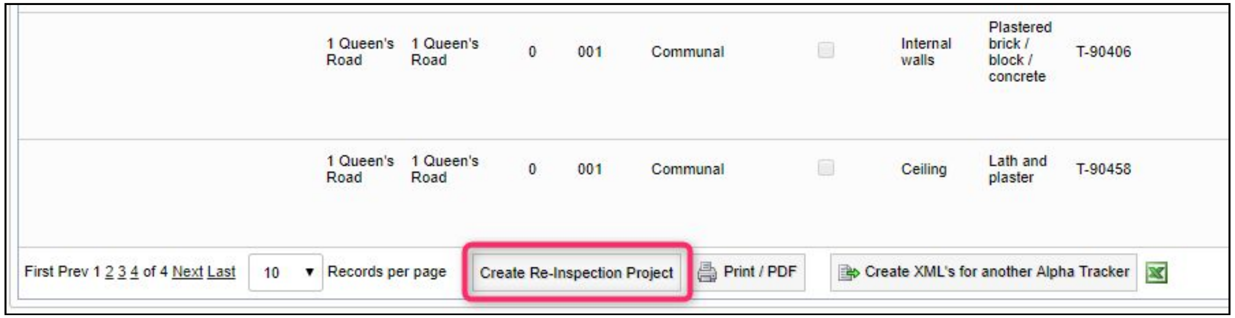
Release 29 - Alpha Tracker Release Notes

New Features / Changes (from SVN3057 to SVN3251)

1. It is now possible to create re-inspections from the Client View Site Register as well as from the Site Register. This means that you can include non-suspect data in the items to be re-inspected. A repository setting controls whether you can use this function - “clientViewSiteRegisterReinspections”. If the setting is set to “yes”, then a “Create Re-inspection Project” button is displayed at the bottom of the Client View Site Register. Note that the “showNonACMSRoomSummaryOnSiteRegister” needs to be set to no for this function to be available.

