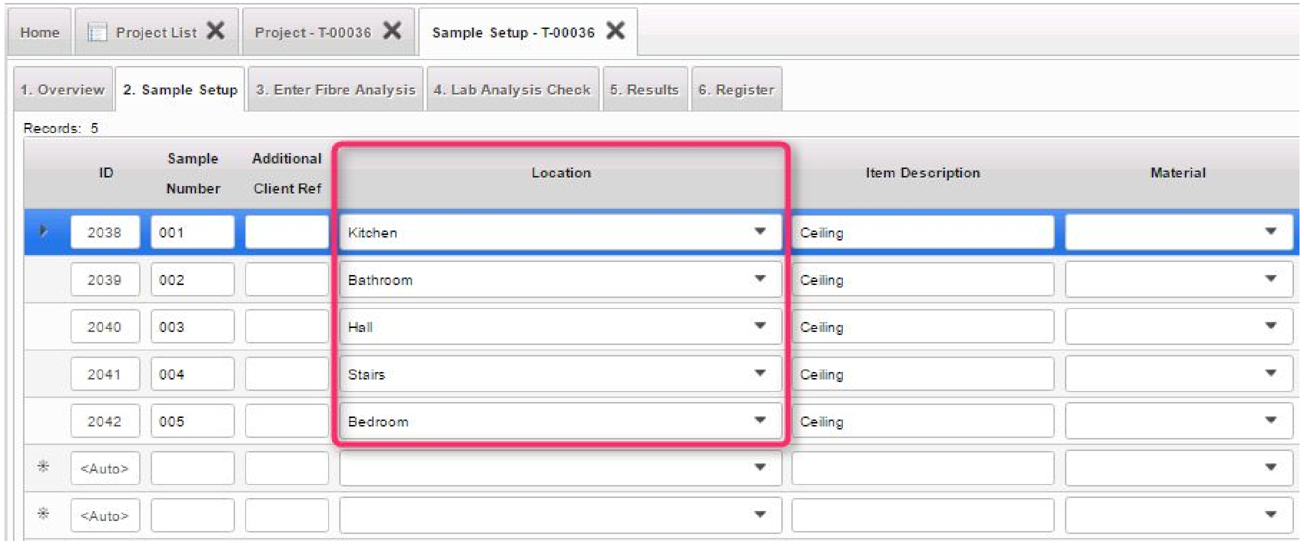
Summer 2016/Release 21 Alpha Tracker Release Notes

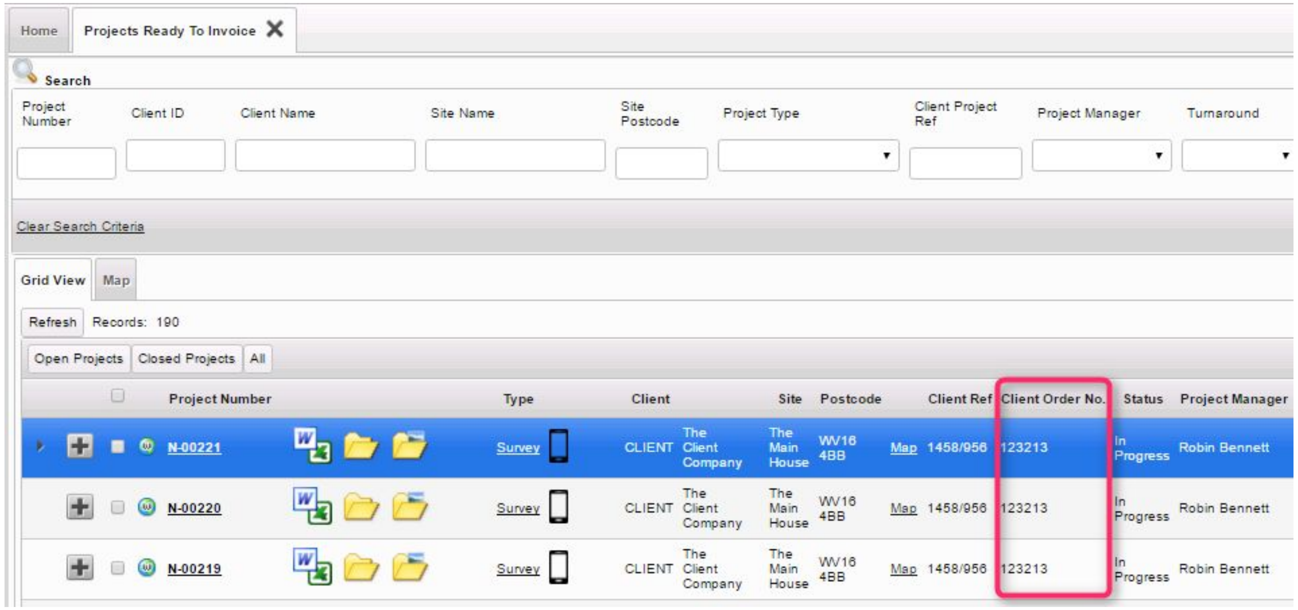
New Features / Changes (SVN2074)

