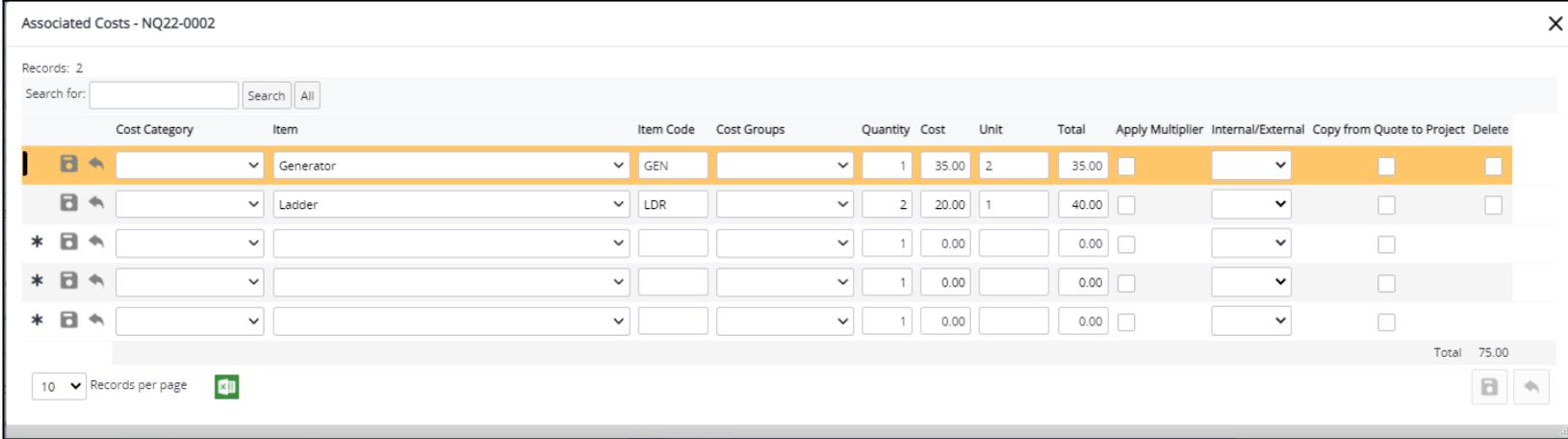


Release 38.5 - Alpha Tracker Release Notes

New Features / Changes (from SVN6666 to SVN7130)

1. A new feature is available to build your quotations from your costs plus a margin. This form of quote building can be switched on by using the setting "QuotesFromCosts" - acceptable values are "yes", "no" and "mixed". If "mixed" is specified then you can switch it on for certain project types only by ticking a box on the project type(s).

If you are building quotations from costs plus margin, then you see a **Costs** button instead of the usual ... button. Use this button to specify the costs. There are additional fields on the screen for specifying cost groups, whether the margin should apply to an item, be copied to the project etc. The Client Multiplier is then applied (as the margin) to arrive at the total.



Associated Costs - NQ22-0002

Records: 2

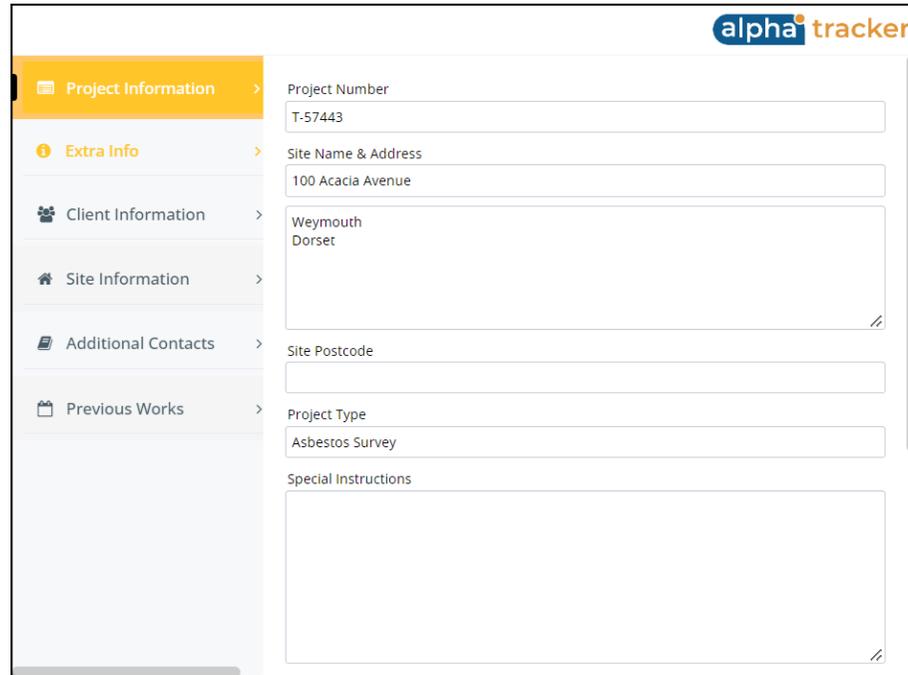
Search for: Search All

Cost Category	Item	Item Code	Cost Groups	Quantity	Cost	Unit	Total	Apply Multiplier	Internal/External	Copy from Quote to Project	Delete
	Generator	GEN		1	35.00	2	35.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Ladder	LDR		2	20.00	1	40.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
*				1	0.00		0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
*				1	0.00		0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
*				1	0.00		0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
							Total			75.00	

10 Records per page

Anything marked as "External" comes through as a direct cost onto the project (ie you can see it in the Associated Cost window on the project).

