New Features / Changes (SVN1822)

1. QR codes can now be used within survey reports. Initially, the idea of using QR codes is that if someone scans the QR code at a future date using their smartphone or tablet, the new service can allow them access to the relevant Client Portal for more info about that report.

We are generating public and private QR codes, for both projects and sites. Public QR codes are likely to be used most often and they have a passcode built in which would enable the user to see the data as per the report without the need to enter a login. In other words, the same info as the report. Private codes are generated without the passcode and so need a login for them to work.

New tags can be added to your report templates to show the appropriate Project QR code on, for example, the front cover.

Site QR codes might be used within a physical site – for example on visitor sign-in books at reception, or on labels on the walls. These Site QR codes would be available for the emergency services or a contractor to scan to get more info about asbestos at the site. Again, there are public and private versions.

The QR codes are generated and saved within the project document folder and the site document folder as PNG images. They are generated when the project document folder or the site document folder is opened, or when a report is produced if they have not already been generated. This screen shows an example of the files generated in the project document folder.
Records are kept, and stored independently, of all requests for register or report data making it possible to determine whether a site register was accessed. Please contact Support if you are interested in using the QR code service.

2. Survey data can now be shared between linked Alpha Tracker systems enabling you to send completed surveys to another Alpha Tracker where the data can be stored and reported as if it had been created on the system. You can see which systems you are linked to by displaying the Setup/System/Linked Systems screen. When you have completed a survey and produced and finalised the report, you can choose to send both the report and all the supporting survey data to a linked Alpha Tracker system. All the data is sent to a holding server, from where it can be requested by the receiving party. To send the data, from the Choose Task menu on the report select “Send Survey to another Alpha Tracker” and complete the Setup Transfer screen.
Select the Alpha Tracker system to which you want to send the survey and click each of the Process Transfer buttons in turn to send the data. You can also write a message, if required, to the recipient of the survey.

If you are receiving survey data from a linked Alpha Tracker system, then you need first to set up a project and survey in your Alpha Tracker, into which to transfer the data. You can then select the project that you want to receive. In the new project, from the Choose Task menu, select “Receive Data from another Alpha Tracker”.

![New Transfer dialog box](image)
Select the sending system and the project that you want to receive into your project.

Click each of the **Process Transfer** buttons in turn to receive the data. Once the transfer is complete, you can view and check the data and print the report as you wish.

3. Postcode lookup is now integrated into Alpha Tracker, meaning that when you are entering a new client, site or project you can look up the address from just the postcode. You simply type in the postcode and then click the **Lookup Address** button and the address is entered - all you need to do is to select or type in the first line of the address. This is an extra-charge service that is controlled by the Post Office. You buy bundles of postcode lookups from the Post Office and get an account code and password from them that you need to enter into Alpha Tracker.

Visit the following website to set up your account and buy your bundles of postcode lookups: [http://www.postcodesoftware.net/](http://www.postcodesoftware.net/)
There are three settings that have to be completed in Alpha Tracker to switch on the postcode lookups:
- set “showPostcodeLookup” to “yes” to enable the feature and show the buttons
- set “postcodeLookupAccount” to your account code with the Post Office
- set “postcodeLookupPassword” to your account password for postcode lookup.

4. There is a new feature that lets you duplicate multiple sites from the Site List. This mechanism works in the same way as on Quotations and Projects. Simply tick the box alongside the site(s) you want to duplicate and then click the **Duplicate Site(s)** button at the bottom of the Site List. You can also duplicate from a particular site record - open up the site details and then click the **Duplicate Site** button at the bottom of the screen.

5. You can now control the currency symbol displayed on your Alpha Tracker screens by using the “Standard Currency Symbol” setting.

6. When the Material Code is changed on the Survey Items screen, a prompt is now displayed asking if you would like to update the Material Code automatically on all related cross reference items (ie items with an approach of “X”).
7. The Site Contact on the Project looks up from the address book only where the Contact has a Site ID and is associated with the current Client. An auto suggest list is displayed.

8. There is a new invoice template "C" available that includes the payment terms at the bottom of the report. New settings control the invoice footer message and payment terms.

9. Improvements have been made to the Survey Details screen, including a new dedicated button to View Survey Data.

10. Changes have been made to the WorkTime SQL function and a new setting has been created for “DefaultWorkingHours” to set the standard number of hours in a working day. This is defaulted to 8. The new setting is used in the WorkTime function which calculates the appointment values.
11. The Site Reference/UPRN field on the Project screen has been extended to allow for longer UPRNs.

12. Settings have been added to control the display of all the buttons and frames within the Main Menu on the Client Portal. This means that you can control which menu items are displayed via a Client Portal login.

13. There is a new report available for the "Photo Asbestos Register" on the Client Portal. This produces a PDF of the current Photo Register, taking account of any filters or record order that you may have set.

14. Searching and alphabet buttons have been added to the "Alerts" screen in Alpha Tracker to make searching of alerts issued by the system easier.

15. The accounts software reference on invoices can now be hidden and the size of the "Invoice Number" field on the template PDF has been increased.

16. You can now assign different Account Numbers to different offices and display the appropriate Account Number on invoices. Use the Setup|General|Offices option to specify the Account Number for each office. If you do not set the Account Number for an office then the value stored against the "AccountNumber" setting is used.

17. You can control the text label of the "Report Produced" milestone by using the new setting “Name: Report Produced”.

18. There is a new feature to link Extra Info fields to the standard project milestones. When a milestone is updated, if Extra Info fields are linked to this milestone, the Extra Info window will pop up. It will be filtered to show only the Extra Info fields for the current project that are linked to the updated milestone.
19. "Dept Code" has been added onto Project Types and the Sage 50 export view now contains the new Dept Code field from the Project Type.

