

Release 22 Alpha Tracker Release Notes

New Features / Changes (SVN2136)

- Changes have been made to the Survey Items screen so that it is now possible to enter characters in the **Risk Category** field.
- Changes have been made to the Diary Appointments screen so that you can use single quotes in the Event Name field.

Diary appointments for T-00057

Staff: [Dropdown]
 Start From: [Calendar] To: [Calendar]
 End From: [Calendar] To: [Calendar]

Clear Search Criteria [Search]

Records: 0

Staff Details	Start / End	Event Name / Location	Notes	Delete
Staff: Kim Evison Role: [Dropdown]	Start Date/Time: 02/09/2016 10:33 End Date/Time: 02/09/2016 11:33	Adam Porter - 1 Queen's Road, Shrewsbury, SY1 1ST - Asbestos Management Survey Shrewsbury, SY1 1ST	<input checked="" type="checkbox"/> Visit Confirmed <input type="checkbox"/> Cannot Move <input type="checkbox"/> Tentative <input type="checkbox"/> Write-up <input type="checkbox"/> Appointment Aborted	

10 Records per page [Submit] [Cancel]

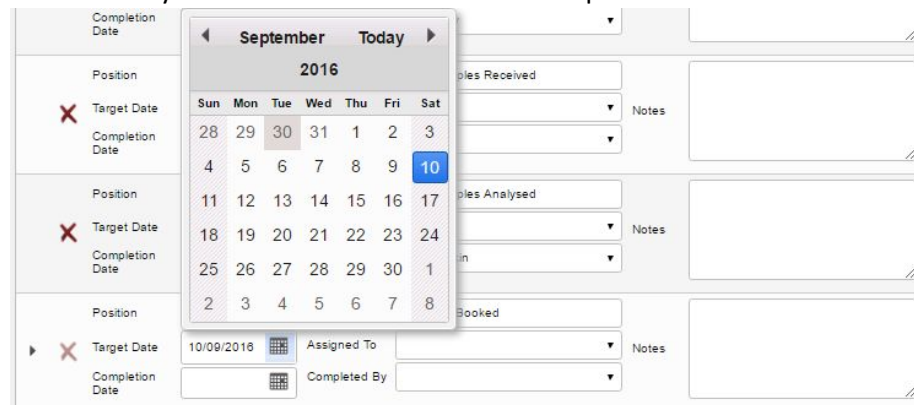
- The **Sample Status** column on the Project List has been moved so that it is no longer the last column but is now further forward and found between the **Project Due Date** and the **Last Milestone** columns. You can also now sort on this column by clicking on the column heading.

Project Number	Type	Client	Site	Postcode	Client Ref	Client Order No.	Status	Project Manager	Opened	Turnaround Due	Sample Status	Last Milestone	Next Milestone	First Diary	Last Diary
T-00061	Re-Inspection	STARTSOFTWARE	Start Software	Queens Court House				Dan Darkin	30/08/2016		No Samples Received				
T-00060	Re-Inspection	STARTSOFTWARE	Start Software	Queens Court House				Dan Darkin	30/08/2016		No Samples Received				
T-00058	Asbestos Management Survey	STARTSOFTWARE	Start Software	The Mogg	Man			Kim Evison	05/07/2016		Samples Analysed	Survey Start Date	Bulk Samples Analysed		
T-00056	Bulk Sample	STARTSOFTWARE	Start Software	Queen's Court House				Dan Darkin	01/07/2016		Samples Analysed				
T-00050	Asbestos Management Survey	STARTSOFTWARE	Start Software	Queens Court House				Dan Darkin	23/05/2016		Samples Received				

4. When Tracker Air documents are sent into Alpha Tracker and automatically generated, the filename under which they are saved now includes the certificate number, eg:



5. Weekend days can now be selected in the date pickers on the “More Milestones”.



6. If you enter fibre analysis results using the Lab menu options, you will now find that the Survey Details screen is automatically updated with details of the person carrying out the analysis. The fields on the Survey Details screen - **Date of Analysis** and **Analysed By** - are only updated if they are initially blank.

Survey Details

1 - Survey Setup 2 - Survey Complete

Summary & Cover Sheet


Choose Task for other options

Asbestos Summary

(non-suspect)	No Access	S
12	1	2 (2 positive)

View Asbestos Data

Photo File



Photos\81014.jpg

Approved By Judy Key Date 05/07/2011

Lab Details

Date of Analysis 30/08/2016 Analysed By Dan Darkin

Certificate Ref

Quality Control (QC)

- There is a new setting that allows you to choose whether re-inspections use the **Condition Description** on a record or whether they look up the description based on the **Condition** score. The setting is: "conditionDescLookup_Reinspections".
- There are now two separate settings to control the display of Remediation details in Alpha Tracker. The existing setting is "Show Remediation Details on Survey Items screen". There is now a new setting, "Show Remediation Details on the Client Portal", so that you can switch this on or off for your clients while still having it visible on the Survey Items screen.
- You can maintain the descriptions for **Condition** and **Surface Treatment** used in Tracker Mobile on new screens available from the Setup|Lab and Surveys menu. These values will be used to populate dropdowns in Tracker Mobile on MDS.