2. The Project/Job Summary Sheet (or JSS) is now integrated within Alpha Tracker. Its format has been improved and it has a menu on the left-hand side to separate areas of information into individual screens. In addition, Category has been added and there is a new setting "Show Financials on the JSS" which shows or hides some project information (total cost, quote ref, order ref), the Cost Breakdown menu and the Quote History menu.



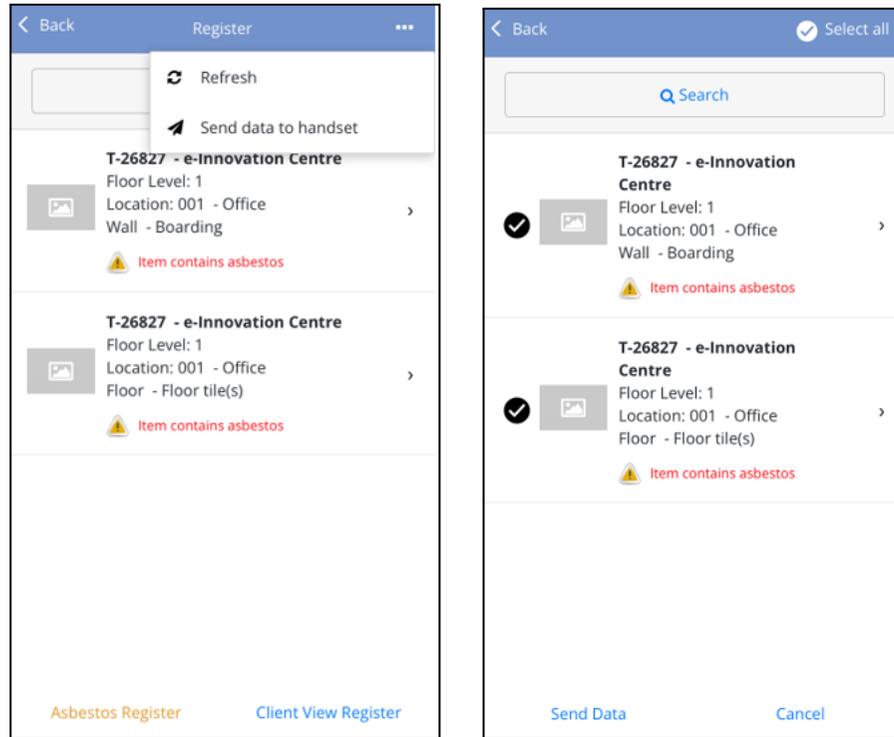
The screenshot displays the 'alpha tracker' software interface. On the left is a navigation menu with the following items: 'Project Information' (highlighted in orange), 'Extra Info', 'Client Information', 'Site Information', 'Additional Contacts', and 'Previous Works'. The main content area shows a form with the following fields:

- Project Number:** T-57443
- Site Name & Address:** 100 Acacia Avenue
- Client Information:** Weymouth, Dorset
- Site Postcode:** (empty)
- Project Type:** Asbestos Survey
- Special Instructions:** (empty text area)

3. The Quotation List now displays the **Assigned To** field, as both a name and a photo. In addition, you can search by the **Assigned By** name or use a preset filter button for "Assigned To Me".
4. When the status of a quotation is changed to Won, a new **Client Order Number** field is displayed for you to complete if you wish. The content of the field is copied to any projects created from the quotation.

The screenshot shows the 'Enquiry' form in Alpha Tracker. The form has a blue header with the title 'Enquiry'. Below the header, there are several input fields and buttons. The 'Reference' field contains 'NQ22-0002'. The 'Date Enquiry Received' field contains '16-09-2022' and has a calendar icon. The 'Status' field has radio buttons for 'Enquiry', 'Open', 'Won', and 'Lost', with 'Won' selected. Below the status field, there are two links: '|_Enquiry_|' and '|_Quote_|'. A 'Create Project' button is located below the links. The 'Decision Date' field contains '04-09-2022' and has a calendar icon. The 'Client Order Number' field contains '12345' and is highlighted with a red border. Below this field is a 'Linked Quote' field with the text 'Only use for quotes linked to others' and a 'Linked Projects' button. At the bottom, there is a 'Reason' field.

