July 2014 Alpha Tracker Release Notes

New Features

1. There is a new “plan viewer” on the client portal which shows the images stored (or uploaded) into the \Drawings sub-folder of the project folder.

2. There are new options available for project scheduling in AT. Projects may be allocated to individuals who then organise their own diaries. These new screens and features provide a way to track the allocation of projects.
   
a) A new repository settings controls whether these screens and features are displayed: “Resourcing controlled by individuals (yes/no)”.

   b) The new “Allocation Dashboard” screen (Resources | Diary | Allocation Dashboard) allows you to monitor the status of jobs allocated to a PM/Consultant, eg Not Allocated, Allocated Not Accepted, Reallocated Not Accepted, Allocation Rejected, Accepted. Also allows jobs to be allocated to a PM/Consultant.
c) The new “Accepted Allocations” screen (Resources | Diary | Accepted Allocations) lets you monitor the status of jobs allocated and accepted to see whether diary appointments have been booked for these jobs.
d) The new “My Allocated Projects” screen (Projects|My Allocated Projects) lists the projects that have been allocated to you and allows you to accept, reject or reallocate a job.

![SCREENSHOT]

e) The new “My Projects Not In Diary” screen (Projects|My Projects Not In Diary) shows any projects that you have accepted but not yet booked into your diary. One click of a button gives access to the Diary to create a booking.

![SCREENSHOT]

f) The new “My Open Projects” screen (Projects|My Open Projects) lists all open and accepted projects so you can check the scheduled status of your accepted jobs.

![SCREENSHOT]
3. New repository settings enable an email alert to be sent to someone (and cc’d to someone else) whenever a new project is created:
   - “SendAlertAfterNewProject” to switch the feature on
   - “EmailAddressNewProjectAlert” to specify the main email address
   - “EmailCCAddressNewProjectAlert” to specify the copy to address

4. When deleting project types, Alpha Tracker will now check to see if any projects exist with the current project type. If there are any, a friendly message will pop up: “This project type cannot be deleted. Existing projects are already assigned to this.”

5. The size of the invoice address field on the bottom of the pdf’d invoice has been increased to allow for longer addresses.

6. The new ”Data Validation” feature has been added.
   The new AlphaValidator module is a flexible and comprehensive automated data validation tool which can be configured to run up to 36 data checks before you produce your asbestos reports. The set of checks performed is configurable, so you choose the essential validation for your surveys.
   The new AlphaValidator checks the survey data and writes the info to an HTML file called data_check.htm in the project’s folder. The data_check.htm is backed up and renamed _1, _2 etc as per other generated files so you will see a history of data validation checks run. This info is also displayed in the new Data Validation section of the Survey screen.
It has the facility to have up to 26 checks (A-Z). You specify either a list (eg ‘ABDEFG’) or ‘*all*’ in a new repository setting: “ValidatorTests”.
Each survey type can have extra tests associated with it:

As well as tests A, B, C etc we can now use 0, 1, 2 … which are determined by the survey type. The difference is that the numbered ones (0, 1, 2…) do not automatically get run when "*all*" is specified. This means that survey-type or client-specific tests can be coded numerically.

7. Software updates now automatically zip and back up the webroot folder to a \backup sub-folder before a software update is applied. This means that a backup of the software is automatically created before a software update is applied.
8. There is a new setting to add a Building record automatically when a new project is created. The setting is “Auto add building on project creation”.

9. A new setting lets you choose whether the Survey screen automatically closes when you click Save. The setting is “CloseSurveyScreenOnSave”.

10. A new repository setting enables you to choose whether entering a date in the Approved By Date field on the Survey Details screen prevents the production of any further reports for the project. The Produce Report buttons are greyed out if the setting is set to yes and a date is entered. The setting is “ApprovedStopsDocProd”.

11. The Asbestos Register is now available from the Sites screen enabling you to view the latest position on a site. You can also perform a manual update of previously inspected items if they change by clicking the Update button on the Register and amending the details displayed.

12. Re-inspections can now be created from the Site Asbestos Register, by clicking the Create Re-inspection Project button, allowing you to create a Re-inspection project from the latest position recorded against the site. Filtering options let you select subsets of the data and to export only these to a Re-inspection project - either to a new project or to an existing project. The Re-inspection projects are either sent to a specified handset or held in a pending subfolder to be manually sent later. The identification of previously sampled items is already selected and carried forward from the original survey.
13. The Survey Details screen has been redesigned, moving the Section 3 Re-use Data options to be under the “Choose Task” option button and adding a section to specify the areas that are included in or excluded from the survey.
14. On the Site Detail screen there are now icons on the Quote, Project and Other Info buttons.

15. The layout of the Quotation screen has been amended to make it clearer and to improve its appearance.
16. The Client ID is now included in the filter list on the Projects List.

17. There is a new repository setting “Name: VAT” that lets you specify the text to use instead of ‘VAT’ on screen and in print. It might, for example, be appropriate to change this to ‘Tax’ if you operate outside the UK.

18. There is a new repository setting “Name: Invoice” that lets you specify the text to use instead of ‘Invoice’ on screen and in print. It might, for example, be appropriate to change this to ‘Tax Invoice’ if you operate outside the UK.

19. The Event Description has been taken out of Diary Appointments accessed from Projects.

20. You can now enter Floor Descriptions within Buildings, assigning the name of your choice to floor numbers. Click the Buildings button on a project to access this functionality.

Bug Fixes:

1. The “Completed Call/Task(s)” and “All” filter buttons on My To Do List are now correctly showing all tasks for the logged in user.

2. Improvements have been made to invoicing (especially ad-hoc) so that for example, the Invoice To and Deliver To addresses are populated when the client is selected.

3. The Site ID is now completed when creating a new Site from a Project.

4. The error encountered when sorting survey data by the S/SP/X column has now been fixed.

5. A bug has been fixed so that new clients added via the New Enquiry or New Quotation screens are displayed in the Client dropdown.
6. A fix to the New Quotation screen has enabled the generation of documents from this screen without having to close the screen first.

7. In the calculation of Analysts’ daily points, points for the Analyst’s assessment of the material are pulled through as the priority. If there is no Analyst’s assessment then the points relating to the Surveyor’s assessment of the material will be pulled through.

8. Now when you create a new project or quotation and select an existing site the full site address is pulled through to the project or quotation.

9. An error has been fixed in the creation of Contract Reviews (Contracts|Reviews), letting you create and save Review Meeting dates, attendees and notes.