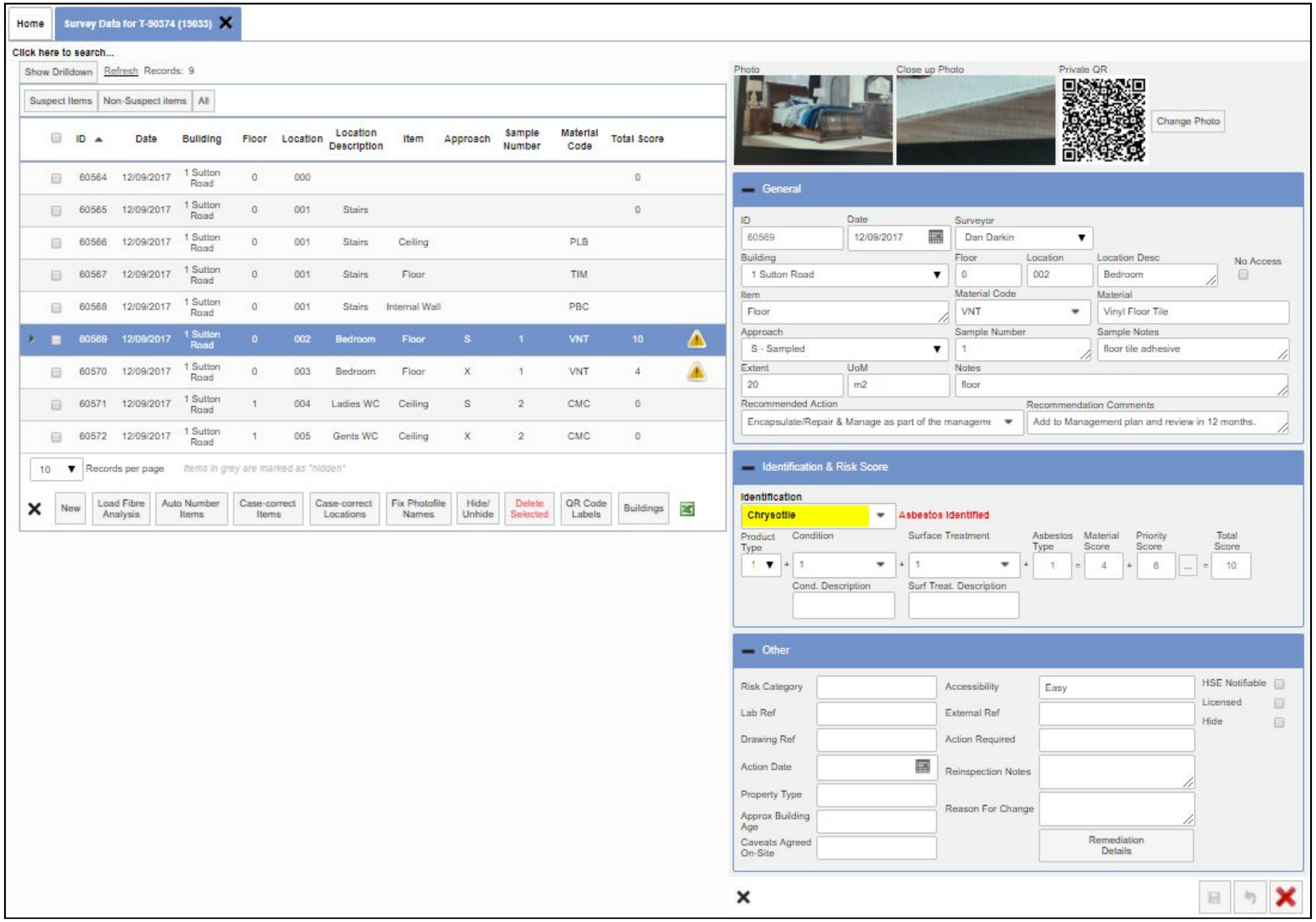
Release 26 - Alpha Tracker Release Notes

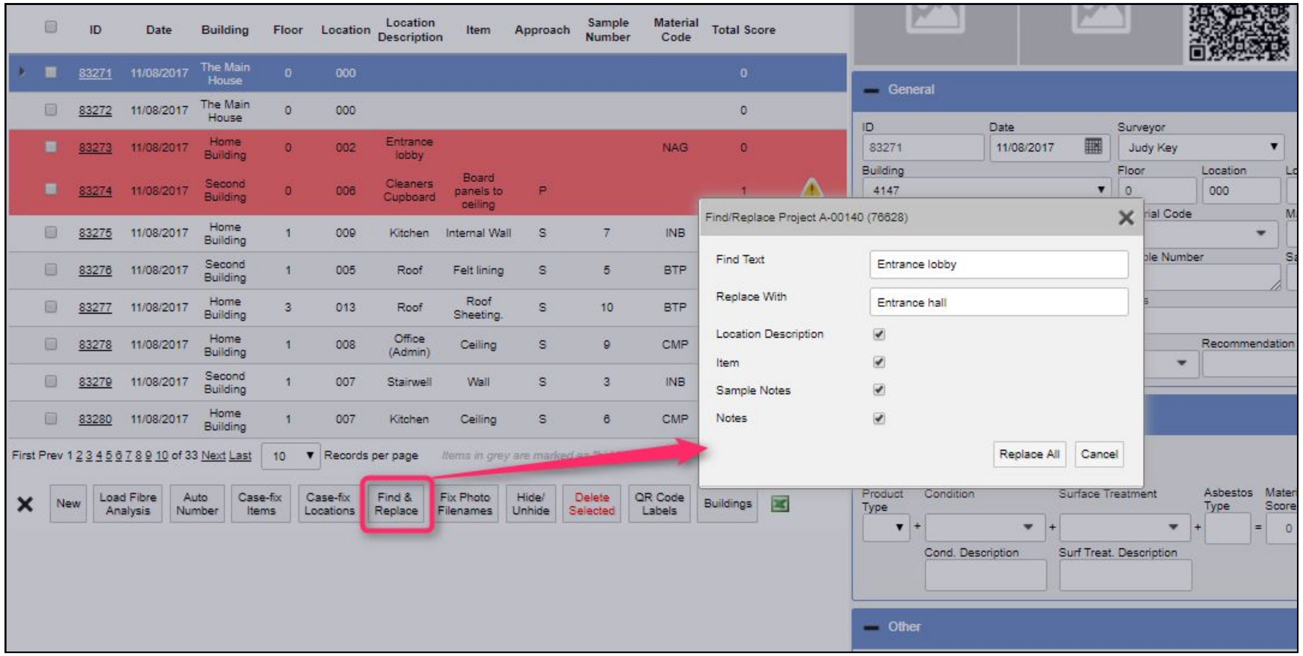
New Features / Changes (SVN2648)