5. Major improvements have been made to Alpha Tracker Mobile to enhance general functionality and appearance. Updates include to New Project and Other Info functions, Report Sign-off, New Enquiry, New Quote, Enter New Samples. There is an “Add Photos” option on the “...” menu on New Quote, New Enquiry, My Quotes and My Enquiries which lets you add an unlimited number of photos to a list and then upload them to Alpha Tracker. It is also possible to see the Client View Site Register, not just the Asbestos Register. You will now only see the menu options that settings and permissions allow.
6. If you are using the Alpha Tracker Mobile app, there is a new option that allows surveyors to pull down data for reinspection. The benefit of this method is that the person setting up the reinspection project does not need to select the data that is to be reinspected. The surveyor can open a site register on the app on the day, and use the “...” menu option to select “Send data to handset”. They can then use the checkboxes on each row to select the required data, or use the select all/deselect all toggle at the top right of the screen.

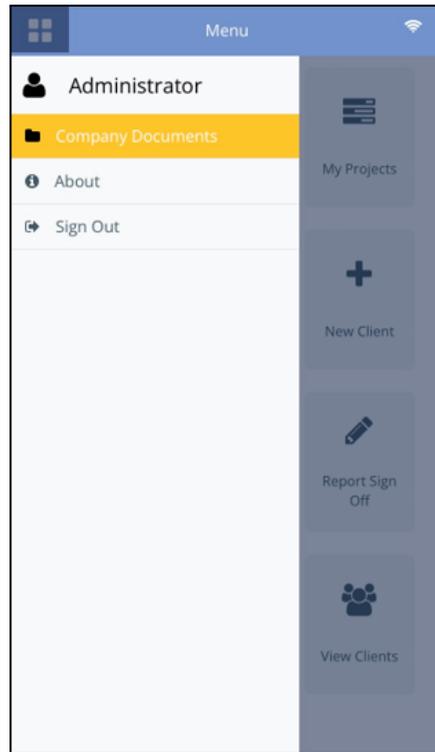


The “Send Data” button then displays a list of their appointments, two days ahead and 2 days in the past. The surveyor simply selects the reinspection project to which the records are to be sent, and confirms the sending of the items to their phone/tablet. If the appointment is in the future, they have the option to send the data immediately or have it marked as pending and sent on the relevant date.

If you have multiple client-specific Tracker Mobiles in use, then you can also choose which app to send re-inspection data to.

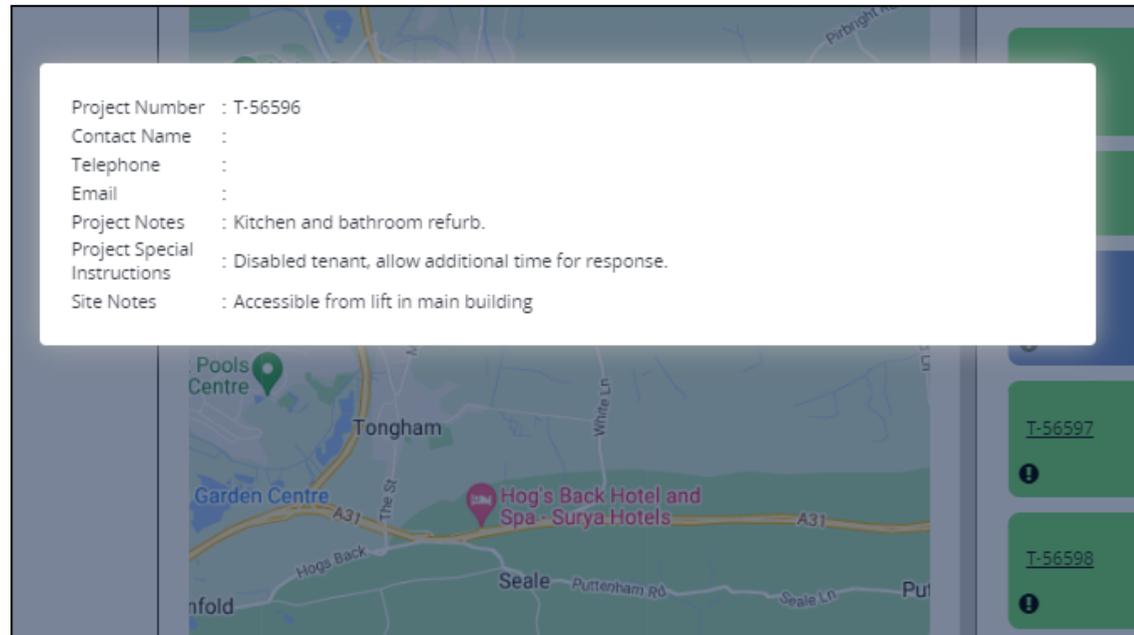
If your system settings allow you to create reinspections from the Client View Site Register, then you can also do this on the app.

7. Company Documents have been made available on the Alpha Tracker Mobile app via a new option on the left-hand menu. This will display any documents uploaded to Resources>Company Documents (root and subfolders).