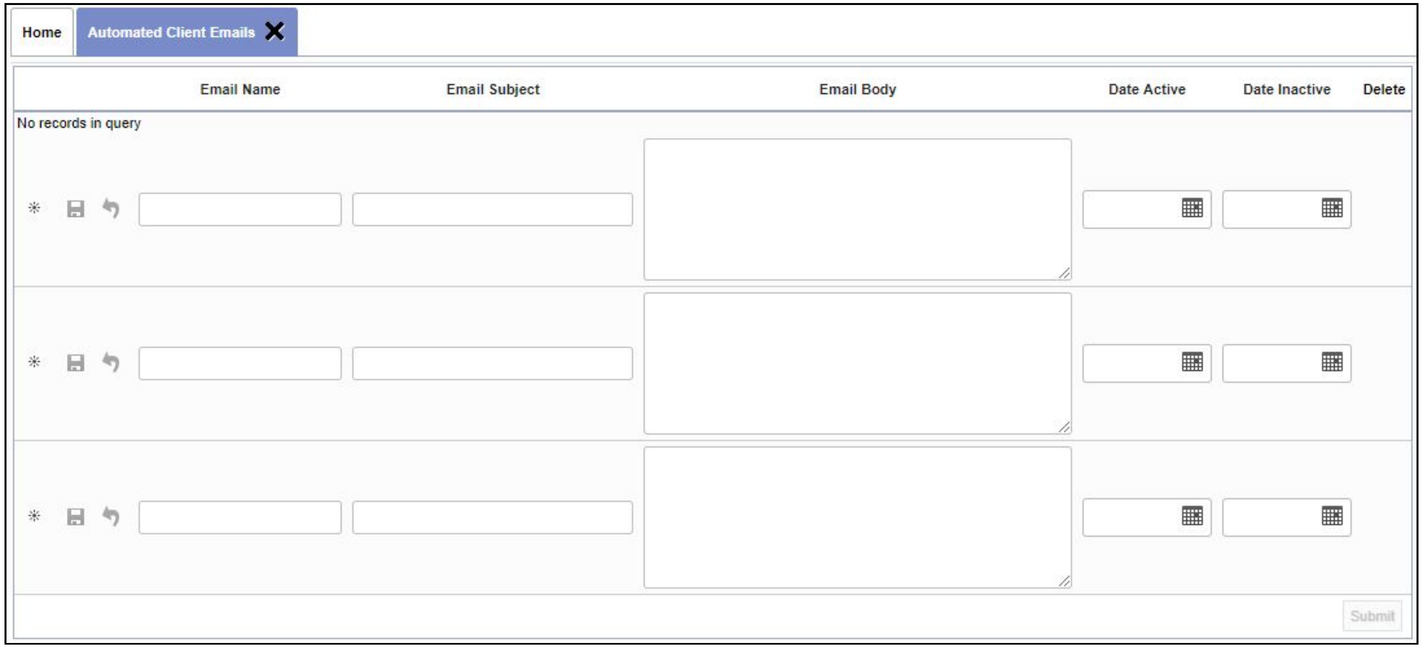


2. There is a new setting, “Training Module Report Template”, to define report template ordering. It is defaulted to "A" (by expiry date). This affects the reports that are displayed by using the “Certificate Reports” option in the Staff/Training section of the Resources menu. Reports can also be ordered by training date.
3. Also in Staff/Training, you will find that the Staff screen now lists the training courses that a member of staff has completed by training name then training date.
4. For users of the Staff Training module, the Certificate Reports screen has new date range filters so that you can report on training / certificates expiring within a specified date range. There is also a new section for Awards (training with no expiry date) that lets you report on this type of training taken within a specified date range.

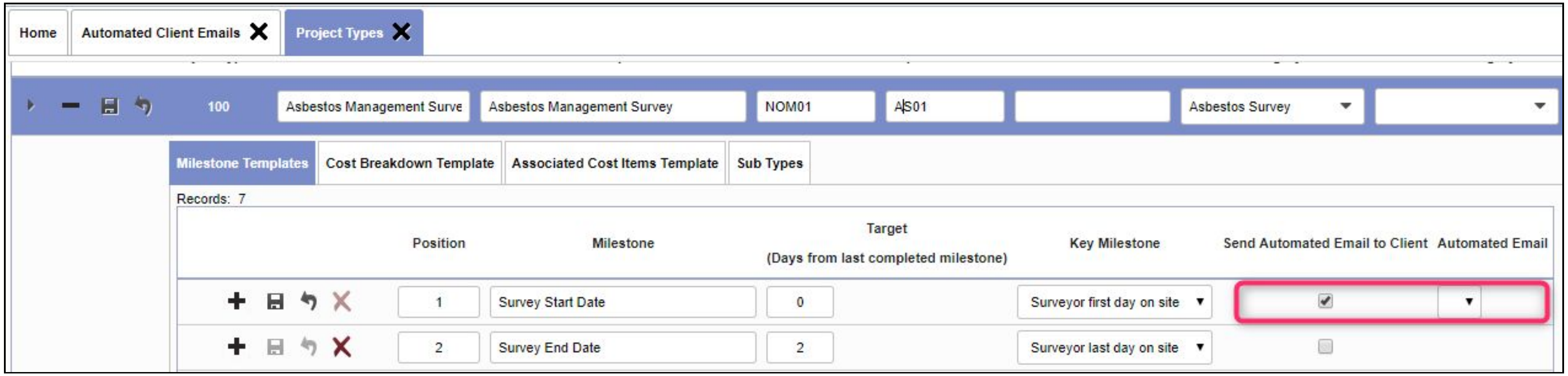
5. For diary users where individuals control their own diaries by means of the Allocation Dashboard, there is a new Project Value column displayed between the Project Manager and Project Opened fields.
6. A set of four new settings has been created to control changes to the Recommendation and Recommendation Comments on suspect items if the identification turns out to be negative. The new settings are:
   - ChangeRecommendedActionOnNegative (this defaults to “no”)
   - NegativeIdentificationsForRecommendedActionUpdate (default values are “NAD,NADIS,Removed”)
   - RecommendationCommentsForNegative (these are the Recommendation Comments to be displayed if the result is negative)
   - RecommendedActionForNegative (this is the Recommended Action to be displayed if the result is negative).

   If ChangeRecommendedActionOnNegative is set to “no” then the system works as normal.
   If ChangeRecommendedActionOnNegative is set to “yes”, then the Recommended Action is updated if the Identification is one of those specified in the setting NegativeIdentificationsForRecommendedActionUpdate. It is updated to the text specified in the setting RecommendedActionForNegative (or blanked if no text is specified), and the Recommendation Comments is set to the text specified in the setting RecommendationCommentsForNegative (or blanked if no text is specified).
7. On the Site Asbestos Register, you will now find that only “Show On Web” items are updateable. Pending items cannot be updated. The View History button will only be displayed if there is a history of updates to display, and these updates are listed in order with the newest item first. There is also a quick search on the View History screen to help you find the required update faster.
8. There are new label settings to control the names of some fields on the Survey Items screen. This means that you can choose how the fields are named. The fields affected are Building, Item, Location Description and Material.
9. You can now specify whether your clients (in the “Clients” permission group) are allowed to upload into the “Other Documents” folder on the Client Portal.

