

## June/July 2015 Alpha Tracker Release Notes

SVN1401-1500

### Additions

1. The Survey Items screen is now sorted by Building|Floor|Location by default.
2. A new field has been added to the Add/Edit Event screen on the Calendar to allow users to specify an appointment value which will override the calculated appointment value. Tick the Shift Value Override tickbox to display the field into which you enter the new appointment value. The new appointment value will be displayed on the Wallboard.

The screenshot shows the 'Add/Edit Event' interface. The 'Appointment Details' section includes dropdowns for Resource (Robin Bennett), Role (Bulk Analyst), and Team (Pink). Below these are fields for Project Number (A-000034) and Client. A 'Shift Value Override' section is highlighted with a red box, containing a checked checkbox, a 'Shift Value' input field with '500.00', and a confirmation message: 'The value of this appointment will be 500.00'. The 'Event Name/Description' field contains 'Zak Porter Housing - Beech Street South'. The 'Start Time' is '03-06-2015 10:00' and the 'End Time' is '03-06-2015 18:00'. A map on the right shows the location. At the bottom, there are checkboxes for 'Visit Confirmed', 'Cannot Move', and 'Tentative'.

3. It is now possible to run the data validator automatically when generating a report. A setting controls whether the data validator runs manually or automatically - "Run Alpha Validator before generating Survey Reports". If there are any problems found when the validator runs automatically, it will prompt you and output the findings on the screen.
4. You can now find Remediation fields on the Survey Items screen into which you can enter any remediation details for an item. Click the Remediation Details button on the appropriate item to pop up the screen where you can enter Remediation Status, Cost and other details. The "Show Remediation Details on Survey Items screen" setting determines whether this button is displayed on the Survey Items screen.

Recommended Action	Recommendation Comments	Caveats agreed on-site	Notes	PPCGUID	Reinspection Notes
<input type="text"/>	<input type="text"/>	Remediation Details <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Remove <input type="text"/>	Comments <input type="text"/>	Remediation Details <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Re-inspection required <input type="text"/>	Comments <input type="text"/>	Remediation Details <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Remediation Details

ID	46746	Remediation Status	<input type="text"/>
Survey ID	73232	Estimated Cost	<input type="text"/>
Floor	0	Actual Cost	<input type="text"/>
Location	002	Cost Band	<input type="text"/>
Location Description	Bedroom	Contractor	<input type="text"/>
Item	Ducts	Remediation Spec	<input type="text"/>
Material Code	INB	Remediation Complete	<input type="text"/>
Material	Insulating Board	Remediation Notes	<input type="text"/>
S/ P/ SP	SP		
Extent	2		
Sample Number			
Identification	Amosite		

The same screen is available from the Remediation Details button when you are updating records on the Asbestos Register.

You can set the values for the dropdowns on the Remediation Status and Cost Band fields by using the new menu options *Setup/Lab and Surveys/Remediation Cost Bands* and *Setup/Lab and Surveys/Remediation Statuses*.

On the Client Portal there is a menu option to view the Remediation Register which lets you see all items with remediation details and searching fields.

5. It is also possible to enter a document download link in the Remediation Notes field so that clients can download specific remediation documents from the Remediation Register itself. To do this, the document to download must be available in the project's document folder in the appropriate format - eg it could be a txt file, doc or pdf. The example link to enter in the Remediation Notes field is:

```
<a href="http://alpha.redhills.co.uk/downloadfile.a5w?project=C-01096&filename=DocumentLink.txt"> Download link</a>
```

where:

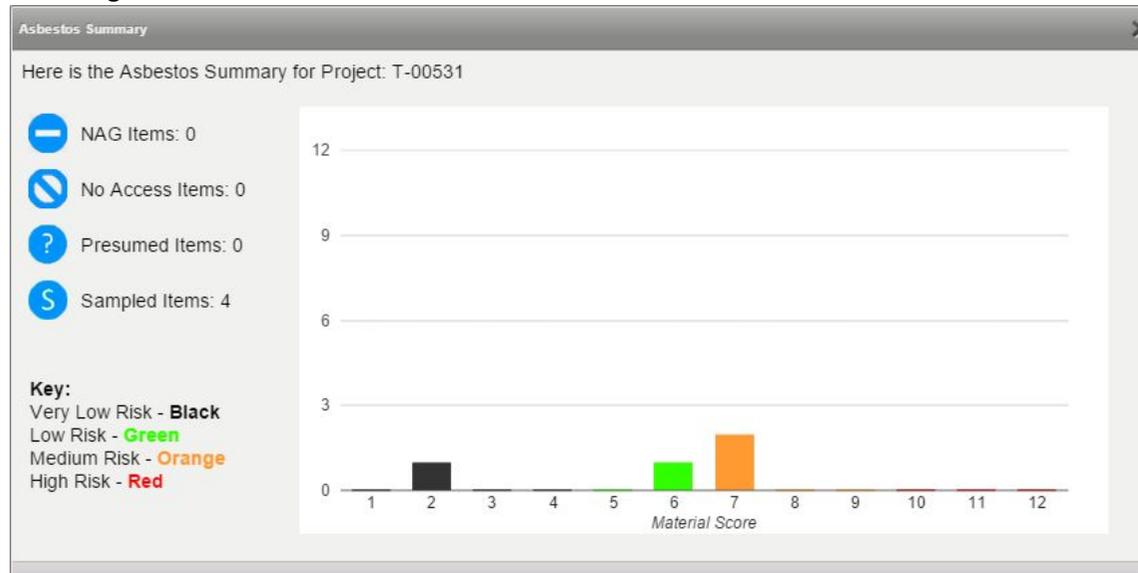
“C-01096” is the project number

“DocumentLink.txt” is the filename of the document that is to be made available

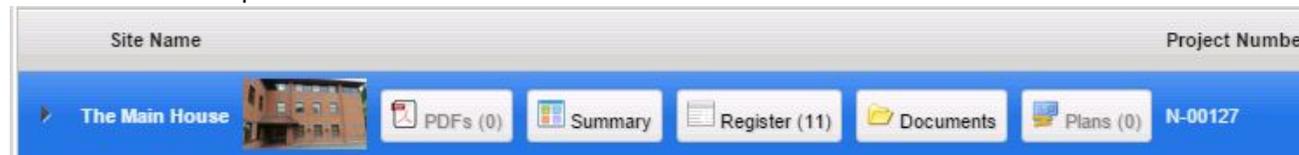
“Download link” is the text that you want to appear as the download link on the Asbestos Register.

6. The chart on the Asbestos Summary on the Client Portal is now colour-coded with a key. The colours of the bars on the graph match others:
- Black – Very Low Risk
  - Green – Low Risk
  - Orange – Med Risk

## Red – High Risk.



- The documents that you choose to show on the Client Portal can be specified by setting the pattern of the filenames to show in the setting: “Client Portal Document Pattern”. You might, for example, choose to show files that are pdfs and start with the project number - “<PN>\*.pdf”.
- Some Client Portal changes now mean that the Plans button is disabled if no plans exist and document counts tell you how many PDFs and Plans are available. For example:

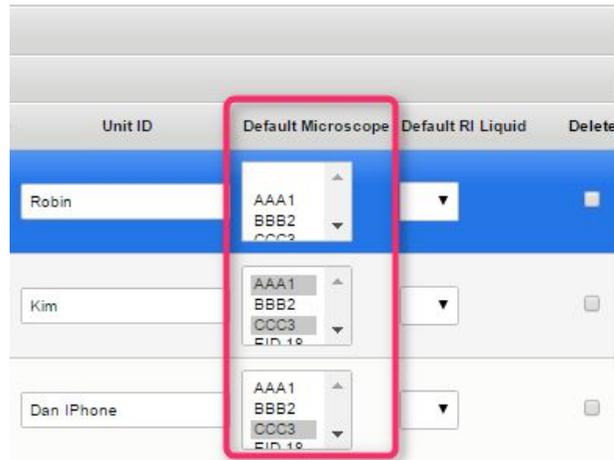


- You can also create a “blacklist” of words to hide PDFs from the portal. For example, you might want to hide all PDFs that contain the word “draft” or “secret” in their filename. This is controlled by the setting “Client Portal blacklist key words”.
- Other changes to the Client Portal include a new login screen and the ability to include a logo on the client login screen. Any logo saved on the client record can be used on the client login screen. It is also possible for the client to upload their own logo by using the Our Contact Details menu option from the Client Portal.
- There is also a new security group giving two levels of access to the Client Portal; one of which cannot delete documents.
- It is now possible to show or hide sections of the Client Portal selectively for different logins. There are four new “hide” settings that control this, relating to the portal dashboard, portal site grid, portal site list and portal site map. To hide one of these features for individual client logins, list the client user IDs to which it applies, separated with a comma (no space).

13. There is now an additional field (`external_status`) that can be displayed on Survey Items and on the Registers on the Client Portal. Its purpose is to allow the original status of items to be displayed but it can have a more general application as it can be named as you wish. Two new settings control this field, one determines whether or not it is displayed on the Survey Items screen, the other determines its name.
14. The "CAD View" on the Choose Task dropdown has been renamed to "Delivery View" and now also includes "NAS" material codes as well as NAGs and LAGs. The screen has a default order by building name. Items on both the Survey Items and Delivery View screens are now sorted automatically.
15. There is a new setting "Prevent any deletion of invoices" that stops invoices from being deleted. The default value for this setting is no and it overrides the security groups.
16. There is a new repository setting to allow users to specify an address at the top of invoice Template B: "Invoice Header Address (Template B)".
17. When invoice clients are selected, the invoice address/recipient details are now updated on the project.
18. A number of new settings have been created to enable you to set up your own filename templates for invoices, credit notes and bulk sample certificates. These are: "Invoice PDF Filename Template", "Credit Note PDF Filename Template" and "Bulk Certificate Filename Template".
19. It is now possible to have building-specific survey types and produce building-specific reports.
20. There is also a new setting to control the document name using a template for individual building reports: "Survey Report Name Template for Building Specific Reports". You can use this in the same way as the "Survey Report Name Template" and so, for example, have: "<Project Number> - <Site Name> - <Survey Type> - <Building Name>".
21. Recommendation comments have been added onto the import/export XMLs for re-inspections.

