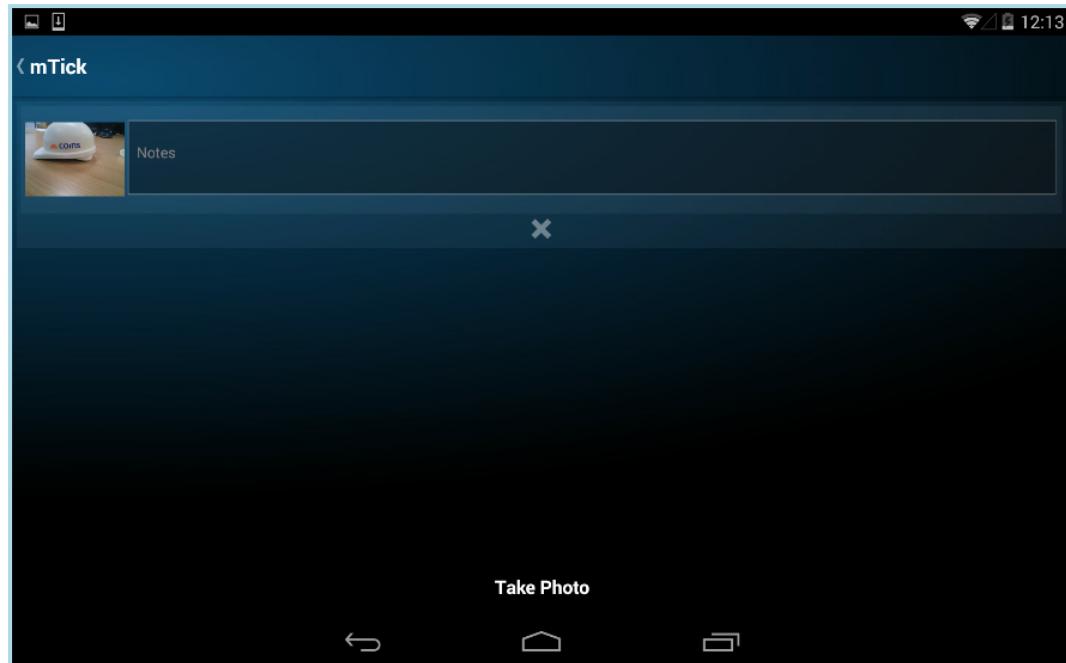
Users can add 'comments' to each Tick Group item which also get updated onto COINS.



When the 'Value' and 'Progress' amounts have been changed, the app can enforce the user to take photos.



User can tap on 'Take Photo' on valuation or within 'Review Photos' option.

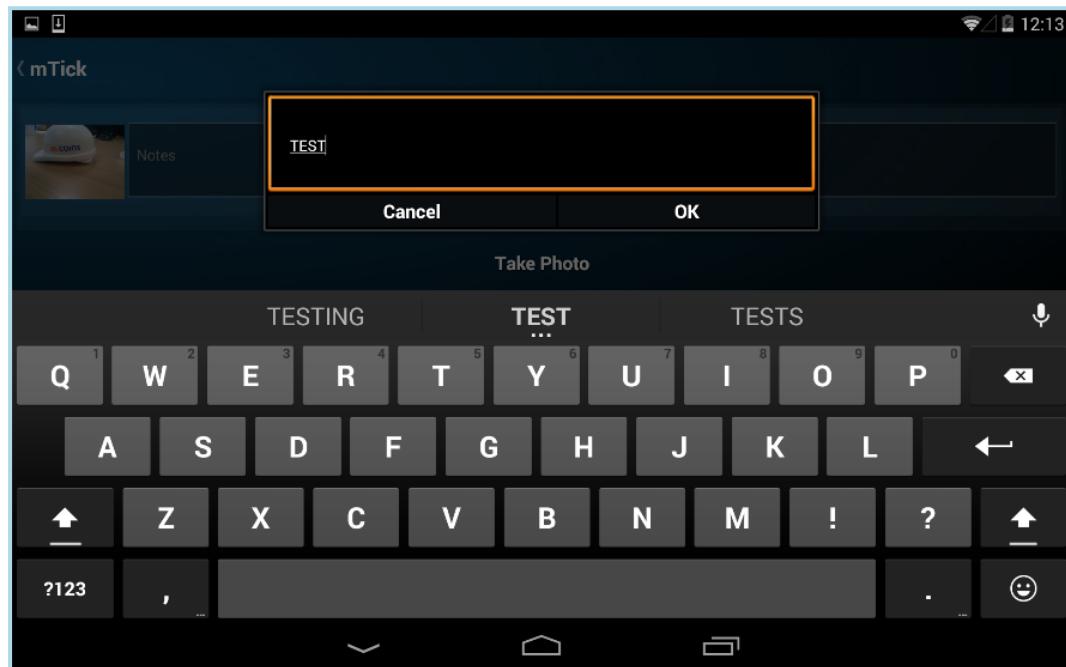


Note: Photo mandatory, max and minimum amount are OA configurable.
Including the maximum number of photos per Tick Group or Payment Stage.