20. The project number is now included with the Site Name in the Sage 50 export.

21. If an invoice does not have a nominal code, the Sage 50 export now pulls through the nominal code from the Project Type.

22. In further changes to the Sage 50 export and the Sage 50 Detailed export the Invoice number now works with up to 6 digits and the account number (instead of the client ID) can be taken from the Client record if it exists.

23. The link to project documents that can be displayed in your appointments now has two available styles. The setting “DocumentLinkInAppointmentStyle” controls which style is selected, either the “Documents” hyperlink (setting 1) or the full path (setting 2). Note that the “URL for Doc Download” setting must also be completed.

24. If a Project has a Project Type that has the Category "Asbestos Survey" you can now go to the Survey Details screen straight from the Project List by clicking on the underlined Project Type.
25. There is a new feature that allows you to mark Client Contacts as default report recipients. To do this, you use the Client Address Book tab on the Client Details.

26. Improvements have been made to the invoice audit trail, with better timestamping and logging to the normal access log file.
27. There is a new photo gallery previewer on the Project List which gives you a quick view of all the photos in the project.

28. You can now use subfolders in the Company Documents screen (Resources | Company Documents). Upload a document to a specific subfolder by selecting the subfolder first, then using the Choose File button to select the file to upload.
29. There is a new field on the Quotations screen which allows you to record the reason for winning or losing a quotation. This new field is only displayed once you have marked the Quotation as either Won or Lost. The field auto suggests a list based on the result of the quotation.

30. The "Read from Tracker Mobile" button is no longer displayed on the Projects screen as its function has been automated. When the Other Info button is clicked the Extra Info fields from Tracker Mobile are automatically read. This also happens when the draft and final reports are produced.

31. You can now generate standard documents and not automatically save copies of them in the project folder. This may be useful if you want to see or use a draft copy of a document but know that it will not yet be complete. Request the document in the usual way from the Word/Excel Generate Document button and tick the Email Only? tickbox. Once the document is generated it will be emailed to you, but no copy will be saved in the project folder.
32. We are now generating additional counters for certificates. These counters increment each time a Generate Bulk Certificate button is clicked allowing. They may be used on your certificate templates if you wish to show a unique certificate reference number.

33. A message will now be displayed if you attempt to complete the Project Invoiced or Project Closed milestone when an earlier milestone (either the Report Produced or Project Invoiced milestone) is blank. A similar message is displayed if you try to complete a custom milestone when earlier milestones are blank. The message does not stop you from completing the milestone, it just asks you to check.

Fixes

1. The Bulk Samples screen now shows multiple analysts/dates correctly.
2. A problem with opening the Fibre Analysis screen from the "Choose Task" option on the Survey Details screen has been fixed by changing how the grid is opened.
3. There is a new trigger to update the Modified timestamp field on Fibre Analysis.
4. A fix has been applied to the Survey Items screen to prevent a problem with the saving of records.
5. A problem with the "Re-use" options not appearing when the “Re-Use Survey Data” option is selected on the Survey Details screen has been fixed.
6. A minor change has been made to the Fibre Analysis view. The Surveyor’s Assessment is a lookup field that now checks to see if there is a Surveyor Assesment (MaterialCode) on the Fibre Analysis table. If there is not, the Material Description is looked up from the corresponding Survey Item. If there is no Material Description, it tries to use the Material Code to look it up and if that fails uses the Material Code without a lookup.
7. An issue when sending back "sampled" items to the handset has been resolved. The Alphabet search field was changed to be the same as the Register view so that cross referenced, previously sampled as well as sampled items are sent back.
8. Speed issues on the Client Portal when using the Site ID in calculated fields to do counts have been fixed.
9. Only users in the "Client Admin" group are allowed to edit the client contact details on the Client Portal.
10. There are various lab changes to fix comments, emails and colour coding:
   - The Standard Reported Comments field is a dropdown field and the Reported Comments field is a free text field.
   - Problems with emails not sending for "disputed" fibre analysis records has been fixed.
   - The email for “disputed” fibre analysis is now only sent if the sample has a positive identification. If it is negative, the email is not sent.
   - Colour coding has been added on the "Select Samples" screen when the sample is marked as being over the limit, as on other Fibre Analysis screens.
11. The Site Re-inspection function does not now include "removed" items when generating XMLs.
12. A problem with the deletion of invoices has been resolved.
13. A bug in the item text on invoices when the number of invoice lines is changed to one has been fixed.
14. The Net, VAT and Total fields are no longer over-keyable on an invoice.
15. An issue with the scoping button not working on new projects has been fixed.
16. A problem with the Repeat Appointment function on the Calendar has been resolved.
17. Users are now prevented from typing into the Project Type box on Quotations so that any new Projects created from the Quotation can be created with a valid Project Type.
18. Exporting XMLs will now show the correct number to export rather than a grid count.
19. Improvements have been made to the upload of the client logo for the Client Portal to prevent blurred images.
20. Any new Quotations created by duplicating a Quotation will now have a status of Open.
21. A problem with entering amounts into ad hoc invoices has been fixed.
22. An issue with documents having an incorrect requested time of midnight when two documents are produced for the same project from different templates one straight after the other has been fixed. This has had an effect on the displayed document production times as documents were not actually taking as long to produce as was indicated (because the start time was being incorrectly set on some as 00:00).