February/March 2015 Alpha Tracker Release Notes

New Features

1. In Fibre Analysis, new code has been added to look for the surveyor’s email address and send a notification email to the surveyor if the analyst’s assessment of the material is different to the surveyor’s assessment. If the surveyor’s email address is not found or the records are generated from a bulk sample job, then the email will be sent to the Lab Notification email address as normal. The Lab Notification address is specified in a system setting.

2. Validation has been added to the Projects screen to ensure that the project number entered is in the expected pattern, eg B-00345 or B15-00345.

3. When you try to delete a client (Superusers only), a message now indicates if the attempt was successful and if not instructs you to remove linked items before trying again.

4. The Item and Surface Treatment description fields in Survey Items have been lengthened so that you can now enter up to 100 characters in the Item field and up to 250 characters in the Surface Treatment field.

5. The Survey Items screen will now automatically show 25 records per page on opening.

6. A new setting (“Only allow System Administrators or Analysts to update fibre analysis records once processed?”) allows only Superusers or the Analyst to update fibre analysis records. If this setting is set to “yes”, then no other user can save changes made to Fibre Analysis records. All changes that are made after the original analysis are logged and can be viewed in Lab Warnings.

7. When you generate the XMLs for a Re-inspections, the Re-inspection Comments, Re-inspection Notes and Condition Description are all pulled through as well as the old values.

8. There is a new import facility for re-inspections that allows you to import data from third parties for re-inspection. It imports the data from Excel into a new table and XMLs can be generated from the new table and sent to a particular person/handset. The new menu options are under Setup|Import/Export|Re-inspection.
The Import Data screen lets you type in the data for re-inspection or provides an Excel template for you to download and populate. Note that you need to set up the re-inspection project and the survey in advance of importing the data. A button then lets you import the data from the Excel spreadsheet. The imported data is then visible and editable on the Import Data screen.

When the data is all present the Export Data screen will show the data ready to export. Show all the data on one screen by setting the number of records per page (you can show up to 500 records per page here). Click the Create Handset Records button to generate the XML records.
First there is a check of the number of XML records you are creating. Then you must specify the handset (Unit ID) to which you want to send the records – Pending and Reference do not need to be specified unless you are storing the records to release later. Click Create Handset Records to create and send the XML records to the specified handset.

The exported XMLs are then available on the Archived XMLs screen. You can also export the XMLs from the Archived list to a handset for re-inspections. This works in exactly the same way as from the Export XMLs screen, allowing you to re-use or re-send data.
9. The Item field on Survey Items has been increased in length to 100 characters.

10. The speed of the Client Portal has been improved, including on the Sites screen.

11. Material Code has been added to the Survey Items screen as a search field.
12. You can now choose whether you display either the Wallboard or the Calendar from the Resource menu options as the Show Calendar/Wallboard button has been split into two separate buttons:

Show Calendar  Show Wallboard


AutoNumberCostBreakdowns  09/02/2015  yes

Automatically number lines in a cost breakdown (yes/no)

14. Working weekends and non-working weekdays can now be set for individual Staff members as well as Teams to allow a flexible approach to arranging weekend rotas. Validation checks the dates set up when you book appointments into the Diary, in the same way as in does for Team validation. Use the plus button on the member of staff to display the tabs for recording working weekends and non-working weekdays:
15. You can copy a "rota" for weekend/weekday work for both teams and for staff. Use the tickbox to select which items you would like to copy, click the Copy this Rota button, and then copy to either individual or multiple teams/staff members.

16. Weekend availability is visible to schedulers on the Add/Edit Event screen when booking jobs into the Diary. Simply drag and drop as normal to make a booking on a Saturday or Sunday. By clicking the Weekend Availability button you can see a list of all those teams or staff members who are marked as being working on the selected weekend.
17. A new method of populating the details when a client is typed in to the New Quotation screen is now in use and has made data entry much faster.

18. The search fields on the Asbestos Register have been changed from dropdowns to text fields, allowing you to use more complex search criteria (such as listing of multiple required values eg “2,3,4”):
19. A Condition Description field has been added to the Survey Items screen allowing you to record a text description of the condition of an item:

21. LAG items are now also colour-coded (red) on the Survey Items screen, like the NAG items.

22. A new setting, “LockProjectOpenedOnceSet”, allows you to control whether the Project Opened Date and Project Opened By fields on the Project screen are locked. Set the setting to “yes” to lock the fields. By default, this setting is set to “no”.

