April/May 2015 Alpha Tracker Release Notes

New Features

1. An Import Scoping button has been added to the Enquiry/Quote screen. This allows you to copy scoping details from one quotation into another. The button is only available when you have opened the quotation for editing; it is not available on the New Quotation screen.

   ![Import Scoping Button](image)

   It is only scoping details that are copied, these are defined in the Extra Fields screen with a Category/Sub Category of Scoping. You need only specify the number of the quotation from which you want to copy and then click Import Data. Any existing scoping details are overwritten.

2. There is a new feature to analyse the “access logs” that Alpha Anywhere can create. In particular, this allows us to see how busy an App Server is if a client reports performance issues. For the feature to work, the server must be an Alpha Anywhere (ie V12) server and the logging feature must be enabled.
The new menu option is **Setup|System|Analyse Log**. If you do not have a V12 Alpha Anywhere server, then the option will not be available.

3. There is a new “access log” which is designed to be used to track (a) who has opened which screen and (b) how long the screen look to open. Specific screens are tracked, such as: Project List, Project, Survey Data, Site Details. The new menu option is **Setup|System|Access Log**.
The “Apdex” score is used to show how well a system is performing. There is a system setting that controls the tolerance threshold, which may be set to any whole number - a usual value is 2 seconds for a screen to open. The score is shown at the bottom of the Access Log screen. An Apdex Total greater than 0.75 shows good system performance; an Apdex score between 0.50 and 0.75 is sluggish; an Apdex score less than 0.50 shows poor performance.

4. There is new logging code so we can analyse why large SQL reports are taking a long time to return data to the browser. This enables us to run a troublesome report and see where the problem is.

5. There is new code in the Project List which further optimises searching if the user has a selection of office letters available to them (> 1 and < 26). There is an associated repository setting “Project search SQL optimisation” which is set to “A” by default but which can also be changed to “B” to see if project searches/lists are quicker.

6. There is a new "CAD View" of survey data available from the Choose Task button on the Survey Details screen. This view shows: all data with an approach (eg S, P, SP, X, PS or R), NAG items, LAG items and NAS items.

   The items are coloured-coded to make identification easier, as follows:
   - Blue = NAG
   - Light blue = LAG
   - Red = S with a positive identification (ie a positive sample)
   - Light red = P or SP with a positive identification
   - Green = S with a negative identification (ie a negative sample)
   - Light green = P or SP with a negative identification.
Additions

1. A Cancel button has been added to the Report Issue Reason/Log screen so that you do not have to record an entry if you select a Report Issue Reason. All entries made either automatically or manually remain uneditable.

2. The Invoice Lines Item field has been extended and a message added if it is exceeded.

3. The Samples for Checking screen, which is displayed when you are checking lab samples above 40 points, now shows 50 records per page by default. The selected samples are sorted by Project number and Sample Number.

4. The Points field on the Fibre Analysis screen is no longer amendable.

5. A new Projects Not On Diary screen has been created to work when the project allocation system is not in use. The system will know which screen to use depending on the Allocation system settings in use.

6. The Site Address automatically displayed on a quote now varies depending on where the quote has been raised from. For example, if it is from the Client, then the Client Address is displayed; if it is from a Site, then the Site Address is displayed.

7. The Salutation on a quote now automatically displays the first name of the Contact if you select the Contact Name from the dropdown list.
8. Two fields have been added to the Enter Lab Results screen (available from the Survey Quick Start menu). These are Recommended Action and Recommendation Comments. This means that if you are entering analysis results from a third party you can amend the Recommendations on the same screen.

9. Contacts have been split on Client records so that you now have a Client Address Book and a Site Address Book. The Site Address Book lists Contacts who have been added for individual Sites.

10. It is now possible for you to define Sub-types for Project Types. These can be used on Quotations and only those defined for the particular Project Type will be available from the Sub-type dropdown. Use the plus button on the Project Type to which you want to add Sub-types, then enter the details on the Sub types tab:
You can set up default values for these Sub-types within the Extra Info templates. So for example, if you want the default value for the Property Type field to always be “Residential Property” except when the Project Sub-type is say “Management with Priority Assessment”, then it is now possible to define this in Alpha Tracker. Use the More button on the Extra Info screen to display the screen where you can list the Sub-types and corresponding default values.