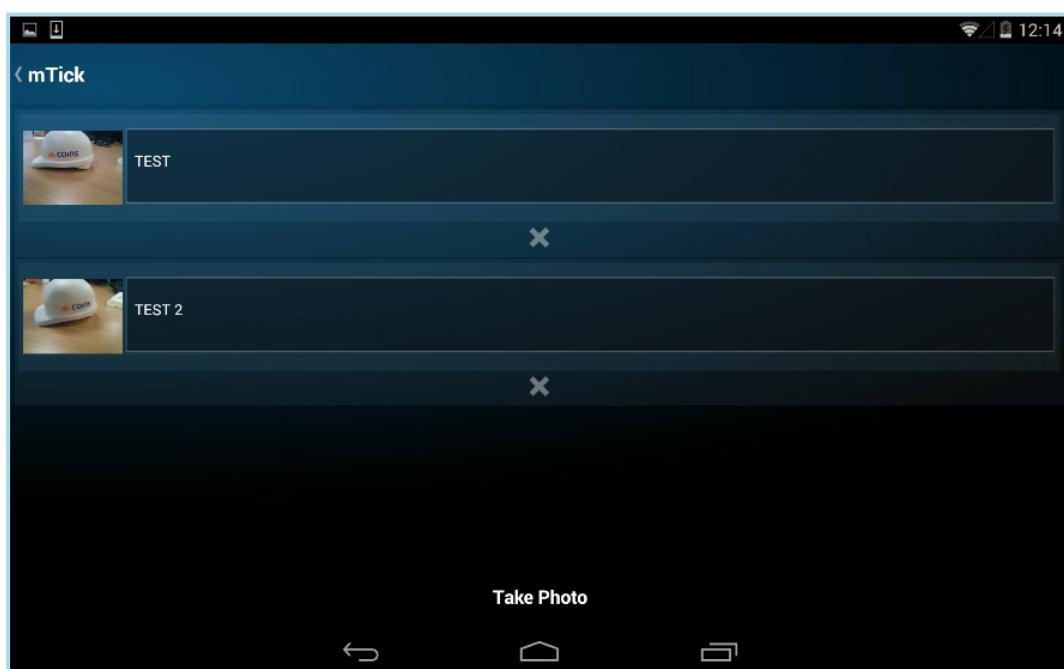
Clicking the image will open a preview application and the "X" will delete it.

Once photos have been captured, they will be displayed in the photos screen where notes can be added against each and the user can take more photos.

Tapping on the 'Notes' field will bring up the on screen keyboard.



Photos will be saved and displayed in the order in which they were taken.



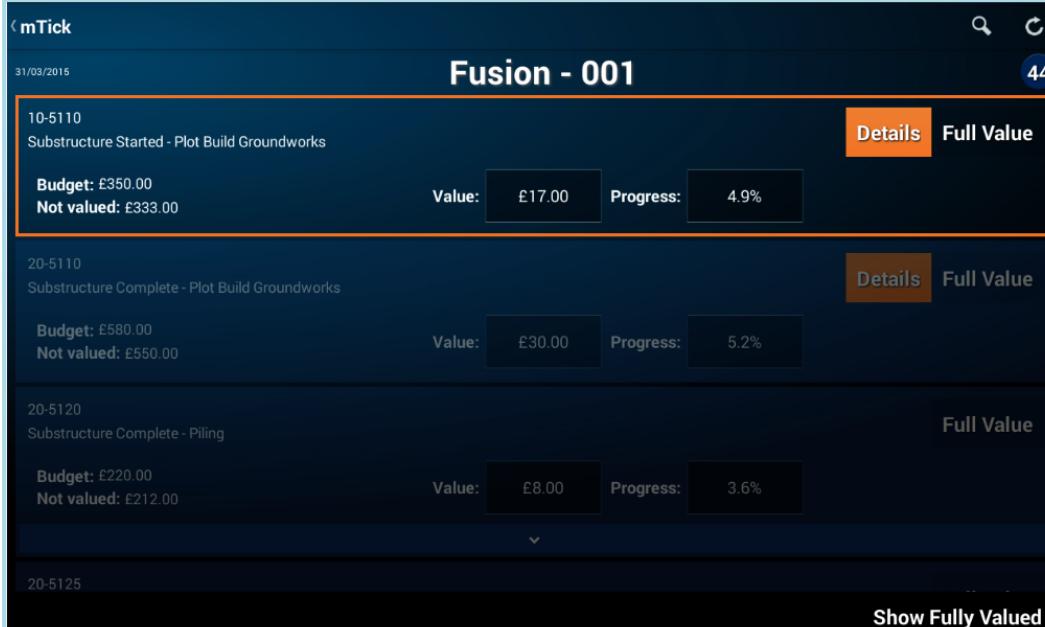
To return to previous screen user has to click back button or the mTick home button in the top left corner.

After photos have been saved and the user taps back to the plots screen, the user can review the captured photos and notes.

Note: Once the user submits data the photos will no longer be visible to review.

7 Payment Stages

Within a Plot, the user will be able to perform valuations on Tick Groups and/or Payment Stages.



Payment Stage	Description	Budget	Value	Progress
10-5110	Substructure Started - Plot Build Groundworks	£350.00	£17.00	4.9%
20-5110	Substructure Complete - Plot Build Groundworks	£580.00	£30.00	5.2%
20-5120	Substructure Complete - Piling	£220.00	£8.00	3.6%

The Payment Stage information is same as Tick Groups and includes group number, description, budget and the not valued amount.

Note: Users can see the 'Value' and 'Progress' details but cannot modify them in Tick Group screen.

The 'Details' button will allow user to go into Payment Stages and perform the valuations. The total value and progress are then visible on Tick Groups screen.



