

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.

Home
Survey Data for T-90374 (19035) ✕

Click here to search...

Show Drilldown Refresh Records: 9

Suspect Items Non-Suspect Items All

ID	Date	Building	Floor	Location	Location Description	Item	Approach	Sample Number	Material Code	Total Score
60564	12/09/2017	1 Sutton Road	0	000						0
60565	12/09/2017	1 Sutton Road	0	001	Stairs					0
60566	12/09/2017	1 Sutton Road	0	001	Stairs	Ceiling			PLB	
60567	12/09/2017	1 Sutton Road	0	001	Stairs	Floor			TIM	
60568	12/09/2017	1 Sutton Road	0	001	Stairs	Internal Wall			PBC	
60569	12/09/2017	1 Sutton Road	0	002	Bedroom	Floor	S	1	VNT	10
60570	12/09/2017	1 Sutton Road	0	003	Bedroom	Floor	X	1	VNT	4
60571	12/09/2017	1 Sutton Road	1	004	Ladies WC	Ceiling	S	2	CMC	0
60572	12/09/2017	1 Sutton Road	1	005	Gents WC	Ceiling	X	2	CMC	0

10 Records per page Items in grey are marked as "hidden"

New
 Load Fibre Analysis
 Auto Number Items
 Case-correct Items
 Case-correct Locations
 Fix Photofile Names
 Hide/Unhide
 Delete Selected
 QR Code Labels
 Buildings

Photo Close up Photo Private QR Change Photo

General

ID	Date	Surveyor		
60569	12/09/2017	Dan Darkin		
Building	Floor	Location	Location Desc	No Access
1 Sutton Road	0	002	Bedroom	<input type="checkbox"/>
Item	Material Code	Material		
Floor	VNT	Vinyl Floor Tile		
Approach	Sample Number	Sample Notes		
S - Sampled	1	floor tile adhesive		
Extent	UoM	Notes		
20	m2	floor		
Recommended Action	Recommendation Comments			
Encapsulate/Repair & Manage as part of the managemt	Add to Management plan and review in 12 months.			

Identification & Risk Score

Identification						
Chrysotile Asbestos Identified						
Product Type	Condition	Surface Treatment	Asbestos Type	Material Score	Priority Score	Total Score
1	1	1	1	4	6	10
Cond. Description		Surf Treat. Description				

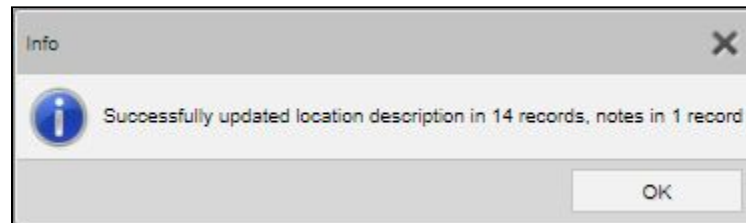
Other

Risk Category	Accessibility	Easy	HSE Notifiable
Lab Ref	External Ref		Licensed
Drawing Ref	Action Required		Hide
Action Date	Reinspection Notes		
Property Type	Reason For Change		
Approx Building Age			
Consents Agreed On-Site			Remediation Details


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.

ID	Date	Building	Floor	Location	Location Description	Item	Approach	Sample Number	Material Code	Total Score
83271	11/08/2017	The Main House	0	000						0
83272	11/08/2017	The Main House	0	000						0
83273	11/08/2017	Home Building	0	002	Entrance lobby				NAG	0
83274	11/08/2017	Second Building	0	006	Cleaners Cupboard	Board panels to ceiling	P			1
83275	11/08/2017	Home Building	1	009	Kitchen	Internal Wall	S	7	INS	
83276	11/08/2017	Second Building	1	005	Roof	Felt lining	S	5	BTP	
83277	11/08/2017	Home Building	3	013	Roof	Roof Sheeting	S	10	BTP	
83278	11/08/2017	Home Building	1	008	Office (Admin)	Ceiling	S	9	CMP	
83279	11/08/2017	Second Building	1	007	Stairwell	Wall	S	3	INS	
83280	11/08/2017	Home Building	1	007	Kitchen	Ceiling	S	6	CMP	

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.

