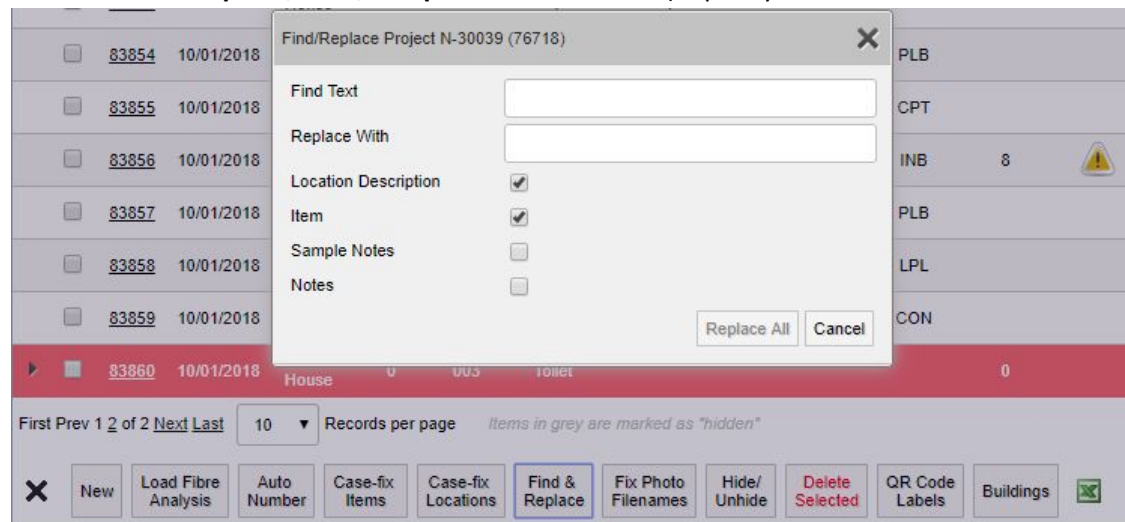


## Release 27 - Alpha Tracker Release Notes

### New Features / Changes (SVN2840)

1. You can now use find & replace on the Survey Items screen. Click the **Find & Replace** button to display a window which lets you select the fields to be searched (any or all . of **Location Description**, **Item**, **Sample Notes** and **Notes**). Specify the text to be searched for and the text to replace it with, then click **Replace All**.



2. Changes have been made to how the dynamic calculation of milestones works. It will now calculate the target dates for all the “upcoming” milestones when a milestone has a completed date filled in.

- The order of the fields on the Create New Site screen has been changed to provide better grouping. The label on the Site Name field is now in bold to draw your attention to this field.

