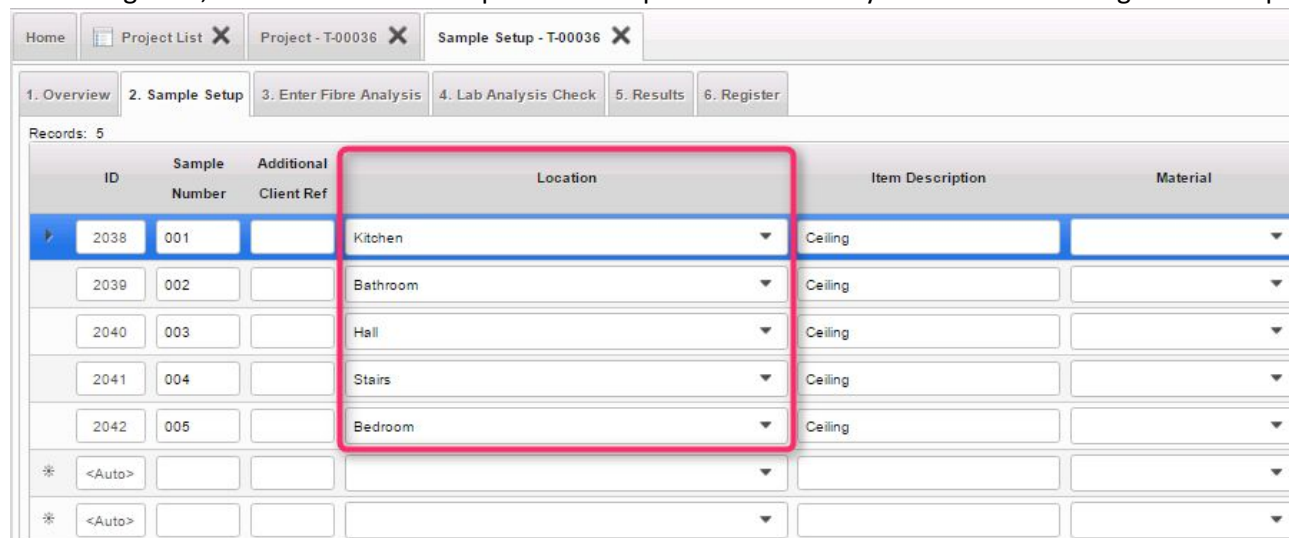


Summer 2016/Release 21 Alpha Tracker Release Notes

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".



The screenshot shows the 'Sample Setup' screen in the Alpha Tracker software. The interface includes a breadcrumb trail at the top: Home > Project List > Project - T-00036 > Sample Setup - T-00036. Below this is a navigation bar with tabs for '1. Overview', '2. Sample Setup', '3. Enter Fibre Analysis', '4. Lab Analysis Check', '5. Results', and '6. Register'. The main area displays a table of records with the following columns: ID, Sample Number, Additional Client Ref, Location, Item Description, and Material. The table contains five records, with the first record (ID 2038, Sample Number 001, Location Kitchen) highlighted in blue. A red box highlights the 'Location' column for all records, showing that the location is auto-populated from the previous record. The last two rows are marked with an asterisk and '<Auto>' in the ID and Sample Number columns.

ID	Sample Number	Additional Client Ref	Location	Item Description	Material
2038	001		Kitchen	Ceiling	
2039	002		Bathroom	Ceiling	
2040	003		Hall	Ceiling	
2041	004		Stairs	Ceiling	
2042	005		Bedroom	Ceiling	
* <Auto>					
* <Auto>					

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.

Project Number	Type	Client	Site	Postcode	Client Ref	Client Order No.	Status	Project Manager
N-00221	Survey	CLIENT The Client Company	The Main House	WV16 4BB	Map 1458/956	123213	In Progress	Robin Bennett
N-00220	Survey	CLIENT The Client Company	The Main House	WV16 4BB	Map 1458/956	123213	In Progress	Robin Bennett
N-00219	Survey	CLIENT The Client Company	The Main House	WV16 4BB	Map 1458/956	123213	In Progress	Robin Bennett

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.