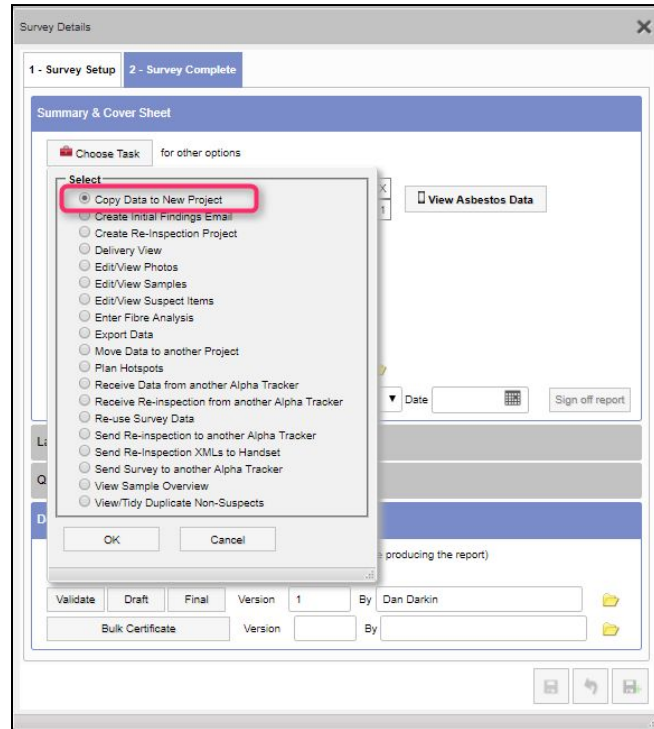
<input type="checkbox"/>	ID ▲	Date	Building	Floor	Location	Location Description	Item	Approach	Sample Number	Material Code	Total Score	
<input checked="" type="checkbox"/>	<u>81840</u>	19/04/2017	8 New Road	0	002	Office	Internal wall	S	2	NAI	0	
<input type="checkbox"/>	<u>81841</u>	Download the associated XML file (the surveyor's original data sent from handset)								ZEL	7	
<input type="checkbox"/>	<u>81842</u>	19/04/2017	8 New Road	0	001	Hall	Ceiling			TIM		
<input type="checkbox"/>	<u>81843</u>	19/04/2017	8 New Road	0	001	Hall	External wall			GLA		

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.

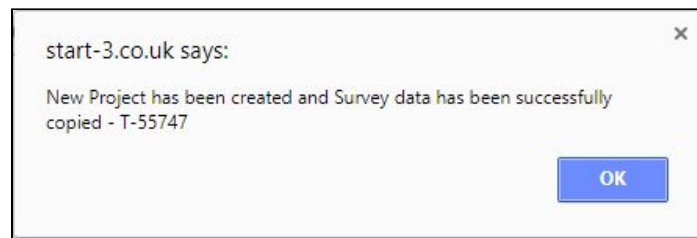
The screenshot displays the 'Project Details' and 'Milestones' sections of the Alpha Tracker software. The 'Project Details' section includes fields for Project Number (T-90072), Client (STARTSC Start Software), Quotation Ref, Client Order Number, Client Order Ref, Project Manager (Kim Evison), and Site Name/Ref (The Mogg). The 'Milestones' section shows dates and names for Project Opened, Quote Produced, Order Received, Turnaround, and Report Produced. A search dropdown menu is open under the 'Site Name/Ref' field, listing sites with columns for ID, Site Name, Site Address, Site Postcode, and Site Reference. The 'New Site' button at the bottom of the dropdown is highlighted with a red box.

ID	Site Name	Site Address	Site Postcode	Site Reference
69122	Queen's Court House			
75384	OHEC HQ			
75390	1/2 Queens Court House			
75391	Fox's Earth	The Row Easthope Much Wenlock	TF13 6DW	
75392	The Mogg	The Row Easthope Much Wenlock		

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.