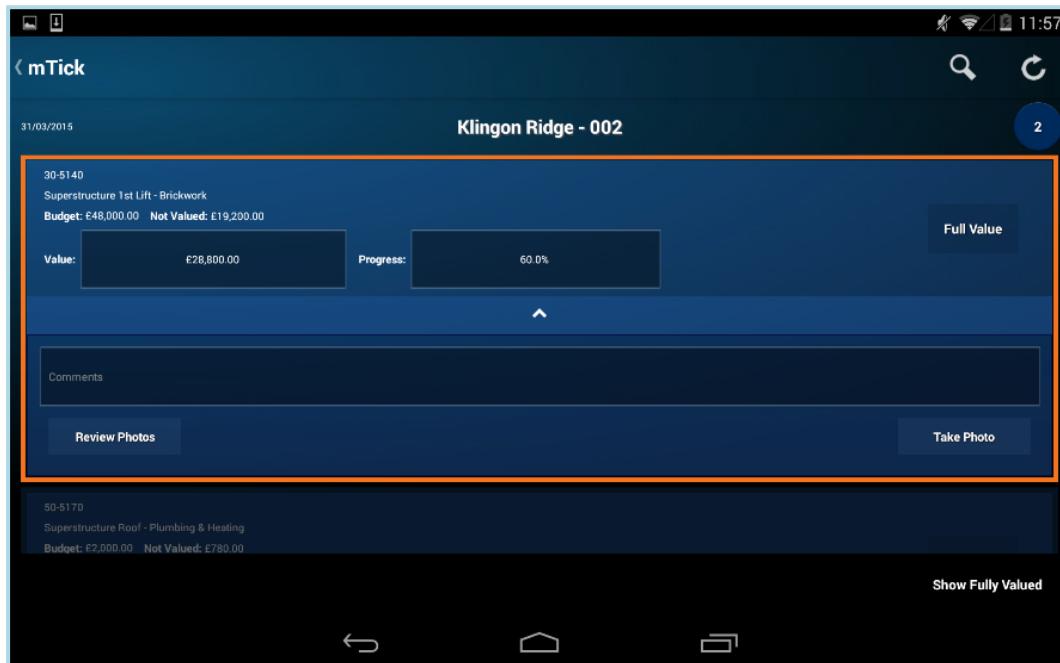
When selected each stage is highlighted with orange border and user can update value, progress, add comments and take photos.



Note: Tapping on the 'white arrow' allows to show or hide comments and photo options.

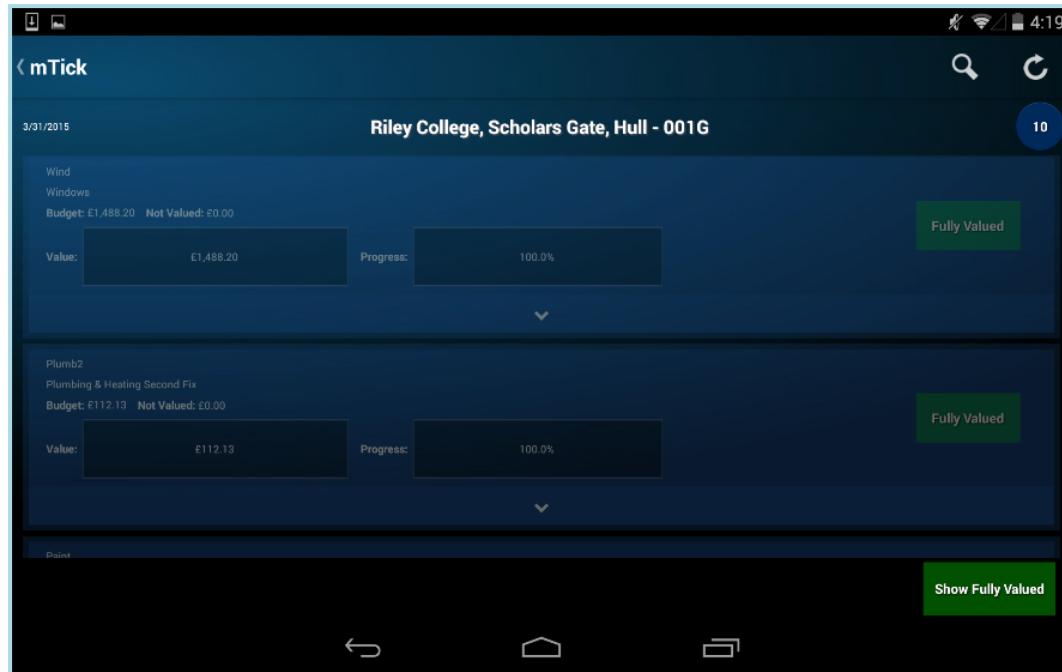
8 Features

On Plot selection, the user will get the Tick Groups for that Plot and selected Tick Group will be highlighted.

