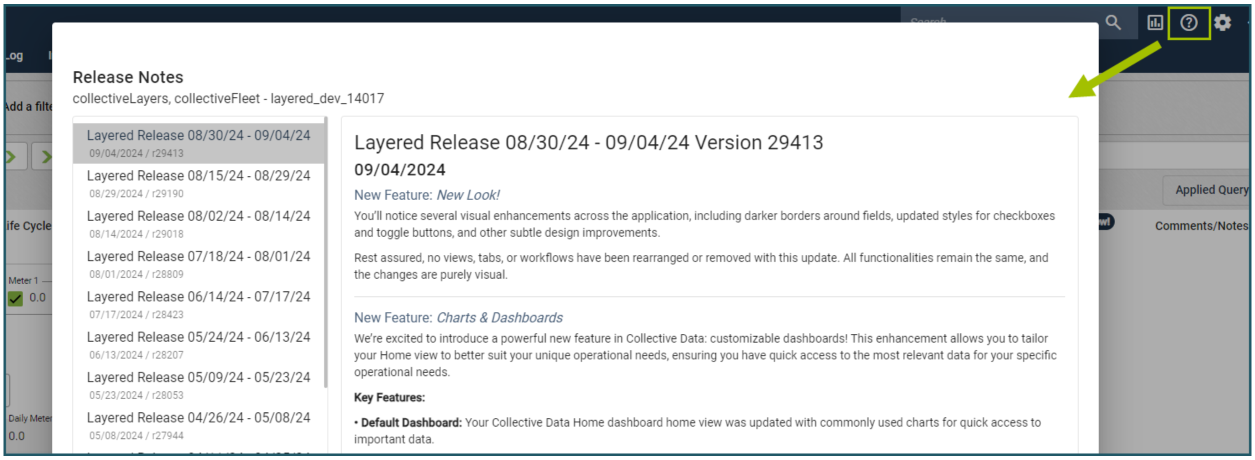
COLLECTIVE DATA

2024 QUARTERMASTER CHANGELOG

Throughout 2024, Collective Data has introduced key improvements to our platform. You can explore these updates in our Release Notes, which offer a detailed overview of all the enhancements made this year. Whenever an update is applied to your application, you'll see the Release Notes when you log in for the first time, outlining the changes. You can also access these notes at any time by clicking the Question Mark icon at the top of your application and selecting Release Notes.



[December]

Feature Enhancement	Asset Audit

The Asset Audit view has received a facelift! Now, it's easier to perform asset audits. If you haven't used this feature before, it's a handy way to verify your assets are in the correct storage locations.

Feature Enhancement	Asset Attachments

We're excited to share an update to the Asset Attachments workflow, making it easier and more intuitive to manage asset attachments. For a detailed walkthrough, check out the **User Guide** under the *Asset – Attachments* topic.

Highlights include:

- A dedicated **Attachments** tab is now available on the Asset view. If an asset has attachments, a badge will display the total number of attachments.
- Attached assets now have a clear callout on the main tab, showing which asset they're connected to.
- Clearly visible buttons for attaching and detaching assets make the process quicker and more user-friendly.

November

New Feature	Asset Catalog Book – QM

We're excited to introduce the **Asset Catalog Book** report. This new report provides a comprehensive catalog of all assets, complete with scannable barcodes to streamline asset issuing and auditing processes. Each entry includes the asset number (also used as the barcode), description, category, type, and location for quick reference. Simply search **Asset Catalog Book** in the Search Bar to access this report.

Feature Enhancement	System Views

We're updating how views are organized and filtered in the Search Bar to make it easier to access the views you use most frequently.

All views will remain searchable in the Search Bar. A new **System Views** section, found below the **Reports** section, will house setup-related views, like category and status views, along with similar items for easy reference during initial configuration.

Feature Enhancement	Added Registration Scan Field to License Completion Log

We added the Registration Scan field to the License/Certification Completion Log. Now you can scan in a document every time a completion log is updated.

Feature Enhancement	New Import Option

We've simplified the process of updating your inventory when importing quantity adjustments, ensuring your inventory is accurate at go-live. Now, you can run an Inventory Count report, enter the updated quantities, and upload them via import. For detailed instructions, please refer to the Importing section in the User Guide.

