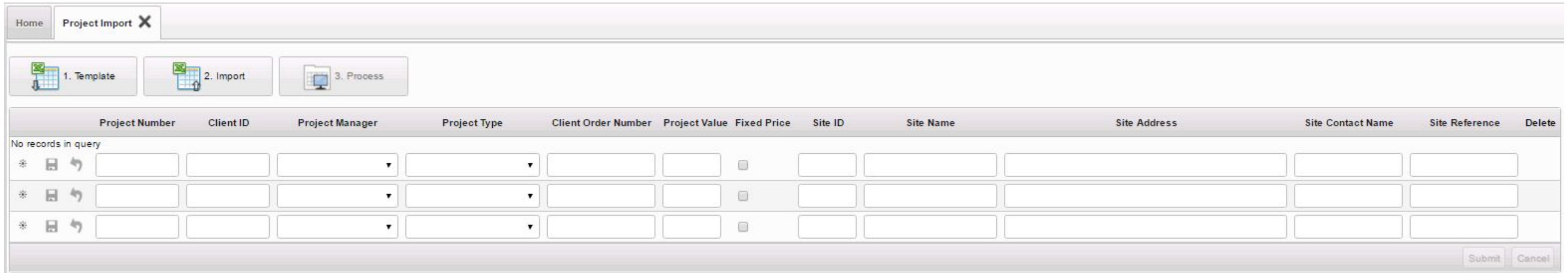
April 2016 Alpha Tracker Release Notes

New Features / Changes (SVN2000)

1. There is a new Alpha Tracker import process for sites, surveys, projects and diary appointments. If records are not imported then messages are displayed on screen (in red as soon as the import has finished) which include information on why the record was not imported. The new menu options can be found under *Setup|Import/Export.*

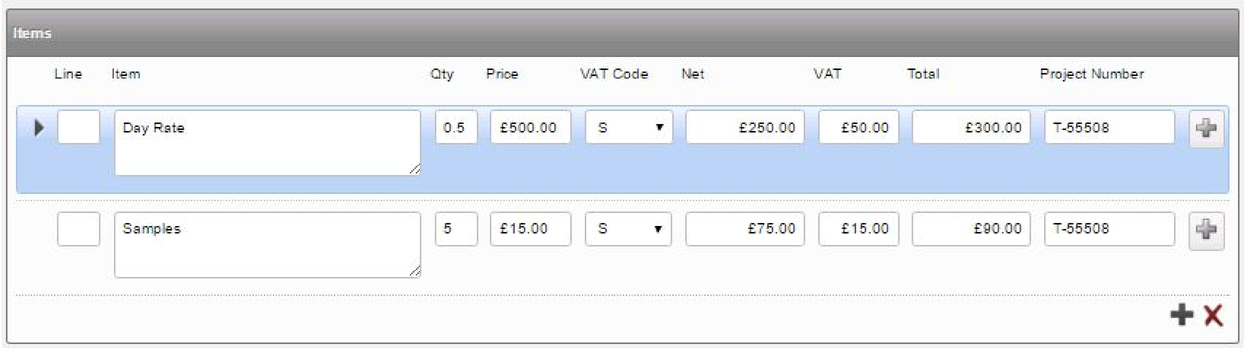
   As before, the import process starts with you downloading a template which you populate with the data to import. You then import the data to display it on screen, amend it as necessary and then process the data to complete the import. Click the 1, 2, 3 buttons at the top of the screen to perform each step.

   An important difference in the new process is that you can now create sites - either as part of the projects import or by importing sites separately. When creating sites as part of the project import, sites are or are not created as follows:
   - If the Site ID entered already exists the import adds the project to the Site
   - If no Site ID is entered but the Site Name already exists the import adds the project to the Site
   - If a new Site ID or Site Name is entered then the import adds a new Site
   - If the Site ID exists with a different Site Name then the import adds the project against the Site ID
   - If a Project Number already exists it will not import.