Create New Site

Site ID: <Auto>

Client: ABCD A B C D Company

**Name & Address**

Site Name

Address

Post code

Country: United Kingdom

Lookup Address

Site Reference

**Contact Details**

Contact Name

Contact Telephone

Contact Email

Account Manager

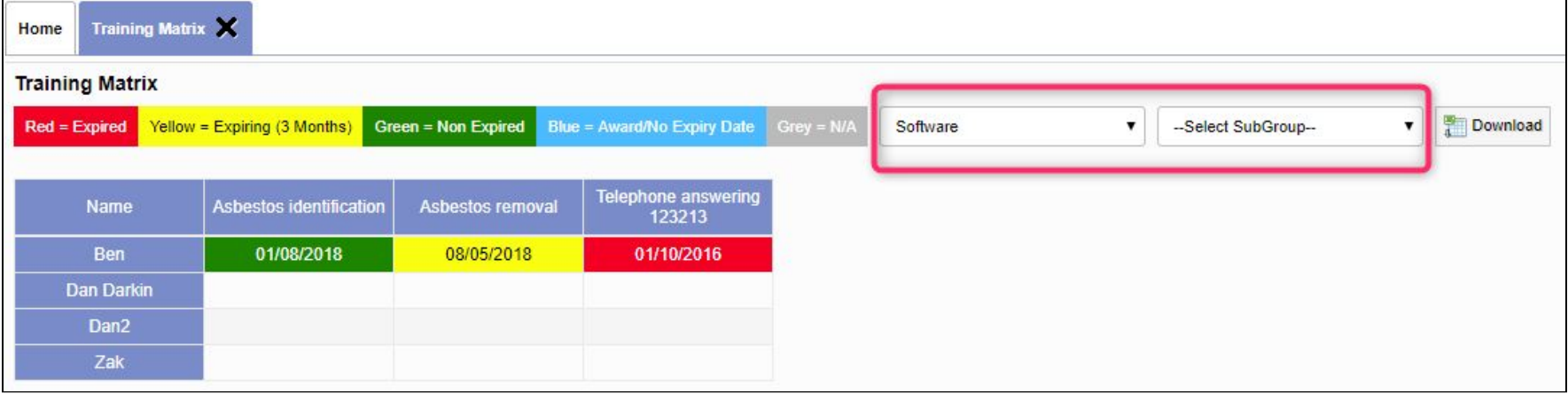
Landlord

Notes

Save Cancel

- If you are using the new Training Matrix, then you will now find that there are no restrictions when scheduling appointments for staff if the Project Type is not linked to any Training Types. This leaves you free to schedule appointments for Project Types that do not require any training qualifications.

5. Also on the Training Matrix, you will find that it is possible to filter the display by Group and Sub Group. A Group or "All" must be selected to display data on the Training Matrix.



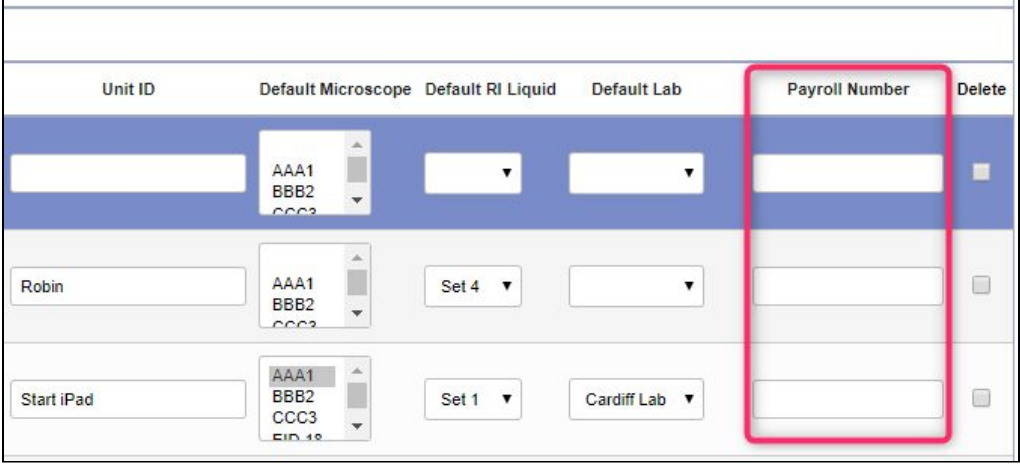
**Training Matrix**

Red = Expired   Yellow = Expiring (3 Months)   Green = Non Expired   Blue = Award/No Expiry Date   Grey = N/A

Software   --Select SubGroup--   Download

Name	Asbestos identification	Asbestos removal	Telephone answering 123213
Ben	01/08/2018	08/05/2018	01/10/2016
Dan Darkin			
Dan2			
Zak			

6. The Training Matrix has a new export to Excel button.
7. There is a new field on the Staff List which lets you record Payroll numbers. You can find the field on the far right-hand side of the screen:



Unit ID	Default Microscope	Default RI Liquid	Default Lab	Payroll Number	Delete
	AAA1 BBB2 CCC3				
Robin	AAA1 BBB2 CCC3	Set 4			
Start iPad	AAA1 BBB2 CCC3 EID.18	Set 1	Cardiff Lab		

The Payroll Number is also displayed on the Training Matrix Staff List:

The screenshot shows the Alpha Tracker interface with the 'Staff' tab selected. The search bar contains 'bridgnorth'. The staff list table has the following data:

ID	Name	Group	Payroll Number	Download
177	Robin Bennett	Director Bridgnorth		Download
185	Kim Evison	Lab Bridgnorth		Download
680	Test	Surveyor Bridgnorth		Download

The training matrix table has the following data:

Training Date	Start Time	End Time
01/01/2018	08:30	17:00
01/01/2018	08:30	17:00
01/01/2018	08:30	17:00
19/01/2018	08:30	17:00
*		
*		
*		

8. Improvements have been made to the Staff dropdowns on the Project and Survey Details screens to improve performance. Non-current members of staff are no longer displayed on the lists (they used to be in brackets at the bottom of the lists). A non-current member of staff is only displayed in a field, in brackets, if they were previously selected in that field.
9. Only current staff are displayed on Staff Training, Training Matrix and Training Calendar.
10. It is now possible to send data for re-inspection to a handset of a linked Alpha Tracker system. This means that if you are holding your own survey data which other surveying companies send to you, then you can now send them items for re-inspection - both XML records and photos are transferred. To create the re-inspection project, go to the Client View Site Register for the site, filter the Register as necessary and then click the Create XMLs for another Alpha Tracker button.