October

Feature Enhancement	Employee Inspections

We've added an exciting new feature to Inspections! Employee Inspections now allow you to act on failed inspection items. With this enhancement, Employee Inspections can be reviewed, and actions can be taken directly from the Inspection Management View, just like Asset Inspections.

In addition, we've improved the Inspection Set Up View for greater efficiency. You can now easily drag and drop inspection items within groups or move them between groups to reorganize your inspection setup. No more deleting and re-entering items to rearrange sections.

For more details, refer to the Inspection documentation in the User Guide, or contact your Client Success Coordinator for a quick walkthrough.

New Feature	Embedded Videos in User Guide

We are beginning to add training videos in the application User Guide. Some are for limited users; you can share the link to the videos to those users in your organization.

New videos are available on the following topics:

- General Navigation
- Organization Hierarchy
- Performing Inspections (limited users)

Feature Enhancement	Emergency Contacts Import

We have a new import available to use, called Emergency Contacts. You can use this to import Emergency Contacts for your employees. This makes it easier to get this information into your application, rather than having to add the emergency contacts one by one. Please note, the employees need to already have records in the application; this import will not create new employees from this import.

Feature Enhancement	Order Details Report Improvements

Improvements were made to the look and feel of the Order Details Report for POs for readability and ease of use.

Feature Enhancement	Barcoding Improvements

We've enhanced the barcoding options in the application to improve usability and flexibility. Here's what's new:

1. **Barcode Labels Update**: Barcoding labels have been adjusted to ensure information remains on a single barcode, though please note that longer descriptions may still be cut.
2. **Simplified Asset Barcodes**: Asset barcodes now display essential details like the year, make/model, and asset number. If a serial number is entered, it will also be

included. This will help to quickly verify what item you have in front of you and can match to records in the application.

3. **Improved Warehouse and Item Styles Barcoding**: For clients managing inventory across multiple warehouses or using Item Styles, barcode fields in the warehouse stock view will now automatically update when a barcode is entered in the main view if the field is blank. This update allows barcodes to be printed from warehouse views if you're working in a specific warehouse or room. If a unique barcode is entered in the warehouse stock view, that barcode will be used for printing so you can make sure to have the right barcode on the item. A tooltip on the main inventory view provides further guidance.
4. **Updated Field Label in Inventory View**: The field previously labeled "Barcode labels" next to the main barcode field is now called "Action on Received PO" to better reflect its function. Selecting an option from this dropdown allows you to print barcodes when items are received on POs, either by quantity received or by shipment.

Feature Enhancement	Task List View Updates

We've made some improvements to the Task List and To-Do List views. The action buttons, previously located at the bottom, have now been moved to the top. This means you no longer need to scroll to create work orders, perform tasks, or navigate to the associated asset or work order. Please note, these changes are purely visual—everything will continue to function as it always has.

Feature Enhancement	New Warranty Scheduling Option

We created a new option for setting Warranty dates – there is now a Specified Date available to select in addition to the already available Meter, Elapsed Time and Meter or Elapsed Time options.

Feature Enhancement	Employee View Update

You asked, we answered! The Employee View sizes section now includes fields for Sleeve Length and Dominant Hand.

September

New Feature	New Look!

You'll notice several visual enhancements across the application, including darker borders around fields, updated styles for checkboxes and toggle buttons, and other subtle design improvements.

Rest assured, no views, tabs, or workflows have been rearranged or removed with this update. All functionalities remain the same, and the changes are purely visual.

New Feature	Charts & Dashboards

We're excited to introduce a powerful new feature in Collective Data: customizable dashboards! This enhancement allows you to tailor your Home view to better suit your unique operational needs, ensuring you have quick access to the most relevant data for your specific operational needs.

Key Features:

• **Default Dashboard:** Your Collective Data Home dashboard home view was updated with commonly used charts for quick access to important data.

• **Additional Charts:** We've added over 40 new charts, giving you the ability to easily track the critical day-to-day metrics that drive your success.