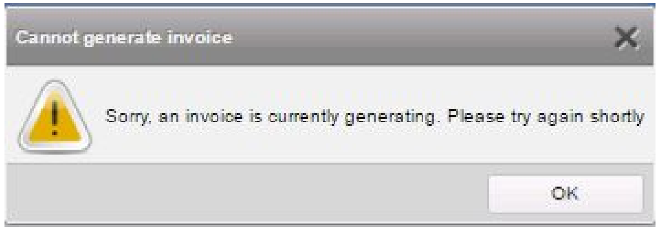
2. A new setting allows you to pull the cost breakdown into the individual lines on an invoice. When you create the invoice, an invoice line is created for each item on the Cost Breakdown table. This replaces the invoice lines that would usually be created. The setting which controls this is

"UseCostbreakDownForInvoices".



3. When creating a New Quotation from the Client Details screen, the mobile number of the main client contact is now pulled through to the quotation and can be edited as required.

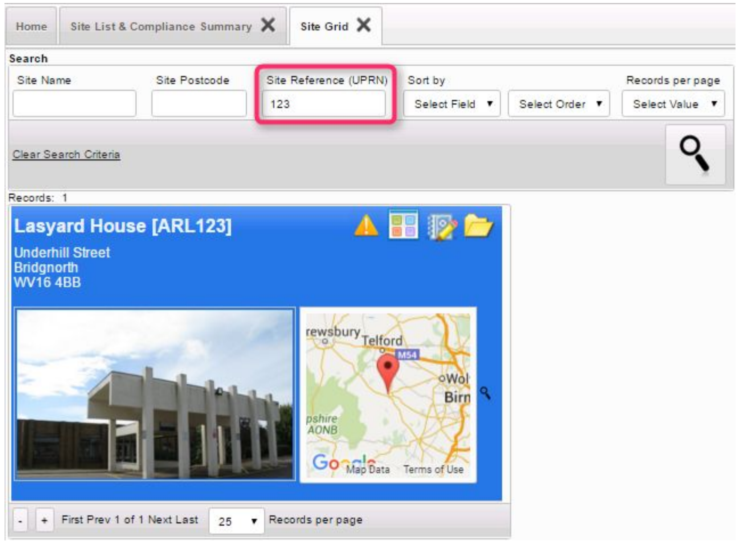
4. If you use the Word method of invoice generation, you will notice a new dialog that appears if you request an invoice while one is already generating. Invoice generation does not have a queue and only one invoice can be generated at a time.

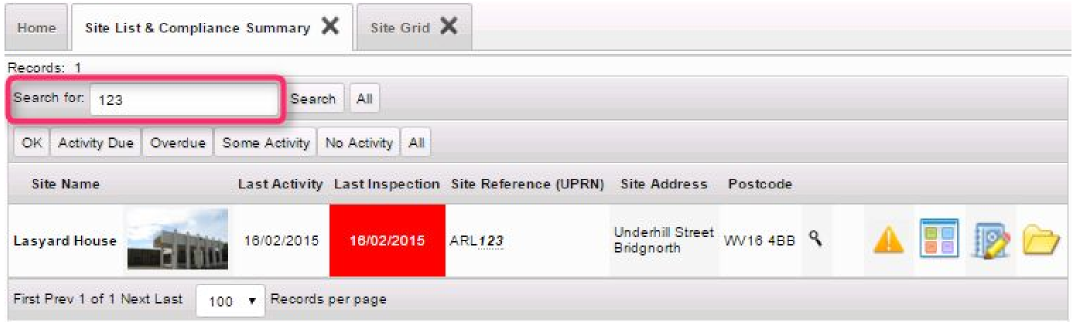


5. Changes have been made to Risk Assessment Type A which now shows the signature from Tracker Mobile in the new Signature accordion tab pane.