Dialog box titled "Create XML's for another Alpha Tracker".

Fields:

- ID: 797
- Created: 30/11/2017
- Sending Alpha Tracker: Demo
- Receiving Alpha Tracker: (dropdown menu)
- Sending Site Name: 12a Ivor Road

Process Transfer section:

- 1 Send Records: (button)
- 2 Send Photos: (button)

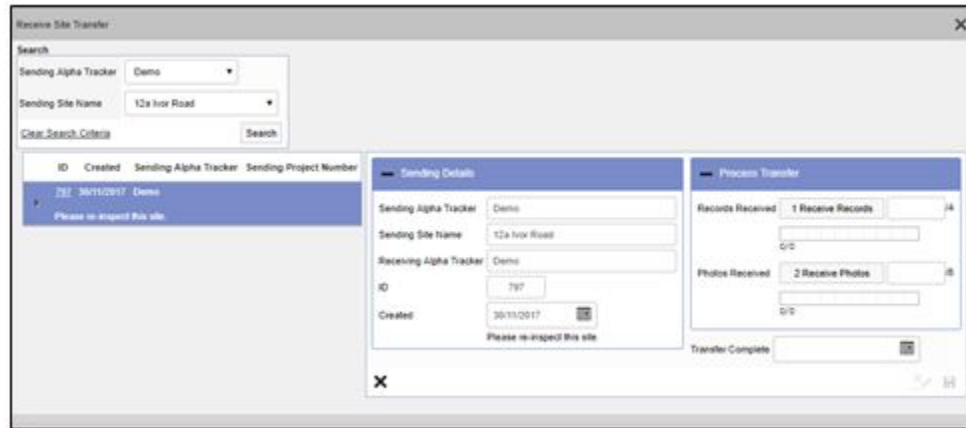
Notes/Message: (optional) enter a note or a message to the recipient

Delete: (checkbox)

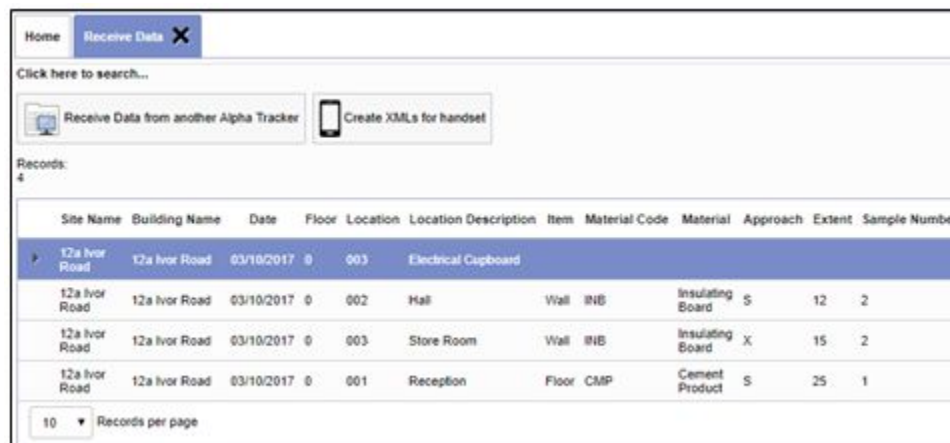
Buttons: Save, Cancel

Complete the fields and follow the instructions to transfer the data and photos as normal.

The surveying company who are receiving the transferred re-inspection data must accept the data. To do this, they use Setup|Import/Export|Transfer XMLs|Receive Data. Clicking the Receive Data from another Alpha Tracker button displays the standard screens to receive transferred data but with a Sending Site Name field. Note that the site to which the re-inspection data relates must already exist on the receiving Alpha Tracker. If the site exists with a slightly different name, eg with a different spelling, then Alpha Tracker lets you match up the sites. If the site does not exist, it is best to create it before attempting to transfer the data.