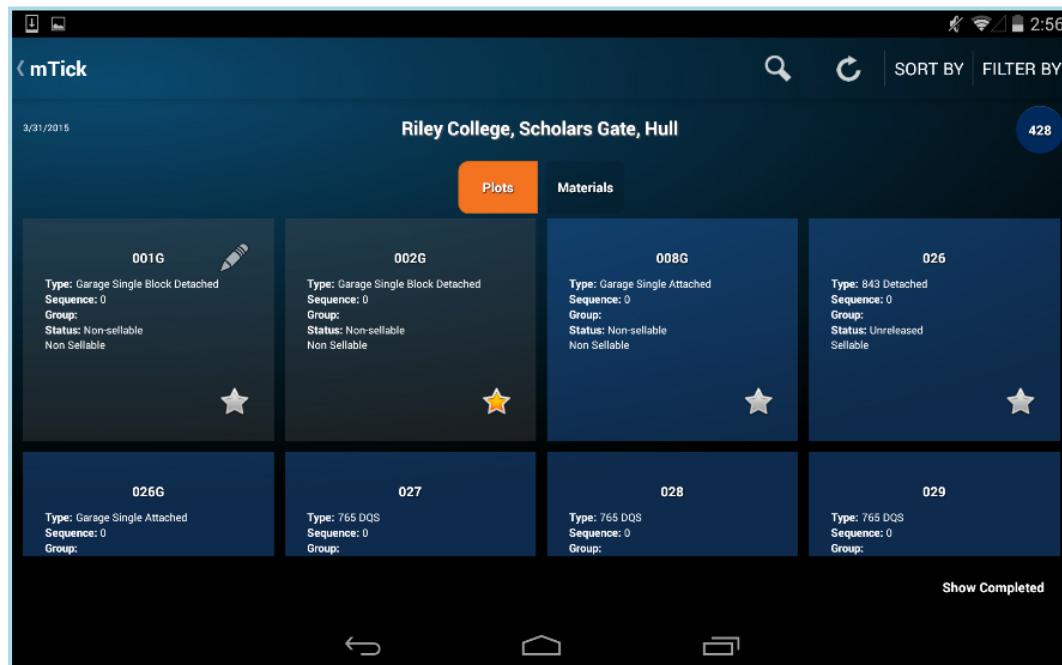


Note: Number of tick groups will be displayed in the top right hand corner.

The Show Fully Valued button, allows the user to see Tick Groups that are fully valued.



Starring Plots will mark them as favourites. These plots will be cached onto the device and displayed to the user. They can be filtered by favourites.

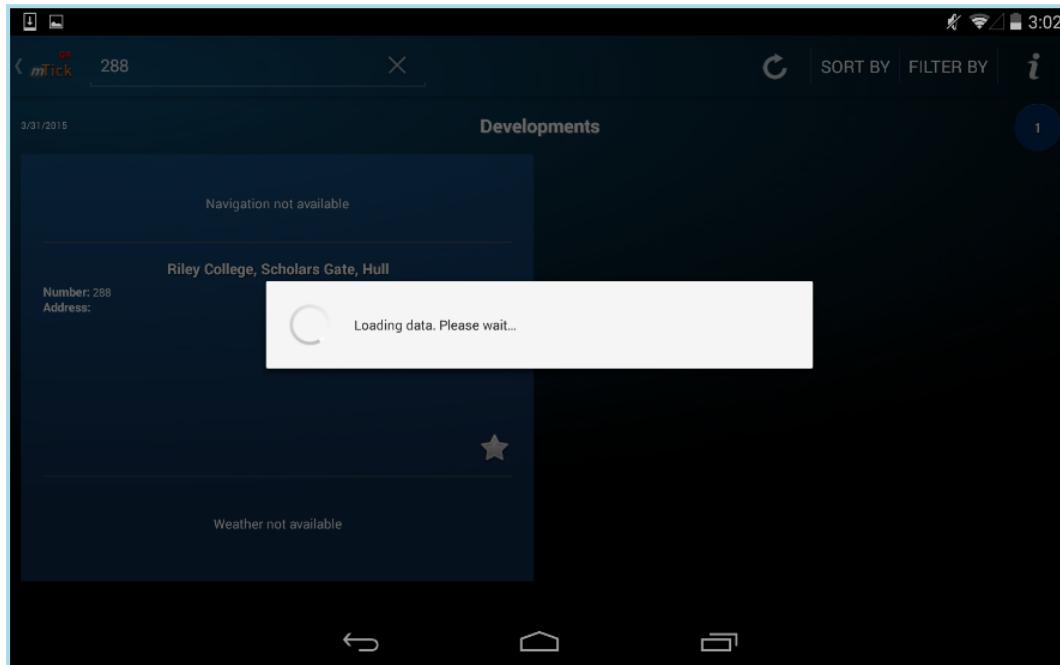


Note: Only previously viewed and starred plot will be cached.

Users can search from the developments/plot/materials screens.

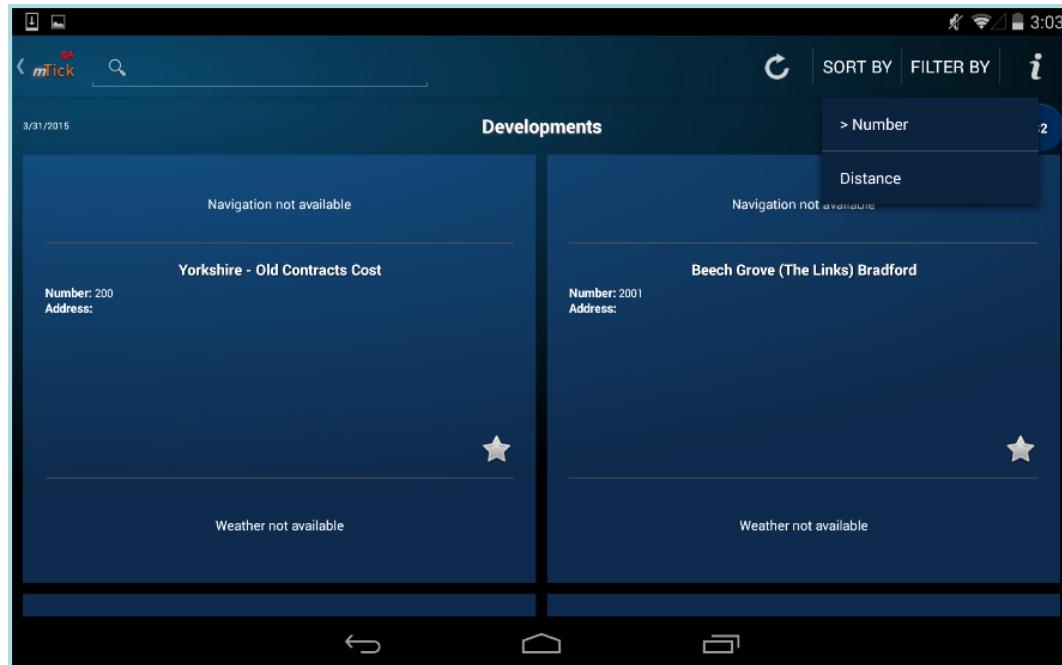
Note: Search feature works with any number/characters and searches all fields.

