February/March 2016 Alpha Tracker Release Notes

New Features / Changes (SVN1900)

1. Alpha Tracker can now produce an invoice export to Xero. This feature requires setting up in both your Alpha Tracker and in Xero as the export directly updates Xero (ie there is no import process to be done in Xero). Certificate files and Consumer Keys need to be generated and entered into the Alpha Tracker settings. The settings are:
   - showXeroExport - to display the new “Xero Export” menu option and screen
   - xeroTimeDiff - usually set at zero but may be different if you post to a server that is not on UK time
   - xeroSSLKeyPath - into which you enter the (private) key generated using OpenSSL
   - xeroConsumerKey - into which you enter the consumer key from Xero
   - xeroOAuthToken - into which you enter the secret oAuthToken from Xero.

   Each contact in Xero has an ID which you need to link to the contact in Alpha Tracker. There is a new field on the Client Details screen where you can enter this Contact ID. This field is only displayed if the “showXeroExport” setting is set to “yes”.

   ![Client Details Screen](image1.png)

   You can display the Xero Export screen by using the Finance|Export|Xero Export menu options and it shows all non-locked invoices. (Invoices are marked as locked and have an exported flag once you have included them in an export.) There is a tickbox on each invoice which lets you select which invoices to include in the export - tick the box in the column heading to select all invoices.
As with the Sage exports, use the export to Excel button first to check what will be included in your export, fix any errors in the data in Alpha Tracker, then when you are ready click the “Export selected invoice(s)” button. A message is displayed when the export is complete. OK the message and the list refreshes, removing the exported invoices. The invoices will then appear in Xero.

The Project Type nominal code pulls through onto the Xero export if it exists. If not, a repository setting (xeroAccountCode) can specify the default nominal code to be used - this defaults to “200” for Sales.

2. It is now possible to create write-up appointments at the same time as you create an initial appointment for a project. These would be used, for example, to book some report-writing time automatically at the same time as you book an onsite visit. This feature can work in two ways:
   - on the Diary Appointments screen from the Project only
   - also on the Add/Edit Event screen when you create an appointment on the Calendar.

**On the Diary Appointments screen from the Project:**
If you click the “Diary Appointments” button on the Financials/Planning tab of the Projects screen, you can now mark any appointments that you make with the status flags (Visit Confirmed, Cannot Move and Tentative) or mark them as write-up appointments:
If you tick the “Write-up” tickbox then the write-up appointment that is created automatically has a zero value and the description “WRITE UP” is inserted into the Notes field. You can also search on the Diary Appointments screen to help find particular appointments more easily.

On the Add/Edit Event screen on the Calendar:
When you create a new appointment you may see a new check box and date/time fields on the Add/Edit Event screen in which you can enter details for the new write-up appointment. To see these new fields, the setting “showWriteUpTimeOptionOnAppointments” needs to be set to “yes”.

If you create a write-up appointment in this way it will link back to the original appointment with a hyperlink (“Linked Appointment”), enabling you to switch between appointments easily. The write-up appointment that is created automatically has a zero value and the description “WRITE UP” is inserted into the Notes field.
3. There is also another new field on the Add/Edit Event screen. This one allows the entry of the postcode of the previous appointment, which can either be typed in manually or entered automatically by double-clicking in the field. Once entered, you can plot the route between offices and also from the previous to this appointment.
4. Also on the Add/Edit Event screen, you will now find that the “Appointment Aborted” section is only visible when you are editing an appointment, not when you are creating a new one.

5. If you attempt to schedule a project on the Calendar, a warning is displayed if you already have appointments booked in for the selected project:

This warning is not displayed if you are working from the Diary Appointments on the Project as there you can easily see whether other appointments already exist for the project.

6. There is a Projects Dashboard available on the Projects menu (Projects|Projects Dashboard). It gives a general overview of your projects as well as custom colour-coding for turnaround times and calculations to indicate whether a project is overdue.

If the Requested Return Date is earlier than today but the report has not been completed, then the Requested Return Date is highlighted in red. You can set the colours for the Turnaround by using Setup|General|Turnaround and selecting a colour for each Turnaround value.