6. The length of the Identification field has been extended - which allows long, multiple-type identifications.

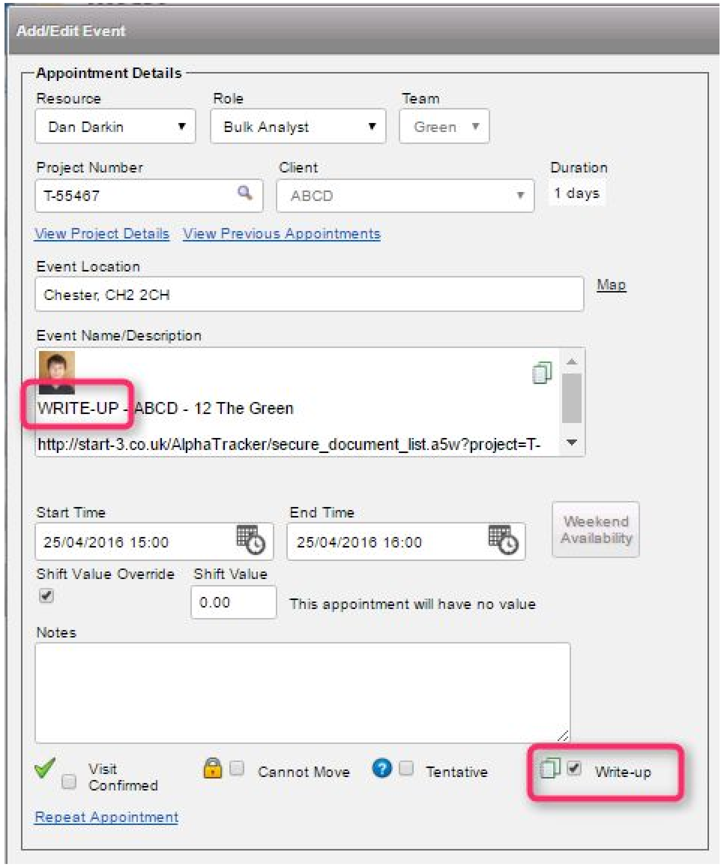
7. On the Client Portal you can now search for the Site Reference (UPRN) on the Site Grid and on the Site List. On the Site Grid there is a specific search field and on the Site List & Compliance Summary the general search field also includes the Site Reference.



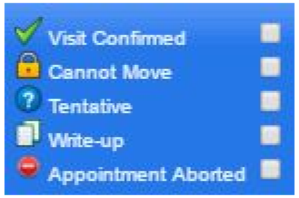


8. The generation of QR codes can now be switched off if required by using the new setting "Enable QR-code generation".

9. The Edit Events screen on the Calendar now has a tickbox that lets you mark appointments as "write-up" appointments. When the box is ticked the words "WRITE UP" will appear at the start of the event name so that they can easily be seen from the calendar. There is also an indicator on the Wallboard.