Tapping on the 'Refresh' button, the application will fetch data.

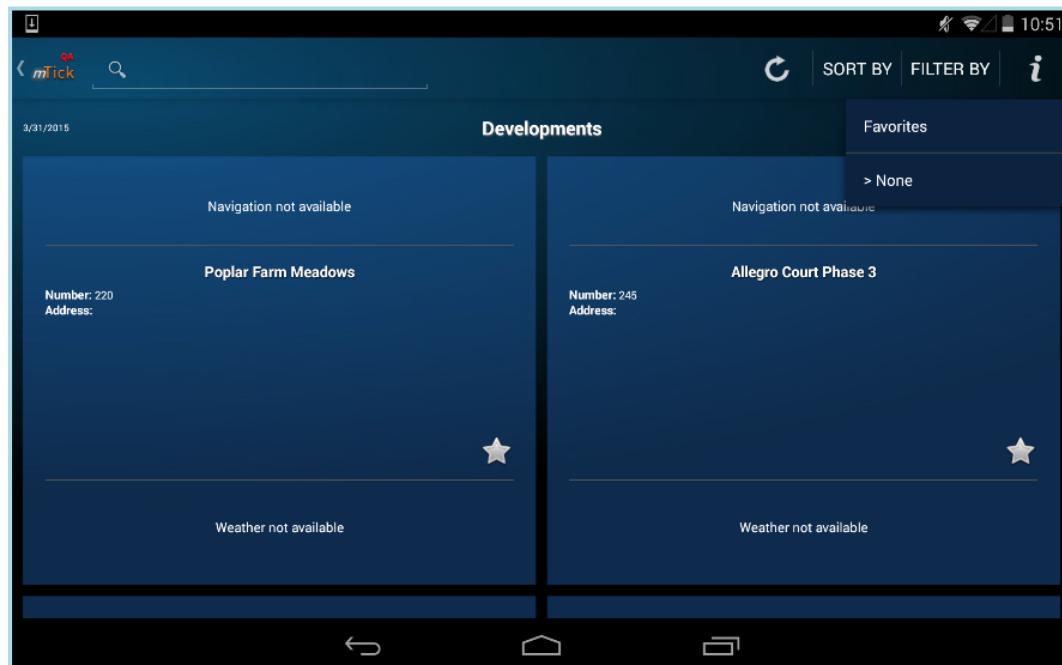


Note: The user will be able to use the search and refresh button on all screens apart from photo screen.

SORT BY on development screen will allow the user to sort developments in order of their number or distance.

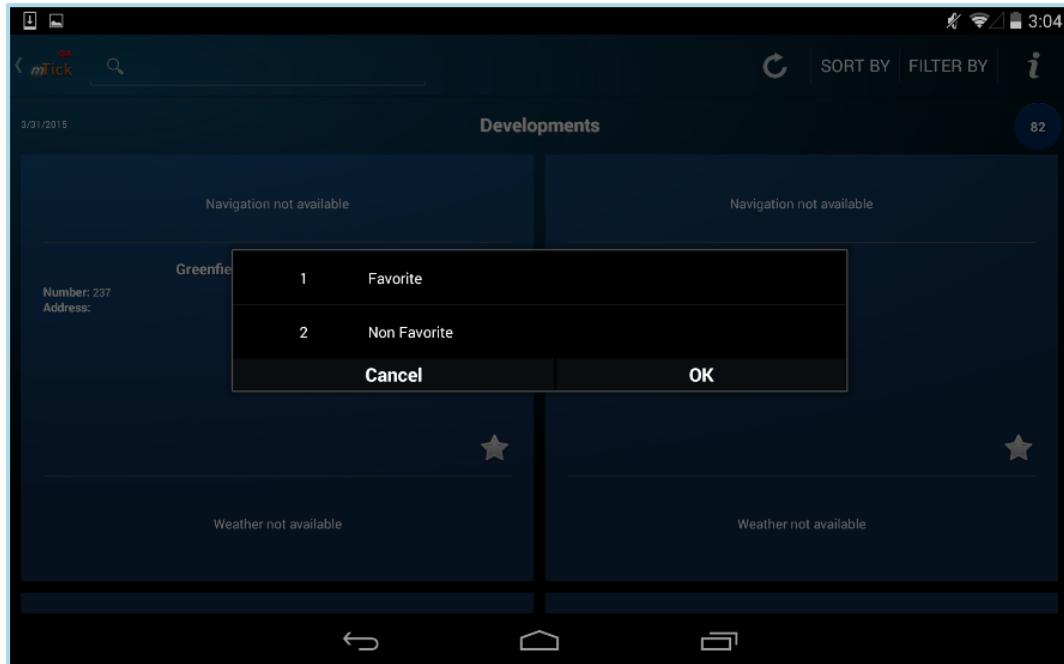


FILTER BY on the development screen allows the user to filter the developments by 'Favourites' or 'None'.

