New Features / Changes (SVN1600)

1. There is a new menu option on the Projects menu, called “Quick-Edit Survey Data”. This menu option provides a speedier way to display and edit Survey data. It is designed specifically for people who regularly check the survey data on big Projects (eg 100+ survey items) and need a quick and responsive edit screen. When first selected, the “Quick-Edit Survey Data” menu option displays a screen that requires a Project Number. You are expected to know the Project that you want to work with. Type in the Project Number and click Search.

The survey data in the Project is displayed, showing 100 records per page by default. The data is grouped by Building, and the plus/minus buttons next to a Building Name lets you expand or hide the records relating to individual Buildings.
Many features of this screen are like the Survey Data screen. You have the usual search boxes at the top of the screen to help you locate individual records. You also have edit buttons at the bottom of the screen. There is one new button here which is “Survey Summary”. Clicking this button displays the Survey Summary screen from which you can generate the report if required.

2. On the far right-hand side of the Quick-Edit Survey Data screen, and also on the far right-hand side of the standard Survey Data screen, there is a new tickbox, labelled “Hide”. This tickbox lets you mark individual survey items to be hidden. If ticked, these hidden items are not visible in Reports, Registers or the Client Portal. If an item is ticked, then it is greyed out on the Survey Data or Quick-Edit Survey Data screen:
3. In the Client Portal change, the Home screen can now have five elements.

The new element is a “Site List & Compliance Summary” which can be displayed on the Home screen or from the Sites menu.
The Site List & Compliance Summary now also shows Sites which have had no activity. The Last Activity column shows the date for the last project marked as Show On Web (not including pending projects). The Last Inspection column shows the date of the last survey or re-inspection.

This list is colour-coded to give you an instant impression of status. Green indicates activity within the last 9 months. Yellow indicates activity due, where the last activity was between 9 and 12 months. Red indicates overdue activity, ie last activity was more than 12 months ago. There is no colour if there are no ACMs at the site.

Next to the Postcode is a magnifying glass icon from which you can display a map of the Site. After the Postcode, the Contact details are displayed. The usual Register, Summary, Reports and Documents Folder buttons are also available.

There are new filter buttons above the list which filter the display with one click to show, for example, Sites with overdue activity (the red ones), due activity (the yellow ones), some activity (some projects) and no activity (no projects). Sites without ACMs will not show under the Activity Due and Overdue filter buttons.

4. There are new “Print/PDF” buttons available on the Registers in the Client Portal that open Registers in separate browser windows better suited to printing.
By hovering the mouse in the bottom right-hand corner of the new Print View screen you can access a range of buttons that let you change the display, save and print the Register.
5. A new setting allows you to set up the footer text that your clients see when they log into the Client Portal. The setting is “Client Portal Footer”. A separate setting is created for each client who logs into the Client Portal which allows you to set different footer text for each client if required. For example, if you have an external lab who log in you will get a setting like this: “Client Portal Footer (EXTLAB)”. If you only want the standard footer text to display for each client, then you need only enter details into the “Client Portal Footer” setting.

6. Approved Contractor functionality has been added to the Client Portal which lets you maintain a list of Approved Contractors, their details and their status. You can also upload documents for Contractors which means that you can store copies of qualifications, certificates, approvals etc. A setting determines whether the Contractor menu options are displayed in the Client Portal: “ShowContractorMenuOnPortal”.

There is also a setting to hide the Suspended Contractors menu option. This setting is set to “no” by default.

7. A new feature shows positive items as “Removed” on the Client Portal if:
   (a) they have an Approach of “R”
   (b) they have an Identification of “Removed”
   (c) they have a Remediation Type of “Removal” AND either a Remediation Status of “Complete” or a Remediation Complete date.
These removed items are easily identified on the Client Portal by a green “Removed” stamp.

They are also visible on the Asbestos Summary graph:
8. New code has been added onto the generate report buttons to replace a range of symbols in the document filenames. If any of the following symbols are found \ : / * ? + | <> they are replaced with a dash (-).

9. The Duplicate Project function will now also pull through the Quote Produced, Order Received and Turnaround values if these are present on the Project that you are copying.
10. You can search your Quotations by the name of the person who produced the Quotation. There is a new “Produced By” field at the top of the Quotation List where you can enter your search criteria. This “Produced By” search will also work from the Quick Search field on the menu. So if you enter your name in the Quick Search field then the returned Quotations will include those that you have produced.
11. Users in the user group “Survey Admin” are now permitted to edit the content of the Identification field, even if edits to the Identification field are disabled. This is to allow for the correction of previously sampled data (Approach=PS) sent in by the Surveyor for which no Fibre Analysis records are held.

12. There is a new setting that allows users to set up text to appear in the footer of the Initial Findings email if this is being used. The format of this email has also been tidied, for example by centring the columns. The setting is “Initial Findings Email Footer Text”.

13. A new setting has been created to control the invoice line text for Bulk Sampling jobs. This means that you can have different text displayed on invoices for Projects of this type. The setting is “Invoice Line - Bulk Identification Template”.

14. The “Projects Not In Diary” menu option will now only display Open Projects. So any Projects that have a date in the Project Closed milestone will no longer be displayed on this list.
Fixes

1. Changes have been made so that when an invoice is saved it will now check whether it is an invoice or pro-forma invoice and will generate the correct document in the documents folder.
2. Changes have been made to the project number validation to check if the pattern matches the current project number pattern (using * as the wildcard in the setting).
3. When creating a new Project and selecting the “Report Recipient”, the email address is now automatically pulled through from the Client details if it exists.
4. If you forget to save a Quotation before requesting a Quotation document to be generated, your changes are now automatically saved. When you click on the Word/Excel button all changes made to the Quotation are saved. This means that your generated document will always reflect the most recent changes to your Quotation and that the system can be sure that a Quotation record exists before attempting to generate a document.
5. Various fixes have been applied to the Client Portal to ensure that Site links, counts and views are correct.
6. A fix to the sending of emails now ensures that quotation marks in the Site Name are allowed.