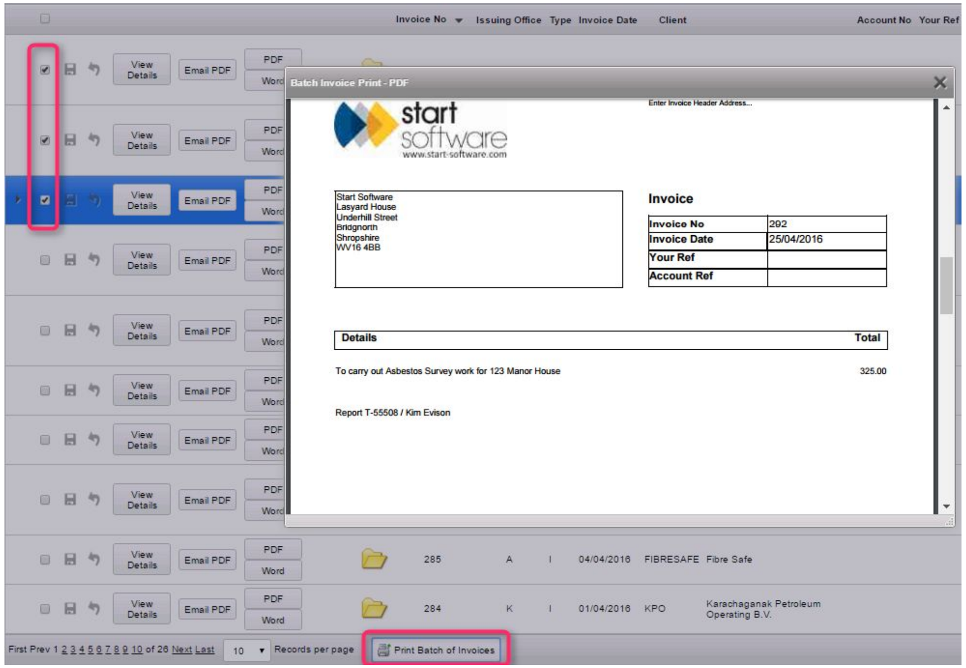


10. You can now mark appointments as "aborted" from the Diary Appointments screen which is displayed from the Diary Appointments button on the Projects screen.



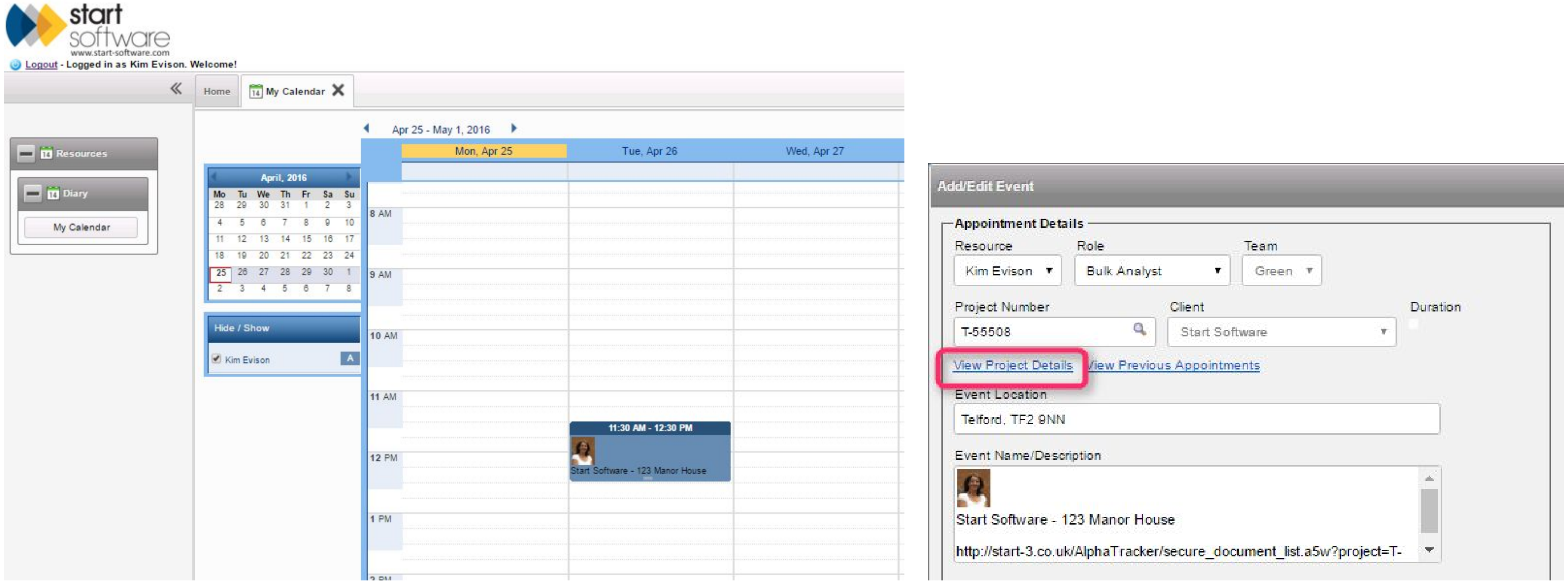
11. If you do not want to include your office letter in the PDF of invoices then you can now hide this by using the “hideOfficeLetterFromInvoiceNoOnPDF” setting.