11. You now have the ability to mark Quotation Types or Subtypes as inactive. If you have marked any Quotation Types or Subtypes as inactive then they these fields on the Quotation screen will show old types in brackets at the bottom of the list. If an existing quotation uses an inactive type, it will be displayed (in brackets), but you cannot select an inactive type on a new or existing quotation.
12. There are new alphabet search buttons on the Lab Projects List which enable you to filter the list to show “Fully Analysed”, “Partially Analysed” and “Not Analysed” lab projects.

![Lab Projects List Screenshot]

13. Changes have been made to the report list on the Client Portal. Also a new component has been added to view the survey data from the report list rather than showing the current register data. The summary graphs have also been changed to read from the survey data rather than from the current register position.

14. Whenever a change is made to an invoice record, for example a change to the amount of the invoice, then a pdf file is now automatically generated and stored in the Invoice file for the project. This will overwrite any existing invoice pdf of the same name. You can view the Invoice file for the project from the Invoice List screen.

15. The file upload buttons are now located at the top of the Document Folder screen, so you no longer need to scroll to the bottom of the list of documents in order to upload a new document. The drop zone, where you drag and drop documents into the folder, is still located at the bottom of the list.
16. There are new icons on the menus to indicate the “new” and the “list” options. They are the same on all menus, for example:

17. A new "upload" button has been added onto the Site grid on the Client Portal. This allows users to upload and download documents into a "Client Uploads" subfolder on the Site.

18. A new "Auditor" security group has been added. This group has options only to view Projects, Sites and their own Calendar. Now data changes are allowed.

19. On the Fibre Analysis screen, the Item Description is now displayed in the **Sample Desc** field, as well as the Location which was already being displayed. This gives you full visibility of what the sample is and where it was taken from.

20. The number of points that an Analyst is assigned when analysing a sample depends on the Analyst’s assessment of the material. The number of points is displayed in the Score field (see screen above). This is now fixed and not amendable on the Fibre Analysis screen. The value is set on the Materials list.

21. The Microscope field on the Fibre Analysis screen is now mandatory. A value must be set in this field before a fibre analysis record can be saved. A default can still be set for each user on the Staff screen.

22. It is now possible to show or hide the Analysis Time field on the Fibre Analysis screen by using the “Show Analysis Time on Fibre Analysis screen” setting.
23. You can prevent editing of the Identification on Survey Items now. There is a new setting “Identification editable when viewing survey data” that controls whether the Identification (Asbestos Type) is editable or not via the Survey Items screen. This change is useful for those with their own laboratory and lets you restrict who can set the Identification of a sample, so that it comes only from the Fibre Analysis records.

24. There is a new field on the Projects screen that lets you select or specify who should be invoiced for a project if this is different to the Client. The Invoice Client field is on the Financials/Planning tab of the Projects screen and works in the same way as the Client field - you can either type in the exact ID of the invoice client or you can use the search on the client name. When you raise an invoice, if you have a client specified in the Invoice Client field then the invoice will use these details instead.

25. Changes have been made to the “re-use” data functionality from the Survey Details screen. It now puts the identification into the XML file which gets pushed back into MDS if GUIDs and Survey ID match.

26. There is a new setting “Lock Report Issue Number on Survey Screen” which prevents changes to the Report Issue Number. The default for this setting is “No”.

27. You can now find the Sample Notes displayed alongside other information when using the Edit/View Samples, Edit/View Suspect Items and Edit/View Photos options from the Survey Details screen.
28. Another new option on the Survey Details screen is the "initial findings email". This option allows you to send an email if all samples in a project have been analysed. The text for the email, filter and subject must all be defined.

29. On the Client Portal the Site Reference has been added to the Report List and also to the quick search.

30. A Client’s mobile and direct dial telephone numbers and their web address can be added to their Client record, on the General Details tab below the main contact details:

31. You now have the ability to upload logos for Clients and to show the Client logo in the Project List and the Quotation List. You can upload a logo by using the Upload Logo link on the Client record.
Settings control whether logos are displayed; these are “Show Client Logo on Project List” and “Show Client Logo on Quotation List”. If the logos are displayed, clicking on a logo takes you to the Client’s website if this has been entered on the Client record.

