January 2015 Alpha Tracker Release Notes

New Features

1. A range of changes to Lab processing have been included in this release:
   (a) If batches of samples are used, a **Choose Lab** field has been added to the Enter Fibre Analysis screen to select the lab who will be analysing the samples. The lab is then set for all samples in the batch.
   (b) There is a new option on the **Choose Task** menu on surveys to show the **Sample Overview**, which gives a summary view of the lab analysis.
   (c) The **Analysed By** and **Analysed Date** fields on Fibre Analysis records now only complete once the Analysis has been set.
   (d) The Lab Project List screen allows searching by the number of survey samples in a project, so that you can for example set the filters to show only jobs that have had survey data returned.
   (e) A set of repository settings let you define the points levels to which analysts work.
You can also specify the messages to be displayed when these levels are reached and send email notifications to a specified email address (“Send Lab Notifications”). The Lab Warnings screen lets you see and search warnings logged:

(f) The Fibre Analysis Records screen which lists the fibre analysis records on your system now shows both the “Surveyor Assessment” and “Analyst Assessment” for each sample.

(g) A new setting (“Show calculated Other Ref field on Fibre Analysis Screen”) can generate a lab reference and show this in the Other Ref field.

(h) An extra field has been added on the Fibre Analysis screen: Score. This displays the Product Score from the Materials table but is amendable here. The points selected in here are used on the re-check screen too.
(i) A new setting (“Require Fibre Analysis Validation”) has been added to work in conjunction with the **Sub Contracted** tickbox. If the **Sub Contracted** tickbox is ticked then the validation on the fibre analysis fields is switched off. This allows users to save just the analysis as everything else is greyed out. If it is not ticked then entries must follow the validation.

(j) An email is sent to the “Send Lab Notifications” email address, stating the project and sample number where the surveyor’s assessment is different to the analyst’s assessment.

(k) On the Enter Check Results screen, there are new radio buttons for “Correct Analysis” and “Incorrect Analysis”. These are required field so must be selected. Validation on here prevents the selection of “Correct Analysis” if the check and original are different. An email is sent out to the Lab Notifications email address if incorrect analysis is marked.
2. The Sites Map on the Client Portal now locates all your sites on the map rather than only the top ten.

3. The client uploads folder on the client portal now includes a dropzone so that files can be dragged and dropped to the folder.

4. When creating site re-inspections from the Asbestos Register, Alpha Tracker now looks for projects with the project type category of “Asbestos Re-Inspection” not the project type description of “Re-Inspection”.

5. A new “Exports” button has been added to the Projects menu, which opens the reports screen filtered by the category = 'Exports'.

6. A new feature allows all files in a folder to be downloaded in one go as a ZIP. Click the red button in the top right-hand corner of the document folder to start the all-files.zip download to your PC.
7. There is a new setting to control the Priority Score maths – “Priority Score Rounding”. It can be set to “Up” or “Nearest” depending on whether rounding up or rounding to the nearest whole number is required if the average is a decimal.

8. A new button on the Project List lets you jump straight to Survey Data. This means that you can get to Survey Data in 1 click instead of 4 (Project | Surveys | Choose Task | View/Edit Survey Data). Click the mobile phone icon to display Survey Data.

9. There is an XML link from the Survey Data screen which downloads the XML file for the item to your PC. You can use programs such as Notepad to read the original XML data sent in by the Surveyor.
10. A new setting (“ShowStorageAreaFibreAnalysis”) lets you show or hide the Storage Area field on the Fibre Analysis screen.

11. The security on the Associated Costs screen has been changed so that only Superusers are able to delete records.

12. You can now select subgroups in the “Select Group” option on the menu (Resources|Diary|Select Group) in order to show a filtered calendar or wallboard for all users in the selected subgroup. Select a group so that the subgroups are displayed, then select a subgroup and click the button to show the Calendar or Wallboard.
To put users into subgroups you need to populate the Group and Sub Group fields on the Staff screen:

13. There is a new setting "OnlyResourceGroupCanEditDiary" which shows or hides different calendar buttons for read only or edit depending on the groups the user belongs to. If set to “yes” then the user must be in the Resource group in order to be able to edit the diary.

14. When you hover over an appointment on the Wallboard you can now see the Project Type, Site and Postcode to help you identify it.

15. When creating a project from a site, Alpha Tracker now pulls through the contact details and the invoice recipient details if they have been recorded.
16. The permissions have been changed slightly so that users in the Surveyors group can now delete survey items.

17. A change has been made to update the target date on the project whenever the milestones are changed. The date is updated to be the Project Due key milestone.

18. A system setting allows you to use a single sequence of numbers when generating project/quotation numbers for many office letters. Whichever office letter is chosen, the next sequence number from the one range of numbers is used, eg T-00135 could be followed by S-00136.

19. It is now possible to copy the Other Info fields, including the answers, from one project into another. Open the project into which you want to copy the fields, and on the Notes/Other Info tab click the **Import Other Info** button. Specify the number of the project from which you want to copy the fields and then click **Import Data**. This also works to import the Scoping information from another project, by using the **Import Scoping** button.

20. Default values can be set for Other Info fields by using the new **Default Value** field on the Extra Fields screen:
If the field is a Yes/No field, the default values “1” or “0” are used for Yes and No respectively.

21. It is no longer possible to amend the Project Opened Date on a project; this now remains fixed for the project.

22. A Subtype field has been added to the Quotations screen to categorise further the type of quotation. If the category of the Type selected is Asbestos Survey, then the dropdown on the Subtype shows the Survey Types, if not then the field learns from the entries you type in.
23. There is a new setting, “PreventInvoiceIfDataCheckProblem”, which when set to “yes” prevents the creation of invoices if the Financial Data Validator checks are not passed.

**Bug Fixes:**

1. The problem with the Client ID not pushing through into the New Project screen from the Site Detail has been fixed.
2. Minor changes have been made to the next number lookup and to the create project from quote so that the correct number should always be returned.
3. Changes were made to fix a Project Manager selection problem.
4. A bug in Timesheets preventing them saving was fixed.
5. A bug has been fixed in the create site re-inspection screen to show the correct data.
6. Client contact details are now pulling through correctly along with the invoice address when raising a project from a client.
7. Issues with the creation of re-inspections when subfolders are used have been fixed. Photos held in subfolders will now be pulled through to re-inspection projects.
8. The additional contact dropdowns have been changed to fix dropdown issues.
9. A problem when creating more than one quote from a client has been fixed by changing the cached grid setting.
10. A fix has been introduced to allow apostrophes in invoice recipients names.
11. A fix has been made to correct the Due Date milestone.
12. We now force the Client ID to upper case on Projects.
13. Changes have been made to how information is pulled through from the Site Record, in particular the values for Invoice Recipient, Invoice Address, Site Contact and Site Contact Telephone. These are now all defaulting but can be changed.
14. Projects can be saved without a project manager needing to be entered.