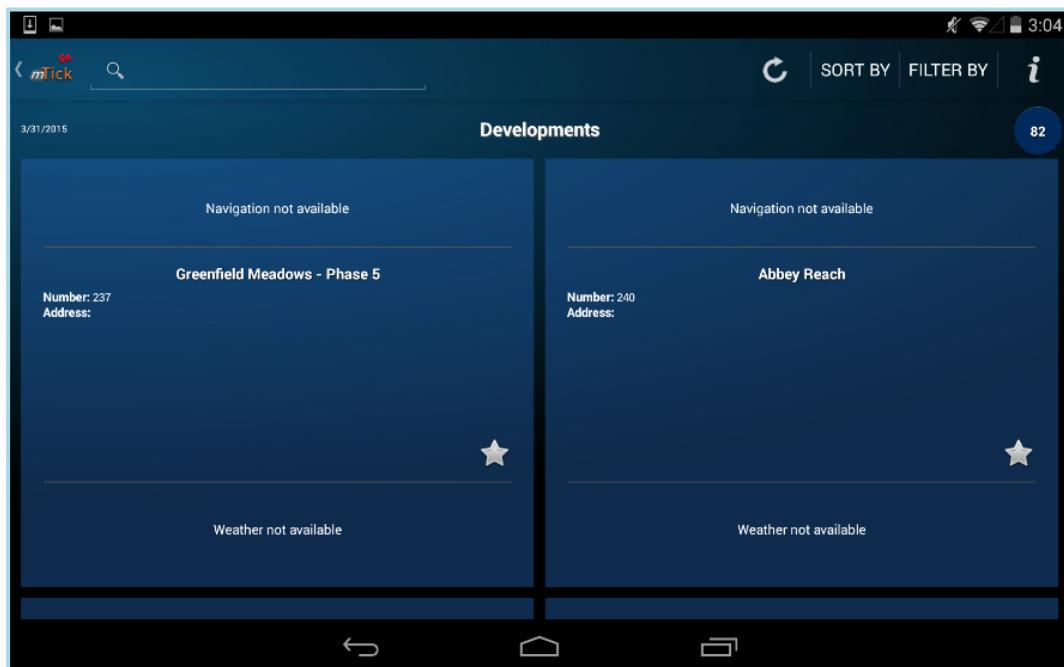


Note: Choosing 'None' will remove all filtering options that were previously selected.

When the user taps to sort by 'Favourite', the following option will be given. Here the user can select to view developments which have been starred or all of those except starred developments.

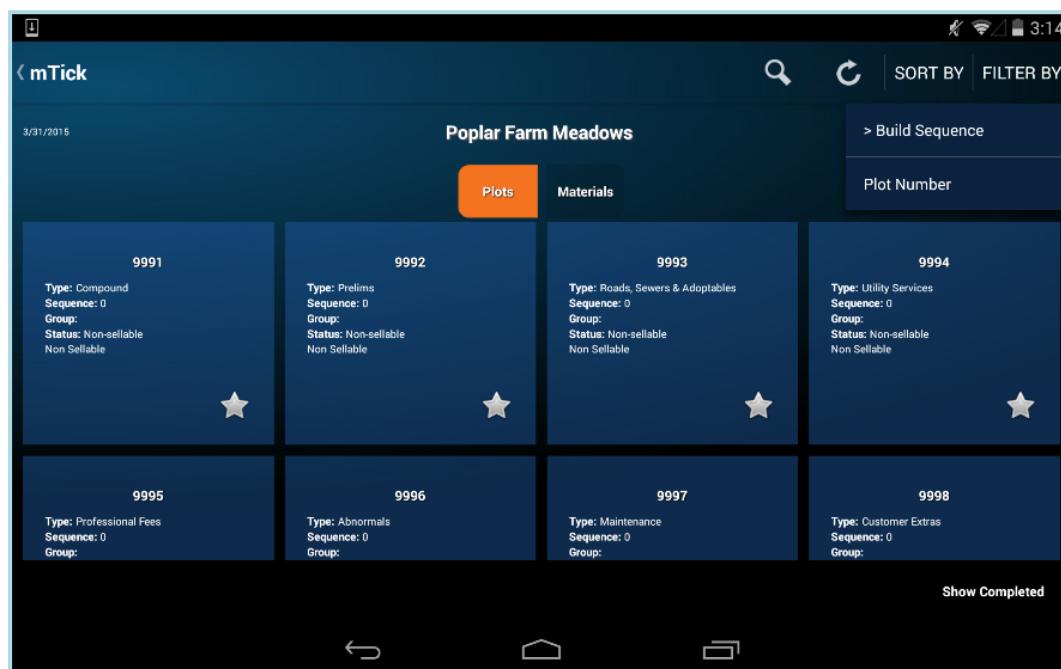


A total will always be displayed at the top right hand corner.



Note: This will be shown for Developments, Plots, Materials and Tick Groups.