Disturbance	Accessibility	Recommended Action	Recommendation Comments	Normal Occupancy	Location	Access
0				0	0	0
0				0	0	0
0				0	0	0

22. You can now select multiple microscopes as a default for the Fibre Analysis screen. To do this, go to the Staff screen and scroll right until you see the Default Microscope field, then use hold down the Ctrl key and click the mouse to make multiple selections for a member of staff.



23. A column (O) has been added to the Sage 200 export for the Nominal Analysis Nominal Department/1. This is the Department field from the staff record. In addition, currency fields have been set to 2 decimal places, and Offices is now joining on the right field.
19. You can now use the Survey Name from the Survey Types screen as a field in file naming settings (as <survey\_name>), so that you can, for example, group all your customer-specific management surveys under the term "Management Survey".
20. When fibre analysis is complete the project manager can now be emailed as well as the lab manager. This is on a new setting: "Email Project Manager when Fibre Analysis has been completed for a Project".

21. The Analysed field on the Project List now shows more detail, for example “Samples Received” and “No Samples Received”, as well as “Samples Analysed”.

No Samples Received
Samples Received
No Samples Received
Samples Analysed
Samples Analysed
No Samples Received
No Samples Received

22. A warning has been added on the Enquiry/Quotation which displays when a Client is set to be “on stop”.

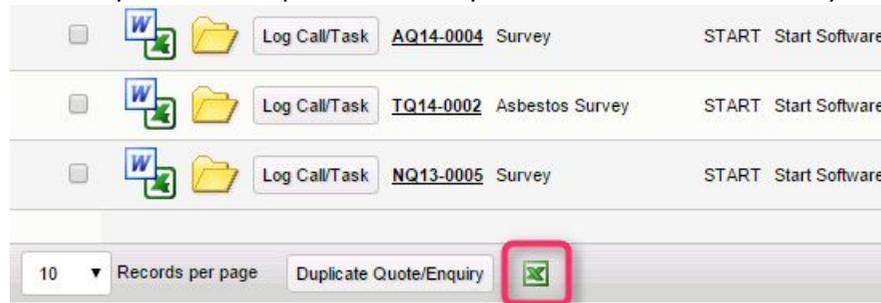
The screenshot shows a 'Contact' form with the following fields and values:

- Reference: NQ15-0024
- Status: Open (selected)
- Client: SSWIFT (Swift Surveying)
- Produced By: Dan Darkin
- Account Manager: Kim Evison

A red warning box is displayed over the Client field with the text: "This client is 'on-stop'. Cannot save quotation".

23. The location description has been added to the site XMLs for Re-inspections.
24. Security groups on the main menu have been changed so that now only Superusers and Lab users can view the Lab menu.
25. A new reports category has been added for your Data Exports. You can find this under the Reports menu if you have data exports.
26. There have been a few changes to the hotspot editor. Two new tags have been added to the tag dropdown and the new tag images have been added as well. The auto colour code has been altered for the new tags, using R - Blue, P - Magenta, SP - Yellow.

27. It is now possible to export data from your Quotation List to Excel by using the button at the bottom of the list.



28. On the Fibre Analysis screen, the Sample Size field can be renamed as you wish by using a setting in the system repository (“Name: Sample Size”). In addition, the field has been changed to an edit combo so that it accepts free typing, allowing you to set the values.

29. If members of staff have been made “not current”, they will no longer display as a number in the Survey Items and Project Staff screens - the whole name will be displayed.
30. A new setting allows you to rename the Drawings folder to a name of your choice: “Drawing Folder Name”.
31. For re-inspections, the old identification can now be pulled into the XML files that are generated. If required, this can then be made visible in Tracker Mobile.
32. There is a new feature on the Survey Items screen to "Fix Photo Filenames". This will update the photo filename with the ID + .jpg and also check whether the subfolder name exists and include this in the filename. The filename will only be updated if it is blank.

33. A “My Calendar” menu option on the Resources menu lets you display the Calendar with your own name only selected. This provides a quick way to see what appointments have been made for you or to manage your own diary.



## Bug Fixes

1. A problem with duplicates not showing in the View/Delete Non Suspect Duplicates screen has been fixed.
2. Some tweaks have been made to the Export screen to allow quotes, ensure tags are replaced and specify the project folder path.
3. A problem with the building name not pulling through when typed in in Tracker Mobile has been fixed.
4. The Survey Items screen and the Delivery View both now automatically sort by building, floor and location.
5. A problem with opening Fibre Analysis from the Survey screen has been fixed.
6. Photos will now display on the Client Portal when using the Register Photo Viewer.
7. A bug fix has been applied to the Invoice screen, which is now pulling through payment terms correctly and calculating the date correctly.