8. The Intellisearch field at the top of the menu now also allows a name search matching on client contact, site contact and project site contact. This means that you can easily find, for example, all projects that have the same site contact.
9. If you wish, you can now set up templates to run from registers on the Client Portal. The “Print/PDF” button has the option to generate the standard Print/PDF as well as any additional templates that have been set up.
10. If you have the Project Pipeline displayed on your Client Portal logins, you will see that all open projects are displayed, not just those marked as Show On Web. This allows your clients to check on the status of work in progress as they can see which milestones are completed, overdue etc.
11. The Recommendations chart on the Client Portal Home page has been changed to use the register as its source so that it matches the registers in terms of which items are the latest, hidden items, re-inspections, updated items etc.

12. Both the Edit/View Site Status screen and the Project Pipeline will now reflect shared/linked sites. So if your Client Portal login gives you a view of sites and data that belongs to more than one client, you can also view it in those screens.
13. The Map Scheduler is now fully linked to the Staff Training Matrix, if it is in use, preventing the addition of appointments for unqualified staff.
14. If you have special notes on your projects that help with scheduling you can now easily see these on the Map Scheduler. An exclamation mark icon on the project draws your attention to the fact that notes are present. Clicking the exclamation mark displays contact details and any notes if present in Project Notes, Project Special Instructions and Site Notes.



15. There is a new screen available from the Resources>Diary menu, called Appointments Not Confirmed. This screen displays appointments that are either Tentative or Not Confirmed, and that are for today or in the future. This screen is fully searchable and includes preset filter buttons for the number of calls made to the client relating to the project. The screen allows you to chase up future appointments that the client/tenant has not yet confirmed, and to see how many times you have contacted them. Click on an underlined number to see details of the contacts made or planned. It's easy to record a new call/task from this screen should a further call be necessary, and also to open the project to make any required updates.

Home | Appointments Not Confirmed x

Click here to search...

Refresh Records: 2

No Contacts | 1 Contact | 2 Contacts | 3 Contacts | 4 Contacts | 5 Contacts | 5+ Contacts | All

Project Number	Master Project	Client	Project Type	Site Name	Post Code	Contact	Time	Staff Member	Contacts Made	To Do	Last Contact Date	
T-55672		SSWIFT Swift Surveying	Consultancy	Batch Cottage	TF13 6	Traci	17/10/2022 09:00 17/10/2022 13:00	Kim Evison	1	0	+Call/Task	10/10/2022
T-56567		ABCD A B C D Company	Asbestos Survey	Jack's Test			20/10/2022 09:00 20/10/2022 11:00	Start Software, Judy Key, Kim Evison	0	0	+Call/Task	

10 Records per page

16. The same counts are also available on the Projects Not In Diary screen so that you can clearly see the number of contacts made and planned regarding a project. If you wish to search this screen by master project number, simply use the new search field at the top and all projects sharing the same master project number will be displayed. In addition, some further columns have been added, such as Site Name, Site Contact Phone and Email and Site Notes to provide further information.

Home | Projects Not In Diary x

7DANE

Clear Search Criteria

Grid View | Map

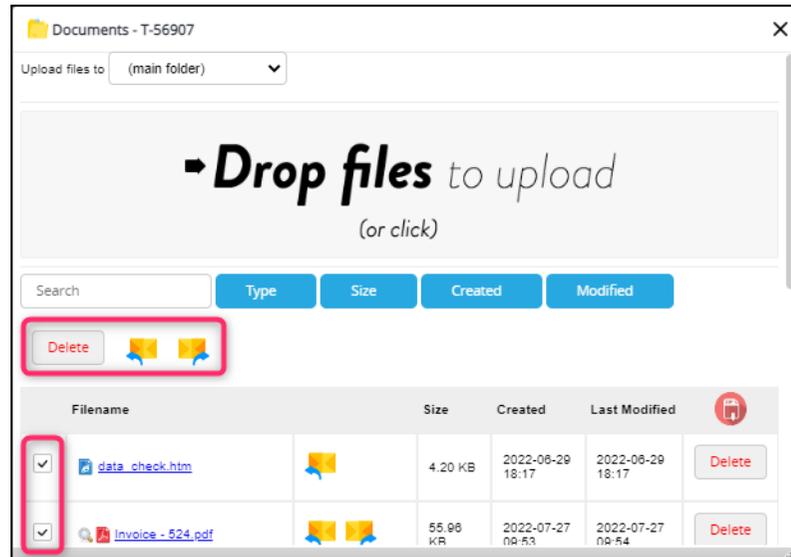
Refresh Records: 108

Quick Search: Search All

No Contacts | 1 Contact | 2 Contacts | 3 Contacts | 4 Contacts | 5 Contacts | 5+ Contacts | All