The Client’s logo is also displayed in the menu when they log in to the Client Portal.
32. There is a new Contact Details button on the Client Portal which allows clients to update and change their details themselves as required. These details will be automatically visible in the Client screen of Alpha Tracker.

33. Changes have been made to the Client Portal to allocate certain sites to specific users. The effect is to filter the Client Portal by the site(s) selected. To set which sites a Client can view, set up the Client as a User then use the row expander (plus button) on the User record to specify which sites the Client is allowed to access.
If you do not specify any sites, then the Client can see all sites normally available to them. If you do specify sites, then the Client can only see data relating to those sites.

34. A new repository setting has been created to hide the "Delete" button in the documents folder. This prevents users from deleting any documents generated or uploaded to the document folder, directly from Alpha Tracker. The setting is "Show Delete button on the Project Documents folder".

35. You can put a Client “on stop” by ticking the On Stop tickbox on the Client record. A red message is then clearly displayed on the Client record so that you know immediately that a Client is “on stop” when you visit their Client record.

You can also see that the Client is “on stop” on the Client List, as the icon is displayed as well as the row being highlighted in red:
If a Client is “on stop” then you cannot save any new projects for them.

36. There is a new Raise Credit Note button available on the Financials/Planning tab of Projects so that you can raise a credit note directly from the project as well as from the Finance menu options.
37. Get access to all the latest Alpha Tracker news by clicking on the link at the bottom of the menu to Robin’s blog. Here you can find details on all the latest updates and releases, information on upcoming developments and general news on what we are all up to at Start Software.

38. The Site ID has been added to the search fields at the top of the Site List so that you can search by the Site ID if you know it.

39. If a new item is added to the Survey Items, such as a manual insert of a Survey Item, then the Surveyor(s) on the item is/are now added automatically to the Project Staff List.

40. You can specify the format of survey report names yourself by using the new setting “Survey Report Name Template”. Newly generated reports will use the new naming format.

41. Google Analytics can be used on Alpha Tracker to track site usage. This is controlled by a new setting “Google Analytics”.

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42. If a project has a Status of “Archived” then it will no longer show in the Report and Site Lists on the Client Portal. These projects are however still accessible on the Client Portal by using the new “Archived Report List” menu option on the Reports/Jobs menu.

43. If you are manually entering Survey Items by using the Add New Survey Item(s) button at the bottom of the Survey Items screen, you can now also enter the Sample Notes at the same time as defining the new item.

**Bug Fixes**

1. An issue with the site details saving has been fixed by removing the cached components and adding a full page refresh when the records are saved.
2. The calculated Payments Made field has been changed to be not updatable to prevent problems when saving an invoice.
3. Validation on the Project Manager field has been fixed so that changes can be made to projects which have non-current members of staff assigned as the Project Manager.
4. The document type of Pro-forma invoices has been amended to show as P, Pro-Forma Invoice.
5. The “running...” dialogs previously displayed when sending XMLs back to handsets have been hidden.
6. A bug in the New Site screen adding the site contacts multiple times has been fixed.
7. Any changes made to your “Approaches” are now fully reflected in the Asbestos Register, allowing you to search and filter by your customised approaches.
8. An issue with the client postcode not pulling through onto a new quotation from a site has been fixed.
9. The “Approach” was not pulling through from the survey items export to Excel. This has now been fixed.
10. When you use the “Enter Lab Results” option on the Quick Start menu the items are now sorting correctly on the sample number.
11. The default microscope is working correctly again on the Fibre Analysis screen and the "Set on all" button for Microscopes is restricted to only be displayed when batches are in use.
12. An issue with the Extra Info not pulling through for drop-downs has been fixed.
13. We have made a code change so records are **not** pulled through into the Asbestos Register where the approach is P or SP and the identification is NAD or No Asbestos Detected.
14. After closing the Invoice list from the Project a refresh was running and closing the Financials/Planning tab. New code has been added so that the refresh occurs while the list remains open.
15. The Report Commissioned B and Report Recipient were pulling through when a Project was raised from a Site. They now only pull through when raising a Project from the Client.
16. Survey Items will now sort by Building Name instead of Building ID when clicking on the Building column heading.