Receive the transferred data as usual. The received records are now displayed on the Receive Data screen, ready for the XML records for the handset to be created.



Filter the Receive Data screen by site name if there are records for multiple sites present. Click the Create XMLs for handset button and confirm the number of records to be created. The Create Site Re-inspection screen then allows the specification of the handset to which XMLs are to be sent and the site name and the creation of the project.

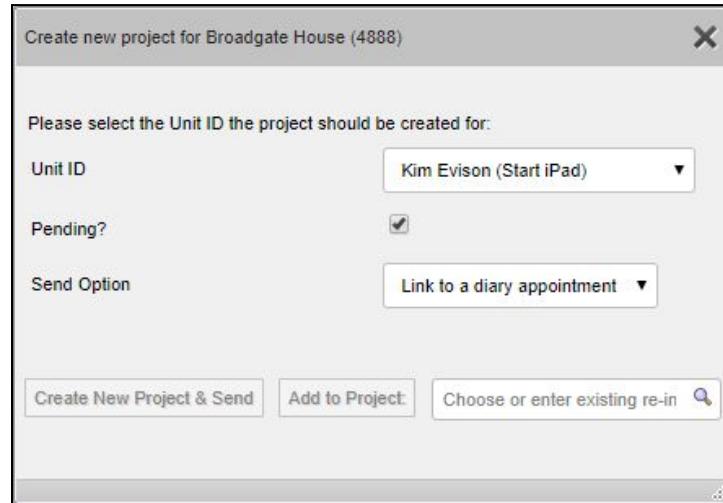
When the surveyor connects their handset, they will receive the data items for this project to re-inspect.

11. A new development lets you delay the sending of re-inspection records (XMLs) to a handset. This new feature lets you specify the day on which pending XMLs should be sent to a smartphone or tablet, or lets you link the sending of the pending XMLs to an Alpha Tracker appointment. If the linked appointment moves, then the sending of the pending XMLs also moves. The XMLs are subsequently processed by a scheduled task.

Tick the Pending? box to see the new options when creating a re-inspection.

If you are creating a new re-inspection project, eg from the Choose Task menu on a project, then you only have the option to specify the day on which pending XMLs are to be sent. This is because there can be no pre-existing diary appointment for the new project.

If you are creating a re-inspection from the site's asbestos register, then you can choose whether to send the re-inspection records on a specific date or to link the sending of the records to an appointment.



Dialog box titled "Create new project for Broadgate House (4888)".

Please select the Unit ID the project should be created for:

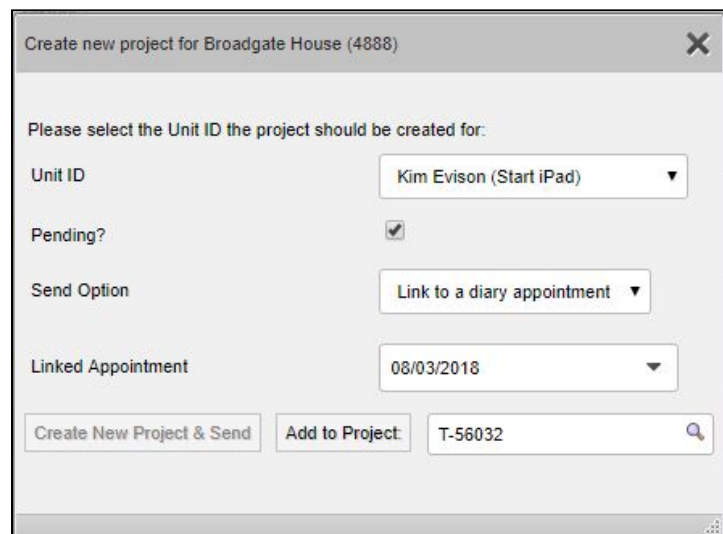
Unit ID: Kim Evison (Start iPad) [dropdown]

Pending?

Send Option: Link to a diary appointment [dropdown]

Buttons: Create New Project & Send, Add to Project, Choose or enter existing re-in [search icon]

You can use the "Choose or enter existing re-inspection" box to select or specify the project which has the linked appointment, or the system will suggest the linked project. Use the dropdown on the Linked Appointment field to select the date of the required appointment.