Home Invoice List X

Search

Invoice No Issuing Office Invoice Date From: To: Client ID Client Name Project Number

Clear Search Criteria Search

Records: 325

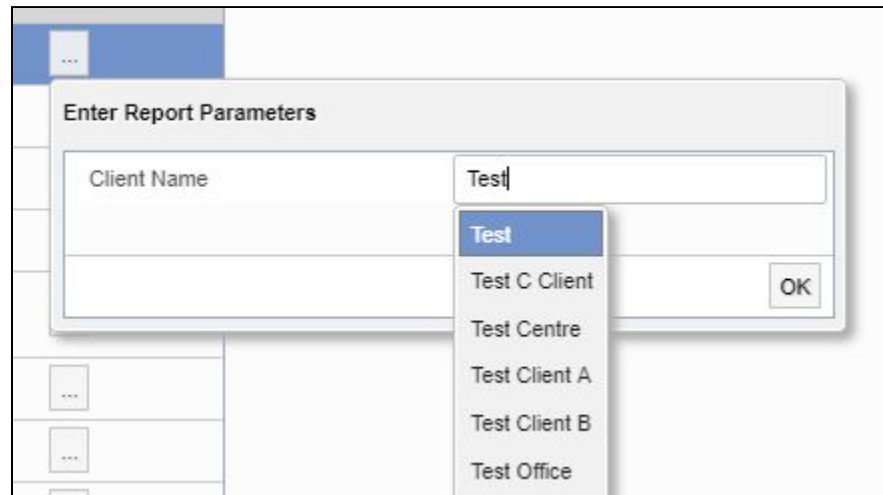
Locked Unlocked All

Invoice No	Issuing Office	Type	Invoice Date	Client	Account No	Your Ref	Invoice To	Net	Project Numbers
1	N	I	10/02/2014	CLIENT	The Client Company	CLIENT	123 High Street Big Town AB12 3CD	£1402.50	A-00075, A-00076, A-00077, A-00078, A-00082, A-00083, N-00037, N-00225, N-30005

View Details Email PDF PDF Word

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.

Turnaround

More Milestones Done: 3 Due: 0 Overdue: 1

Report Produced 19/07/2017 Dan Darkin

[Issue Reason/Log](#)

Show On Web

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:

Survey Details


1 - Survey Setup 2 - Survey Complete

Summary & Cover Sheet

Choose Task for other options

Asbestos Summary	(non-suspect)	No Access	P	S	X	<input type="button" value="View Asbestos Data"/>
	10	1	1 (1 positive)	2 (2 positive)	1 (1 positive)	

Photo File

 Photos\58828.jpg

Approved By Dan Darkin Date 19/07/2017

Lab Details

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.