1. The Survey Data screen has a new look!
   To improve the performance of the very busy Survey Data screen, there is a new layout available. This is changed by using a setting so that you can choose which type of Survey Data screen your Alpha Tracker uses. To see the new layout, set the “Survey Items screen style (list/form)” setting to “form”.
   The new screen is faster and lets you see more detail on one screen. It also includes the following features:
   - Individual Item details displayed on the right
   - Clear indicator of presence of asbestos
   - New button to access the Buildings screen directly from Survey Data enabling quick addition of new buildings
   - A Drilldown that gives a tree view and lets you filter the Items displayed by building, floor and location
   - Preset filter buttons for displaying Suspect or Non-Suspect Items
   - Hideable search fields
   - Clearer layout of the Identification and Scores
   - Grouping of survey data into three areas: General, Identification & Risk Score, Other
   - Sample Number field sorted as a number not character
   - A new Search and Replace function.

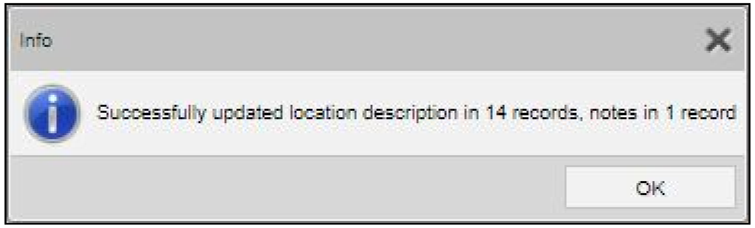
   The following screen shows an example of the new layout.



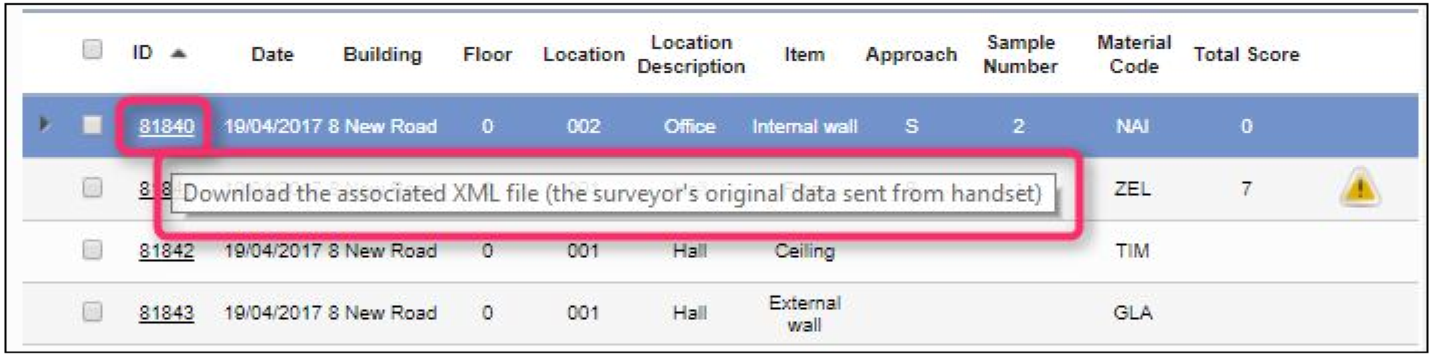
The new Search and Replace function gives you an easy way to search for text in the Location Description, Item, Sample Notes and Notes fields, and to replace it with specified replacement text. By default only the Location Description and Item are included in the search and replace, but you can use the tickboxes to extend the range.



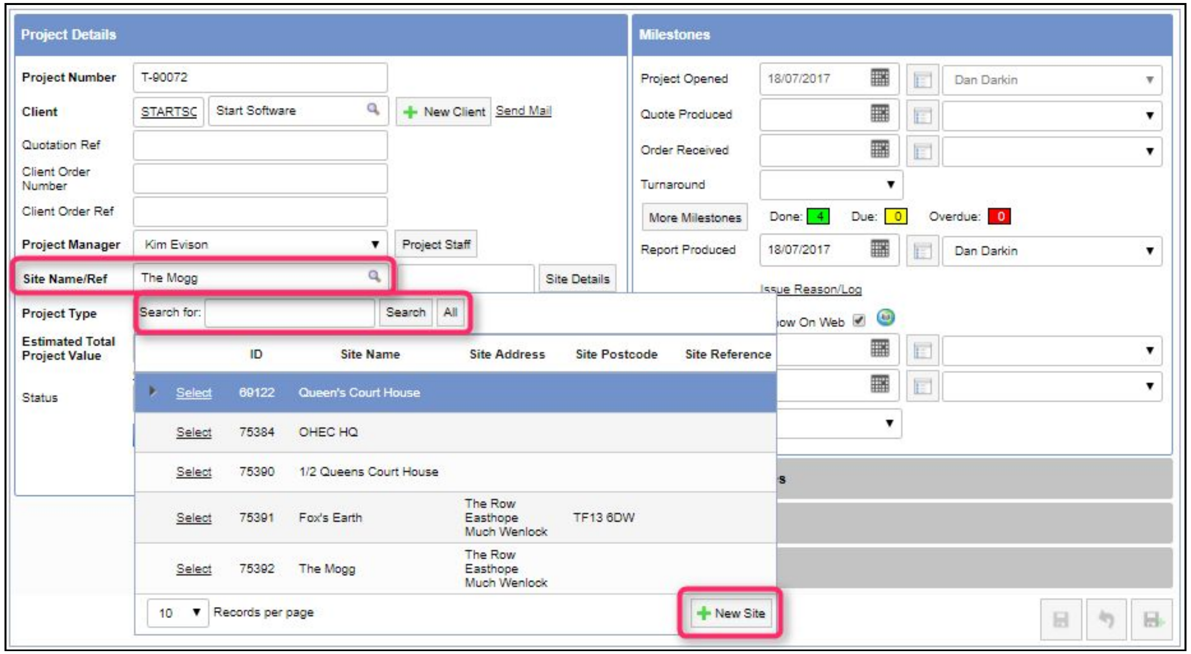
Both the **Find Text** field and the **Replace With** field must not be blank for the **Replace All** button to be available. A message indicates the number of replacements made in each field when the action is complete:



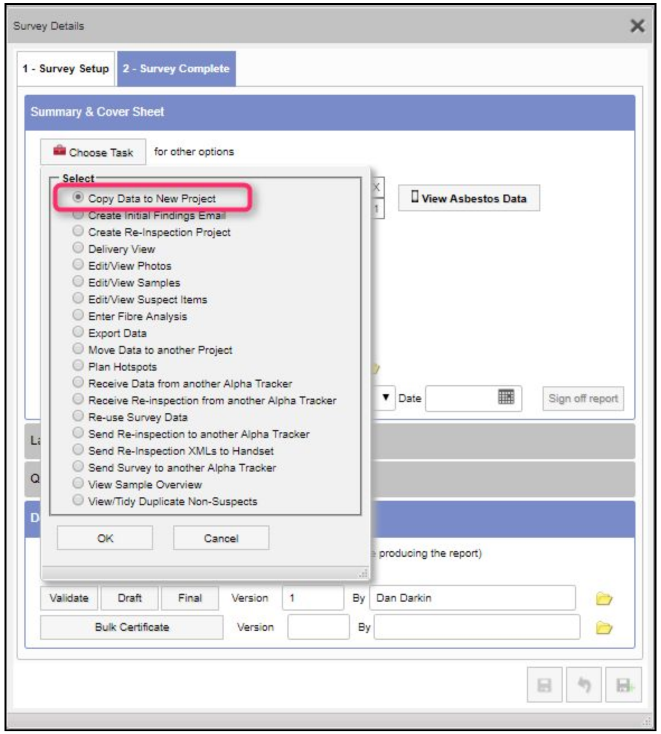
2. If you are looking for the link to download the XML record for a survey item on the new Survey Items screen, you should now click on the underlined survey ID to access this information. There is no longer a separate XML link; simply click on the ID number to download the original XML file.



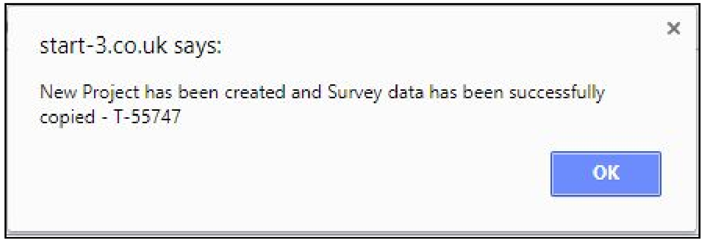
3. Following on from the new Survey Items screen, if your system is set to show the new Survey Items screen then you will also see this screen when you use the *Check Survey Data* menu option from the Survey Quick Start menu.
4. When booking in a new project, you will find the **Site Name/Ref** field behaves slightly differently. It is designed to make it easier for you to select an existing site. Clicking anywhere in the **Site Name/Ref** field displays the list of sites for the client. You can:
   - search - enter search criteria in the **Search for** box at the top of the list, then click the **Search** button
   - select - select a site by clicking on its **Select** link
   - add - create a new site for the client by clicking the **New Site** button.



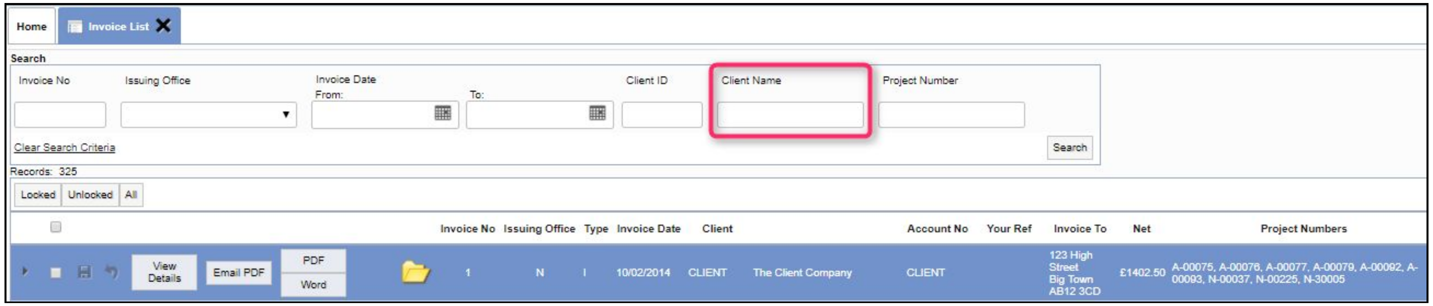
5. It is now possible to copy survey data from one project to another. You need only open the original survey project, go to the Survey Details and select “Copy Data to New Project” from the **Choose Task** list.



As soon as you click OK the system creates a new survey project, tells you the project number, and copies the survey data into the new project.

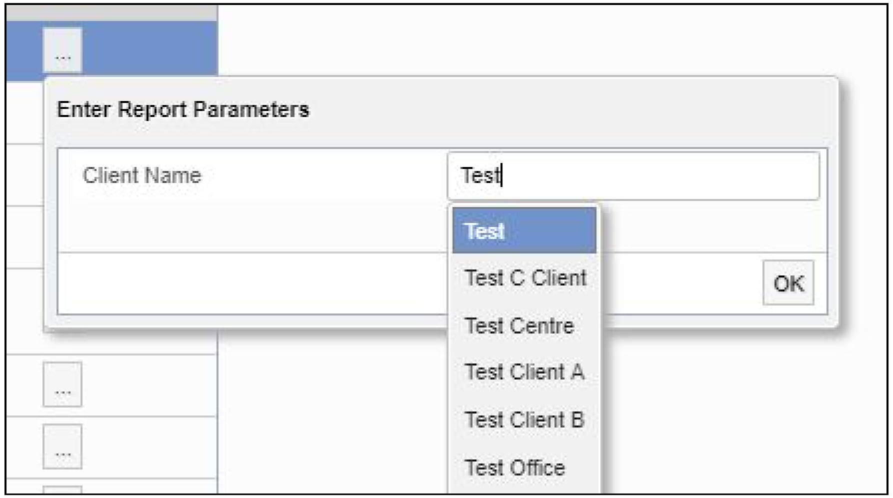


6. The Invoice List screen has been updated so that the Client search field at the top is a free typing text box and no longer a dropdown list. It now works in the same way as the Client searches in other places, such as the Project List and Client List.



7. Improvements have been made to the way Re-inspection records (XMLs) are created. They are created faster and in a way that reduces any effect on system performance.
8. The Recommended Action and Recommendation Comments fields on the Survey Data screen can be controlled by using two new settings. One determines whether the Recommendation Comments field is editable or not, and the other determines whether the comments overwrite the existing entry or are appended, thereby allowing you to make multiple selections in the Recommended Action field. The settings are:
   - "Survey Items Recommendation Comment is Editable" which can be set to yes or no, with a default of yes
   - "Survey Items Recommendation Comment Type" which can be set to 1 for Append or 2 for Overwrite, with a default of 1.
9. You can choose whether your Alpha Tracker system moves fibre analysis records when you move survey data from one project to another. A system setting controls this: "Move fibre analysis when moving survey data".