1. A new setting has been added to allow users to turn on or off the auto population of the sample location field when entering bulk sample records. If the setting is on, the location from the previous sample is automatically entered. The setting is "AutoPopulateSampleLocation".



2. If the analysis on a sample changes from NAD to a positive result, as might happen during the checking process, then the original material code and description are now re-entered into the survey item record.

3. The Projects Ready To Invoice screen now includes the PO / Client Order Number.



4. Aborted appointments are now displayed in the Projects Ready To Invoice screen and the Projects Not In Diary screen.

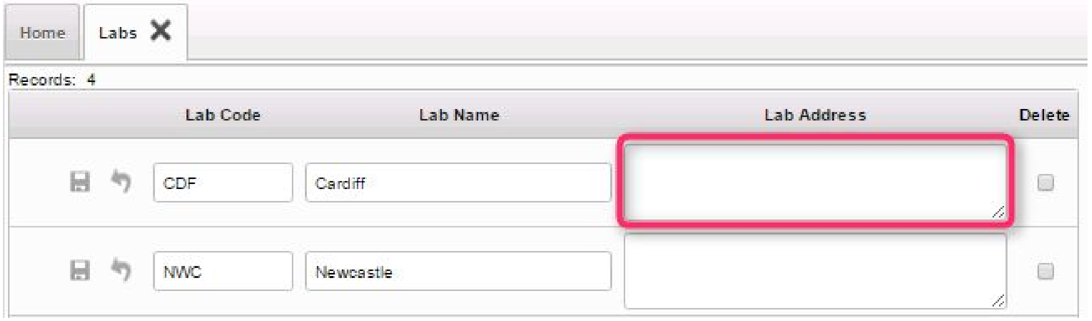
5. When duplicating projects, you can now select projects from multiple pages at the same time.

6. When generating XMLs for Re-Inspections, the XMLs will now include the "ExternalStatus" tag which will output the external status.