Project Number	Master Project	Type	Client	Site Name	Post Code	Contact	Status	Project Opened	Due Date	Estimated Man Days	Contacts Made	To Do	Last Contact Date	
T-56830	Legionella Survey (C)		7DANE Dane Environmental	Hill House		Bob	New	31/03/2022		1	1	0	+Call/Task	11/10/2022
T-56832	Re-inspection		7DANE Dane Environmental	25 Leigh Road	BH21 1AB	Liz Truss 01234567777	New	07/04/2022	21/04/2022	1	0	0	+Call/Task	
T-56833	Re-inspection		7DANE Dane Environmental	Norma View			New	07/04/2022	21/04/2022	1	0	0	+Call/Task	
T-56834	Air Monitoring		7DANE Dane Environmental	25 Leigh Road	BH21 1AB	Liz Truss 01234567777	New	07/04/2022		1	0	0	+Call/Task	
T-56851	Day Sheet Licensed Removals		7DANE Dane Environmental	32 Fisherman's Wharf			New	27/04/2022		1	0	0	+Call/Task	
T-56893	Re-inspection		7DANE Dane Environmental	Copenhagen House	CO7 1AP	Karl Mann	New	21/06/2022	05/07/2022	1	0	0	+Call/Task	

17. A new tickbox has been added to the Project Types screen called **No Diary Appointments**. If this box is ticked, then projects of this type are excluded from the Projects Not In Diary screen.
18. Sending multiple files to your client or to yourself from the Project Document Folder is now even easier. Use the tickbox on the left of the filenames to select the files that you want to work with. You can then choose the action to take, eg delete all the selected files, send them to yourself, send to client. If you are sending files to the client, then only the selected files in PDF format are sent and you will be warned if they appear to be drafts.



19. You can now set a list of values for the Client Type and the Industry Type field that are displayed in the Classification section of the Client Details. This will help if you want staff to choose from a specific list of client types and industry types rather than making up their own. To define the lists, use the Setup>General>Lookups menu option and select the category "Client Industry Types" or "Client Types".

Industry Type is also now available on the New Client screen.

Home | Lookups x

Search

Category: Client Industry Types (dropdown) Value:

Client Industry Types (dropdown) Search (button)

Records: 6

ID	Value	Category	Value Number	Sort Position	Delete
185	Communication	Client Industry Types	0	0	<input type="checkbox"/>
186	Chemical	Client Industry Types	0	0	<input type="checkbox"/>
187	IT	Client Industry Types	0	0	<input type="checkbox"/>
205	Housing Association	Client Industry Types			<input type="checkbox"/>
206	Housing Trust	Client Industry Types			<input type="checkbox"/>
207	Software	Client Industry Types			<input type="checkbox"/>
* <Auto>					
* <Auto>					
* <Auto>					

10 Records per page Submit Cancel

20. This release introduces greater control over the calculation of milestones on a project. There is a new setting "Calculate milestone targets on specified key milestones". This setting gives a generic way of forcing specific key milestones to calculate the milestones that are positioned **after** it. When this setting has a value, no milestone target dates are calculated when the milestones are first generated. This means they will never start from the Project Opened date, and will only begin when one of the specified key milestones is completed.

For example, if you are using the Surveyor First Day On Site key milestone, you can choose to have the milestone target dates that come after Surveyor First Day On Site calculated as soon as the surveyor sends in data. So once the surveyor sends in data, your subsequent target dates are calculated and populated, ie the clock starts ticking once the surveyor sends data into the project.

"CalcDynamicMilestoneTargets" should be set to no. "Calculate milestone targets on specified key milestones" should be set to the number of the key milestone(s) whose completion triggers the calculation of the target dates of the subsequent milestones.

Calculate milestone targets on spec: 15/09/2022 2 Specify a comma separated list of key milestone IDs that will cause milestone targets to calculate

Home | Milestones x

Standard Milestones | **Key Milestones** | Custom Milestones

Records: 11

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
9	Tracker Air data received
10	Survey Approved

First Prev 1 2 of 2 Next Last 10 Records per page Save Cancel

Position	Milestone	Disable Target Date Calc.	Target (Days from last milestone)	Key Milestone
1	Appointment booked	<input type="checkbox"/>	0	Site visit booked
2	Onsite survey completed	<input checked="" type="checkbox"/>	0	Surveyor first day on site
3	Samples received	<input type="checkbox"/>	2	Samples received in lab
4	Samples analysed	<input type="checkbox"/>	1	Bulk Samples Analysed
5	Drawing completed	<input type="checkbox"/>	1	Plan Complete
6	Report Checked	<input type="checkbox"/>	1	Report QC Checked
7	Project Due Date	<input type="checkbox"/>	0	Project Due Date

21. In addition, there is now greater flexibility in generating and calculating milestones. A new method allows you to set milestones and their target dates not only according to the Project Type but also with reference to the Turnaround. This means that you can create different sets of milestones, or just different target date calculations, for a Project Type depending on the Turnaround. For example:

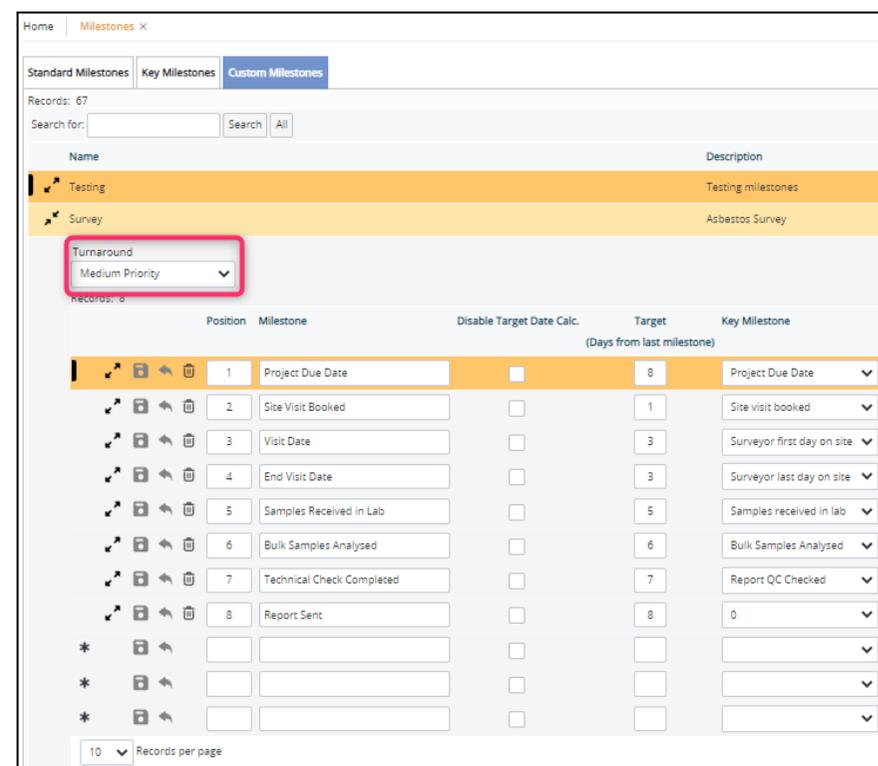
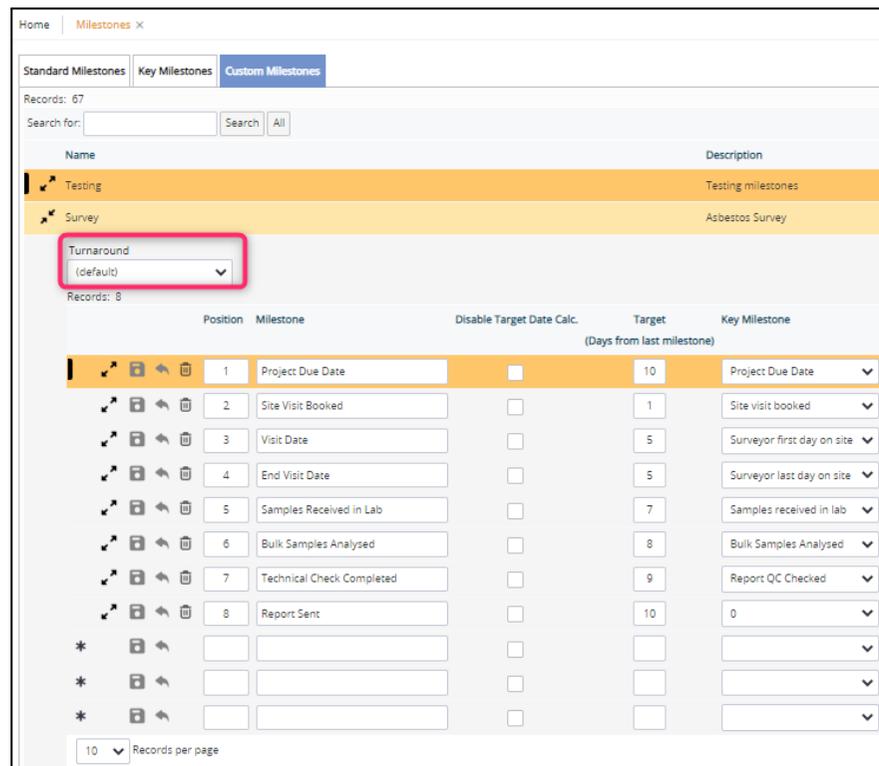
Project Type “Survey” has a default set of milestones including a Project Due Date calculated as +10 days. This set applies if no Turnaround is set.

It also has a set of milestones that applies when the Turnaround is “High Priority”. This has a Project Due Date calculated as +3 days.

It also has a set of milestones that applies when the Turnaround is “Medium Priority”. This has a Project Due Date calculated as +6 days.

This method works for both dynamic and standard milestone calculation.

To make it easy to create the extra sets of milestones, when you select a Project Type/Turnaround combination for which no set of milestones has been defined, the system offers to copy the default set of milestones. This makes it very quick to have the same set of milestones with different target date calculations as you need only amend the number of days.



Note that if you change the Turnaround on a project, then the existing milestones on that project are deleted as long as they haven't been completed - new milestones are created using the template for the newly-selected Turnaround. If some milestones have already been completed, then a message tells you that the milestones should be manually amended. A Jotter record is written whenever the Turnaround is changed.

