

April 2016 Alpha Tracker Release Notes

New Features / Changes (SVN2000)

1. There is a new Alpha Tracker import process for sites, surveys, projects and diary appointments. If records are not imported then messages are displayed on screen (in red as soon as the import has finished) which include information on why the record was not imported. The new menu options can be found under *Setup/Import/Export*.

As before, the import process starts with you downloading a template which you populate with the data to import. You then import the data to display it on screen, amend it as necessary and then process the data to complete the import. Click the 1, 2, 3 buttons at the top of the screen to perform each step.

Project Number	Client ID	Project Manager	Project Type	Client Order Number	Project Value	Fixed Price	Site ID	Site Name	Site Address	Site Contact Name	Site Reference	Delete
No records in query												
*												
*												
*												

An important difference in the new process is that you can now create sites - either as part of the projects import or by importing sites separately.

When creating sites as part of the project import, sites are or are not created as follows:

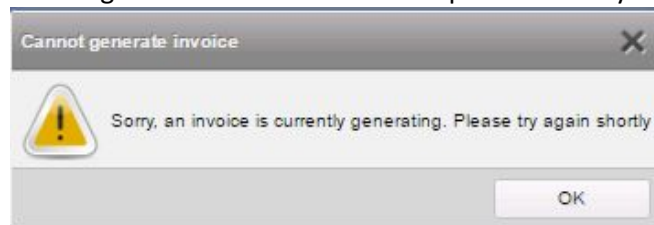
- If the Site ID entered already exists the import adds the project to the Site
- If no Site ID is entered but the Site Name already exists the import adds the project to the Site
- If a new Site ID or Site Name is entered then the import adds a new Site
- If the Site ID exists with a different Site Name then the import adds the project against the Site ID
- If a Project Number already exists it will not import.

2. A new setting allows you to pull the cost breakdown into the individual lines on an invoice. When you create the invoice, an invoice line is created for each item on the Cost Breakdown table. This replaces the invoice lines that would usually be created. The setting which controls this is

“UseCostbreakDownForInvoices”.

Line	Item	Qty	Price	VAT Code	Net	VAT	Total	Project Number
▶	Day Rate	0.5	£500.00	S	£250.00	£50.00	£300.00	T-55508
	Samples	5	£15.00	S	£75.00	£15.00	£90.00	T-55508

- When creating a New Quotation from the Client Details screen, the mobile number of the main client contact is now pulled through to the quotation and can be edited as required.
- If you use the Word method of invoice generation, you will notice a new dialog that appears if you request an invoice while one is already generating. Invoice generation does not have a queue and only one invoice can be generated at a time.



- Changes have been made to Risk Assessment Type A which now shows the signature from Tracker Mobile in the new Signature accordion tab pane.
- The length of the Identification field has been extended - which allows long, multiple-type identifications.
- On the Client Portal you can now search for the Site Reference (UPRN) on the Site Grid and on the Site List. On the Site Grid there is a specific search field and on the Site List & Compliance Summary the general search field also includes the Site Reference.

Home Site List & Compliance Summary X Site Grid X

Search

Site Name Site Postcode Site Reference (UPRN) Sort by Records per page

123 Select Field Select Order Select Value

Clear Search Criteria

Records: 1

Lasyard House [ARL123]

Underhill Street
Bridgnorth
WV16 4BB

Underhill Street
Bridgnorth
WV16 4BB

First Prev 1 of 1 Next Last 25 Records per page

Home Site List & Compliance Summary X Site Grid X

Records: 1

Search for: 123 Search All

OK Activity Due Overdue Some Activity No Activity All

Site Name	Last Activity	Last Inspection	Site Reference (UPRN)	Site Address	Postcode
Lasyard House	16/02/2015	16/02/2015	ARL123	Underhill Street Bridgnorth	WV16 4BB

First Prev 1 of 1 Next Last 100 Records per page

8. The generation of QR codes can now be switched off if required by using the new setting “Enable QR-code generation”.
9. The Edit Events screen on the Calendar now has a tickbox that lets you mark appointments as “write-up” appointments. When the box is ticked the words “WRITE UP” will appear at the start of the event name so that they can easily be seen from the calendar. There is also an indicator on the Wallboard.

Add/Edit Event

Appointment Details

Resource: Dan Darkin | Role: Bulk Analyst | Team: Green

Project Number: T-55467 | Client: ABCD | Duration: 1 days

[View Project Details](#) | [View Previous Appointments](#)

Event Location: Chester, CH2 2CH [Map](#)

Event Name/Description: **WRITE-UP - ABCD - 12 The Green**
http://start-3.co.uk/AlphaTracker/secure_document_list.a5w?project=T-

Start Time: 25/04/2016 15:00 | End Time: 25/04/2016 16:00 | Weekend Availability

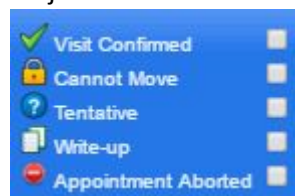
Shift Value Override: | Shift Value: 0.00 | This appointment will have no value

Notes:

Visit Confirmed | Cannot Move | Tentative | **Write-up**

[Repeat Appointment](#)

10. You can now mark appointments as “aborted” from the Diary Appointments screen which is displayed from the Diary Appointments button on the Projects screen.