Dialog box titled "Create new project for Broadgate House (4888)".

Please select the Unit ID the project should be created for:

Unit ID: Kim Evison (Start iPad) [dropdown]

Pending?

Send Option: Link to a diary appointment [dropdown]

Linked Appointment: 08/03/2018 [dropdown]

Buttons: Create New Project & Send, Add to Project, T-56032 [search icon]



12. There is a new Project Status Notes field available to display on the Project Details screen.

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

- Project Manager:** Kim Evison (dropdown), Project Staff (button)
- Site Name/Ref:** 12 The Green (text input), Site Details (button)
- Project Type:** Survey (dropdown), Survey Details (button), Buildings (button)
- Estimated Total Project Value:** 575.00 (text input), Fixed Price (checkbox)
- Change Log** (link)
- Status:** New (dropdown)
- Status Notes:** A text area field highlighted with a red border.
- Actions:** Word document icon, folder icon, Duplicate Project (button)

You can enter free text in this field.

The setting that controls whether the field is displayed or not is:

Setting	Date Created	Value	Help
Show Project Status Notes	05/01/2018	yes	Show the project status notes field? (yes/no)

13. In addition, the Project Status and Project Status Notes have been added to the Projects Dashboard to give added visibility, for example:

Turnaround	Due Date	Reporting Days to Deadline	Samples Analysed	Plan Produced	No. Samples	No. Fibres Analysed	Report Complete	Invoice Date	Project Status	Project Status Notes
	06/03/2018	OVERDUE	No	No	0	0/0			In Progress	Job is part complete and another visit to site is required.

14. There are new fields available to display on the Project Details screen:

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

- Site Name/Ref:** test 1 (with a search icon), my site (button), Site Details (button)
- Project Type:** Removal (dropdown), Removal Details (button), Buildings (button)
- Licence Status:** Licensed (selected radio button), Non-Licensed (radio button) **1**
- HSE Notified:** yes (selected radio button), no (radio button) **2**
- HSE Notified Date:** 28/12/2017 (with a calendar icon) **3**
- Estimated Total Project Value:** £0.00 (input field), Fixed Price (checkbox)
- [Change Log](#)

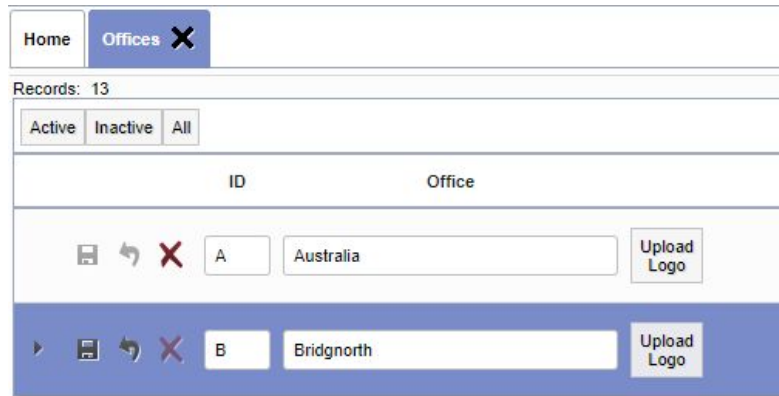
The settings that control whether these fields are displayed or not are:

Setting	Date Created	Value	Help
HSEnotifiedRequiredOnNewProjects	04/01/2018	no	Should the HSE notified field be required when setting up new projects? (yes/no)
showHSENotifiedonProject	04/01/2018	no	show HSE notified on project details (yes/no)

Setting	Date Created	Value	Help
licensedStatusRequiredOnNewProjects	04/01/2018	no	Should the Licence Status field be required when setting up new projects? (yes/no)
showLicensedStatusonProject	04/01/2018	no	show licence status on project details (yes/no)