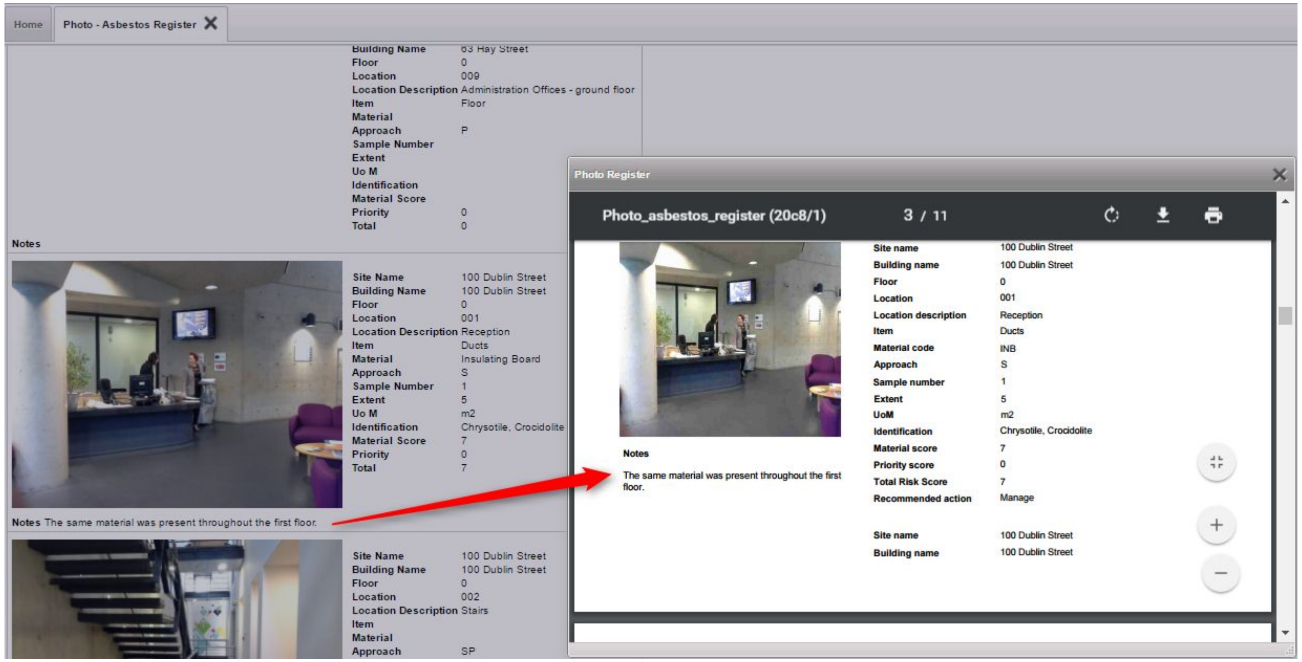
7. It is now possible to send an email to the Project Manager when they have been assigned a project. Three new settings control this function, one for the email body (“emailToPM_Template_Body”), one for the email subject (“emailToPM_Template_Subject”) and one to turn the setting on/off (“sendAlertEmailToPMWhenRaisedOrAllocated”).

8. There is a new invoice template available, which is Standard Invoice Template D, with different information displayed at the foot of the page.

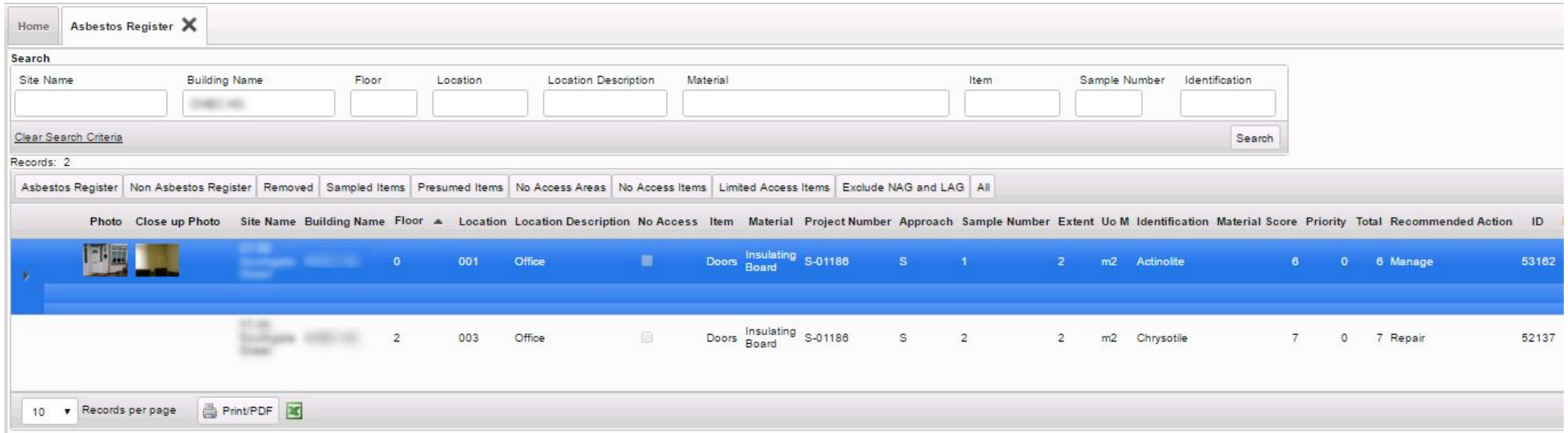
9. You can enter an address for your different labs now in the Setup details and use the address wherever required, for example on Air Monitoring certificates.



10. A change to the Photo Register PDF/Print option on the Client Portal now means that the notes are displayed on the PDF/Print.