11. If you do not want to include your office letter in the PDF of invoices then you can now hide this by using the “hideOfficeLetterFromInvoiceNoOnPDF” setting.
12. There is a new process for "batch invoicing" which allows you to select the invoices and then generate one big PDF file with all invoices merged. On the Invoice List screen tick individual invoices to select them, then click the **Print Batch of Invoices** button at the bottom of the Invoice List.

The screenshot shows the 'Batch Invoice Print - PDF' window. The main content area displays the 'start software' logo and the following invoice details:

Invoice	
Invoice No	202
Invoice Date	25/04/2016
Your Ref	
Account Ref	

Below the invoice details, there is a 'Details' table with a 'Total' column:

Details	Total
To carry out Asbestos Survey work for 123 Manor House	325.00
Report T-55508 / Kim Evison	

At the bottom of the window, the 'Print Batch of Invoices' button is highlighted with a red box.

The Batch Invoice Print - PDF screen is then displayed showing the merged invoices. You can print or download as normal from here.

13. There is a new user group available which provides restricted access to Alpha Tracker. The group is called “Calendar Only”. If you put a user into this group, and this group only, when they log in they can only see the “My Calendar” menu option. This means that they have access to *their own* appointments only and from there can access the project details by using the **View Project Details** link.

The screenshot displays the Alpha Tracker user interface. On the left, there is a navigation menu with options for 'Resources', 'Diary', and 'My Calendar'. The main area shows a calendar for April 2016, with a detailed view for Monday, April 25th. A calendar event is visible for 11:30 AM - 12:30 PM, titled 'Start Software - 123 Manor House'. On the right, the 'Add/Edit Event' form is shown, with the 'View Project Details' link highlighted in a red box. The form includes fields for Resource (Kim Evison), Role (Bulk Analyst), Team (Green), Project Number (T-55508), Client (Start Software), and Event Location (Telford, TF2 9NN). The Event Name/Description field contains 'Start Software - 123 Manor House' and a URL.

You might use this group if you want your surveyors only to be able to access the projects you have assigned to them.

14. Site Postcode has been added to the search on the Project List and also to the search under the Projects menu.

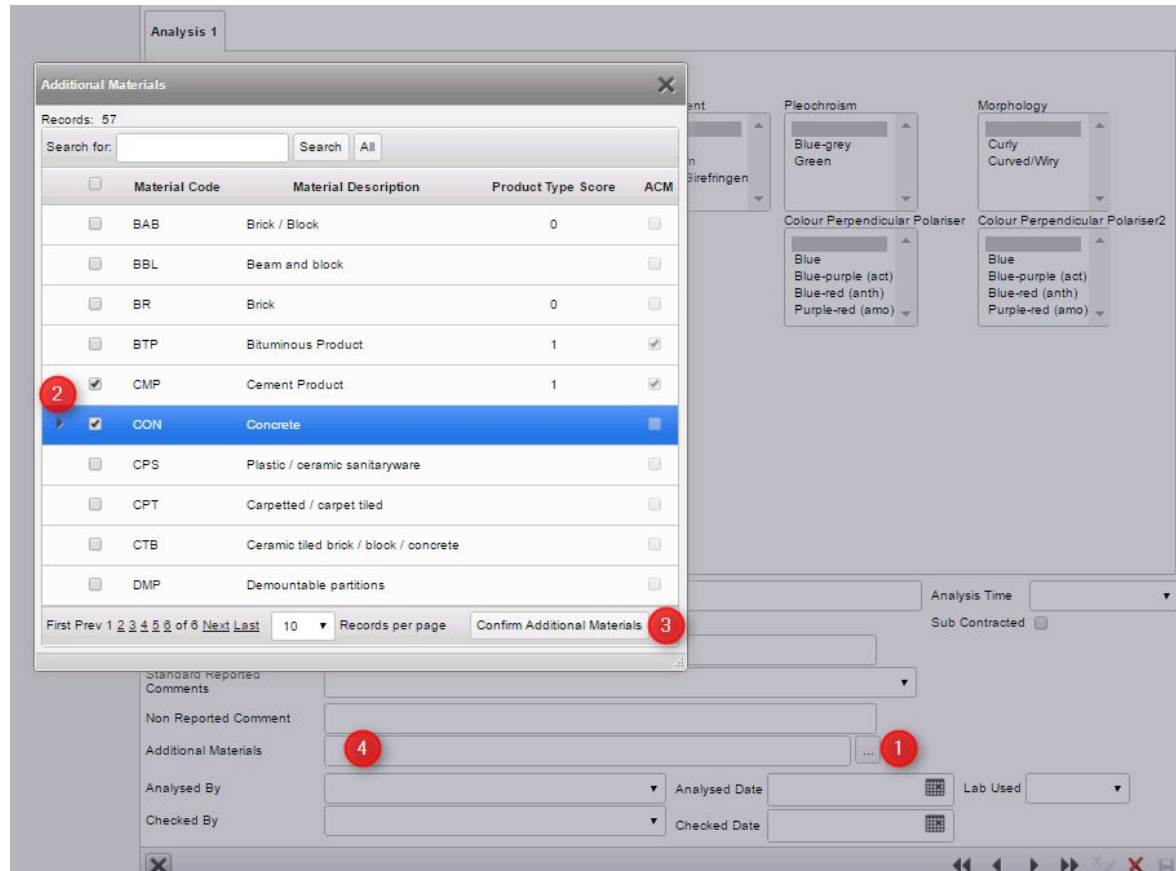
The screenshot shows the 'Project List' search interface. The search criteria include Project Number, Client ID, Client Name, Site Name, Site Postcode (highlighted with a red box), Project Type, Client Project Ref, Project Manager, and Turnaround. Below the search fields are buttons for 'Clear Search Criteria', 'Grid View', and 'Map'. A 'Refresh' button shows 'Records: 2,374'. Filter buttons for 'Open Projects', 'Closed Projects', and 'All' are present. The table below has columns for Project Number, Type, Client, Site, Postcode, Client Ref, Status, Project Manager, Opened, and Turnaround. A sample row shows Project Number 'T-55508', Type 'Asbestos Survey', Client 'START', Site 'Start Software', and Project Manager 'Kim Evison'.