23. Case-correct buttons on the Survey Items screen provide an easy way to switch from all lower or all upper case to mixed case, eg “Utility room” will be changed to “Utility Room”. Buttons are available to case-correct the Location Description and the Item.
24. Inactive items on dropdown lists show in brackets at the bottom of dropdown lists. Most of the set-up screens let you set Active and Inactive Dates. Items become inactive where an Inactive Date has been set and it is in the past. This means that you can still see values attached to old data, eg the names of members of staff who have left and are marked as no longer current, or survey types that you no longer use, and you can distinguish current from old values.

25. A number of changes have been made to improve how information flows from one screen to another. For example, when creating a quotation from the client record or the site record more details are now pulled through.

26. The Hotspot Editor is a new feature that lets you annotate a plan or drawing with the survey items from the project.
To access the Hotspot Editor:

a. Upload the required plans (as .jpg files) to the Drawings subfolder for the project.

b. Open the project and click Survey Details to display the Survey Details, then click Choose Task and select “Plan Hotspots”. A list of the plans in the Drawings subfolder for this project is displayed.

c. Select the required plan and click Hotspots! to open the Hotspot Editor. The list on the right displays the survey items that you can place on the plan. This consists of all survey items with an approach (eg S, P, SP, X, PS) and also No Access items (NAG). Those that have a tag displayed next to them, have already been placed on a plan.
You can place items on the plan by first filtering the list and then selecting the item to place. You then click on the cross-hairs and drag and drop these to the required position. You can move the tags subsequently if required. You can also specify the colour of the tags placed on the plan or you can use the Auto colour-code button to colour the tags according to their identification.

27. The latest version of Tracker Upload Manager will auto-save “close up photos” as site plans if the location is 000. The idea is that that 000 record is used for the front page photo AND the site plan. If a surveyor takes a close-up photo on location 000 it should save as a JPG into the Drawings sub-folder of the project document folder.

28. There is a new Easy-Close menu option (under Projects). It opens the Projects Easy-Close screen which lists all open projects, ordered by date opened. The Invoiced column is green if the amount invoiced is greater than or equal to the estimated project value. Double click in the Date Closed field to insert today’s date and the logged in user’s name in the Project Closed milestone.
29. It is now possible for Alpha Tracker to send automatic emails on completion of specific milestones. To set these up, open the Milestone Template for the Project Type, and click the plus button on the milestone for which you want to set up the email alert.
The screen allows you to specify either an individual email address to send the email alert to or a Staff Role, such as “Surveyor”, to send the alert to everyone who has that Role. There are four replaceable ‘tags’ that can be used with the email text, these are {ProjectNumber}, {Milestone}, {By} and {Date}.

30. The Projects Not In Diary screen has been changed so that if you click the Book Appointment button it books in the appointment via the Calendar for the Project Manager/Consultant on the selected Project, not for the logged in user.

31. If the Landlord for a Site is updated, then a check is made to see if that Landlord already exists in the Client’s Address Book. If not, they are added with the Role “Landlord”. Contacts with the Role “Landlord” are also now available for selection on the Invoice Recipient Name field on the Projects screen.
32. There is a new “Created” field on Clients that records when a Client record was created. It has the default value of the current date/time.

33. The process for removing items on the Asbestos Register has been made the same as in re-inspections. The Remove button has therefore gone and now the user can mark an item as removed by selecting “Removed” from the dropdown on the Identification field. Re-inspection notes can now also be added to the update screen.
34. New code has been added to check when a batch has completed fibre analysis. If it has completed, an email is sent to the surveyor, if there is no surveyor email available then an email is sent to the Lab Notification email address. This change only applies if you are using batches in lab analysis.

35. It is now possible to select samples manually as well as let the system choose random samples when checking other analysts’ fibre analysis.

36. A new trigger on the Fibre Analysis table automates the **Load Fibre Analysis** button if the “AutomateLoadFibreAnalysis” setting is set to yes. This means that fibre analysis automatically updates the survey data, without you having to click the **Load Fibre Analysis** button. Identifications and material scores etc are updated in the survey data for the samples and cross-references.

37. Changes have been made to the Keystone Export view and a UoM (unit of measure) field added.
38. Additional validation on the Fibre Analysis screen checks whether the setting “RequireAllMorphologyFields” is set to yes, if it is, then the fibre analysis can only be saved if there is a value displayed in each of the displayed fibre analysis morphology fields.

