November 2014 Alpha Tracker Release Notes

1. Users must now specify the Project Types for which Extra Info fields will be added. Simply select the Project Types you would like the Extra Info field to be added to and then when a project is created and the Other Info button is clicked the correct fields will be created. (CR374 SVN857)

2. A Scoping button has been added to the Project screen which allows you to display a filtered list of Extra Info fields. Extra Info items with a Category of “Scoping” will appear on this list. (CR374 SVN857)
3. Colour coding is now available on the Wallboard. You can set different project types to display in different colours so that you can see at a glance what type of project a booking is for. (CR356 SVN877)

Set the Wallboard Colour field on the Project Types screen:

to display the projects in different colours on the Wallboard:
4. It is possible to restrict who can see the wallboard by entering their user IDs as a comma-separated list against the “UserListSeeWallboard” setting. Leave the setting blank to allow all users to see the Wallboard.

5. If last minute changes are made to an appointment in the diary (last minute = within 24 hours) then an email alert is sent to the member of staff. (CR359 SVN876)

6. Alpha Tracker facilitates the organisation of Staff into Teams and the scheduling of weekend rotas for these Teams. Use “Teams” from the Setup|General menu to create the Teams, then define their working weekends and non-working weekdays by clicking on the row expander (+ button).
You can then assign members of staff to the Teams by using the **Team** field on the Staff screen (“Staff” from the Setup|General menu). When you try to make appointments on the Calendar for members of staff whose Team is not scheduled to be working, a warning message is displayed.

To help you view appointments for a Team, you can use the “Select Team” menu option from Resources|Diary to display the Calendar and Wallboard for individual Teams.

7. In this release, the Add/Edit Event screen which you use to define a diary appointment will check to see if the staff member’s **Title**, as set on the Staff screen, is the same as the **Role** selected on the appointment.
So, for example, if a member of staff is defined as a “Trainee” on the Staff screen, a warning will be displayed if you set their role as “Assistant Surveyor” on an appointment.

8. The View Project Details link on the Calendar’s Add/Edit Event screen now takes you to the full project details on the Projects screen rather than displaying a summary of the details.

9. You can now mark appointments in the diary as aborted: tick the Appointment Aborted tickbox, enter the date it was aborted and a reason. The Event Name/Description of the appointment then has a prefix of “ABORTED” and the appointment is displayed with a “No Entry” sign on the calendar so that the appointment is clearly marked as aborted.
10. There is a new setting which allows you to show/hide an additional field, the Friable field, on the Survey Items screen.

11. A new setting “Number of days allowed for back dating invoices” lets you stop users from backdating invoices by more than a specified number of days. Superusers will not be restricted by this setting and will still be able to back date invoices.

12. New fields on the Client help you control the requirement for purchase orders for certain clients on projects and on invoices. These are: Requires PO For New Project tickbox, Requires PO For Invoice tickbox and Default PO Template field. Tick the required boxes on the Finance/Credit Details tab on the Client Details screen.
If you try to save a project or raise an invoice for a project for a client where these are set and nothing is present in the **Client Order Number** field, a warning message displays and you cannot complete the action.

The **Default PO Template** field lets you set a default entry for new projects for the **Client Order Number** field for the client, eg “TBC”. You can use two tags in the default to pull through today’s date - {Date} - and the logged in user’s name - {LoggedInName}, eg “TBC - {Date} - {LoggedInName}” might produce a default entry of “TBC - 21/12/2014 - Administrator”.

13. A new field has been added to the survey items table and is visible on the Survey Items screen, it is called **Action Required**.

14. When you have printed an invoice, if you enter the date into the **Date Printed** field all users apart from Superusers are prevented from making further changes to the invoice.

15. A Run Data Validator button on the Financials/Planning tab of the Projects screen lets you run some standard tests on a project to see if it is ready for invoicing. Red answers show failures and green answers show passes. The tests are to see if: a PO number/entry in the **Client Order Number** field is present; an invoice address is present; an invoice recipient is specified; the client is marked as on stop; a value has been entered for the project. The results are displayed in a table.

16. You can now set the “Delivered To” address on an invoice to default to the Site Address for the project by using the “Use Site Address on Invoice” setting.
17. To help prevent you entering duplicate clients, a warning is now displayed if you try to create a client record with the same name as one that already exists:

18. There is a new setting that allows you to control who can add new clients (“UserListNewClients”). If this setting is left blank then all users can create new clients. To restrict client creation to specific users then list their user IDs.

19. If the office issuing a report is different to the office that created the project, then you can now record details of the issuing office on the project. A setting (“Show Survey Issuing Office”) controls whether you can see this field or not. The field defaults to the project’s office address but can be changed.

20. The setting “Show Contract dropdown on Projects” lets you enable the link between Contracts and Projects and use a Schedule of Rates defined for the Contract to set the breakdown for the Project value. Simply create a contract by using the Contracts menu option and set a Schedule of Rates for the contract, then when creating the project make sure you select the contract number in the Contract field so that you can access the Schedule of Rates defined for that contract.
21. Photos can be made to drop automatically into a separate subfolder. To do this you need the “Photo Subfolder Name” setting to specify the name of the subfolder and for this also to be specified in settings.xml in TUM. The photos are dropped into the subfolder when new data is processed from Tracker Mobile.

22. There is also a “ProjectSubfolders” setting which lets you specify a list of subfolders to be auto-created for a project. Enter the subfolder names as a comma-separated list.

23. Some extra fields have been added to the Project List and Subproject List: “First Diary” showing the first diary date; “Last Diary” showing the last diary date; "Last Milestone" showing the date of the last completed milestone; "Next Milestone" showing the target date of the next milestone.

24. It is now possible to link buildings to sites. This means that you if you set up sites in advance of projects, then you can also define the buildings for those sites by using a tab on the Sites screen. Then when you come to set up the project, you can select the site and also select the buildings (from a list that shows only those buildings defined for the site). Buildings can still be defined when setting up the project and when carrying out the survey on Tracker Mobile.
25. A new setting lets you restrict who can add new clients. Specify the user IDs of the people to be allowed to add clients as a comma separated list against the “UserListNewClients” setting. Leave it blank to allow everyone to create clients.

26. A repository setting lets you specify the default project type of Re-inspection projects when they are created by Alpha Tracker, either from the Site Register or from a Survey. The setting is “Default Re-Inspection Project Type”. So if you call your re-inspection projects by a different name you can continue to do so when creating them automatically.

27. Site address validation on projects is now controlled by a setting so that it is not mandatory to specify a Site Address and a Site Postcode unless the setting “Site Address Validation” is set to “yes”.

28. Alpha Tracker now supports six-digit project numbers which is useful if you create large numbers of projects.

29. You can set the default status for newly-created projects by entering the required status against the “Default Project Status” repository setting.

30. You can list Credit Notes created in Alpha Tracker by using the “Credit Note” option on the Finance menu.

31. Recommendations can now have comments associated with them so that when a Recommendation or Recommended Action is selected in Tracker Mobile or on the Survey Items screen in Alpha Tracker, if there is an associated comment then it is displayed. The comment can be amended locally.

32. Single-page drawings and certificates can now be uploaded in PDF format without needing to convert them to JPGs first. Upload using the Drag & Drop method and make sure that the filename contains the word “drawing” or “certificate” for them to be recognised. It isn’t possible to mix and match filetypes and the system will look for PDFs before JPGs. So if there is one PDF drawing the system will not look for any JPG drawings. You could use JPG certificates however in the same document (as long as there was not a PDF certificate).