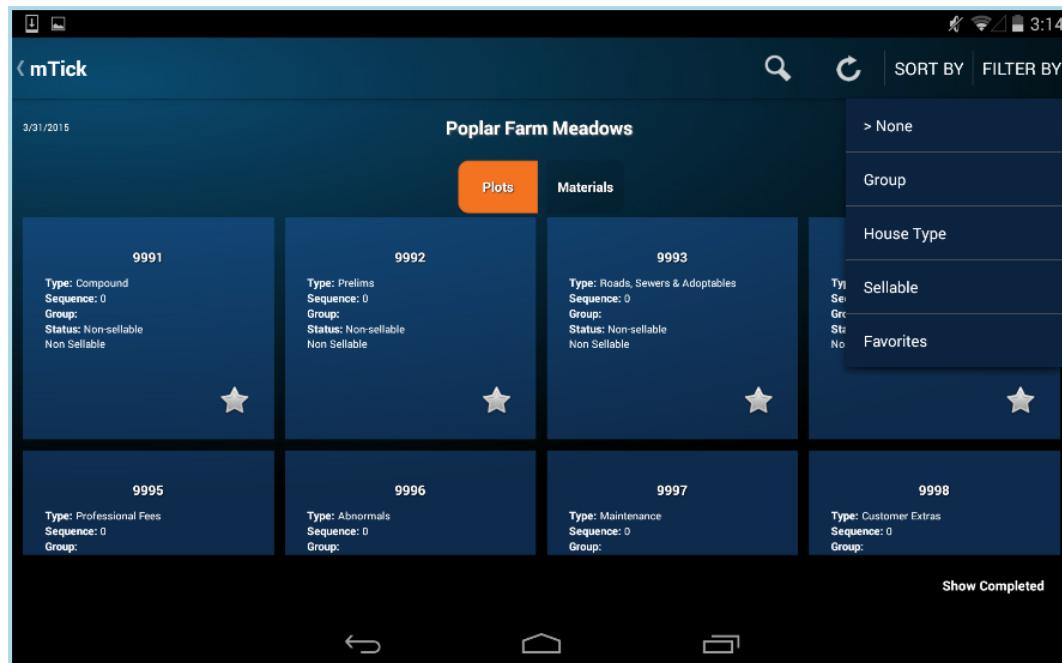
SORT BY on plots screen will allow the user to sort the plots by 'Build Sequence' and 'Plot Number'.



Note: To return to previous screen user has to click back button or the mTick home button in the top left corner.

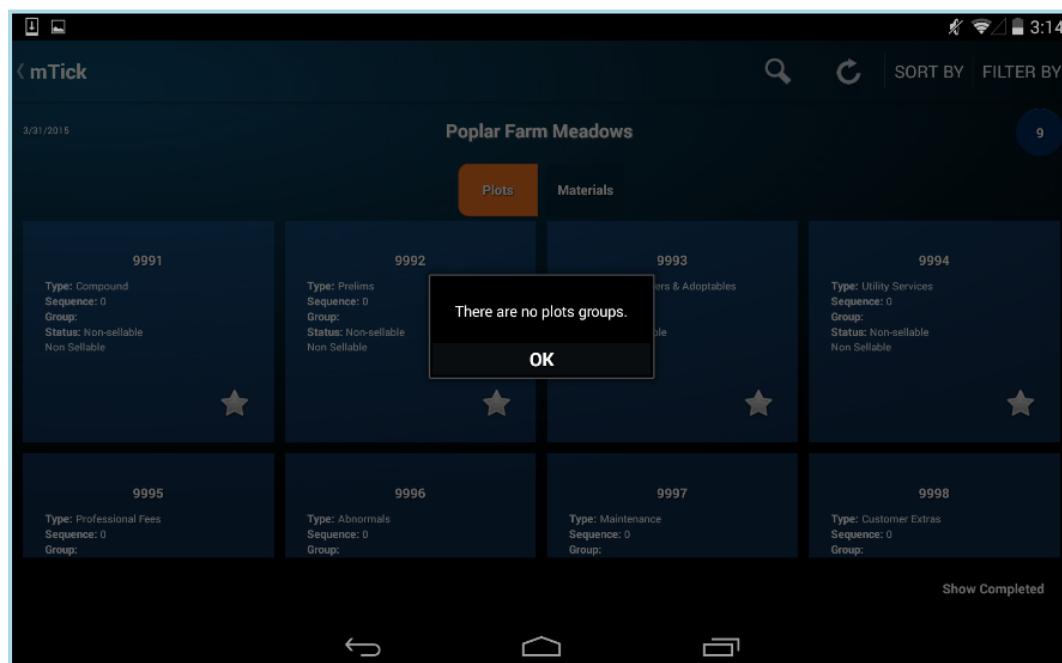
The user can filter by any of the following options:

- None
- Group
- House Type
- Sellable
- Favourites



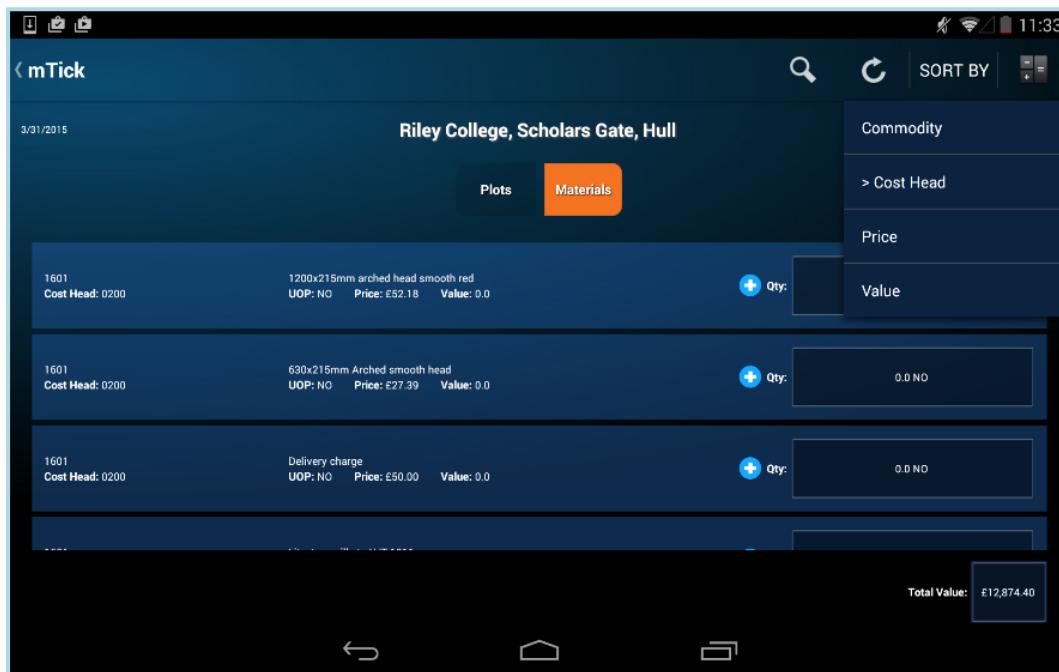
Note: All filter by options are persistent, meaning that when the user logs out and in again, the users filtering preferences will be saved.

