December 2014 Alpha Tracker Release Notes

New features

1. Messages are now displayed if you are trying to create or open projects without a PO where the client record indicates that a PO is needed. For example:

   ![Image of Project Details screen]

   *This client requires a PO number before the project can be saved*

   - **Project Number**: T-0038
   - **Client**: SSWPT
   - **Quotation ID**: 
   - **Project Summary Sheet**: 
   - **Send Mail**: 
   - **Project Started**: 07/01/2015
   - **Quote Produced**: 
   - **Order Received**: 

2. If you mark an appointment as aborted, and your Wallboard is set to display values rather than hours, then the aborted appointment will now be displayed with a value of zero on the Wallboard.

3. If the logged in user is not in the list of users who can see the Wallboard, then their buttons on the Select Group, Select Resource and Select Team screens will be labelled “Show Calendar” rather than “Show Calendar/Wallboard”.

4. A new setting, “Email new project alert to logged in user?”, allows the logged in user to receive an email copy of any new project alerts that are sent.

5. On projects, the Buildings button is now greyed out until a Project Type has been selected.

6. A quick search box has been added to the Sites tab on Client Details helping you locate a site quickly when a client has a long list of sites.
7. The Invoice Recipient field on the Project screen has been changed to be a dropdown list. For a name to appear here, it must be recorded as an additional contact on the client with either the Role or the Title field containing the word “account” or “invoice”. If selected, the associated address will be displayed.

8. Tasks can now be assigned to individuals, groups, subgroups, offices and teams. Simply make your selection from the Assigned Type dropdown and the field below changes accordingly (B-03451/CR347).
9. Some changes have been made to the Lab screens to allow for batches of samples and customising the screen.
   (a) A setting controls whether or not batches are used and this changes the Enter Fibre Analysis screen to allow for batch selection.

   ![Enter Fibre Analysis Screen]

   (b) A Set On All button allows the settings in the Microscope field to be applied to all records in the batch.
   (c) New settings allow the Microscope field to be hidden and the Objective Lens and RI Fluid Equipment No fields to be renamed.

10. Changes have been made to improve the Lab checking process to make the calculation of points clearer and entering of check analysis details easier:

![Lab Checking Process]

11. When you are raising a re-inspection project from a quotation, you can now select the previous project that you are re-inspecting. On clicking the Create Re-inspection button a window is displayed in which you must select the handset to which the re-inspection records (XMLs) are to be sent and the project number that they are to be created from. Click OK to create the new Re-inspection project.

![Create Re-inspection Project]
12. When creating any project from a quotation, you must first select the project Type or the project creation will not be allowed.

13. Quotation document filenames can now be custom-defined by using the “Quotation Name Format” setting.

14. New buttons have been added to show/hide sections on the Survey Items screen and to allow colour coding to make it much more readable.

The buttons and column headings are colour-coded to make the selection easier.
15. There is a new Lab Warnings screen available from the Lab menu which displays warnings issued and the points count for the analyst when the warning was issued.
16. Site Address has been added to the Allocation Dashboard to provide more detail when allocating projects.

17. Quotations now save automatically if the status is changed. So if you have marked the quotation as Won and generate a new project, for example, it is not now necessary to return to the quotation and save it prior to closing the Quotations screen. (PID20985)
18. There is a new “All Allocated Projects” menu option available on the Projects menu which is only available to Superusers and Administrators. It allows a view of all allocated projects and permits one user to accept projects on another’s behalf when the Project Allocation features are switched on.

19. The Quotation ID on a Project is now a link (like the link on the Master Project Number). If you double click it then the quotation opens in a new screen.
20. If there are any files stored against a quotation, a Quote Documents folder is now displayed next to the Quotation ID on a Project. This means that you can access the quotation documents related to a project without having to find and open the quotation.

21. A number of changes have been made to the contents of the Sage 50 Detailed Export to remove superfluous columns (NAME, ADDRESS_1, NOMINAL_REF, ITEM_NUMBER, PROJECT_REF), change the description of others (DESCRIPTION to SERVICE_TEXT, NET_AMOUNT to SERVICE_AMOUNT) and add five new columns (STOCK_CODE, GLOBAL_DEPT_NUMBER, GLOBAL_NOM_CODE, CARR_DEPT_NUMBER, CARR_NOM_CODE).

22. There are two new fields on the Offices screen, for the Department Number and Nominal Code, which are used in the Sage 50 Detailed Export.

23. A number of changes have been made to the columns exported in the Sage 200 Export.
24. The Invoices list now has a document folder displayed where copies of invoices and related documents can be stored.

25. The Client dropdown on the Projects screen has been changed to make it quicker and easier to search for and select a client when client lists are particularly long. You can type a client code into the first part of the Client field, if you know it, and tab out of it to display the full client name. Or you can click the magnifying glass to use the search facility to search for and select a client.
26. When a consultant/project manager is selected on the Allocation Dashboard and the record is saved, Alpha Tracker sends an email to the consultant/project manager with a link to the JSS and the general site details.
27. The “Turnaround” field has been added onto the Allocation Dashboard so that you can see the priority of the project when allocating to consultants/project managers.

28. A new option on the Choose Task button on Survey Details lets you move data from one survey to another. Select the option to open the Move Data to another Project window:

The current project and survey number are pre-populated as the source of the data - you need only select the Building and, optionally, the Surveyor
and Date to complete the source details. Then you can select the project number and building to which the data is to be moved. Two further options let you specify whether you want the XML files to be copied and any photos moved to the destination project.

29. "ShowOnWeb" has been added to the Update Register screen so that you can hide prevent records from displaying on the client portal if you wish.

30. The flowchart has been removed from the Home Page.

31. A new tickbox has been added to the Staff screen, to make the Home Postcode visible or not. When the Home Postcode is marked as not visible, it is hidden from the Staff screen and from the Edit Event dialog (on the Calendar). Furthermore, editing of the Staff list is now limited to only Superusers or Admin users. Other users can only view the Staff list as read-only.
32. Changes have been made to the Finance menu to create separate buttons for Raise Invoice, Credit Note and Pro-Forma Invoice. The “List” menu options have been renamed for consistency.

33. Filters are now present when using the “Add More Projects” button on an invoice, allowing you to filter by “Not Invoiced” and “All”.

34. There is a new feature to help you to set up login accounts. On the Staff ID/Client ID field on the Users screen there is a new lookup, which shows both staff members and clients with the correct IDs. This means that when you are setting up logins you can select “staff” or “clients” and see a full list
which you can search through and select from.

**Bug fixes**

1. A warning is now displayed if you attempt to close the sample setup screen without saving.
2. The ShowOnWeb filter has been removed from the Register view.
3. The Home page no longer refreshes each time you return to it, saving you time.
4. Fields on the Extra Info screen are no longer disabled when accessed from a site.
5. New project alert emails are now sent to the correct address when projects are created from a quotation.
6. The length of the Event Name field has been extended.
7. The duplication of multi type/site quotations now correctly duplicates the multi information.
8. Selecting a contact on a Site now correctly pulls through the email and telephone details.
9. Open Quote lists and the Client Name field search on the Quotation List now work correctly.
10. Site Contact details are now correctly pulled through when the Contact is selected on a Project.
11. Buildings are now pulled through and marked as “included” when projects are created from quotations.
12. The “Log Bulk Samples” option on the Lab menu now lets you correctly select a Bulk Sample project for which to record samples.
13. The Archived History button is now filtering properly on the site asbestos register.