10. The auto-suggest prompts on the parameters when you are running reports on your data (from the Reports menu) have returned. Simply start typing to get a list of matching entries:



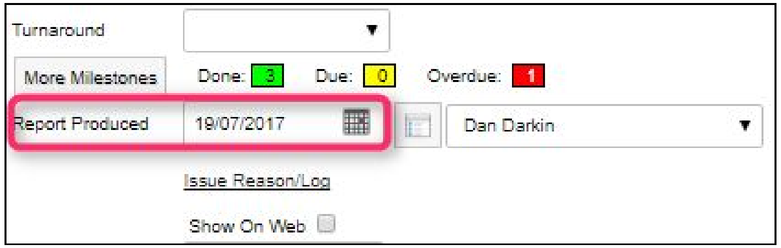
11. The Projects Dashboard has a new column which indicates how many of the project's samples have been analysed. This is the **No. Fibres Analysed** column and it displays two numbers, separated by a slash. The first number indicates the number of analysed samples; the second number indicates the total number of fibre analysis created. So if there are two samples in a project, you have booked them in and completed the analysis on both of these, you would see details like this:

Samples Analysed	Plan Produced	No. Samples	No. Fibres Analysed	Report Complete	Invoice Date
18/07/2017	No	2	2/2		

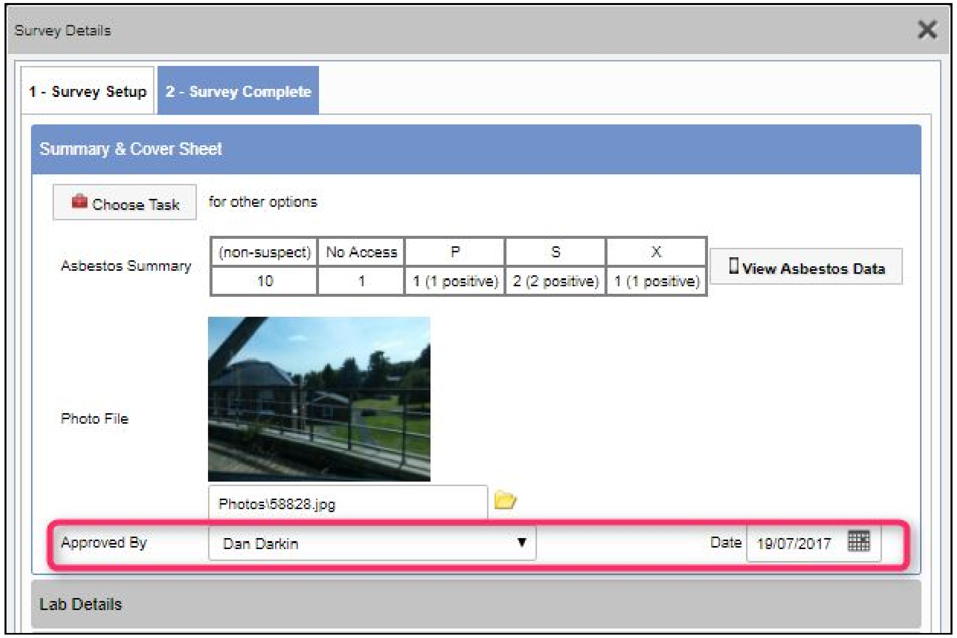
If you have a project with one sample, which you have booked in but not yet analysed, you would see details like this:

Samples Analysed	Plan Produced	No. Samples	No. Fibres Analysed	Report Complete	Invoice Date
No	No	1	0/1		

12. A new setting lets you change how the **Report Produced** milestone is completed. Until now, the milestone is completed with today's date when you first click the **Draft** or **Final** button to generate a survey report.



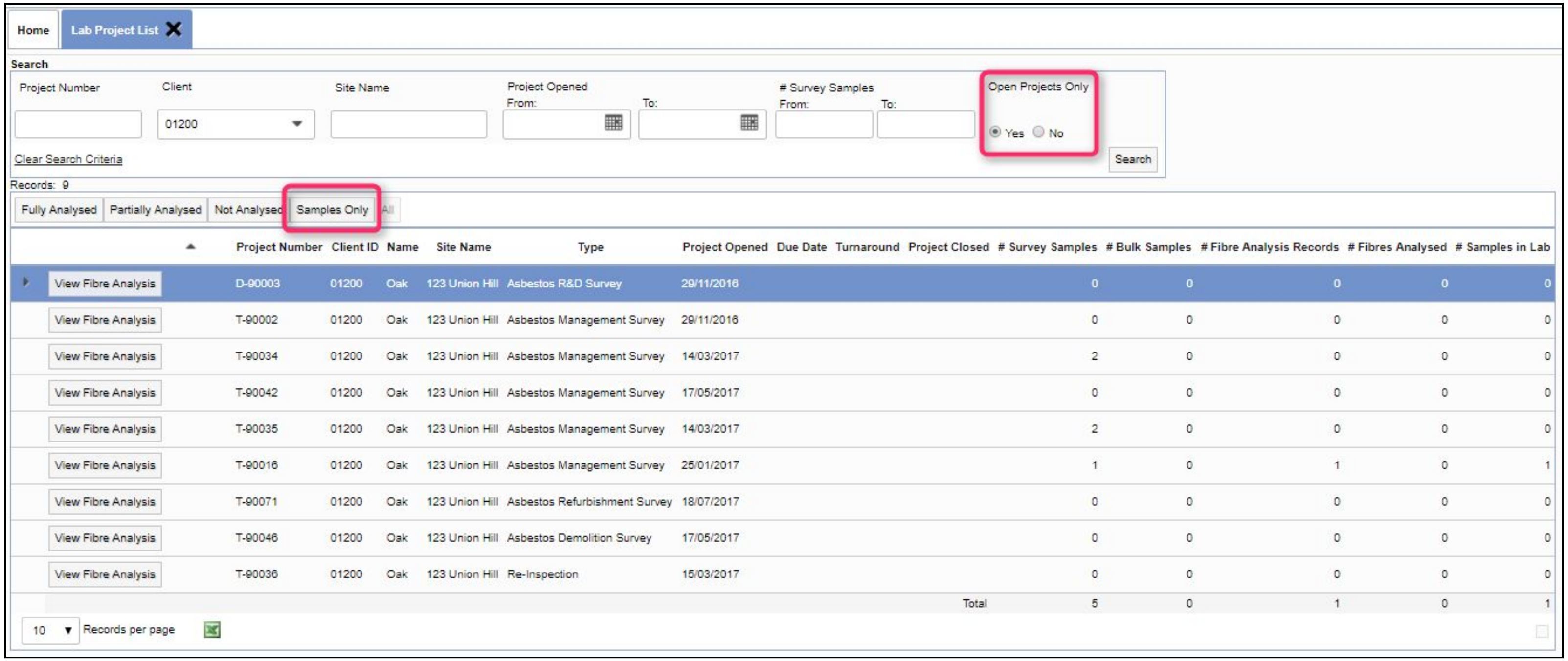
The new setting lets you choose to populate the milestone when the survey report is signed off rather than generated, and so indicates that the report is complete and authorised. The setting is “Update report produced when report is signed off”. Survey reports are signed off here:



This setting is particularly useful for people using the Projects Dashboard, where the **Report Produced** milestone populates the Report Complete column:

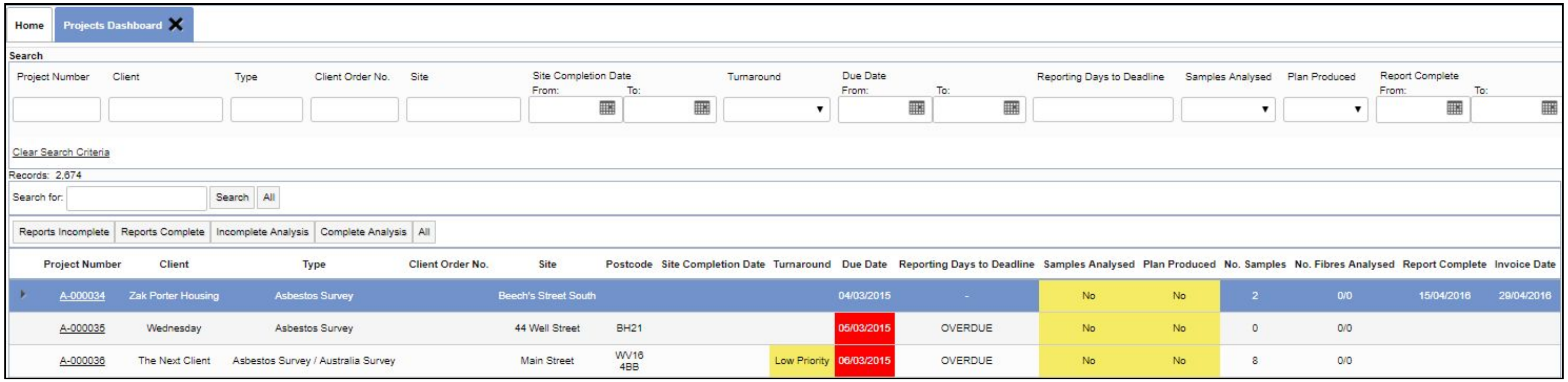
Samples Analysed	Plan Produced	No. Samples	No. Fibres Analysed	Report Complete	Invoice Date
No	No	1	0/1	19/07/2017	

13. The Lab Project List has new features to help you display the projects you need. In the Search box at the top of the screen you now have **Open Projects Only** Yes/No radio buttons so that you can restrict your search to open projects only if required. The **Open Projects Only** search can be used in conjunction with the filter buttons so that it is always possible to hide closed projects whichever way you search the data. There is also a new filter button which lets you hide projects that have no samples (0 survey samples *and* 0 bulk sample) - this is the **Samples Only** button.

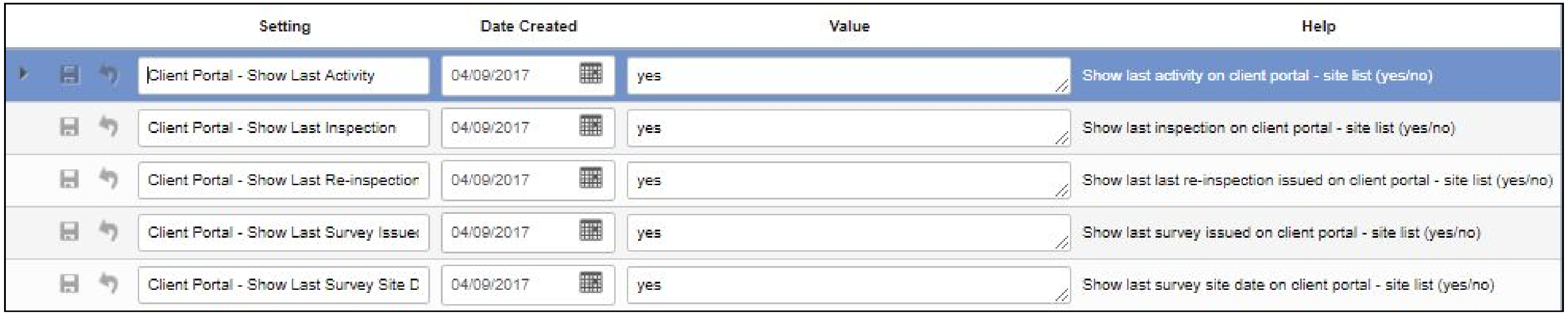


	Project Number	Client ID	Name	Site Name	Type	Project Opened	Due Date	Turnaround	Project Closed	# Survey Samples	# Bulk Samples	# Fibre Analysis Records	# Fibres Analysed	# Samples in Lab
View Fibre Analysis	D-90003	01200	Oak	123 Union Hill	Asbestos R&D Survey	29/11/2016				0	0	0	0	0
View Fibre Analysis	T-90002	01200	Oak	123 Union Hill	Asbestos Management Survey	29/11/2016				0	0	0	0	0
View Fibre Analysis	T-90034	01200	Oak	123 Union Hill	Asbestos Management Survey	14/03/2017				2	0	0	0	0
View Fibre Analysis	T-90042	01200	Oak	123 Union Hill	Asbestos Management Survey	17/05/2017				0	0	0	0	0
View Fibre Analysis	T-90035	01200	Oak	123 Union Hill	Asbestos Management Survey	14/03/2017				2	0	0	0	0
View Fibre Analysis	T-90016	01200	Oak	123 Union Hill	Asbestos Management Survey	25/01/2017				1	0	1	0	1
View Fibre Analysis	T-90071	01200	Oak	123 Union Hill	Asbestos Refurbishment Survey	18/07/2017				0	0	0	0	0
View Fibre Analysis	T-90046	01200	Oak	123 Union Hill	Asbestos Demolition Survey	17/05/2017				0	0	0	0	0
View Fibre Analysis	T-90036	01200	Oak	123 Union Hill	Re-Inspection	15/03/2017				0	0	0	0	0
									Total	5	0	1	0	1

14. It is now possible to rename the **Client Project Ref** field on the Projects screen to any name of your choosing by using the “Name: Client Project Ref” setting.
15. When using the Projects Dashboard you now have more search options, including being able to search for Client names in the general **Search For** box. Further changes to the Projects Dashboard have removed the “Report Drafted” column, combined “No. Fibres” and “No. Analysed” into one field and included bulk sample projects in the calculations in the “No. Samples” column.