Home Labs X

Records: 4

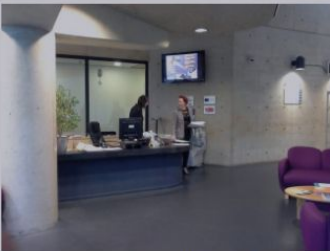
Lab Code	Lab Name	Lab Address	Delete
CDF	Cardiff		
NWC	Newcastle		

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.


Home Photo - Asbestos Register X

Building Name 03 Hay Street
 Floor 0
 Location 009
 Location Description Administration Offices - ground floor
 Item Floor
 Material
 Approach P
 Sample Number
 Extent
 Uo M
 Identification
 Material Score
 Priority 0
 Total 0

Notes




Notes The same material was present throughout the first floor.



Site Name 100 Dublin Street
 Building Name 100 Dublin Street
 Floor 0
 Location 001
 Location Description Reception
 Item Ducts
 Material Insulating Board
 Approach S
 Sample Number 1
 Extent 5
 Uo M m2
 Identification Chrysotile, Crocidolite
 Material Score 7
 Priority 0
 Total 7

Photo Register

Photo_asbestos_register (20c8/1) 3 / 11



Notes The same material was present throughout the first floor.

Site name	100 Dublin Street
Building name	100 Dublin Street
Floor	0
Location	001
Location description	Reception
Item	Ducts
Material code	INB
Approach	S
Sample number	1
Extent	5
UoM	m2
Identification	Chrysotile, Crocidolite
Material score	7
Priority score	0
Total Risk Score	7
Recommended action	Manage

Site name	100 Dublin Street
Building name	100 Dublin Street

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

The screenshot shows the 'Asbestos Register' interface. At the top, there is a search bar with fields for Site Name, Building Name, Floor, Location, Location Description, Material, Item, Sample Number, and Identification. Below the search bar, there are tabs for different record types: Asbestos Register, Non Asbestos Register, Removed, Sampled Items, Presumed Items, No Access Areas, No Access Items, Limited Access Items, Exclude NAG and LAG, and All. The main table displays two records with columns for Photo, Close up Photo, Site Name, Building Name, Floor, Location, Location Description, No Access, Item, Material, Project Number, Approach, Sample Number, Extent, Uo M, Identification, Material Score, Priority, Total, Recommended Action, and ID. The first record has a close-up photo and shows details for an office on floor 0, location 001, with doors made of insulating board (S-01186). The second record shows details for an office on floor 2, location 003, with doors made of insulating board (S-01186).

Photo	Close up Photo	Site Name	Building Name	Floor	Location	Location Description	No Access	Item	Material	Project Number	Approach	Sample Number	Extent	Uo M	Identification	Material Score	Priority	Total	Recommended Action	ID
				0	001	Office	<input type="checkbox"/>	Doors	Insulating Board	S-01186	S	1	2	m2	Actinolite	6	0	6	Manage	53162
				2	003	Office	<input type="checkbox"/>	Doors	Insulating Board	S-01186	S	2	2	m2	Chrysotile	7	0	7	Repair	52137

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.

The screenshot shows the 'Site - Lasyard House' details page. The left sidebar contains the following fields:

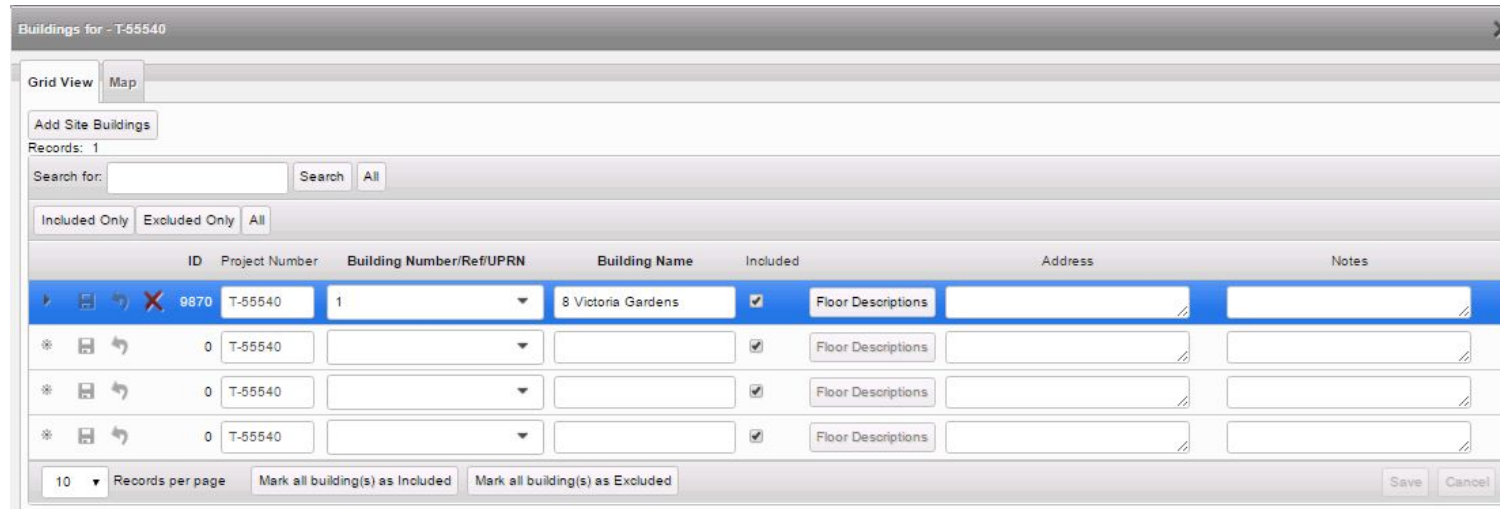
- Site ID: 68115
- Site Reference: LH2222
- Client: Test Client A
- Account Manager: [Dropdown]
- Site Name: Lasyard House
- Address: Underhill Street, Bridgnorth, Shropshire
- Country: [Field]
- Postcode: WV16 4BB
- Contact Name: Dan Darkin
- Contact Telephone: 0845 612 2402
- Contact Email: dan.darkin@start-software.com
- Landlord: Adam Dangerfield
- Calculated Last Inspection: [Field]
- Set Last Inspection: [Field] (highlighted with a red box)
- Notes: [Text Area]

The right sidebar contains a 'Buildings' section with a table:

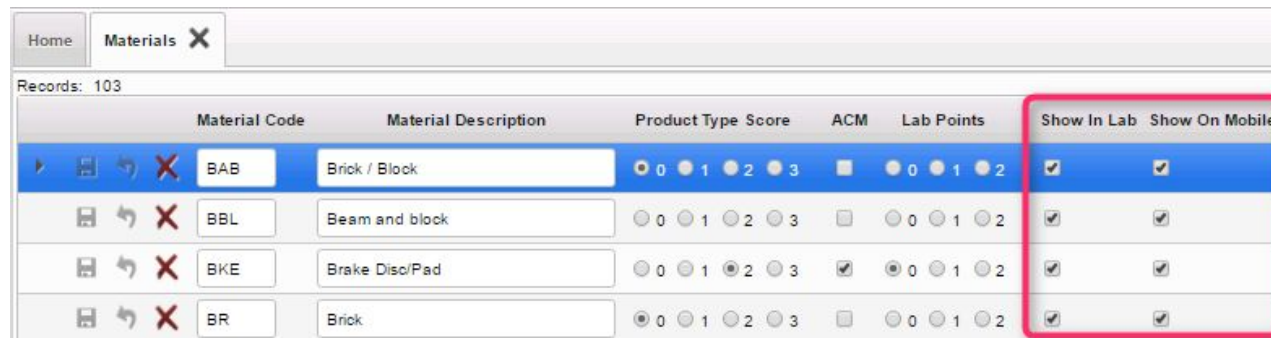
Building Ref	Building	Address
No records in query		
* [Icon]	[Field]	[Field]
* [Icon]	[Field]	[Field]
* [Icon]	[Field]	[Field]

At the bottom of the page, there are buttons for '+ Quote', '+ Project', 'Other Info', and 'Duplicate Site'.