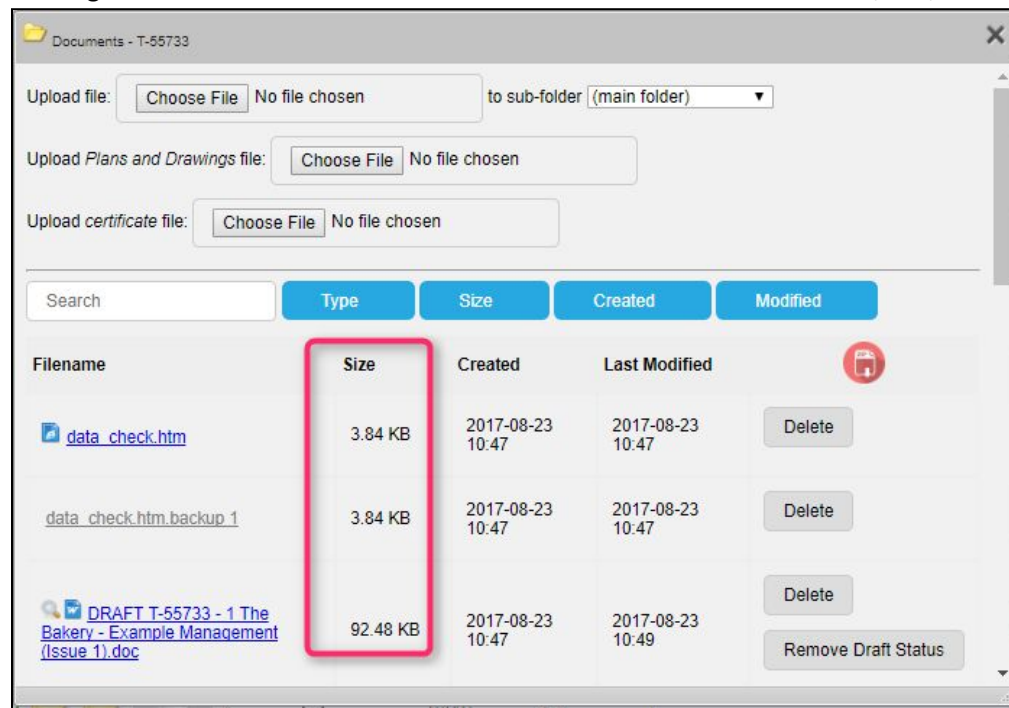
Project Number	Client	Type	Client Order No.	Site	Site Completion Date	Turnaround	Due Date	Reporting Days to Deadline	Samples Analysed	Plan Produced	Report Complete			
A-000034	Zak Porter Housing	Asbestos Survey		Beech's Street South	04/03/2015				No	No	2	0/0	15/04/2016	20/04/2016
A-000035	Wednesday	Asbestos Survey		44 Well Street	BH21		05/03/2015	OVERDUE	No	No	0	0/0		
A-000036	The Next Client	Asbestos Survey / Australia Survey		Main Street	WV16 4BB	Low Priority	06/03/2015	OVERDUE	No	No	8	0/0		

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.

Setting	Date Created	Value	Help
Client Portal - Show Last Activity	04/09/2017	yes	Show last activity on client portal - site list (yes/no)
Client Portal - Show Last Inspection	04/09/2017	yes	Show last inspection on client portal - site list (yes/no)
Client Portal - Show Last Re-inspection	04/09/2017	yes	Show last last re-inspection issued on client portal - site list (yes/no)
Client Portal - Show Last Survey Issued	04/09/2017	yes	Show last survey issued on client portal - site list (yes/no)
Client Portal - Show Last Survey Site D	04/09/2017	yes	Show last survey site date on client portal - site list (yes/no)

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.

The screenshot shows the 'Site Details' window. The left sidebar contains the following fields:

- Site ID: 4459
- Site Reference: 567824
- Client: MORRIS (Morrisons)
- Account Manager: 0
- Site Name: 1 The Bakery
- Address: The street, The Town, Walsall
- Country: United Kingdom
- Postcode: WS1 1LY
- Lookup Address
- Contact Name: Judy Key
- Contact Telephone: 01922 673452
- Contact Email
- Landlord
- Calculated Last Inspection
- Set Last Inspection
- Notes

At the bottom of the sidebar, there are buttons for '+ Quote', '+ Project', and 'Other Info'. A red box highlights a close button (X) in the bottom-left corner.

The main area features a table with the following columns: Building Ref, Building, Address, Postcode, Notes, and Delete. The table contains one record:

Building Ref	Building	Address	Postcode	Notes	Delete
567824	1 The Bakery				

Below the table, there is a 'Records per page' dropdown set to 10 and a 'Duplicate Site' button.

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.

The screenshot shows the 'Survey Types' screen. At the top, there is a navigation bar with 'Home' and 'Survey Types' (with a close icon). Below this, it says 'Records: 17'. A search bar is highlighted with a red box, containing the text 'Search for:' followed by a search button and an 'All' button. Below the search bar are filters for 'Active', 'Inactive', and 'All'. The main content is a table with columns: Survey Type, Survey Name, and Report Format. The table contains four rows of survey types: 'New Zealand Survey', 'Australia Survey', 'Example Management', and 'Re-Inspection'. Each row has icons for edit, refresh, and delete, and a dropdown menu for the Report Format.