If the user tries to use a filter that has not been set. i.e. 'Groups', then the following message will be shown.

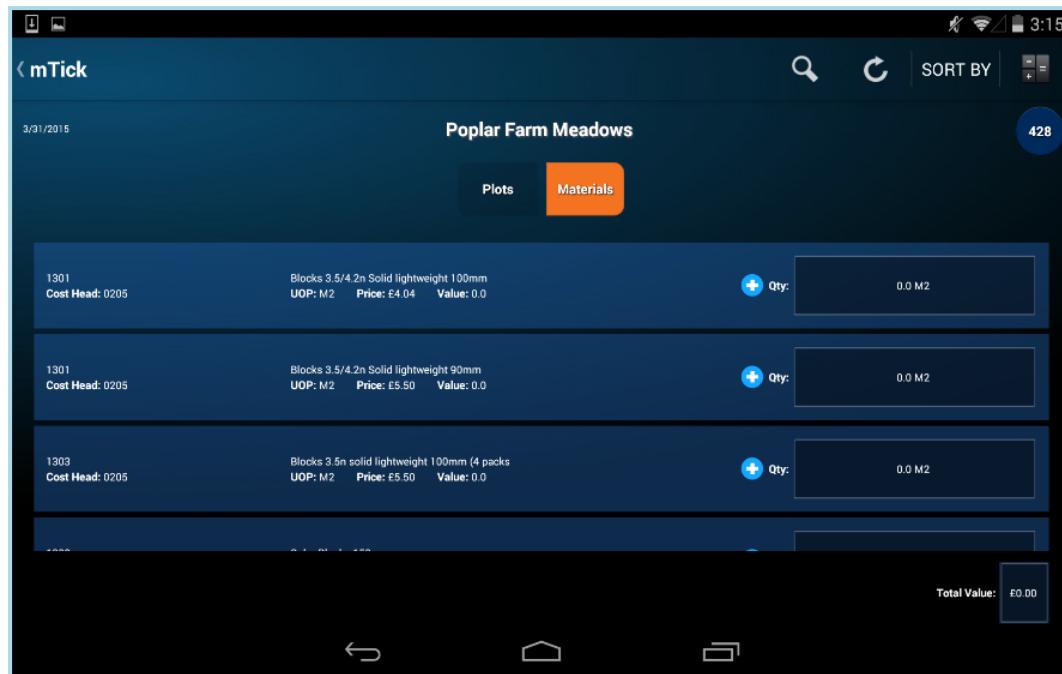


For the materials the user can 'SORT BY' the following:

- Commodity
- Cost Head
- Price
- Value



A 'Total Value' will be displayed at the bottom of the material screen. This will automatically get updated whenever the user makes amendments to the quantity.



Note: All sort by options are persistent, meaning that when the user logs out and in again, these sorting preferences will be saved.

Tapping onto the calculator symbol will bring up the will bring up a pre-installed calculator on the device.

9 COINS VAP Module

To view the Valuation at payment tick group level, the parameter 'VALTG' will need to be enabled.

Company	ID	Description	Value	Required?	History
	KEEPVAL	Keep valuation at 100% of budget	Y	<input checked="" type="checkbox"/>	Hist
	MATCC	Use Material Commodity Cost Head for Budgets	Y	<input checked="" type="checkbox"/>	Hist
	SUBCC	Use Trade Commodity Cost Head for Budgets	Y	<input checked="" type="checkbox"/>	Hist
	VALBINC	Allow valuation budget increase when fully valued? (OA)	Y	<input type="checkbox"/>	Hist
	VALBUD	Budget used for valuation	FC001	<input checked="" type="checkbox"/>	Hist
	VALCH	Cost Heads used in valuation	5*	<input checked="" type="checkbox"/>	Hist
	VALNEG	Allow negative valuations	Y	<input type="checkbox"/>	Hist
	VALSTG	Valuation at detailed payment stage level	N	<input type="checkbox"/>	Hist
	VALTG	Valuation at payment tick group level	Y	<input type="checkbox"/>	Hist
	VALTOVAP	Default Valuation to VAP Payment	N	<input checked="" type="checkbox"/>	Hist
	VAPCAT	Budget Category for VAP	SC, MA, OT, US	<input checked="" type="checkbox"/>	Hist

To add a new development select Development maintenance -> Development maintenance & add a record.

Development	...
Development Name	000000Q
Land Name	
Gross Area	0.00
Net Area	0.00
Area Unit of Measure	ACRE
Number of Plots	0
Number of HA Plots	0
Classification	<Select>
Sales Status	Active
Development Status	<Select>

Note: This is also similar in Plots and Tick Groups, the user must understand how they are organised inside each other.

To see material updates that return to Coins OA, select "Materials on Site" and locate the development and cost period. This will then display the updates from the application.

To view the photos submitted from app for Tick Groups or Payment Stages. Go to 'Valuation Matrix(Tick Group)', open the Development then tap on 'Options' and 'Valuation Photos'