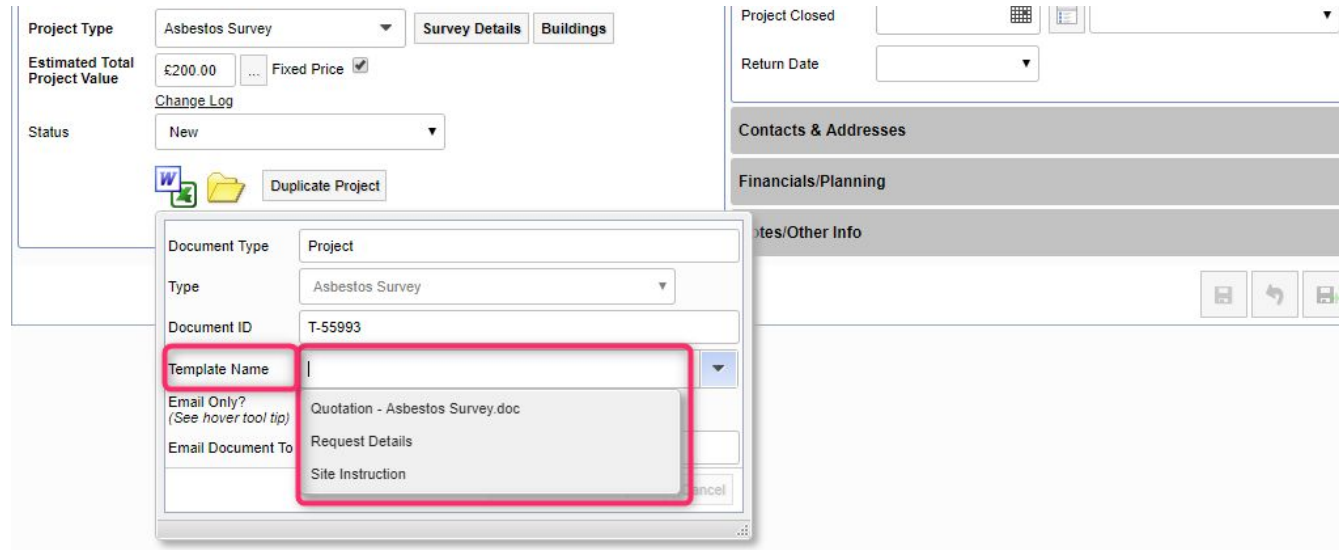
15. A new setting lets you lock the Project Closed date after a date has been entered, unless the user is in a list of users who are allowed to remove the date. The new setting is called "Lock project closed from all users apart from this list". If the list is blank then all users can amend the project closed field. Otherwise only the specified users (list of Staff IDs) can amend the field.
16. A change has been made to Template C Invoices and Credit Notes. The Report Header is now a Page Header which allows the references and details to pull through on all pages rather than just the first page. A page count has also been added at the top of each page.
17. A change has been made to the Survey Items screen to remove the 10-character limit on the "Caveats agreed on site" and "Property Type" fields..
18. A performance update to the Project screen reduces the number of staff names in the dropdowns on the right hand-side. Only current members of staff are now listed.
19. The Invoice Number field on the Payments screens is now pre-populated with the invoice number to prevent users typing in custom values.
20. Improvements have been made to the move survey data process to improve performance.

21. There is no longer a file upload limit on the drag and drop zone within the document folders.
22. The Software Updates screen now logs that a software update was applied to the Access Log.
23. Improvements have been made to the calculation of milestone target dates on dynamic milestones.
24. Each office that you list under Setup | General | Offices can now have a different logo associated with it.



25. The Project Staff screen has had a performance update to remove inactive staff members, other than those previously selected. This means that “not current” members of staff will not be displayed on the dropdown lists. However, if a “not current” member of staff was previously selected in a field then it will continue to be displayed.
26. The Contracts screen has had a minor change to improve performance. The Client dropdown field has been changed in all places to the standard Client ID and Client Name fields.
27. Milestones have been updated so that the **Assigned To** and **Completed By** dropdowns only display active staff.
28. A number of improvements have been made to improve the handling of special characters, eg when uploading files, in the document folders, and when handling signature and staff photo files.

29. The list of templates displayed when you click the Word/Excel button, eg on the Projects screen, will now only display active documents. Any Document Templates with an Inactive Date set will not be displayed on the list.



30. The Extent column has been added to the Default PA Scoring screen so that you can now include the extent in any room-based priority scoring defaults that you want to set.

The screenshot shows the 'Default PA Scoring' screen with a table of records. The 'Extent' column is highlighted with a red box. The table contains the following data:

ID	PA Location	Normal Occupancy	Access	Extent	Location	Number of People	Use	Average Time	Type	Frequency	Delete
1	Kitchen	1	2		2	1	1	2	1	2	
2	Lounge	0	0		2	0	0	0	0	0	
3	Classroom	0	0		2	0	0	0	0	0	
* <Auto>											
* <Auto>											
* <Auto>											

31. An update has been made to the ProcessMDSData trigger to update the condition description and surface treatment description when data is processed from MDS.