Home		Condition X	
Records: 4			
Score	Description	Delete	
0	Excellent		
1	Good		
2	Fair		
3	Poor		
*			
10 Records per page		Submit Cancel	

Home		Surface Treatment X	
Records: 4			
Score	Description	Delete	
0	Composite		
1	Sealed		
2	Partially Unsealed		
3	Unsealed		
*			
10 Records per page		Submit Cancel	

10. There is a new setting, "downloadSubfolderInZip", which lets you choose whether subfolders should be included or excluded when downloading into the Zip file from the Documents folder.
11. The error trapping in the Xero export function has been extended, with additional friendly error messages and logging. In addition, a new field has been added onto Project Types for the "Account Ref. Code" and changes have been made to the Xero XML generation to include a new tag "ItemCode" which will read from the "Account Ref. Code" field.
12. The Extra Info fields on Quotations are now created based upon the Project Type selected. So your Quotation can include different Extra Info fields if it is, for example, for a Survey to those included if it is, say, for a Re-inspection.
13. Some updates have been made to the HazMat screens, including:
 - removing "SMF Result" from the SMF Edit screen
 - changing the field headings in the HTML summary
 - adding a delete button to the PCB Hazmat Items screen
 - changing the HTML summary table to pull through the SQL alias into the field headings
 - Adding extra Processed fields.
14. The setting that lets you choose the currency symbol in use in Alpha Tracker now also controls the currency symbol visible on the Wallboard.

15. On External Invoices, you now need to enter search criteria, such as a date range, before any invoices are displayed.

Home Invoices (External) X

Search

Invoice Number Project Number Date From: To: 01/01/2016 30/08/2016

Clear Search Criteria Search

Records: 2

Invoice Number	Date	Project Number	Value	Comments	Delete
1254	24/03/2016	T-55463	£525.00		
1254	09/08/2016	T-55548	£150.00		
*			£0.00		
*			£0.00		
*			£0.00		
*			£0.00		
*			£0.00		
Total			£875.00		

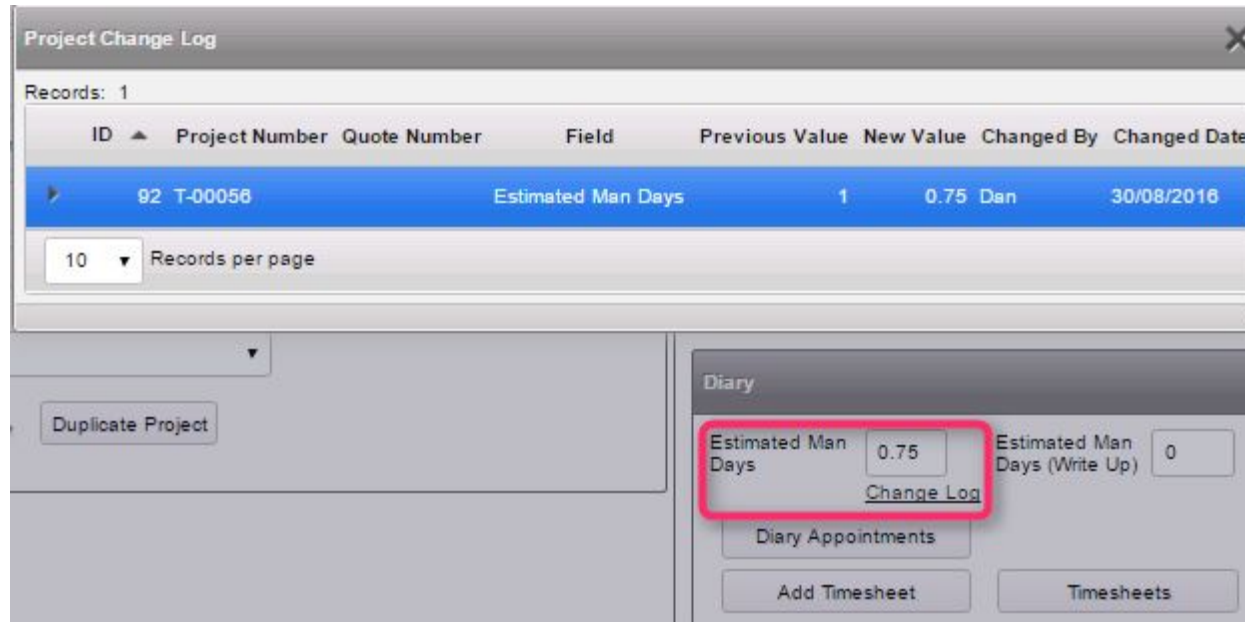
200 Records per page Submit

16. A new setting enables the sending of auto-emails to Account Managers when a quotation is marked as “Won”.

wonQuotationAlertSubject 30/08/2016 Quotation Won [<ID>] - <Details> for <Client_Name> Customises the won quotation email subject. Refer to Start for examples