15. A new setting automatically updates the Project Closed date when the Project Invoiced date is entered. The setting is “autoUpdateProjectClosedWhenInvoiced”.
16. “Type” and “Sub Type” have been added to the search on the Quotation list.

The screenshot shows the 'Quotation List' search interface. The search criteria include Reference, Client ID, Client Name, Status, Produced By, Site Name, Type (highlighted with a red box), and Sub Type (highlighted with a red box). Below the search fields is a 'Clear Search Criteria' link and a 'Search' button.

17. Additional materials can now be selected if required on the Fibre Analysis screen. To display the field additional field on the Fibre Analysis screen so that you can record further materials you need to set the “showAdditionalMaterialsOnFibreAnalysis” setting to “yes”. You might use this field if you want to record all materials found in, for example, a sample of debris rather than just the material with the highest score.

Click the ... button next to the new Additional Materials field to display a screen on which you can select the additional materials for the sample. When you have clicked the Confirm Additional Materials button the materials are all listed in the Additional Materials field. You may need changes to your certificate templates to display this information on your certificates.



18. On bulk sample projects you can now record the name of the member of staff at your client who took the samples. If you select "Client" in the Sampled by field then a further field is displayed, in which you can record the person's name.

The screenshot shows the 'Sample Setup' form in the Alpha Tracker software. The form is titled 'Sample Setup - N-14521' and is part of a multi-step process. The current step is '2. Sample Setup', which is highlighted in the navigation bar. The form is divided into two sections: '1. Project Setup' and '2. Project Complete'. The 'Project Setup' section includes the following fields: 'Lab' (dropdown), 'Date Samples' (Received, 02/03/2016), 'Booked In By' (Dan Darkin), 'Sampled By' (Client), and 'Client Staff Name' (Jeremy Hunt). The 'Project Complete' section includes a 'View Analysts/Dates' button and an 'Approved By' dropdown. A red box highlights the 'Sampled By' and 'Client Staff Name' fields.

19. If you do not require email notification when the Surveyor's and Lab Analyst's assessment of a material differ then you can now switch off these emails by setting the "sendLabNotificationEmailAssessment" to "no".
20. Improvements have been made to the "Tesco" print queue allocation method. In this method of assigning documents to print queues documents go to the least busy queue. To use this method set the repository setting "Queue Allocation Method" to the value "Tesco". This method doesn't choose simply on the basis of how many documents are in the queues, it also looks at the size of the reports being issued.

If required, you can assign a weighting to Bulk Certificates which is then used with the "Tesco" method when determining which queue is the least busy. Setting the "Doc Size (average) for Bulk Certs" setting to, for example, "50" gives Bulk Certificates the same weighting as a survey report with 50 items. It is also possible to send all Bulk Certificates to a specific queue. By default, Bulk Certificates are sent to queue 1 but you can use the "Queue for Bulk Certificates" setting to specify an alternative queue.

You can use the "Tesco" option in conjunction with other options, for example sending documents for specific clients to specific queues, by using the setting "MaxTescoQueueNo". For example, if you had four queues and set this to "3" then you could use the "Tesco" method on queues 1-2, leaving queue 4 for documents for specific clients.

21. The log of changes to fibre analysis data that you can find under the Lab Warnings menu option now provides more information. The details include the Fibre Analysis record ID, the date/time and the logged in user.

22. The Read from Tracker Mobile button is now fully automated. If a field from Location 000 on Tracker Mobile is to be created and populated then this happens when you do any of the following:
- click **Read From Tracker Mobile**
 - click the **Draft** button to generate a report
 - click the **Final** button to generate a report.
- If the field doesn't exist, it gets created and populated.
If the field already exists in Extra Info, then its content is updated *as long as* the field is blank. If there is something in the field, eg a default value, some text or even "N/A", then the existing content is not overwritten.

Fixes

Approximately 25 bug fixes are also included in this release.