- In this release there are changes to help with the management of master projects that contain a large number of sub projects. For example, when a master project has one of the following fields changed, the same fields on the sub projects will be updated. This applies to all sub projects that are open, that do not have a Report Produced date and are not invoiced.

- Invoice recipient
- Accounts email
- Report recipient
- Turnaround
- Client Order Number
- Project Notes
- Special instructions
- Estimated job value.

Values will only be updated, however, if the **deleted** value from the master project matches that on the sub project being updated.

23. Similarly, if you change a site's details, the changes are now reflected on the corresponding projects. Only projects that are open, have not had a Report Produced and have not been invoiced will be updated. These are the fields that will be updated:

- Site Name
- Site Address
- Site Postcode
- Site Ref
- Site Country
- Landlord
- Longitude
- Latitude
- Site Contact Name
- Site Contact Telephone
- Site Contact Email.

24. Updating items on the Client record are also now reflected on the client's projects. The fields updated are:

- Client Name
- Account Manager
- Contact
- Invoice Address
- Invoice Recipient

- Report Recipient
- Accounts Email Address.

25. On the Lab Check screen, which is used to display the number of samples analysed, points accrued and checks required, there has been a change to the calculation of underlimit samples required. The 5% underlimit samples will now always round up rather than down, so that one check will be required as soon as any samples are analysed.
26. A new setting, “Auto update show on web when report produced updated”, allows you to have the system automatically tick the **Show On Web** box when the **Report Produced** date is added.
27. Improvements have been made to invoicing, including to batch printing and exporting, and the Jotter has been added. In addition, there is a new consolidated invoice feature from the Invoicing screen so that you need only generate one invoice for your client no matter how many projects you are invoicing.

You can flag the clients who require consolidated invoices on the Clients screen, and this flag is displayed as a filter on the Projects Ready To Invoice list.

General Details

Contacts/Emails

Classification

Finance/Credit Details

Account Code

Cost Centre

Cost Code

Xero Contact ID

Quote Multiplier

Accounts Email

Invoice Recipient

Invoice Address

Consolidate Invoices

Payment Terms

Initial Credit Check Completed

Initial Credit Check By

Ready (58) Draft (160)

58 160

Projects Ready to Invoice

Search

Project Number Client ID Client Name

[Clear Search Criteria](#)

Refresh Records: 58

Consolidated Single Invoices All

Project Type

<input type="checkbox"/>	A-00017	<input type="checkbox"/>	<input type="checkbox"/>	Asbestos Survey
<input type="checkbox"/>	T-00273	<input type="checkbox"/>	<input type="checkbox"/>	Asbestos Survey
<input type="checkbox"/>	T-00284	<input type="checkbox"/>	<input type="checkbox"/>	Asbestos Survey

28. There have been some small changes to the Recommendations screen. The main one being the addition of a **Category** field, with some fixed values on its dropdown. The purpose of this field is to enable you to group recommendations in reports, dashboards, on the Client Portal etc.

In addition, the **Timescale** column has been removed from the Recommendations screen. Also, the **Screen Type** column is now only displayed if Hazmat is in use, validation prevents the entry of duplicate recommendations and the deletion of recommendations that are in use.

29. If you have a number of client-specific Tracker Mobile apps in use, there is a new way to specify which app to use for re-inspections. When creating the re-inspection project, this method lets you specify which app the records to be re-inspected should be sent to.

When creating a new re-inspection project from a previous project you will see a new drop down called **Mobile App** where you can make your selection:

Home | Client Search - LCC x

Summary & Cover Sheet

Choose Task for other options

Select

- Copy Data to New Project
- Create Fibre Analysis
- Create HazMat Reinspection
- Create Initial Findings Email
- Create Re-Inspection Project
- Delivery View
- Edit/View Photos
- Edit/View Samples
- Edit/View Suspect Items
- Enter Fibre Analysis
- Export Data
- Move Data to another Project
- Open Alpha Draw
- Plan Hotspots
- Receive Data from another Alpha Tracker

Re-Use / Re-Inspection Details

Please select the Unit ID the re-inspection records should be sent to

Mobile App

Unit ID

Project Letter M

Pending?

The same dropdown is available when creating a re-inspection from the Asbestos Register.

Fixes/Minor Changes

There have also been some fixes/minor changes in this release, including:

- Document maker now supports the SPECIAL_ExtraInfo instruction.
- There have been minor cosmetic improvements to Edit Quotation and Associated Costs.
- The staff selector in Staff Calendar now includes a “me” option at the top of the list.
- System logs are now visible via the Setup>Systems menu. It is not expected that clients will use this option but it is useful for debugging and interrogating the system.