The columns on the Projects Dashboard screen calculate dates by referring to key milestones as follows:
- Site Completion Date gets the date from the milestone which is linked to the key milestone “Surveyor Last Day On-Site”
- Requested Return gets the date from the milestone which is linked to the key milestone “Project Due Date”
- Bulks Saved checks if the date for the key milestone “Bulk Samples Analysed” is greater than 0, if so then “yes” else “no”
- Plans Produced checks if the date for key milestone “Report QC checked” is greater than 0, if so then “yes” else “no”
- Report Drafted checks if the date for the key milestone “Report QC checked” is greater than 0, if so then “yes” else “no”. 
7. You can now enter secondary occupancy details in Priority Assessments and change the way that the calculations are made to take account of the secondary occupancy. If you want to use this feature then the setting “UseSecondaryOccupancy” needs to be set to “yes”. The secondary occupancy appears below the normal occupancy and has the same options available. It defaults to the same value as the normal occupancy.

8. If you have signed up for data sharing between Alpha Tracker systems, then you will find that Re-inspections are now also included in the data sharing. There are separate options on the Choose Task menu that let you “Send Re-inspection to another Alpha Tracker” and “Receive Re-inspection from another Alpha Tracker”.

The sending party selects the survey that is to be re-inspected by a third party and uses the “Send Re-inspection to another Alpha Tracker” option to send the data, JPGs and report PDFs to a holding server, from where they can be requested by the receiving party.

The receiving party creates a project and survey manually, as if they were going to do the re-inspection. They then use the “Receive Re-inspection from another Alpha Tracker” option to import the data. The survey item records are written and building records created as necessary, and JPGs and report PDFs are unzipped into the project folder.

Whether sending or receiving, the process and the screens are the same as those for sending and receiving survey data.

9. You can control whether or not the Read From Tracker Mobile button is displayed on your Projects screen by changing the setting “showReadFromTrackerMobileButton” to “yes” or “no”. 
If the button is present and it is clicked, then the Extra Info fields are updated. If it is not present, then when reports are produced, additions only are made to the Extra Info (if fields exist they are not updated).

10. Extra columns are displayed on the Lab Project List screen which show you the Due Date of the project, its Turnaround Time and, if it is a Bulk Sample project, also the number of Bulk Samples.

11. Another standard invoice template is available for use, it is template C which gives another possible layout for invoices.

12. When running a management information report you now have two buttons available instead of the Run button. These buttons let you choose how to display the output so that the report can go straight to screen or to Excel.

13. You can now search for project numbers using the quick search on the finance menu. Type the project number in the quick search field and click the magnifying glass or press Enter to display a list of invoices that feature the specified project number.
14. Project folders are now created immediately when the project is created.

15. The setting “Disable register button on report list (portal) - (clientname)” lets you hide the Register feature on the Report List on the Client Portal. This is set to “yes” by default and is client-specific. This prevents the register for the project being displayed, which is useful if you tend to revisit sites and want your clients to look at the site registers.

16. Recommended Actions for NAD items can be hidden from the Client Portal registers by using a new setting: “hideRecommendedActionForNADItems”.

17. On the Fibre Analysis screen the “Reported Comments” field is hidden if the “Standard Reported Comments” field is displayed, and vice versa. The field displayed is determined by the “FibreAnalysis_ShowProductTypicalOf” setting. This enables you to choose between having both a drop-down of pre-entered comments and a free-text field or just a drop-down of pre-entered comments.

18. Extra long sample numbers are now allowed in Alpha Tracker with a new extended limit of 255 characters on the Sample Number field.

19. Analysts’ points from their QC samples can now be added into the system so that they are included in their points totals. There is an option on the Lab menu, “QC Samples”, which allows you to specify how many points are to be added for an analyst and on which date.
These points will then count towards the analyst’s total points for the day. It is anticipated that the usual approach is for analysts to perform their QC sample analysis early in the day, and then to record the number of samples and points by using this new “QC Samples” option. As the analysts continue to carry out their normal analysis and record the fibre analysis details on the system, the running total of their points for the day is displayed and includes points from both QC samples and ‘normal’ analysis:

You can see the breakdown of QC points, analysis points and check points on the Lab Check Result screen, and can also drill down to show the make-up of the samples/points:
As checked points cannot be selected for rechecks, these samples/points will never be available in the selection of recheck analysis. Furthermore, if you add these points at the end of the day - rather than the more usual start of the day - and this causes the analyst’s points to go over the 40 point limit, then no further checks are required as only checked points make up the over-the-limit selection.