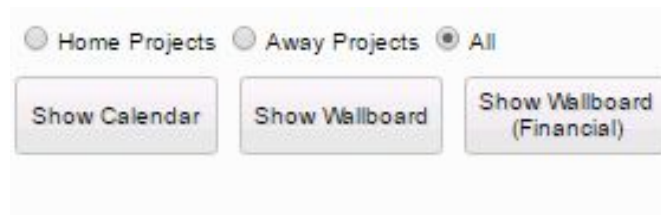
wonQuotationAlertBody 30/08/2016 <Client_Name> @ <Site_Name>, <Site_Address> <Site_Postcode> Customises the won quotation email body. Refer to Start for examples

17. A Change Log is available on the Estimated Man Days field so that you can see if changes have been made to this field, when, who by and what previous values were.



18. It is now possible to use the Wallboard to show both time and financial values within the same system. This is achieved by setting the “WallboardShowAppointmentHours” setting to yes, so that by default users will see time values on the Wallboard, and then allowing specific users to see another copy of the Wallboard showing financial data by listing their staff IDs in the setting “viewFinancialWallboard”.

If your staff ID is listed in “viewFinancialWallboard” then you will see an additional button on the Select Resource, Select Group and Select Team screens enabling you to display the Wallboard with financial data:



19. A new field has been added to the Projects screen called Estimated Man Days (Write Up). This field is to capture the admin time on a project if this is not scheduled in the diary and reports can be specified to output this field.
20. The Estimated Man Days field has been added to the Projects Not In Diary screen to help with scheduling.

Home Projects Not In Diary X

Search

Project Number Client ID Client Name Location Project Type Project Category Order Number Client Project Ref Due Date From: To:

Clear Search Criteria Search

Grid View Map

Refresh Records: 553

Quick Search: Search All

Project Number	Type	Client	Site Name	Site Postcode	Client Project Ref	Status	Project Opened	Due Date	Estimated Man Days
+ Book Appointment N-00009	Asbestos Survey	TEST	testing	Testing			02/08/2013		1
+ Book Appointment N-00010	Survey	TEST	testing	Testing		Complete	02/08/2013		1

21. When Site Details are entered or updated from the Project screen, you will now find that the Site Reference and Contact Email are automatically pulled through to the Project screen.

The screenshot displays three panels from the Alpha Tracker software:

- Site Details:** Shows fields for Site ID (4205), Site Reference (1234567890), Client (Start Software), Account Manager, Site Name (25 Ivor Road), Address (Corfe Mullen, Wimborne, Dorset), Country, Postcode (BH21 3QF), Contact Name (Tania), Contact Telephone, Contact Email (tania@gmail.com), and Landlord. It also includes a calculated last inspection date of 10/07/2015 and buttons for Quote, Project, and Other Info.
- Project Details:** Shows Project Number (T-55581), Client (START), Quotation ID, Sales Contact, Client Order Number, Client Project Ref, Project Manager (Kim Evison), Account Manager (0), Project Title, Site Name/Ref (25 Ivor Road), Project Type (Asbestos Survey), Estimated Total Project Value (£180.00), and Status (New). A red box highlights the Site Name/Ref field with the value 1234567890.
- Milestones:** Shows Contacts & Addresses for the Site, including Contact Name (Tania), Contact Email (tania@gmail.com), Contact Number, Landlord, Address (Corfe Mullen, Wimborne, Dorset), Site Country, and Postcode (BH21 3QF). A red box highlights the Contact Email field with the value tania@gmail.com.

22. When querying the Access Log, you can now identify the site address viewed by a Client Portal login.
23. The Change Photos button is now available on the Quick-Edit Survey Data screen so that you can change photos in the same way as you can from the Survey Items screen.
24. You can now schedule Write-up appointments as well as Visit Confirmed, Cannot Move, Tentative and Aborted appointments, directly from the Projects Not In Diary screen.
25. There is a new user group called "Finance Admin". Users who are put into this permission group have the same permissions as those in the Finance group but they can also amend invoices after they have been locked.
26. Client Portal users who are in the user group "Client Admin" can now create client logins from within the Client Portal itself. The logins that can be created are limited to the logged-in client and new users created are automatically added into the "Clients" user group. It is also possible to restrict the sites to which the client login has access.

27. The Project Import will now insert buildings automatically if the setting to auto add buildings is set to yes.
28. Changes have been made to the Site Asbestos Register PDF / Print report (which is accessible from the Client Portal) so that the remediation notes are now pulling through onto the report, as well as the PPC notes.
29. To prevent report generation errors, the Draft and Final report buttons are now only available once you have selected a Survey Type.
30. When raising a credit note, the Add Projects button is available and will display for selection only projects which have actually been invoiced.

Fixes

Approximately 20 bug fixes are also included in this release.