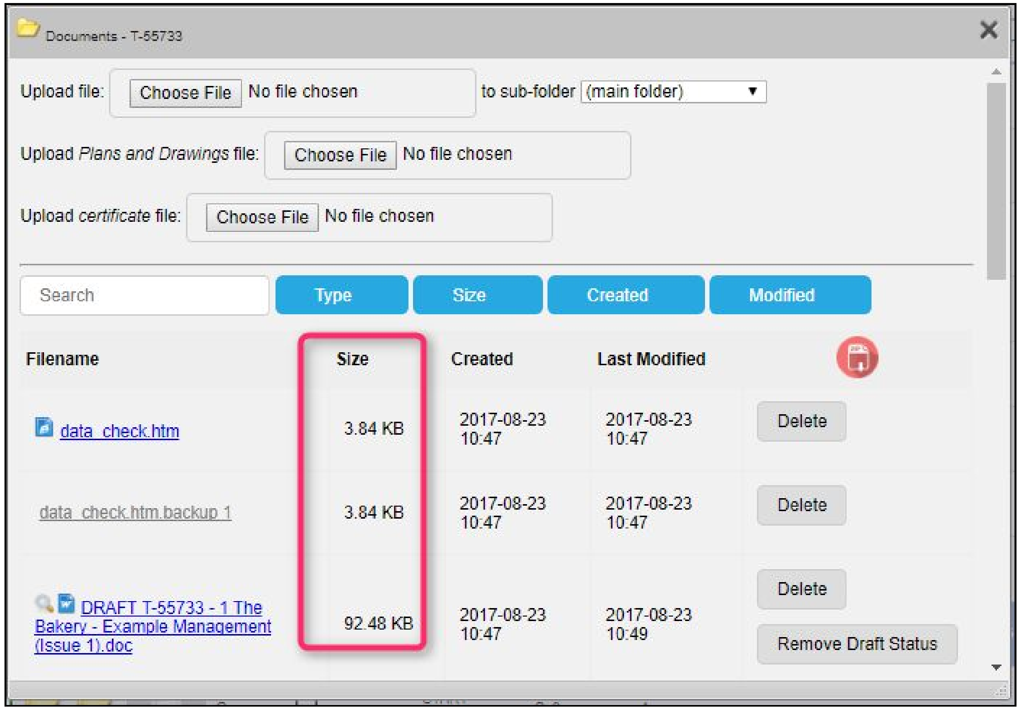


16. There has also been a change to how the Samples Analysed works on the Projects Dashboard. The Samples Analysed will now show "N/A" if survey data has been received, but with no sample items. If samples do exist then it will show the date as it did previously (from Key Milestone 6). If the project is a bulk sample project then it will check for bulk samples rather than survey data and will display "No" if there are no samples for the project, otherwise it will show the date as previously. If the project is neither a survey nor a bulk sample, then it will display "N/A".
17. There is a new setting that updates the "Bulk Samples Analysed" Key Milestone with today's date when a bulk certificate is requested. The milestone is only updated if it has not been entered previously. This is the “Update bulk samples analysed milestone when a bulk certificate is requested” setting.
18. All the dashboard charts on the Client Portal have been converted to be Google Charts rather than Alpha Charts. These charts have improved cosmetics and are easier to maintain, they also have useful hover tooltips and a cleaner appearance.
19. There are five new settings that help you to control what a client can see on the Client Portal. These settings control the columns displayed on the Site List and Compliance Summary. You can hide Last Activity, Last Re-inspection, Last Survey Issued and Last Survey Site Date.



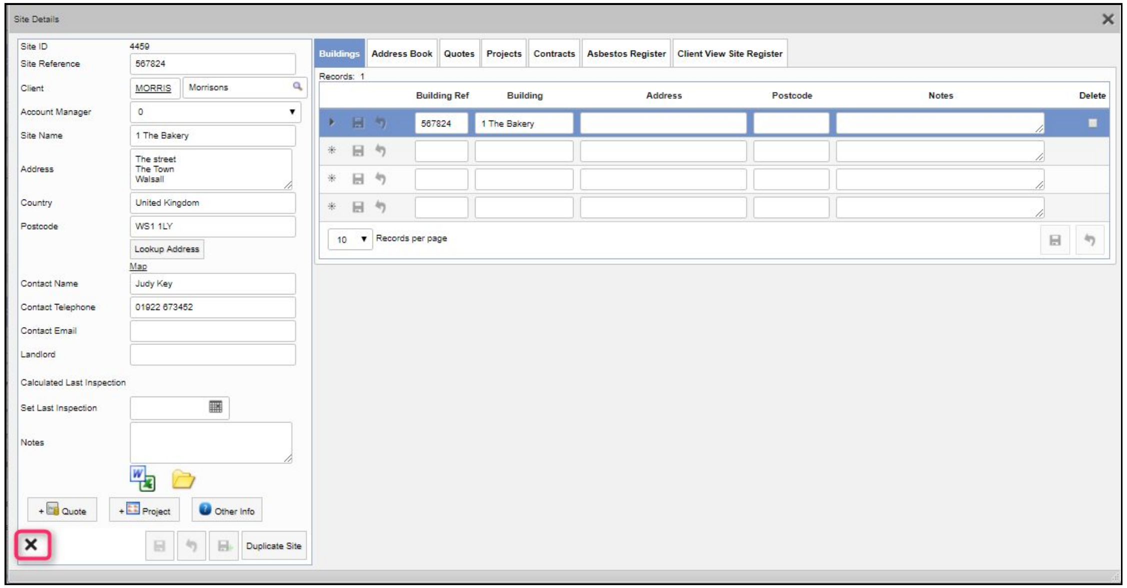
20. A change has been made to the way that users are restricted to seeing only certain sites on the Client Portal. This is now a dynamic filter that is dependent on the user’s linked Client ID.

21. A new setting allows you to overwrite the Invoiced Date on a project when a new External invoice is raised even if it has been filled in previously. The setting is "Overwrite Project Invoiced Date" and its default setting is "no".
22. Project Re-inspections have a new check to include LAG/NAG items. It was previously assumed that other data such as the approach would identify these items.
23. Minor changes have been made to the Invoice, Credit Note and Pro-Forma Invoice for Template A to make them consistent and adjust the alignment of total figures. The Proforma Invoice and Credit Note for Template C have also been amended.
24. Extra checks have been added to prevent "blank" report formats from being added to document request shell strings. Checks are made to ensure the survey type isn't blank and has a valid report format entered. This is intended to prevent items in the print queues that can never generate a document.
25. Improvements have been made to the Xero export so that it handles symbols in the data better.
26. A change has been made in the document folders to show file sizes as KB, MB, GB etc. rather than just bytes which makes them easier to understand.

