September 2014 Alpha Tracker Release Notes

New Features

1. Duplicating a sub-project now keeps the sub-project under the original master project. This is done by copying the master project number when a project is duplicated. (B-03505 SVN691)
2. Adding an appointment for a member of staff in the Calendar adds them to the Staff List for the project if they are not already present on the list.

3. It is now possible to restrict who can see individual clients. On the Client record, there is a new field, “Allowed Office Letter”, in the Notes section that allows you to specify the Office letter to which this Client belongs.

Each logged in user has allowed office letters set in their User record. If a user has the matching office letter set in their allowed office letters, then they will be able to see the client in lists and dropdowns. If no letter is specified on the Client record then all users can see the client. (SVN657 B-03206 PID 19668)
4. There is a Document folder for each Contract on the system, enabling you to upload and store contract-related documents (SVN670 CR121).

5. The display of survey items when using the View Photos option has been improved. Included in this is an increase to how much you can type in the Item description field. (SVN670 CR126)
6. Contracts can now be linked to sites and you can also view the link from the other side, so when looking at the details of a site you can also see if the site is part of a contact (B-03336 CR93 SVN 671).

7. A new contract length dropdown field on Contracts will now automatically fill the contract end date. You can set the values for the dropdown yourself by using the Contract Length menu option (under Setup). The values are entered in months. So if the start date is 02/11/14 and you select a contract length of 12 months, then the end date will be populated with 02/11/15 (SVN671 B-03336 CR90).
8. When creating a project from a won quotation, the Project manager/Consultant field does not get completed from the information on the quotation. This allows projects created in this way to go through the project allocation process (PID 19541 SVN678).

9. When you are creating a new project, if a new site is entered in the Site Name field then the Site Details screen automatically opens so that you can enter all the appropriate details for the site (SVN680 B-03493). A new setting, “AutoOpenNewSite”, controls whether or not the Site Details screen opens. The “Site Details” button on the Projects screen lets you manually open the Site Details at any time.

10. When using a quick search box from a menu (Enquiries/Quotes, Clients, Projects, Sites, Lab and Finance), if there are no matching entries a friendly message is displayed rather than an empty list (SVN 682).

11. We now capture table record counts when a software update is run. This will allow us more easily to monitor the use our customers are making of Alpha Tracker. The software updater also now shows a wait dialog (SVN 667/668/669).
12. The Contracts screen has a new tab to allow the selection of the project types the contract applies to (CR95 SVN672).

13. It is now possible to view and log tasks directly from Contract Reviews. Simply click the button and enter details of the task to log; it is automatically linked to the Contract ID. The tasks can be logged for both clients and staff and you can use the options under the Calls/Tasks menu to track them (CR97 SVN672).
14. There is a new On-Site Risk Assessment Mobile Data Studio app that lets you record Risk Assessment details against a project while on-site and send the data in to Alpha Tracker. The Risk Assessment can then be viewed from the project. Click the Risk Assessment button on the Notes/Other Info tab of the Project screen to display the details (SVN672).
15. There is a section on projects where logs are stored to show when reports have been issued and the reasons for the issuing them (CR463 PID19619). Click the “Issue Reason/Log” link under the Report Produced milestone to display the log screen. Note that the link is only visible if the milestone has been completed.

Generating a Final Report now logs this event in the Report Issue Log. You can also record reasons for re-issue here by simply selecting an entry from the Report Issue Reason field - another report issue event is then logged in the Report Issue Log.

The Report Issue Reasons can be set up by using a new “Report Issue Reasons” option under Setup|General.
16. On the Projects screen, the Search section at the top of the screen is now closed by default to save space. Click the “Click here to search...” link at the top of the screen to open the Search section or use the “Quick Search” to search across multiple fields from one box.

There is now also a quick way to select between open, closed and all projects, by using the buttons below the Quick Search.

17. There is a new valid Building Name check on Survey Items. The check ensures that Survey items can only be saved if there is a valid Building Name - ie a Name that matches a Building for the project number (CR441 SVN660).
18. The Account Manager now pulls through when you create a quote from a client (PID19436 SVN658).

19. There is now a built-in SQL Maintenance option which allows you to run database housekeeping yourself to keep your system running quickly (SVN654). Select the “SQL Maintenance” option from Setup|System to run the option. Note that only certain users will have access to this menu option. A log of the script displays on screen.
20. The System Repository screen has changed slightly so that now the column headings are more meaningful, you cannot delete settings and the “Value” field is a text area - which means that if you are using Chrome as your Browser the “Value” field is expandable by grabbing the diagonal lines in the bottom right corner and dragging to the required size (SVN651).

21. The options under the Setup|System menu have been re-ordered and include a new “Error Log (event.log)”. Any errors encountered by Alpha Tracker are logged here to help with troubleshooting (SVN686).
22. An “Enter Fibre Analysis” option has been added to the Choose Task list on the Survey Details screen (SVN687 CR64).

Select this option to display the Enter Fibre Analysis screen from where you can begin to enter the lab analysis for the samples in the survey, without having to use the Lab menu.
23. When all samples have been marked with an analysis in the fibre analysis table, a new “Samples Analysed” flag will be displayed on the Project List (SVN687 CR65).