12. There is a new process for "batch invoicing" which allows you to select the invoices and then generate one big PDF file with all invoices merged. On the Invoice List screen tick individual invoices to select them, then click the **Print Batch of Invoices** button at the bottom of the Invoice List.



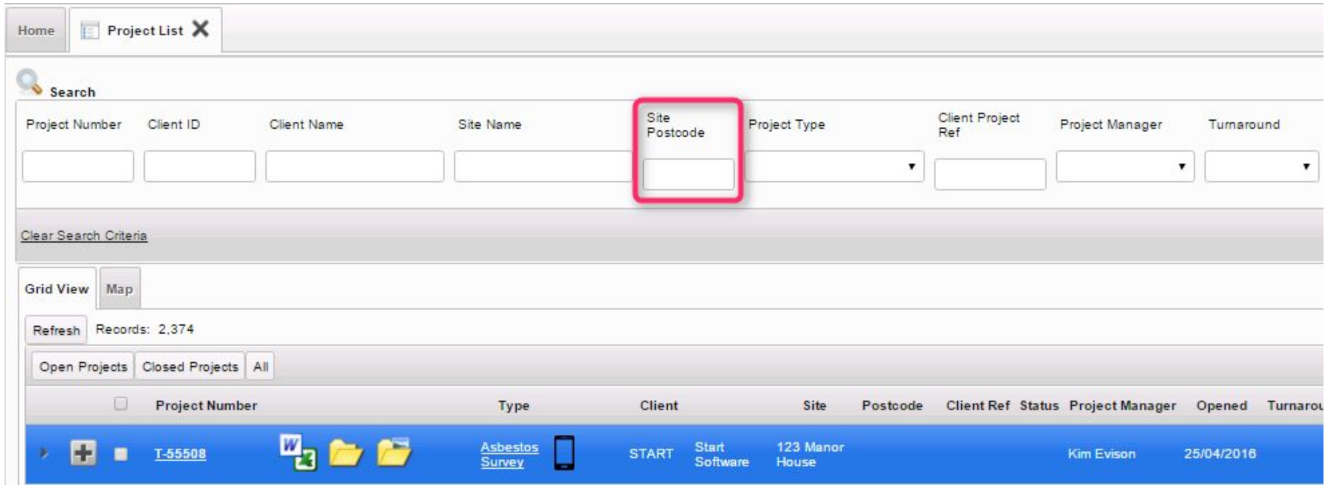
The Batch Invoice Print - PDF screen is then displayed showing the merged invoices. You can print or download as normal from here.

13. There is a new user group available which provides restricted access to Alpha Tracker. The group is called "Calendar Only". If you put a user into this group, and this group only, when they log in they can only see the "My Calendar" menu option. This means that they have access to *their own* appointments only and from there can access the project details by using the **View Project Details** link.



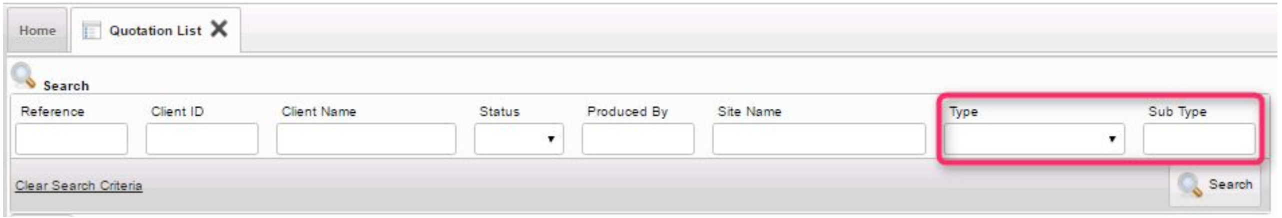
You might use this group if you want your surveyors only to be able to access the projects you have assigned to them.