32. A Download to Excel button has been added to the Buildings tab on Site Details so that you can download a site's buildings list.

33. It is now possible to generate video files (GIF) from PDFs when generating reports. A template (Survey Type) is needed to set the layout and design of the video. The setting “Auto-convert PDF to video for certain survey types” requires a comma delimited list of the Survey Types which are to use the video generation module. A report is generated as usual, and once the PDF is generated the video module then creates the GIF file.
34. Users in the Survey Admin group now have permission to delete survey items when using the Survey Items screen (both list and form views).
35. A new setting lets you display the Item Survey Type field on the Survey Items screen (both form and list views). The setting is “Show Item Survey Type field on the survey items screen” and requires a yes or no, the default being no. If you want to capture this data per item then you will need a change to your Tracker mobile.

















The screenshot displays the 'General' section of a survey form in the Alpha Tracker mobile app. At the top, there are three photo upload areas: 'Photo', 'Close up Photo', and 'Private QR', each with a camera icon and a 'Change Photo' button. Below this is a 'General' header. The form fields are as follows:

ID	Date	Surveyor	Survey Type
83762	26/09/2017	Elaine Porter	Management Survey

Other fields include:

- Building: A01
- Floor: B1
- Location: 025
- Location Desc: Boiler room
- No Access:
- Item: Residue to wall
- Material Code: INS
- Material: Insulation
- Approach: S - Sampled
- Sample Number: 55173
- Sample Notes: right wall high level next to poly wrapped pipes
- Extent: 8
- UoM: m2
- Notes: Ensure no works are undertaken that will disturb trace insulation debris to walls/ceiling
- Recommended Action: Monitor and manage
- Recommendation Comments: (empty)

36. The Key Milestones screen cannot be amended to prevent any addition or deletion to the key milestones. Key milestones have coding behind them and do specific things in the system so it is not possible to add your own. You can only rename the existing key milestones.

Home		Key Milestones X	
Records: 8			
	Key Milestone ID	Key Milestone	
 	1	Samples received in lab	
 	2	Surveyor first day on site	
 	3	Surveyor last day on site	
 	4	Project Due Date	
 	5	Site visit booked	
 	6	Bulk Samples Analysed	
 	7	Report QC Checked	
 	8	Plan Complete	

10 Records per page Save Cancel

37. The search fields on the site asbestos register have been extended so that you can now also search by Survey Item ID and Action Date range.

38. It is now possible to search the Project List by “Return Visit Date”, so if you are populating this field on your projects you can now easily list projects whose return date falls within a date range.

The screenshot shows the 'Project List' interface. At the top, there are navigation tabs for 'Home' and 'Project List'. Below this is a search bar with a magnifying glass icon and the word 'Search'. The main area contains several filter sections: 'Project Opened', 'Report Produced', 'Project Invoiced', 'Return Visit Date', and 'Project Closed'. Each section has 'From:' and 'To:' date pickers. The 'Return Visit Date' section is highlighted with a red box. Below the filters is a table with columns: 'Last Diary', 'Return Visit Date', 'Report Produced', 'Invoiced', and 'Closed'. The 'Return Visit Date' column is highlighted with a red box, and a date '08/03/2018' is visible in the first row of the table.

39. “Late Diary Change” emails now display the site name and the appointment date to make it easier for you to identify the appointment to which they refer.
40. More detail has been added to the “Analyst Assessment is different to Surveyor’s Assessment” emails. They now include details of both the Surveyor’s Assessment and the Analyst’s Assessment.
41. A new repository setting allows certain non-ACMs to be listed in the fibre analysis even if the material is positive. The setting is “AddOtherOScoreMatsToFullAnalysis”.
42. Lab users can now see the “Lab Days to Deadline” on the Lab Project List screen if they wish. The display of this column is determined by a setting “Show Lab Days to Deadline on Lab Project List”. To display values in this column you will have to be using the Project Due Date key milestone.
43. There are additions to the Xero invoice processing that allow you to use Alpha Tracker invoice numbers and to look up the nominal code from the invoice if there is none on the project type. The Payment Due Date and Your Ref can also be pushed through to Xero. Please contact Support for more information.
44. Further validation has been added onto the Fibre Analysis screen to check the points match the assessment selected by the analyst. The validation will only happen if the users are not able to make any edits to the score.
45. The Report List on the Client Portal has been changed to display 10 records on initial load rather than 200.
46. There is a change affecting IIS users and their login. If the current user is using IIS and a default client has been setup but the user does not have a currently active account then a new login will be created to allow the user to log in. The user will be required to be in the "clients" or "client admin" AD group for this functionality to work.
47. A count of unanalysed samples has been added onto the Lab Dashboard on the Home Page. This is to help improve visibility of lab workload.