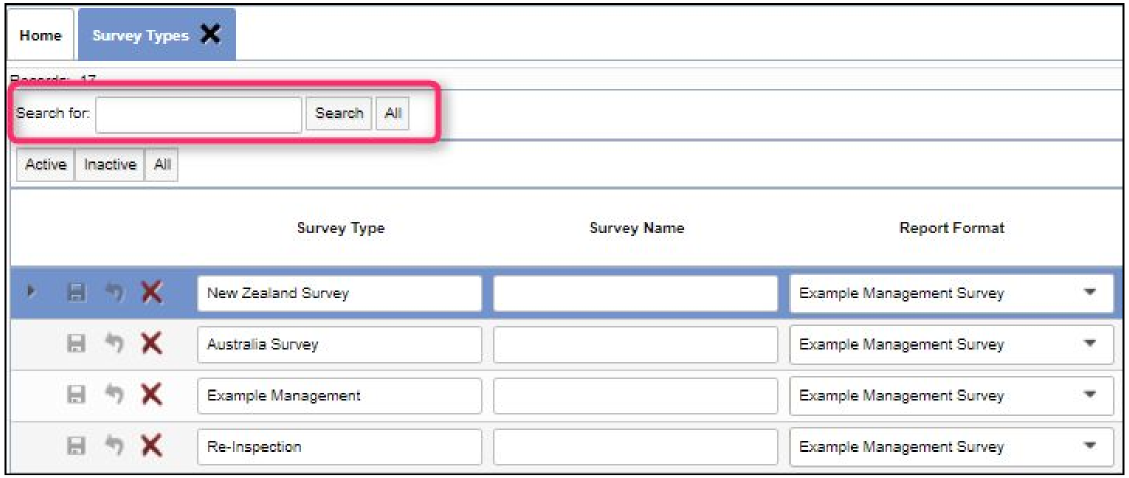


27. Another improvement to the document folders means that an unlimited number of files can be displayed. Previously, the list was limited to 2,000 files, now the list does not have a limit. With this also comes some speed improvements to folders - please keep in mind however that it can take some time to display a folder with thousands of files.
28. Improvements have been made to the selection of building-specific reports so that it is easier to switch between building-specific and non building-specific reports.

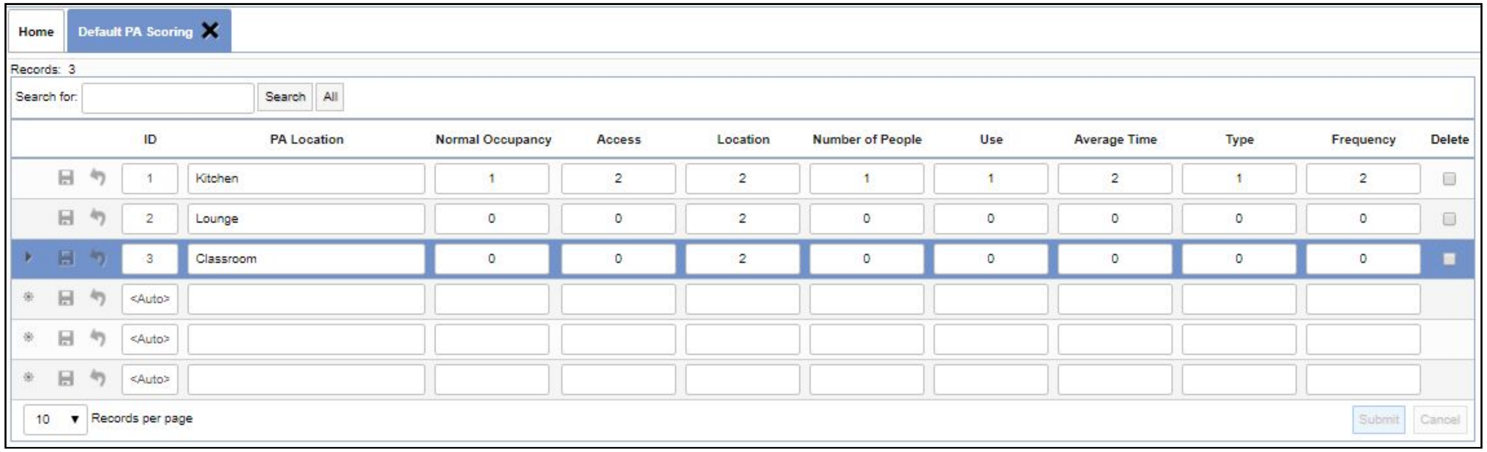
29. Improvements on the Calendar have meant better performance when your system includes very high numbers of clients. These improvements are to the Client field, which is now a read-only text box, and to the project lookup, which no longer includes a dropdown on the Client field.
30. The Survey Items Import has been updated to include additional fields for Photos, Action Date, Sample Notes, UoM and the Priority Assessment fields.
31. The Project and Site Import now allows character returns in site address fields.
32. If you open the Site Details screen from a project, there is now a close button on the left-hand side to make it quicker and easier to close the screen without having to scroll.



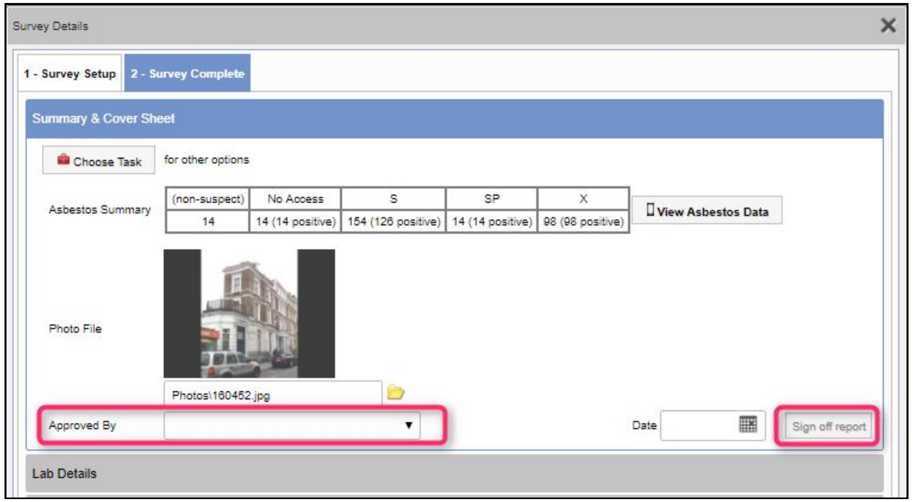
33. A quick search has been added to the Survey Types screen so that it is easier for you to find the Survey Type you require.