24. The customisation of diary appointments is now possible by using either the Google Calendar Sync Config file or by using a new system setting: “AppointmentDescTemplate”. Tell us what you want to see and we can set it up for you (CR66 SVN687).

25. Invoicing has been further locked down. A new setting allows the number of days by which invoices may be backdated to be set. If the “Number of days allowed for back dating invoices” setting is left blank or set to “0” then there is no limit. A user who is logged in as a Superuser is always permitted to override this limit (SVN687 CR315).
26. Another new setting, “Use Site Address on Invoice”, lets you specify whether the site address is to be used as the delivery address on invoices (SVN687 CR324).

27. To help prevent the duplication of clients in the database a warning message will pop up if you attempt to create a client that already exists (SVN687 CR338).
28. For users of the Associated Costs button on the Financials/Planning tab on the Projects screen (now a “...” button in the Costs section), it is now even easier to record expenses. Set up your frequently used Suppliers and Cost Categories in advance by using the options under the new Suppliers menu, and you can then quickly select them from lists when entering expenses in the Associated Costs screen (SVN690 B-03423).

29. An audit trail is kept on invoices to track the generation, editing, printing, exporting etc of invoices. Click the Audit Trail button on an invoice to see the changes - you can also search the list (CR316 SVN679).
30. AlphaValidator functionality has been extended so that you can now run pre-invoicing checks. Click the Run Data Validator button on the Financials/Planning tab on the Project screen to run the checks and display the results. The Data Validator checks that a PO number, Invoice Address and Invoice Recipient are present and also checks that the Client is not marked as being on stop and that the Project has a valid estimated total value (v1.0.39 SVN16).

![Invoicing Data Checks for T09197](image)

31. The Project screen has been redesigned, especially the display of information and buttons on the Financials/Planning tab. This is now divided into areas, grouping the invoice, cost and diary information. In addition, the Fixed Price tickbox has moved from this tab to the main screen, next to the Estimated Total Value.

32. A number of additions have been made to the standard reports. Under the Reports menu option you can for example, if your permissions allow, find new reports on the following: 13107 Samples analysed by; 13065 Bulk samples analysed by; 12519 Work done in last month; 12517 Appointment value by week; 12520 Weekend work (including former staff); 12521 Weekend work (only current staff); 12513 Tracker invoices by office/region; 12514 External invoices by office/region; 13097 Project milestones by Client Project Ref.
33. New fields have been added to the Survey Items screen, Licenced and HSE Notifiable, to display this information when sent through from Tracker Mobile.

![Survey Items screen](image1.png)

34. You can choose the term that you use for projects to suit the way that you work. So, if you would prefer to use “Job” rather than “Project” and to see this on all Alpha Tracker screens, then use the new “Name: Project” setting to specify the text that you want to see.

![Settings screen](image2.png)

35. Photos for Re-inspections are now copied over into the incoming XML folder. This means that when you create a new Re-inspection project from an existing project, the original photos are sent down to the handsets and are then visible for the Surveyor conducting the Re-inspection. If the Surveyor chooses, they can keep the original photo or they can take another.

![Re-inspection screen](image3.png)
36. When conducting a Re-inspection using Tracker Mobile it is now possible to refer back to the original data on the handset, even after you have recorded new data. Simply tick the box to Show Original Data and the original values will be displayed for Condition, Surface Treatment, Identification, Recommended Action, Recommendation Comments and Sample Notes.

37. There is a new, easier method to upload your files to the Document folders in Alpha Tracker. Open a Document folder to see the new drop zone at the bottom of the list of files.

   ![Drop files to upload](image)

   You can use this drop zone in two ways:
   - click in the drop zone to open a file selection window then browse to and select the file or multiple files to upload
   - open Explorer, browse to the file you want to upload then drag and drop the file onto the drop zone.

**Bug Fixes**

1. The VAT Number on PDF invoices now pulls correctly from Offices (under the Setup menu) for the Issuing Office. (PID 19324 QN966 SVN649)
2. The error encountered when updating a project due to write conflicts on the allocation status has been resolved (PID 19423).
3. A bug in the multi quote screen has been fixed (PID 19494 SVN678).
4. When selecting an Account Manager on a new quotation or enquiry, the dropdown list is now limited to current members of staff only (PID 19540, SVN677 & PID 19675, SVN 703).
5. (Problem 19462 Problem adding projects to the demo server, error in the client dropdown. (SVN672)
6. The All Day tickbox has been removed from Calendar appointments (PID19632).
7. Calendar appointments can now only be made for current members of staff (PID19627).
8. When adding calendar appointments from projects the event name is populated as soon as the screen opens (PID19626).
9. The labels on the Invoice Schedule screen and the Reviews screen have been made more precise (PID19667).
10. Calculations on the Wallboard will take account of project set-up, including the Fixed Price tickbox, to display the correct costs.
11. When creating a new site and entering contact details, Alpha Tracker checks whether the contact exists, and if not adds it in as well (PID19588 SVN707).