- The print quality of the PDF Viewer has been improved. It is now at 300dpi.
- The formatting of figures on the Sales Dashboard has been improved, with large numbers now displayed as 1K, 100K, 1M, 10M etc, and the currency symbol from the repository being used.
- Auto-colouring of hotspots has changed slightly to match auto-colouring in Alpha Draw. It no longer colours items red if they have a material score greater than 0 and are presumed.
- Project and site imports now work more reliably with site postcodes containing only numeric data, as with Australian/New Zealand postcodes.
- Improvements have been made to messages if no records are returned.
- Some speed improvements have been made on the Survey Items screen.
- There have been minor changes to fibre counting in Australian Air Monitoring, and also the following changes:
 - audit feature added to samples screen
 - increased the width of location field
 - after generating report, the report window closes
 - new air monitoring setting 'Sort Order for Air Monitoring/Clearances', with options 'ID,ReportNumber', default is 'ID'
 - clearances and air monitoring screens updated to use the sort order based on the setting
 - NPL Test Slide No column now uses an edit combo list. Data source uses equipment where equipment type='NPL Test Slides', only active equipment is displayed (not expired, still active, not out of service)
 - new setting to control the 'inspected by' column on the air monitoring screen
 - Column position changes in the summary section.
- The Wallboard has had some minor fixes:
 - it now allows search filter visibility to be toggled
 - a colour issue has been corrected
 - popups have been improved
 - resources are now ordered alphabetically
 - “U” projects no longer behave in a special way but display a colour based on their project type only.
- The buttons available for different label formats for the barcode labels have changed.
- A problem with sub-groups on the Staff Calendar has been fixed.

- A performance fix has improved the updating and deleting of appointments for U projects.
- The Jotter has the blank row for adding a new entry at the top of the list.
- Barcodes are available on Bulk Sample type projects as well as Survey Items to extend the chain of custody functionality.
- When adding a new row in a weekly timesheet, default values are displayed for both the staff member and the date. Also, double clicking opens a record for editing.
- In the Overdue Appointments section on the Home Page, the Time column displays the full date and time of the appointment.
- A new Xero tracking categories table has been added, with a linked field to the offices table. These tracking categories are sent with invoice lines on the Xero export.
- Soil sampling has a new field displayed, "Sample Dry Weight". A setting controls the display of this field, and by default it is displayed.
- You can now edit the nominal code on individual invoice lines.
- When auto-generating the text for an invoice line, you can now use a tag to provide the sample count.
- Line numbers will now populate on invoices when using the cost breakdown to specify the lines.
- The Milestone Refresh can also be performed from the row expander on the Project List.
- Milestone templates are now displayed in position number order by default.
- The ManualSurveyDocumentVersionNumber setting will now only attempt to increment the value if it is numeric. If it is non-numeric, it will remain as it is.
- Filenames containing a # can also be downloaded from document folders.
- There are three new tags available to use in the email body when emailing a document from the quotations document folder. These are "ProducedByTitle", "ProducedByEmail" and "ProducedByMobile".
- Calls/tasks details now include the site name information below the project number. So does the My To Do List.

- You can now search All Calls/Tasks by the person who has been assigned the call/task. And the master project number is available.
- An issue with changing payment due date on invoices has been fixed.
- Date has been added to the SM2 Survey Item History.
- The master project import now imports the turnaround from the master project onto all newly created projects.
- The Client Order Number and Project Value have been added to the import via the Map Scheduler. The import uses the same fields as the master project importer. There is a tickbox on the site importer on the Map Scheduler (for one project per site) and new validation when importing sites to create projects.
- Figures in the Sales Dashboard are now calculated for the person to whom the quotation is assigned, not the person who produced the quotation.
- If you use the Word/Excel button to generate documents, then you might notice a couple of changes. The "Send Document Request" button is now labelled "Create Document" and the wait message has changed. If you are using the new "instant" document generator then a download button is also available.
- Bugs found when updating the decision date on quotations and displaying the confirmation message for creating projects have been fixed.
- Invoice Template D now outputs the VAT/Tax percentage on invoice lines.
- The Project Number on Weekly Timesheets is now an edit-combo field. It only shows open projects and the list is searchable.
- Appointments Not Confirmed no longer shows "U" projects and respects the allowed office letters.
- Chargeable Projects Not In Diary (only shown if its setting is on) also no longer shows "U" projects.
- The search sections of All Calls/Tasks and My To Do List have had "Logged By" added.
- The Quotation List now includes the Decision Date in the search section and as a column in the main part of the screen.
- The Decision Date on quotations is now read-only but editable by superusers. It is also displayed when a quotation is lost.
- Changes have been made to the way Recommendations are counted on the Client Portal dashboard graphs.

- The Invoice List has a new Status column to match the Invoicing screen, and quick search buttons for status.
- Some updates have been made to improve barcode scanning.
- A change has been made to how Product Type, Condition and Surface Treatment Descriptions are output or looked up when generating XMLs.
- If you select a site contact from the dropdown when adding a new site, by default the system will output the telephone number. Now if the telephone number is blank, the system will output the mobile number.
- Australian air monitoring has seen some minor changes, mostly around work location and description of work.
- The delete button on the Appointment screen has been moved to the end of the row of buttons.