• **Customizable Dashboards:** Customize your dashboard effortlessly by adding and rearranging charts, menus, and tables. Monitor key areas like assets out of service, open work orders, and overdue items with views that align perfectly with your workflow.

Ready to dive in? Visit the User Guide under "Dashboard and Charts" to start customizing your dashboard today!

New Feature	Stipend Updates

For Quartermaster clients, we've updated the Stipends feature! You can now assign a quantity to stipends for employees, not just a dollar amount. Please see the User Guide – Stipends topic for more information.

Feature Enhancement	Inventory Usage Report Update

We've enhanced the visual design of the Inventory Usage report to improve readability and made backend updates for significantly faster loading. For optimal performance, we still recommend narrowing your report filters by warehouse or inventory category.

August

Feature Enhancement	Image Size Updates

We've updated image compression settings in the application in key areas, allowing for larger images to be uploaded for more clarity. This change applies to new images going forward and won't affect or convert the existing ones that are already in your application.

Feature Enhancement	Import Updates

We've made improvements to the Import Templates and File Schema to simplify mass data imports. The template columns have been reorganized, and we've added extra comments and instructions to guide you through the import process more easily.

Feature Enhancement	Storage Locations Update

We've updated Storage Locations so they can now be inactivated. To do this, navigate to the Storage Locations View and select the Inactivate checkbox.

July

Feature Enhancement	Task List Column Updates

The column names in the task list hierarchy have been revised to align with any custom hierarchy labels. The updated task views include:

- Asset Registration Tasks
- License/Certification Tasks
- Maintenance Request Tasks
- PM Scheduled Tasks
- To Do List

Feature Enhancement	Mission Control Item Request

We updated a button on the Item Requests KPI. When clicked, it now opens the Item Request Management view.

June

New Feature	New Inspection Options & Setup

We are excited to introduce new features and improved performance for inspections. One of the most significant updates is the ability to view inspections in either a **List** or **Step-**

Through format. The Step-Through option is particularly useful for drivers using a cell phone or tablet for pre- and post-trip inspections, allowing them to simply click Pass or Fail quickly without having to scroll down on the page and potentially lose their spot or forget something.

The Inspections view has been renamed **Perform Inspection**. After completing the inspection, a summary will appear of the failed inspection items, and the user can Submit the inspection.

Additionally, we are introducing an **Inspection Manager** view. Shop or fleet managers can use this view to create work orders or maintenance tasks based on failed inspection items. This view is also useful for sergeants or lieutenants reviewing inspections of weapons or patrol cars.

For detailed instructions on creating and using the new inspections, please refer to the User Guide – Inspections section. If you have any questions, please contact your Client Success Coordinator!

New Feature	Introducing Our New Filter Bar: Simplifying your Search Experience

At the top of each view, you'll now find a sleek filter bar with quick-add options for seamless filtering. Easily choose the type of filter you want to apply by clicking on one of the buttons and entering your search term.

This update also allows you to create custom filters effortlessly, helping you narrow down options and find the records you need in no time. Plus, you can save these filters for use by any licensed user, eliminating the need for everyone to create their own filters.

Feature Enhancement	Returning Kits

Improvements were made to the Return Item view to incorporate information when a kit is returned. When an employee has a kit issued to them and is returning those items, a field will be available to select the kit on the Return Item view. If they do not have any kits issued to them, the field will not be visible.

Additionally, on the Employee View, a new button appears on the Issued Items tab for their kits. If they have a kit issued to them, a button titled "Return Items from Kit ____" will appear and it will allow for all items in that kit to be returned. If they do not have any kits issued to them, the Kits button will not appear. The original buttons of Return, Transfer, and Go to Issue Record are still available and shown regardless if they have a kit issued or not, so original workflows can still be followed for non-kit items.

May

Feature Enhancement	Security Updates

We have implemented some backend security updates in this release, part of our ongoing commitment to continuous improvement and ensuring the highest level of security for our software.