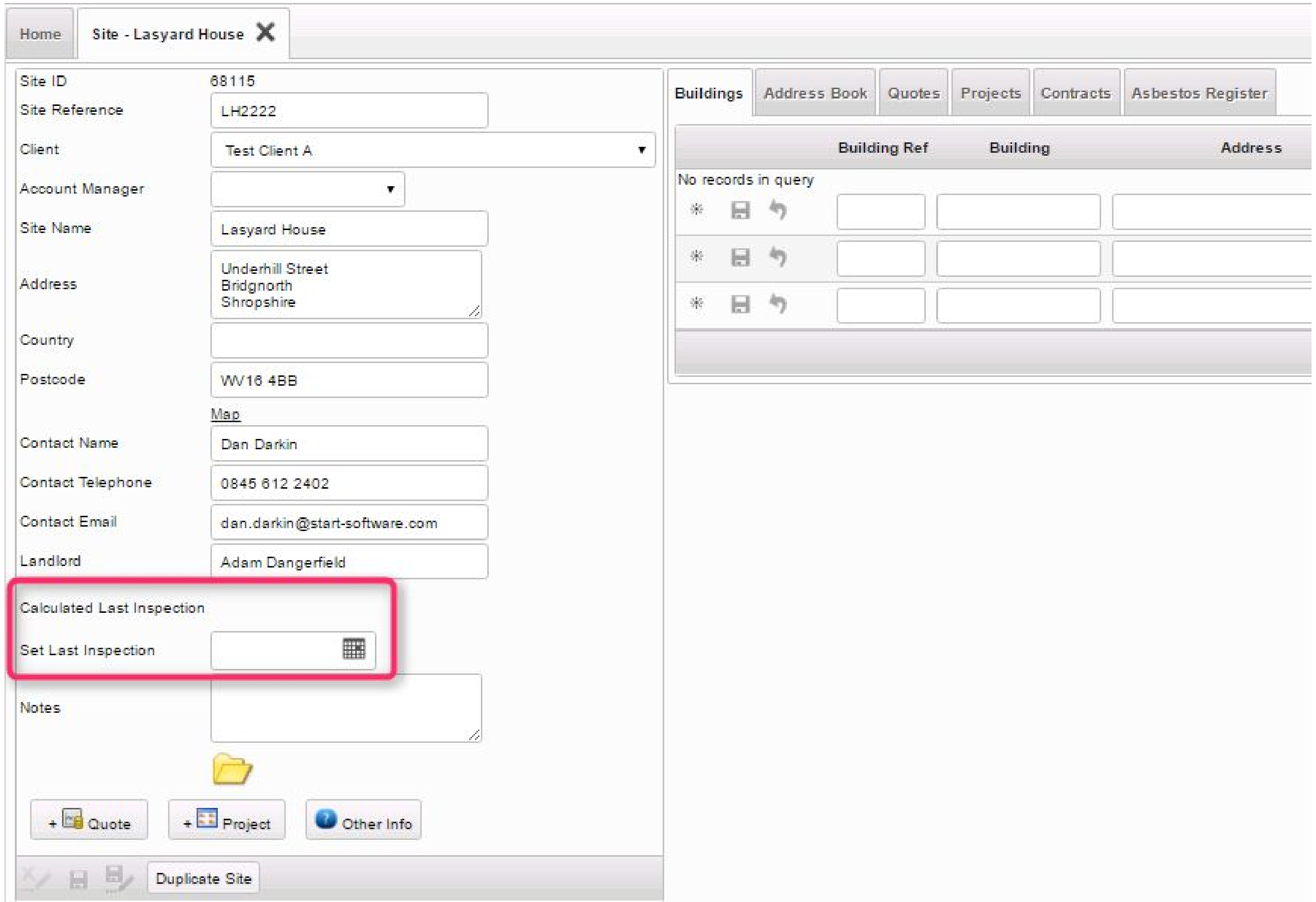
11. Close-up photos are now visible on the Client Portal in the Asbestos Registers, for example:



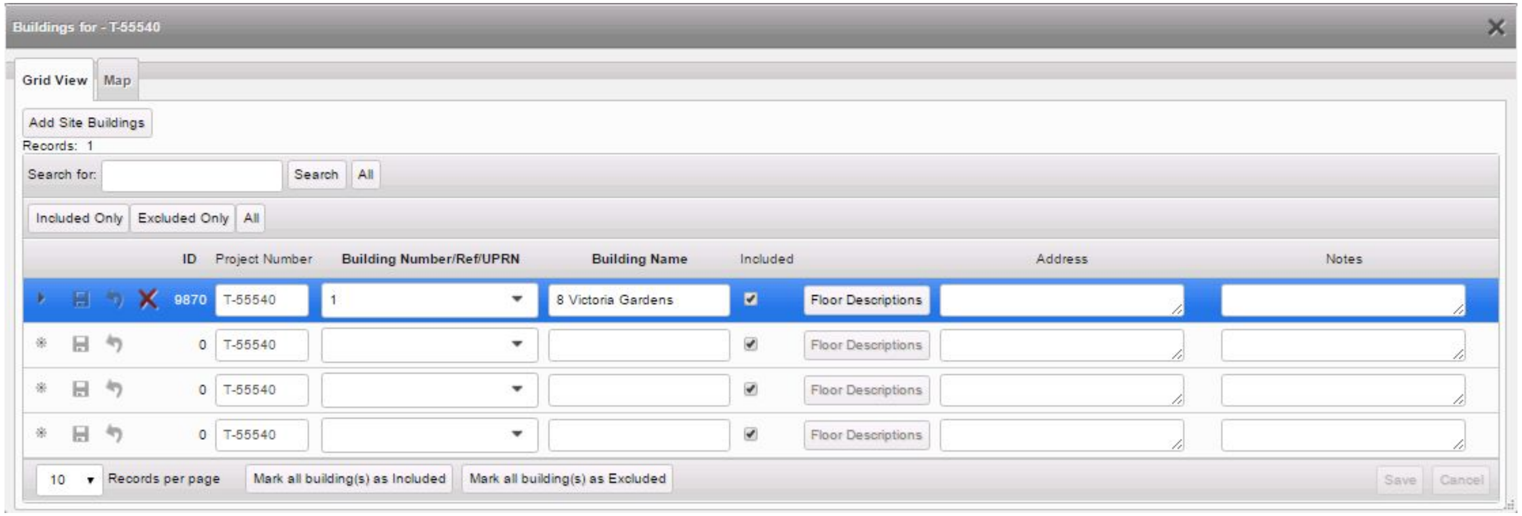
12. Changes have been made to the Site List and Compliance Summary grid on the Client Portal. There are now additional dates displayed so that you can see:
- **Last Activity** – the date of the most recent report at the site (Survey or Re-inspection)
- **Last Inspection** – the date of the last inspection at a site excluding any surveys marked with a new “exclude” flag (eg to exclude Refurbishments)
- **Last Survey issued** – the date of issue of the most recent Survey report
- **Last Survey Site Date** – the latest date when surveyors were onsite for a Survey
- **Last Re-inspection Issued** – the date of issue of the most recent Re-inspection report
- **Last Re-inspection Site Date** – the latest date when surveyors were onsite for a Re-inspection.

Hover over the column headings on the Site List and Compliance Summary grid to see a description of each date.

13. It is also possible to override the last inspection date from the Site Details screen in Alpha Tracker. This gives you the flexibility to use the system calculated last inspection date or to set your own date for a site and for this to display on the Client Portal.



14. Some additions have been made to the Buildings screen to provide it with a Quick Search field as well as buttons to filter for "Included Only", "Excluded Only" and "All".