39. Two fields have been added to Survey Items, these are: Surveyed areas occupied and Limitations applied.

40. A new mechanism has been developed to allow the defaulting of PA scores based upon the location. The setting “DefaultPriorityScoring” must be set to yes to allow this feature. This change requires MDS changes to be in place too. There is a screen that you can use to set the default scores for each location (Setup|Lab and Surveys|Default PA Scoring) which is only available if the setting is switched on.

41. A new method has been developed for capturing information onsite on Tracker Mobile and populating the Extra Info fields in Alpha Tracker with this data. There are ten possible Extra Info fields available, each with a Name and a Value. They are expected to be used to collect information on general site features, such as the size of a building, the number of floors etc. Some MDS and Tracker Mobile setup is required to use these new fields. Once in place, the Surveyor completes the information onsite on Tracker Mobile and sends it in as normal. Then the Read from Tracker Mobile button is clicked on the Project screen in Alpha Tracker to check if there are any of these fields and if so update/insert them in the Extra Info fields.
42. The Contact field is now a dropdown on the Quotation screen whether you are creating a new quotation or editing an existing one.

43. PDFs can now be created from pro-forma invoices on the invoice list from the Project - this is displayed when you raise a pro-forma invoice or click the View Pro-Forma Invoice button. Click the PDF button to generate the PDF.
44. It is now possible to deduct costs automatically from appointment values on the Wallboard. To do this, set the setting “WallboardDeductsCosts” to yes. Any costs that you have entered in the Financials/Planning tab for the Project are deducted from the project value and apportioned across appointments. These values are only displayed on the Wallboard.

45. There are two additional fields on the Associated Costs screen for Commission Income and a Total. The Commission Income is added to the Cost and the total displayed in the Total field. This is the total that is displayed in the Total Current Costs field on the Financials/Planning tab on the Project.

46. An Export to Excel button has been added onto the Sub Project List on the Master Project List screen.
47. On the Invoice List you can now find Locked and Unlocked filter buttons to help you display the required invoices.

48. You can add an account reference to your PDF invoices by using the new “ShowAccountsSoftwareRef” setting.
49. Credit notes are now displayed in the Invoiced Amount breakdown from the project.

50. Document folders are no longer limited to displaying 200 files but are effectively limitless.

51. The opening of PDFs on invoices has been improved and is much faster.

52. There is a new button on the Pro Forma invoice screen which allows you to convert a pro forma invoice into a sales invoice.

53. Many improvements have been made to the pre-population of fields, so that more details are populated when, for example, creating a new quotation from a client or a site, or creating a new project from a client or a site.

**Bug Fixes**

Various bug fixes have been implemented, too many to mention. This list includes some of the important ones:

1. Issue with update button on the register. When the update was running the pending flag was marked as true. I've changed this to be false and now the records are showing correctly on the asbestos register. Also changed the Update_Register_Record.a5wcmp grid to not have the "close detail view" button so the whole screen has to be closed, not just part of it. The View Details button on the Asbestos Register is also much quicker now.

2. The Delete button on Extra Info items has been changed to allow you to delete items.
3. When duplicating projects, there is a check made of the length of the original project number and this length is used in the calculation of the new project number.

4. A problem with the filtering on the My To Do List has been fixed.

5. The Site Name is included in the export from the Project List.

6. A problem with the “Add to Project” button on Re-inspections has been fixed. It now looks for the last project, which has a matching Site ID and a Category of "Asbestos Re-inspection".

7. A bug in the code for Create Reinspection XMLs that was affecting the setting of the filter for the building name has been fixed.

8. New code has been added so that when you edit the client code on quotations all client details are updated.

9. A security issue on the Quotes document folder has been fixed so that Project Managers and Senior Project Manager have access to these.

10. The calculations on the Lab Project List have been improved to better reflect the numbers of records.

11. A problem with Payment Terms when raising an ad-hoc invoice has been fixed.

12. A new function has been developed to deal with apostrophes in text strings. It replaces single quotes (') within SQL strings with two single quotes ("’). This has been applied across the system so that it should now be possible to use apostrophes in text without causing any problems.

13. New code has been added to auto save the version number and produced by when generating bulk certificates from the survey.

14. A bug in the duplicate project list has been fixed so that it now shows the correct list of duplicated projects.