14. Site Postcode has been added to the search on the Project List and also to the search under the Projects menu.



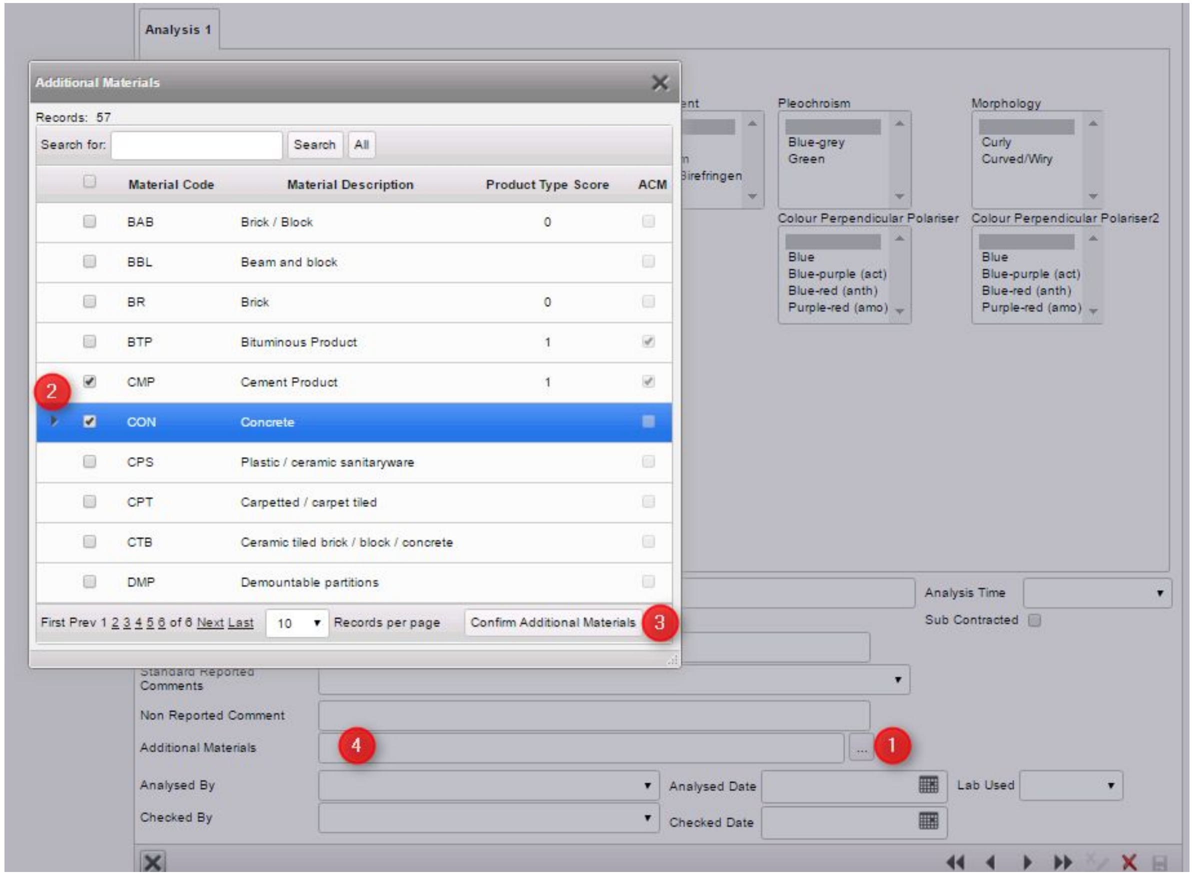
15. A new setting automatically updates the Project Closed date when the Project Invoiced date is entered. The setting is "autoUpdateProjectClosedWhenInvoiced".

16. "Type" and "Sub Type" have been added to the search on the Quotation list.