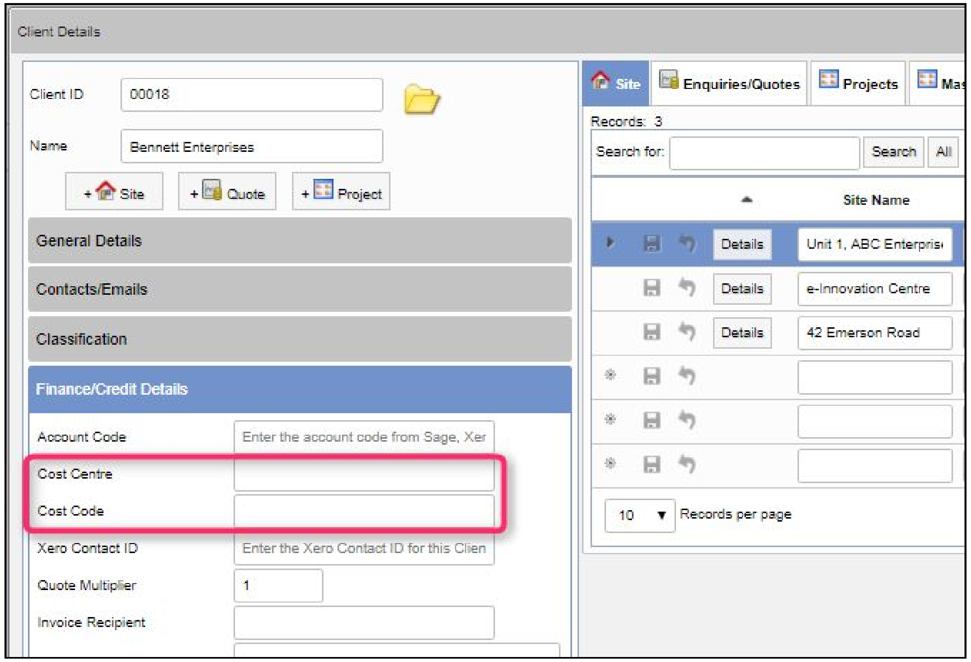
34. The field labels on the Default PA Scoring screen have been amended to match those on the Priority Assessment window on Survey Items. The order of the fields has also been amended slightly.



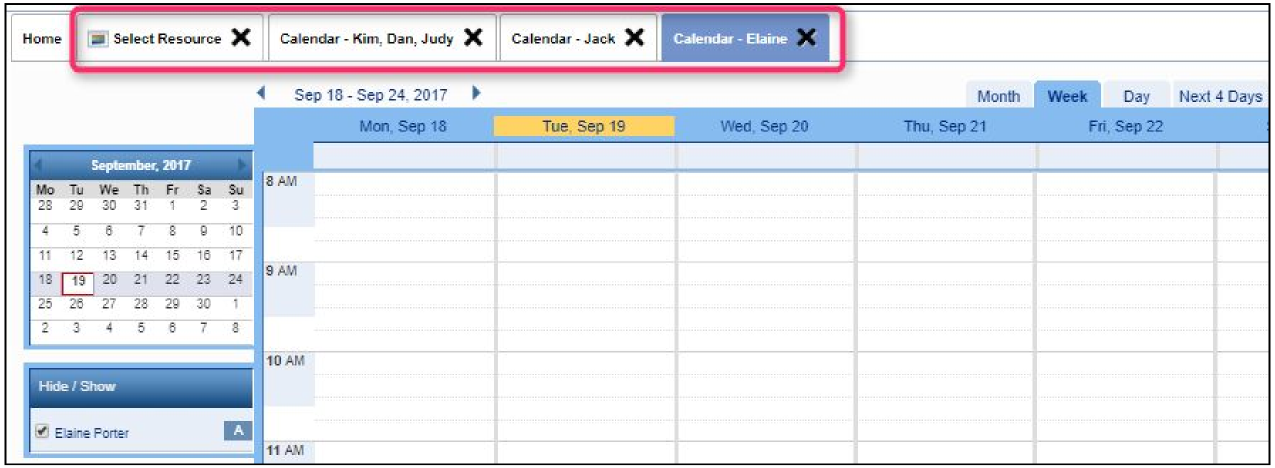
35. On the Survey Details screen, a change has been made to the **Report Sign Off** button so that it is disabled unless the logged in user is in the Quality group. In addition, non-Quality group members can no longer be selected from the **Approved By** dropdown list.



36. Two fields have been added to the Client Details, these are **Cost Centre** and **Cost Code**.



37. A "Delete All" button has been added to Import data screens that deletes all unprocessed records from the relevant table. The button prompts the user before deleting and then shows a wait message while the records are deleted. Once the records are deleted it alerts the user.
38. It is now possible to open multiple tabs/calendars from the Select Resource screen. Previously, you could only make one selection and then display the calendar for the selected person/people. Only one calendar tab could be displayed. Now you can return to the Select Resource screen, make a different selection, and open additional tabs/calendars. The first names of the selected people are displayed in the tab titles and you can easily switch between the different calendars.



39. Moving survey data between projects has been restricted to Superusers only so that only those users with these advanced permissions can now move survey data.
40. A new setting allows you to specify whether your system duplicates Extra Info records when a project is duplicated.

Bug Fixes

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

- Add New Site via the Client Details so that the Client Name as well as the Client ID populates
- ensure that Fibre Analysis records display for Bulk Samples when photos are being displayed for Survey Items
- client name on invoices
- project numbers generated from multi-site quotes
- the generation of site IDs on new sites
- broken image tags on the Fibre Analysis screen
- updating of details on the left-hand side of the Fibre Analysis screen
- auto-fill of the Site Address on Quotations
- errors if there are no results when creating a re-inspection from a site
- totals breaking across pages on invoice type C
- style of the QC Sample screen
- Location on default PA scoring
- duplication of Extra Info fields when creating a project from a quotation
- downloading SQL reports with a slash in the filename
- loading very large amounts of data in the Site Asbestos Register
- controlling the creation of surveys when importing projects
- opening multiple new and existing quotations and enquiries
- error handling on the Refresh Milestones and Delete Milestones buttons
- closing without saving on the Projects screen
- adding more projects to invoices without tax codes
- moving photos and XMLs with survey data
- deleting appointments
- checks on the Alpha Validator
- buttons on the Client Asbestos Register
- the length of the invoice recipient name on projects which now matches that of the invoice recipient on the clients
- removal project creation.