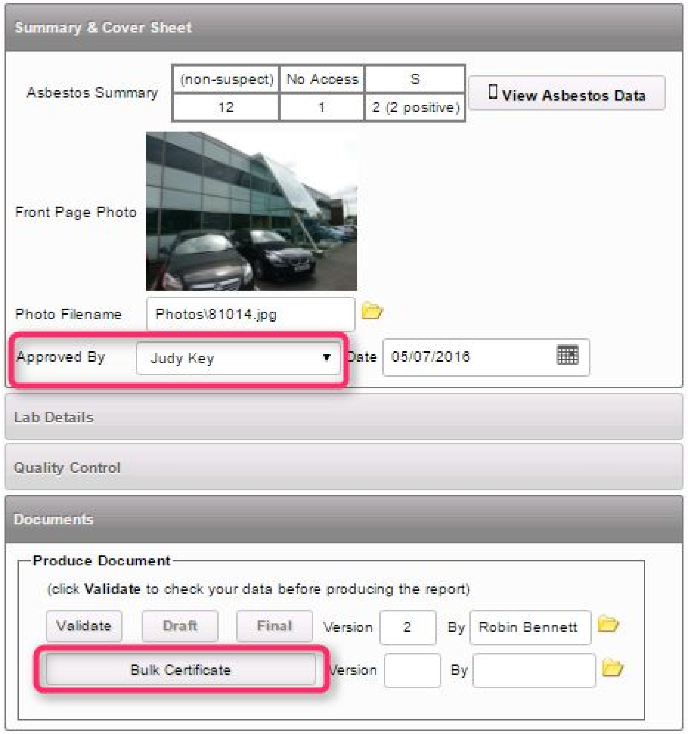


15. Two new fields have been added to the Materials screen which allow you to separate your material codes into those used in the Lab and those that you want to be available to surveyors in Tracker Mobile. Material codes can be in either group or both groups.
- If "Show in lab" is selected, then the material code is available for selection in the Fibre Analysis screen.
- If "Show on mobile" is selected, then the material code appears in the surveyors' list on Tracker Mobile.
- If both "Show in lab" and "Show on mobile" are selected then the material code is available on both the Fibre Analysis screen and Tracker Mobile.

16. There is a new Training Module available in Alpha Tracker, subject to a licence key being entered. If the module is enabled, a button is displayed on the Projects List against any projects with a Project Category of “Training”. Multiple training courses can be recorded against each project and you can display/enter the attendees of a course, with milestone dates such as “Paid”, “Attended” etc. If an expiry date is present, then colour coding indicates whether the training is overdue (red), expires within 6 months (orange), or is OK (green).
    There is also a “Training” section in the Client Portal, subject to a licence key being entered.

17. When transferring data between Alpha Trackers, the receive transfers screen now only shows projects in the dropdown search which have been completed. Also, the transfer of PDFs is limited to items in the "main" project folder, so if there are any PDFs that you do not want included in a transfer, you can place them in a sub folder.

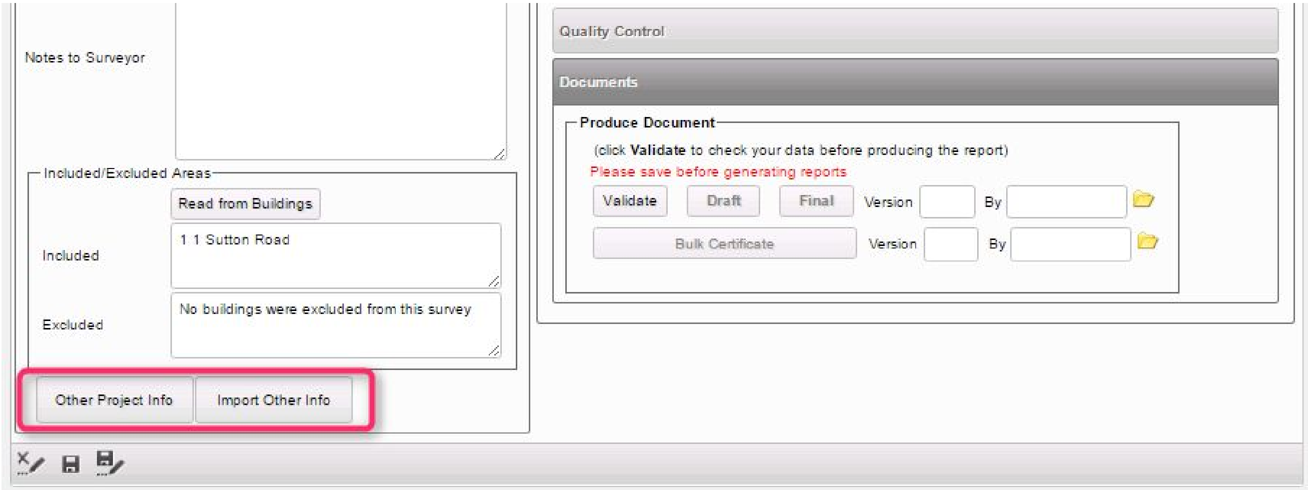
18. A new setting “approvedByRequiredForBulkCert” allows you to specify that the Approved By field must be completed before a Bulk Certificate can be generated.



