

SOR FastTrack v23

Site scoping, Scoping Tools import, Pending SOR resolution, baseline review, photos, verification and export in one PWA.

1 Entry Data / Import > 2 Search > 3 Selected / Review > 4 Quick Look > 5 Photos > 6 Export

1. Entry Data and SOR Dataset

Choose the SOR Dataset for the job. Contract Area, Work Category, Location lists, search behaviour, Scope Builder rules, Verify rules and Scoping Tools mappings come from that Dataset Pack. The job stores the Dataset ID and Dataset version so different company schedules cannot be mixed.

- Complete required fields shown by the active Dataset.
- Use **Include Prices**, **Merge Quantities** and photo output options as needed.
- **Save / Backup Job** creates a portable backup, including an imported Scoping Tools baseline when one exists.

2. Import Scoping Tools

When the active Dataset supports import, tap **Import Scoping Tools** in Entry Data and choose the company workbook. FastTrack reads it using that Dataset's `scoping-import.json`. It does not guess another company's workbook layout.

Import Preview: Shows workbook identity, job details, row count, matched SORs, unmatched/Pending SORs and warnings before you confirm.

Current job: If the current job already contains data, the Preview warns that it will be replaced. One Previous Job recovery snapshot is retained.

Only mapped source values are imported. Missing fields are left for the supervisor to complete rather than being invented.

3. Ventia Scoping Tools mapping in Dataset v1.4

For the packaged Ventia Dataset, the workbook is read from **SOR TOOL**. Header values are read from C6 Contractor, C7 Related Work Order No., C8 Address, C9 PRN/FRN, I6 Contract Area, I7 Date Prepared and I8 Work Category. SOR rows are read from rows 28-619.

Table mapping: C SOR Code, I Quantity, J Location, M Comments, N VDM, O Add/Delete, P Review. These cell references live only in the Ventia Dataset Pack, not in the FastTrack Core.

4. Pending SOR

If a Scoping Tools code is not found in the active Dataset, FastTrack keeps the row as a **Pending SOR**. It is never silently removed. You can also create a Pending SOR manually when the correct code is not yet known.

- Manual Pending SOR requires Quantity and a work Note; Location can be added now or later.
- Photos can be linked to a Pending SOR.
- Tap **Resolve SOR**, search for the correct real SOR, then choose it.
- Resolution keeps the existing Quantity, Location, Note and linked photos.
- Final Scoping Tools export is blocked until every Pending SOR is resolved.

5. Search and Scope Builder

Use Frequent Use, Advanced Search or Intelligent Search. Advanced filters for Component, Trade and Unit only contain real authoritative Dataset values. If a Dataset does not provide one of those fields, that filter stays at All. Scope Builder is also Dataset-driven and never assumes another company's packages.

6. Selected and baseline review

Imported Scoping Tools rows appear in Selected and keep their original source-row identity. FastTrack stores the original workbook as a baseline and compares the current scope with it.

- **Unchanged**: still matches the imported baseline.
- **Added**: created after import.
- **Modified**: Code, Quantity, Location or Note differs from baseline.
- **Removed**: an imported baseline row is no longer in the current scope.
- **Pending**: unresolved SOR identity.

The baseline summary above Selected shows live counts. v23 includes the Variation Summary introduced in v22.1 in Export with filters for Added, Removed, Modified and Pending items, plus Copy Variation Summary for email-ready text.

7. Dataset lock for imported jobs

A job imported from Scoping Tools is locked to the Dataset that interpreted it. FastTrack will not let you switch that job to another Dataset. Clear the job before choosing another Dataset. This prevents a Ventia workbook or SOR code from being reinterpreted under another company schedule.

8. Quick Look and site verification

Quick Look groups the current Selected scope by Location. This lets you review the imported scope room-by-room on site. If the source workbook has a Location that is not available in the active Dataset, it is preserved in the baseline but the current item imports without an assigned Dataset Location and is reported as a warning.

9. Verify Scope

Run **Verify Scope** before finalising. Dataset-specific rules can identify duplicate SORs, package/component overlaps, parent/child conflicts and suspicious combinations. Pending SORs are excluded from SOR-specific overlap logic until they are resolved.

10. Site Photos and AI Photo Scope

Photos can be linked to normal or Pending SOR items. AI Photo Scope uses candidates only from the active Dataset, then validates those candidates. It cannot invent a new SOR code. The supervisor makes the final selection.

11. Export and Variations

- PDF, CSV and Excel SOR + Photos can represent Pending items clearly for review.
- Final Scoping Tools export is disabled while Pending SOR items remain.
- For imported jobs, FastTrack starts from the original stored workbook. Unchanged rows remain intact; Added rows are green with **ADD**, Modified rows are blue with **EDIT**, and Removed baseline rows are red with **DELETE** in the Dataset-mapped variation column.
- Ventia generated workbooks use column O for ADD / EDIT / DELETE. VDM and Review content from the baseline workbook are preserved unless the Dataset mapping changes them.
- Use Variation Summary and Copy Variation Summary to prepare a concise email update.

12. Account and Dataset Manager

Standard users do not see Dataset import/remove controls. An administrator can unlock the Dataset Manager using the server-configured Admin Code and import/update a complete Dataset Pack ZIP. Central Packs are validated server-side and stored in Netlify Blobs. v23 validates `scoping-import.json` when a Dataset declares that capability.

13. Save, Open and recovery

Auto Save remains local to the device. Save / Backup Job creates a portable job backup. For a Scoping Tools-imported job, the backup also carries the original workbook baseline so the job can be reopened without losing its audit source. Previous Job recovery remains available after an import replaces an existing current job.

14. Offline, updates and background safety

- After one successful access check, v23 can start offline for up to **24 hours**. An explicit server deactivation still blocks access immediately when the server can be reached.
- Packaged Datasets remain available from the PWA cache. Central Dataset files already loaded by the current user are cached in IndexedDB by user, Dataset, version and revision for offline reuse.
- When the app moves to the background or the page is hidden, FastTrack immediately flushes Auto Save to IndexedDB.
- When a new Service Worker is ready, use **Save & Update**. The update is activated only after the current job saves successfully.
- AI Photo Scope still requires internet access.

15. AI usage control

v23 adds persistent daily AI usage units in central storage. Usage is scoped to the signed user when available and otherwise to a privacy-preserving guest/device network identity. Default daily limits are Public 30, Standard 150, Pro 600 and Internal 2000 units; deployments can override them with `FASTTRACK_AI_PLAN_LIMITS_JSON`. Photo analysis uses one unit per submitted photo; SOR validation uses one unit per candidate checked.

16. iPhone/HEIC and large exports

- The photo picker accepts JPEG, PNG, WebP, HEIC and HEIF. Safari/iPhone decoding is used where supported. If the current browser cannot decode HEIC/HEIF, FastTrack gives a specific conversion message instead of silently skipping the image.
- Large photo exports warn above 100 photos or 120 MB of stored photo data.
- Exports above 200 photos or 600 SOR items are stopped so the job can be split before mobile memory is exhausted.
- Photo ZIP creation stores already-compressed JPEGs without re-compressing them inside ZIP, reducing CPU and memory pressure.

17. Final check

Before finishing: confirm Entry Data, resolve all Pending SORs, review the baseline change counts for imported jobs, run Verify Scope, check quantities and Locations, verify photo links and preview the intended output.

SOR FastTrack v23 - User Manual. The supervisor remains responsible for confirming the final scope against site conditions and the applicable SOR Long Descriptions.