

## Release 23 Alpha Tracker Release Notes

### New Features / Changes (SVN2200)

1. A number of changes have been made to the Projects Dashboard to improve the information displayed and the column headings.
  - Order Ref has been changed to Client Order No.
  - The Site Postcode has been added.
  - Requested Return has been changed to Due Date.
  - Bulks Saved has been changed to Samples Analysed.
  - The three coloured fields Samples Analysed, Plan Produced, Report Drafted now show the date when the appropriate key milestone is completed (rather than “Yes”).
  - The number of Survey Samples has been added.
  - The Invoice Date has been added.

Project Number	Client	Type	Client Order No.	Site	Postcode	Site Completion Date	Turnaround	Due Date	Reporting Days to Deadline	Samples Analysed	Plan Produced	Report Drafted	No. Samples	Report Complete	Invoice Date
T-00050	Start Software	Asbestos Management Survey / Asbestos Demolition Survey		Queens Court House		30/08/2016				09/11/2016	No	No	1		
T-00051	121 Broomwood Road Limited	Asbestos Management Survey / Asbestos Sampling Survey		121 Broomwood Road		22/06/2016				22/09/2016	No	No	1	01/07/2016	
T-00057	Adam Porter	Asbestos Management Survey / Management		1 Queen's Road	SY1 1ST					No	No	No	1		
T-00058	Start Software	Asbestos Management Survey / Asbestos Management Survey		The Mogg		30/08/2016				30/08/2016	No	No	0		

2. Further prompts and validation have been added so that the Project Manager is required when raising a Project from a Quotation.
3. There is a new Alpha Tracker importer that lets you import Clients. The menu option is *Setup/Import/Export/Client Import*. This importer works in the same way as the existing importers so that you have an easy three-step process to import clients:
  - **Step 1 - download** the template which you can populate with your data
  - **Step 2 - import** the data from the template so that you can see and edit it onscreen
  - **Step 3 - process** the data to update your Client database.

There is validation in place to check that no duplicate Clients are inserted. All Client IDs are auto-generated when using the Client importer, using the Get Next Number function.

4. Improvements to the Projects importer mean that it now inserts both Projects and Surveys and the same time and also adds in any required Extra Info info data for Projects of the specified type automatically. Furthermore, fields for the Status, Survey Type, Notes to Surveyor and Issuing Office Letter have been added to the Projects importer.
5. The search has been improved on the Users screen (Web Security|Users). It includes the Staff ID or Client ID so that it is easier to find all logins linked to a particular member of staff or Client.

6. Some updates to the transfer of data process have improved the progress bars, introduced the auto-saving of the number of records/pdfs and photos sent through to avoid duplication and tidied up the screen when adding new data transfers.
7. When using the Diary and ticking the flags to indicate whether an appointment is Visit Confirmed, Tentative, Cannot be Moved etc, it is no longer possible to have both the Tentative and Visit Confirmed options ticked at the same time.
8. On the Client Portal, the Report List, Site List & Compliance Summary and the Site Grid all initially display 10 records per page to improve performance.

9. When using the Edit/View Samples screen, you will find a new Building search field to help you filter the data:

Sample Survey Data - 13980

Search

Building:  Approach:  Sample Number:  Material Code:

Clear Search Criteria

Records: 4

ID	Photo File	Close-up	Building	Approach	Material Code	Description	Sample No.	Sample Notes	Product Type	Condition	Surface Treatment	Description	Identification	Asbestos Type
55535			198/198 Fletchamstead Highway Ind. est.	S		Cement guttering	BQ0080:		1	0	1	Surface Sealed	Chrysotile +	3
55538			198/198 Fletchamstead Highway Ind. est.	S		Bitumen Adhesive	BQ0080:		0	0	0	Completely Sealed	No asbestos	0
55548			198/198 Fletchamstead Highway Ind. est.	S	INB	Insulating Board	BQ0080:		0	1	1	Surface Sealed	No asbestos	0
55549			198/198 Fletchamstead Highway Ind. est.	S		DPC	BQ0080:		0	0	0	Completely Sealed	No asbestos	0

10 Records per page  Load Fibre Analysis

10. The Duplicate Appointment function now also copies the Event Location.
11. If you move Survey records from one Project to another, any Fibre Analysis records linked to Samples in the Project are also moved.
12. If you update Project milestones from the Project List, you will find that the milestones are editable immediately after the plus button is clicked.
13. A new setting “showNonACMSRoomSummaryOnSiteRegister” lets you show a room summary of non-ACMs on the Client Portal. These non-ACM room summaries will also be included in the pdf print.
14. To avoid confusion, there are now two filter buttons on the registers on the Client Portal to show Samples. The “Samples (Positive)” button lists only the positive Samples. The “All Samples” button lists all Samples whether they are positive or negative.
15. A new method has been devised to upload Site Plans via the Client Portal that is particularly useful for customers managing their own properties. There are two levels of user of the Client portal: Clients and Client Admin. Users placed in the Client Admin group have a higher level of access than those in the Clients group and have a new “Upload Current Site Plan” option in the document folder that is displayed from either the Client Uploads folder or when you click on the new Site Plan/Files button from the Site Register.

Client Admin users can both upload and delete files. The Current Site Plan can only be uploaded from the Client Portal using this method. Users in the Clients group can only download files.

16. It is now possible to hide the whole of the Clients menu if you wish to prevent users from accessing it. Simply list the Staff IDs of users who are allowed to see the Clients menu in the setting “canUserSeeClientFrame”. Leave the setting blank to allow all users to see the Clients menu.
17. The Site Details screen has an additional tab that lets you see the Client View of the Site Register. This is in addition to the standard view of the Asbestos Register that you have by using the Asbestos Register tab.

The new tab shows you exactly what the Client can see on the Site Register when using the Client Portal. You can use the filter buttons to show only the Asbestos Register, Sampled Items, No Access Areas etc for the Site. You also have the Print PDF button available so that you can print the register for the site too.

- Further data import functionality has been built into Alpha Tracker to enable customers moving to Alpha Tracker to import data from certain other systems. Please contact Start Software if you would like to import data.

## Fixes

- Minor alignment changes were made to invoice template D.
- Changes have been made to the Site Details screen, so that when a new Site is created from a Project, Alpha Tracker only attempts to save the record if the Project already exists. If the Project is new, it is not auto-saved so that validation messages do not pop-up before the user has finished data entry.
- A fix has been made to the "RunAlphaValidator" function on the Survey screen.
- Changes have been made to the Quotation screens to force the Quote Basic Value to be calculated on save and on update. This is to make sure that the field is always updated.
- A fix has been applied to the calculation of Target dates on milestones.
- The Microscope field on Fibre Analysis is checked on each tab to see whether it should be displayed or not.
- An issue with searching using the Staff Name in the Diary Appointments screen has been fixed.