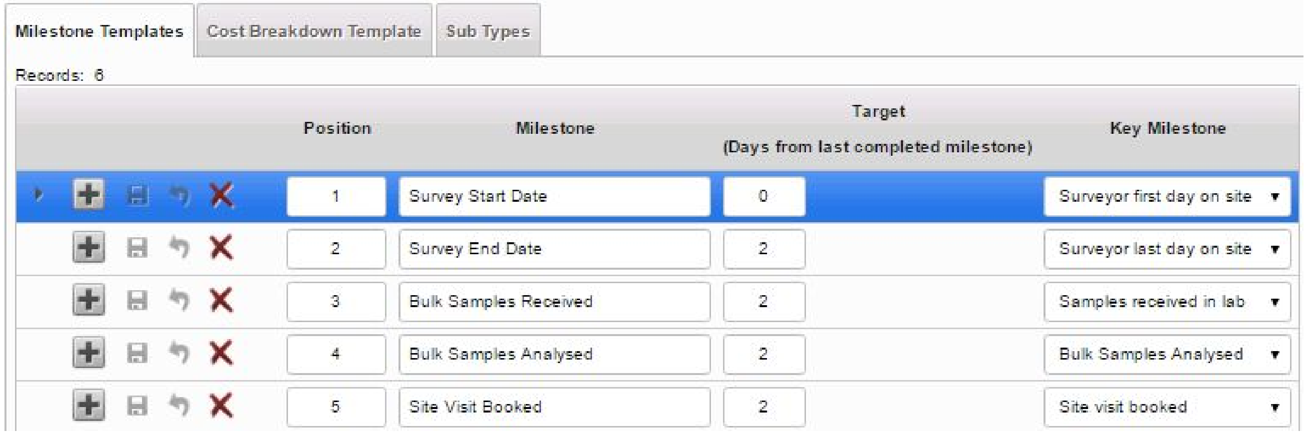
19. You can now specify that only certain clients can see individual reports (data extracts) on the Client Portal. This is set by entering a comma delimited list of client IDs using the "Available To" field on the reports screen (*Setup|Import/Export|Reports*).

20. In Lab Warnings, a change has been made to update the points and overlimit flag for all fibre analysis records, not just records which are over the 40 points limit. Also fibre analysis records are only updated with points if the current points field is null or 0.

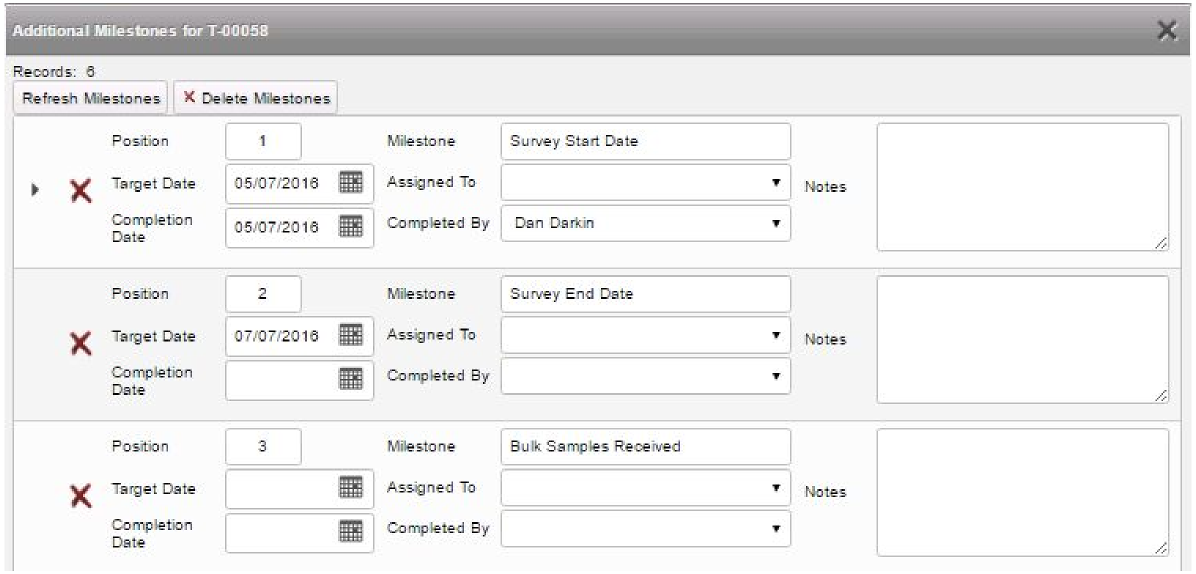
21. You can access the "Other Info" fields on a project from the Survey Details screen now, as well as from the Project screen. The "Import Other Info" button is also available.