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.

Summary & Cover Sheet

Asbestos Summary

(non-suspect)	No Access	S
12	1	2 (2 positive)

View Asbestos Data

Front Page Photo




Photo Filename Photos\81014.jpg

Approved By Judy Key Date 05/07/2016

Lab Details

Quality Control

Documents

Produce Document

(click Validate to check your data before producing the report)

Validate Draft Final Version 2 By Robin Bennett

Bulk Certificate Version By

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.

The screenshot displays the Alpha Tracker software interface. On the left side, there is a 'Notes to Surveyor' field. Below it, the 'Included/Excluded Areas' section contains a 'Read from Buildings' button, an 'Included' list with '1 1 Sutton Road', and an 'Excluded' list with 'No buildings were excluded from this survey'. At the bottom of this section, two buttons are highlighted with a red box: 'Other Project Info' and 'Import Other Info'. On the right side, the 'Quality Control' section is visible, followed by a 'Documents' section. The 'Produce Document' area includes a warning '(click Validate to check your data before producing the report)' and a red instruction 'Please save before generating reports'. Below this are buttons for 'Validate', 'Draft', and 'Final', each followed by 'Version' and 'By' input fields and a folder icon. A 'Bulk Certificate' button is also present.

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:

Milestone Templates		Cost Breakdown Template	Sub Types	
Records: 6				
	Position	Milestone	Target (Days from last completed milestone)	Key Milestone
▶ + ⏪ ⏩ ✖	1	Survey Start Date	0	Surveyor first day on site ▼
+ ⏪ ⏩ ✖	2	Survey End Date	2	Surveyor last day on site ▼
+ ⏪ ⏩ ✖	3	Bulk Samples Received	2	Samples received in lab ▼
+ ⏪ ⏩ ✖	4	Bulk Samples Analysed	2	Bulk Samples Analysed ▼
+ ⏪ ⏩ ✖	5	Site Visit Booked	2	Site visit booked ▼

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.

Additional Milestones for T-0058					
Records: 6					
Refresh Milestones ✖ Delete Milestones					
▶ ✖	Position	1	Milestone	Survey Start Date	Notes
	Target Date	05/07/2016	Assigned To		
	Completion Date	05/07/2016	Completed By	Dan Darkin	
✖	Position	2	Milestone	Survey End Date	Notes
	Target Date	07/07/2016	Assigned To		
	Completion Date		Completed By		
✖	Position	3	Milestone	Bulk Samples Received	Notes
	Target Date		Assigned To		
	Completion Date		Completed By		

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”.

The screenshot shows the 'Project Details' form with the following fields and controls:

- Project Number:** T-00058
- Client:** STARTS (Start Software) with 'Add New Client' and 'Send Mail' buttons.
- Quotation ID:** (empty)
- Sales Contact:** (dropdown)
- Client Order Number:** (empty)
- Client Project Ref:** (empty)
- Project Manager:** Kim Evison with 'Project Staff' button.
- Account Manager:** 0
- Project Title:** (empty, highlighted with a red box)
- Site Name/Ref:** The Mogg with 'Site Details' button.
- Project Type:** Asbestos Management Survey with 'Survey Details' and 'Buildings' buttons.
- Estimated Total Project Value:** £0.00 with 'Fixed Price' checkbox and 'Change Log' link.
- Status:** (dropdown)
- Bottom Bar:** Includes icons for Word, Excel, and a folder, along with a 'Duplicate Project' button.

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.