Survey Type	Survey Name	Report Format
New Zealand Survey		Example Management Survey
Australia Survey		Example Management Survey
Example Management		Example Management Survey
Re-Inspection		Example Management Survey

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.

The screenshot shows the 'Default PA Scoring' screen. At the top, there is a navigation bar with 'Home' and 'Default PA Scoring' (with a close icon). Below this, it says 'Records: 3'. A search bar is present with the text 'Search for:' followed by a search button and an 'All' button. The main content is a table with columns: ID, PA Location, Normal Occupancy, Access, Location, Number of People, Use, Average Time, Type, Frequency, and Delete. The table contains three rows of data: 'Kitchen', 'Lounge', and 'Classroom'. Each row has icons for edit, refresh, and delete, and a dropdown menu for the Report Format. At the bottom, there is a 'Records per page' dropdown set to 10, and 'Submit' and 'Cancel' buttons.

ID	PA Location	Normal Occupancy	Access	Location	Number of People	Use	Average Time	Type	Frequency	Delete
1	Kitchen	1	2	2	1	1	2	1	2	<input type="checkbox"/>
2	Lounge	0	0	2	0	0	0	0	0	<input type="checkbox"/>
3	Classroom	0	0	2	0	0	0	0	0	<input type="checkbox"/>
<Auto>										
<Auto>										
<Auto>										

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.

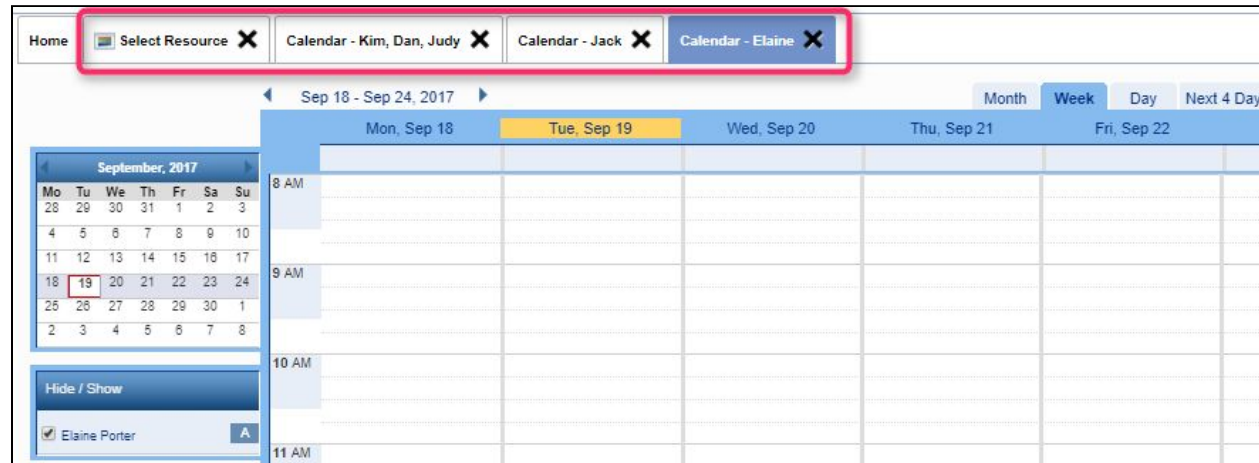
The screenshot shows the 'Survey Details' window with the '2 - Survey Complete' tab selected. Under the 'Summary & Cover Sheet' section, there is an 'Asbestos Summary' table and a 'Photo File' section. The 'Approved By' dropdown menu and the 'Sign off report' button are highlighted with red boxes.

(non-suspect)	No Access	S	SP	X
14	14 (14 positive)	154 (126 positive)	14 (14 positive)	98 (98 positive)

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

The screenshot shows the 'Client Details' window for 'Bennett Enterprises'. The 'Finance/Credit Details' section is expanded, and the 'Cost Centre' and 'Cost Code' fields are highlighted with a red box. The 'Account Code' field has a tooltip that says 'Enter the account code from Sage, Xer'. The 'Xero Contact ID' field has a tooltip that says 'Enter the Xero Contact ID for this Client'.

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.