48. Various changes have been made to the soils fibre analysis. Please contact Judy if you require details.
49. Validation has been added to the Sample Number field on the standard Bulk Samples screen to prevent blank sample numbers.

## Bug Fixes

There have also been numerous fixes in this release, including:

- The Office to invoices now uses the default office setting or the default office from the logged in user.
- Fix to the sites displayed on the "Edit/View Site Status" option on the client portal.
- Fix to the "Pending" option under "Reports/Jobs" on the client portal.
- Improvement to validation of the Project Manager field on the Projects screen.
- If report parameters return null values, the auto-suggest lists still generate.
- Fix for special characters in filenames when uploading into Alpha Tracker.
- Improvement to display all charts correctly on the client portal dashboard.
- Fix on Survey Items to ensure blank scores are null not zero.
- Fix to the creation of a project from a quotation.
- Fix to the Case Correct buttons when opening the screen from the "Check Survey Data" button on the Survey Quick Start menu.
- Files in subfolders will now download.
- Removed the bold text from invoice template C to fix issues with PDFs for Macs.
- Duplicate roles will no longer display on the Contact details for new Clients.
- Fix to resetting of quote values after editing a quotation.
- Change to the path of signatures and staff photos.
- Fix to date and dropdown field widths.
- Fix to allow .xls and .xlsx files to be downloaded for data imports following the Microsoft update.
- Fix to the Project Manager and Estimated Project Value values inserted into new projects when created from multi-site quotations.
- Increase in length of the Material Code field on the Fibre Analysis screen.
- Additional checks on the Xero invoice export to ensure an invoice record has not already been exported.
- On the Asbestos Register, fixes now let the Create Removal/Remediation Project show projects with a project type category of "Asbestos Survey", disable the buttons if there are no records and let Removal/Remediation projects be created.
- Performance improvement when copying data to a new project via the "Choose Task" menu on Survey Details.



- Improvement to invoice generation when populating the invoice from the cost breakdown, checking if cost breakdowns are present and, if not, working from the invoice line settings.
- Improvement to the process for duplicating sites, allowing the duplication of multiple sites.
- A fix to the width of group and sub group fields on the Staff screen and to the display of multiple duplicate and blank records.
- A fix to the duplication of appointments from the Diary Appointments screen and their visibility in Google Calendars.
- Improvement in checks and error messages output from the Survey Items and Project import.
- Change to remove character returns from file names before being inserted into a document request when the Draft or Final button are clicked.
- Change to the Surveyor dropdown on the Quick Edit Survey Data screen so that the dropdown works in the same way as on the Survey Items screen.
- Removal of the Logout button for IIS users.
- Additional validation on the Buildings screen to check for a building name.
- Fixes to the Suppliers screen when opening the Pre-Qualification Questionnaire.
- Resizing of footer logos.
- Fix to copying of photos from the “Copy data to new project” function.
- The PDF Print opens correctly again on registers on the Client Portal, and downloads are working correctly.
- The selection of a Likelihood on a new quotation no longer adds an extra Likelihood value to the display.
- Additional checks and error handling on the Update button on the site asbestos register.
- Change to the ProcessMDSData trigger to ensure that the material score is never inserted as NULL
- Improvements to the processing of the “Sage 50 Detailed Export” to prevent locking.
- Typo removed from Client Portal Dashboard.
- Extra validation disallows special characters in the Client ID field.
- Fix to horizontal scroll bars covering text.
- Fix to maintain record selection on refresh of the new Survey Items screen.
- An issue with the “Auto Number” button on the new Survey Items screen has been fixed.
- Issue with adding records to a re-inspection project from the site asbestos register has been fixed.
- Improvements to site address/postcode validation.
- Fix to the show/hide expression for the Client Portal Site Map.