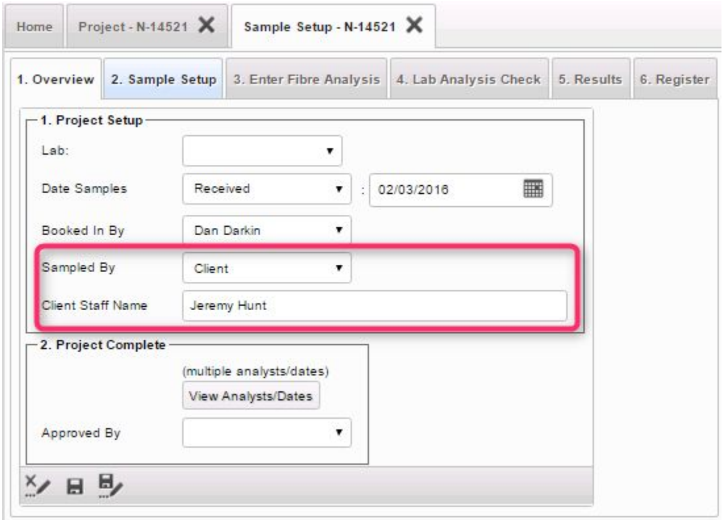


17. Additional materials can now be selected if required on the Fibre Analysis screen. To display the field additional field on the Fibre Analysis screen so that you can record further materials you need to set the "showAdditionalMaterialsOnFibreAnalysis" setting to "yes". You might use this field if you want to record all materials found in, for example, a sample of debris rather than just the material with the highest score.

    Click the ... button next to the new Additional Materials field to display a screen on which you can select the additional materials for the sample. When you have clicked the Confirm Additional Materials button the materials are all listed in the Additional Materials field. You may need changes to your certificate templates to display this information on your certificates.



18. On bulk sample projects you can now record the name of the member of staff at your client who took the samples. If you select “Client” in the Sampled by field then a further field is displayed, in which you can record the person’s name.



19. If you do not require email notification when the Surveyor's and Lab Analyst's assessment of a material differ then you can now switch off these emails by setting the "sendLabNotificationEmailAssessment" to "no".

20. Improvements have been made to the "Tesco" print queue allocation method. In this method of assigning documents to print queues documents go to the least busy queue. To use this method set the repository setting "Queue Allocation Method" to the value "Tesco". This method doesn't choose simply on the basis of how many documents are in the queues, it also looks at the size of the reports being issued.

    If required, you can assign a weighting to Bulk Certificates which is then used with the "Tesco" method when determining which queue is the least busy. Setting the "Doc Size (average) for Bulk Certs" setting to, for example, "50" gives Bulk Certificates the same weighting as a survey report with 50 items. It is also possible to send all Bulk Certificates to a specific queue. By default, Bulk Certificates are sent to queue 1 but you can use the "Queue for Bulk Certificates" setting to specify an alternative queue.

    You can use the "Tesco" option in conjunction with other options, for example sending documents for specific clients to specific queues, by using the setting "MaxTescoQueueNo". For example, if you had four queues and set this to "3" then you could use the "Tesco" method on queues 1-2, leaving queue 4 for documents for specific clients.

21. The log of changes to fibre analysis data that you can find under the Lab Warnings menu option now provides more information. The details include the Fibre Analysis record ID, the date/time and the logged in user.

22. The Read from Tracker Mobile button is now fully automated. If a field from Location 000 on Tracker Mobile is to be created and populated then this happens when you do any of the following:
 - click **Read From Tracker Mobile**
 - click the **Draft** button to generate a report
 - click the **Final** button to generate a report.
 If the field doesn't exist, it gets created and populated.
 If the field already exists in Extra Info, then its content is updated *as long as* the field is blank. If there is something in the field, eg a default value, some text or even "N/A", then the existing content is not overwritten.

Fixes

Approximately 25 bug fixes are also included in this release.