22. A new setting, "CalcDynamicMilestoneTargets", enables the dynamic calculation of target dates for you milestones. If this setting is set to "yes", then each target date is calculated from the previous completed milestone. For example, if you have set your milestones like this:

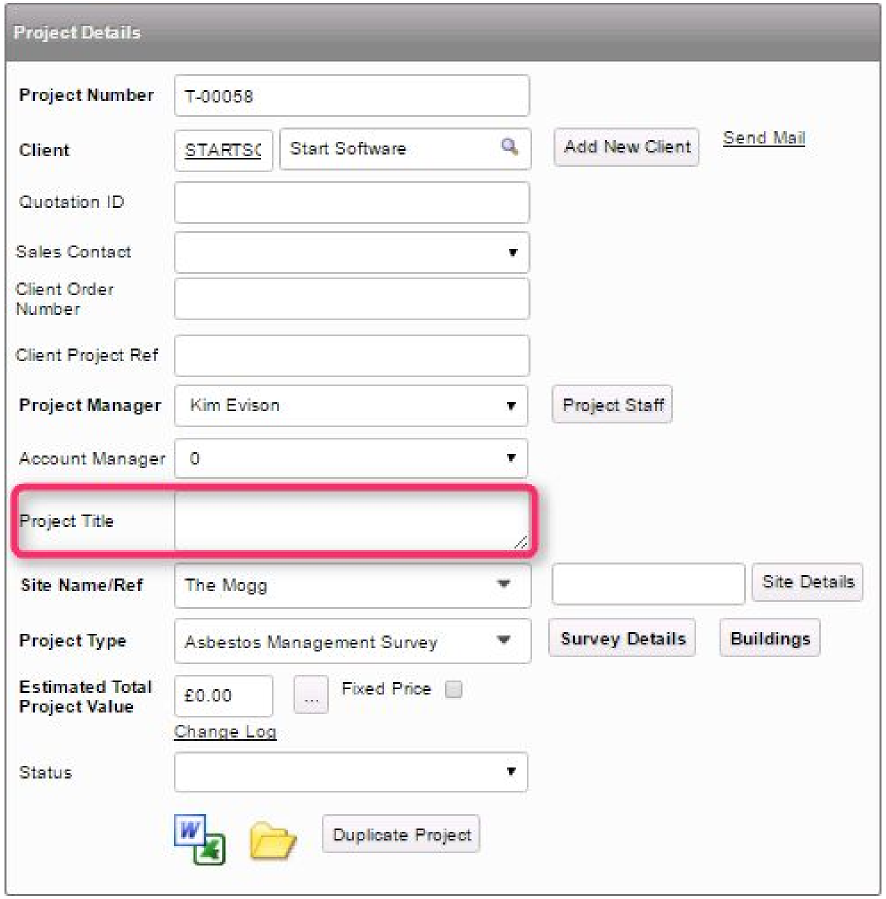


Then once the Completion Date is entered against, say, the Survey Start Date milestone, then the Target Date for the next milestone (here, Survey End Date) is automatically calculated and displayed.



23. A new feature is available, subject to the entry of a licence key, to import external invoice details. The details can be imported from spreadsheets, header records and line details separately, and invoices then produced from Alpha Tracker.

24. An additional field can be displayed on the Projects screen for the title of a project - the Project Title field. To show this field you will need to set the "showProjectTitle" setting to "yes".



25. A range of new "Name: ..." settings have been added to the System Repository to enable the renaming of field labels on Survey Items. This will allow our Australian and New Zealand customers, for example, to use terms that are specific to their asbestos management processes, eg bonded/friable instead of surface treatment.

Fixes

Approximately 30 bug fixes are also included in this release.