New Feature	Inventory Levels Audit

A new tab has been added to the Inventory View → Warehouse Stock tab called "Inventory Levels Audit"

This tab allows you to track stock levels in relation to the reorder points listed on the Inventory record. You'll be able to see what date/time an item went at or below your set Reorder Point and what the Reorder Point was at the time of the audit.

Please see the Inventory section of the software User Guide for more information if needed, including images to see this in action.

Feature Enhancement	Inventory Search Update

We improved the Inventory search field (item selector) to now incorporate partial search terms to ease in searching for item descriptions.

For example, if you have a part with an item description of Oil Temperature Gauge, you can now search by the word temp or gauge to pull up all results that contain those words.

Feature Enhancement	Inventory Adjustments & Transfers – Price Update

We made a few changes to the pricing field when an item is being adjusted. The field has been renamed to "Unit Price of Added Inventory" to better reflect what the field is for. If an item is being subtracted from inventory, the price cannot be altered. If new quantity is being added, you can update the price of the new units of inventory being added if needed.

Feature Enhancement	User Manager

Our new User Manager feature has now been added to the User Guide. The User Manager is used to create and maintain users in the application, and update security role permissions. You can locate the Manager by clicking on the Gear Icon and selecting User Manager. You can locate the User Guide by clicking on the Help icon.

April

Feature Enhancement	Inactive Warehouse Updates

We added a query on the Warehouse View to be able to hide inactive warehouses. Now, when the warehouse is marked as inactive, it will no longer show in the record count unless the "active warehouses" query is unchecked.

Feature Enhancement	General Speed Improvements

We have continued to improve upon speed of loading pages and data in the application.

New Feature	Updating Asset Statuses via Work Orders

We incorporated the ability to change an Asset's status from an open or closed Work Order (WO). This will allow Quartermaster clients to better see if an asset is out of service due to an open work order and make it unavailable for issuance and/or to better keep track of out of service assets due to being sent out for repair.

New Feature	Employee Job Titles

Quartermaster clients now have the ability to use Job Titles rather than ranks (or both) if desired. This can be useful for civilian/non-ranked employees in the application.

New Feature	Purchase Order Form Update

Quartermaster clients that have Item Styles in their application can now more easily see these item styles on the Purchase Order Form. The form now incorporates the different item styles on a PO. This doesn't affect any clients that do not use Item Styles – all former functionality is still displayed and used.

March

Feature Enhancement	Asset View Speed Improvements

We worked on the Asset View speed in this release. We incorporated new behind the scenes logic to improve Lifetime costs and other fields in the Statistics section on the Life Cycle tab, so the page loads faster.

Feature Enhancement	Inventory Count List Report

We updated the visibility of how to serialize items at time of Issuance, and ensured the serialized fields were unable to be updated on limited user views and on returns. We also updated the dropdown to select Specific Item or Category to be buttons now, which will make it easier to select if the workflow is being done on a tablet or other mobile device.

Feature Enhancement	Inventory Count List Report

The Inventory Count List Report now incorporates Item Styles on separate line items.

February

Feature Enhancement	Report Updates

Item Styles

The barcode report has now been updated to pull in the individual barcodes from those styles rather than only pulling the barcode from the Main Inventory page. To print your individual barcodes, you'll need to enter the information in the Barcode field on the Styles tab.

Assets Currently Issued

The Assets Currently Issued Report has been renamed to "Items Currently Issued to Assets." If you need a report of Assets and/or Inventory that is issued to an employee, there are a couple reports you can utilize: "Issue History by Employee," or "Current Issue List by Employee"

Feature Enhancement	Contact Us!

If you need to get in touch with Collective Data, we now have a link in our application that will take you directly to our Contact Us section on our website. There, you'll find our phone number, email address, and contact info for your Client Success Coordinator.

This link is under the Help Section (the question mark in the top right of your application) and titled "Contact Us"

January

New Feature	Previous License Plate Log

When a license plate is updated on an Asset, you'll now be able to easily see the previous plates and pull reporting. The log button, called Previous License Plates, will be right next to the license plate/state fields on the Asset Main tab, and will only appear if a change has been made. Additionally, there is now a report that can be run, called Asset Previous License Plates. This functions as any of our other reports, with filters and dates able to be set for parameters.