If QC samples/points are added retrospectively to the system, ie to a past date, then a warning is displayed and this is logged in the system. You can see the warnings by using the “Lab Warnings” screen and searching on the text “QC”:

20. A button has been added to all Register screens to “Exclude NAG and LAG Items”. This lets you filter the Register to exclude items marked as No Access Gained or Limited Access Gained, which you may find useful if you are creating very targeted Re-inspection projects.
21. If a diary appointments is marked as “Aborted”, and there are no remaining valid appointments for the project, then the project is visible once again in the Projects Not In Diary screen.

22. There is a new setting that allows the auto-saving of the invoice or credit note PDF into the linked project folders. This is the “autoSaveInvoicesInProjectFolder” setting which becomes available once an invoice has been created. When the invoice is saved, the PDF is saved in the project folder.

23. To save time you can set a default for the country on addresses. Whether you create a site from the Site List or from the Projects screen, the default country will be displayed. Use these settings:

24. Invoices can now be clearly differentiated from projects, quotations etc in the numbering system due to a new setting that inserts the letter “I” after the office letter. For example, you might have invoice TI-00234, which is identifiable as an invoice number and is different to project T-00234 and quotation TQ16-0234. The setting is
“UseIPrefixOnInvoices” and it works only with Template A.

25. Two new settings help you to control the text on your invoices. The content of the invoice lines can be specified by using these settings:

<table>
<thead>
<tr>
<th>Setting</th>
<th>Date Created</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>invoteltemLine1</td>
<td>13/03/2018</td>
<td>To carry out &lt;Project_Type&gt; work for &lt;Site Name&gt;</td>
</tr>
<tr>
<td>invoteltemLine2</td>
<td>13/03/2018</td>
<td>Report &lt;Project Number&gt; / &lt;Project Manager_Name&gt;</td>
</tr>
</tbody>
</table>

Contact support@start-software.com if you need help setting the text for your invoice lines.

26. You can now keep tighter control of your “On Hold” projects and set a date on which to review the “On Hold” status. First, you need to tick a new box on the Project Status screen so that you can record a review date when you mark a project as “On Hold” (or any other wording of your choice):

Then set the status on the project to “On Hold” and you will see the new Review Date field, into which you can enter the date on which the project should be reviewed to determine whether it can now go ahead:
Projects marked with a status that has a review date will not appear on the "Projects Not In Diary" list until the review date is reached.

27. When duplicating projects, the new projects created are now displayed on a separate screen so the you can easily identify them.

28. If you are a Superuser and are attempting to amend a locked invoice, then a message is displayed to inform you that the invoice has been locked.

29. It is now possible to restrict the files that are available to be viewed on an appointment to those held within a specified subfolder by using setting “SurveyorCalendarProjectFolder”. You may find this useful if you do not want your surveyors to have access to all project-related documents. Those that you do want them to see should be moved or copied to the specified subfolder. If you also list this subfolder in the “ProjectSubfolders” setting then it will be automatically created for you when the project is created.

30. There is a new button on the Quotation screen that lets you import Other Info from another quotation so that now you can import either the Scoping fields from another quotation or the remainder of the Other Info fields.
31. You can make the Project Manager field on the Projects screen a mandatory field by using a new setting: “projectManagerRequiredOnNewProjects”.

Fixes

1. The Report List on the Client Portal now correctly shows the count of the plans available.
2. In the Sage export, the office letter is now used as the prefix to the invoice reference rather than “T”.
3. A problem with the Address Lookup button has been fixed.
4. The code that checked for a PO number when raising a credit note has been removed.
5. The problem when trying to create more than one new project from the Client screen has been fixed.
6. Invoices are no longer raised with a zero value from a project, when a value exists, as the currency symbol is automatically removed.
7. A problem with saving bulk sample records has been fixed.
8. Invoice pdfs have been changed to allow for longer invoice/issuing office fields.
9. Seconds are no longer displayed on the date and time fields when creating or amending a diary appointment from the Projects screen.
10. A problem has been fixed when using “Read From Tracker Mobile” so that it can now handle single quotes when inserting or checking records.
11. Colour coding in the Site List and Compliance Summary on the Client Portal has been fixed. The conditional formatting on the Last Re-inspection Date was changed.
12. When drilling into the “total points” on the Lab Check screen, the filter now shows all analysis done by the analyst on the date and all the checks done by the analyst on the same date.
13. The “wait” dialog no longer remains on the screen when using the “Re-use Survey Data” option.
14. A function has been added to the “Re-use Survey Data” option to stop invalid characters in the identification field going through to the XML.
15. Problems with the Sample Description and RI Liquid dropdown fields on Fibre Analysis have been fixed.