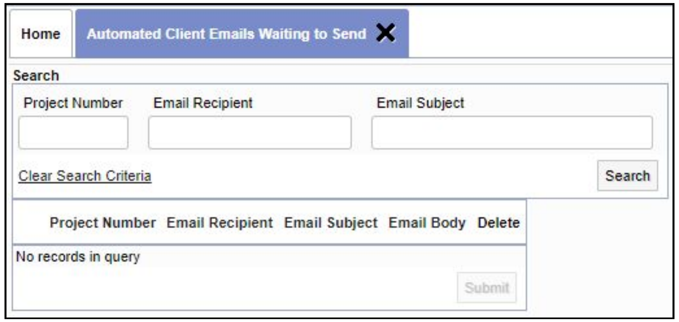
10. A new Client Portal setting lets you decide whether to show or hide the last re-inspection site date: “Client Portal - Show Last Re-inspection Site Date”.
11. Also on the Client Portal, you can select whether the Google Docs previewer is to be used to preview documents. If not, then documents can still be downloaded from the link.
12. New features have been added to enable the generation of site reports from the Client Portal. These are controlled by a setting: “SiteClientPortalReport”.
13. There is a new setting called "Show Remediation Details on the Client Portal for Client Admins only" which only shows the "Remediation Details" button if the user is in the Client Admin permission group.
14. Only users in the Superuser, Management, Senior Project Manager and Survey Admin groups can move survey data between projects.
15. You can now send automatic update emails to clients at certain points, eg when data is received into Alpha Tracker, when sample analysis has been completed or when a report has been drafted or is ready. A setting controls whether or not this feature is switched on: Automatic Emailing to Clients. There is a new menu option for “Automated Client Emails” (under Setup / General) which lets you define the emails that you want to be sent out. You can set up the name of the email, the subject, the body and set the active/inactive date.



You can use placeholders in the subject and body of the emails. These must be enclosed in curly brackets, eg {project number}.
You can link the sending of the emails to the completion of milestones. This is done by completing two new fields on Milestone Templates (on the Project Types screen) - the first is a tickbox to specify that automated emails are to be sent when this milestone is completed, the second is a dropdown list to select the email that is to be sent.



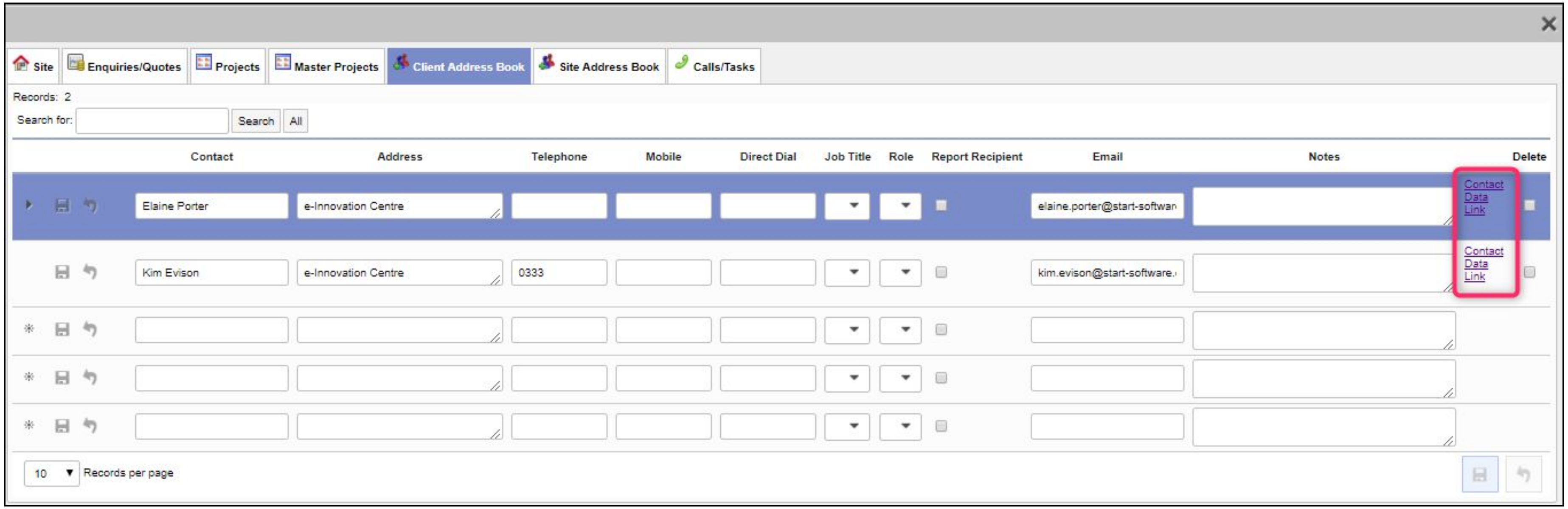
Another new screen and menu option, "Automated Client Emails Waiting to Send", displays the automated emails that are ready to be sent. You can search this screen and modify any of the pending emails.



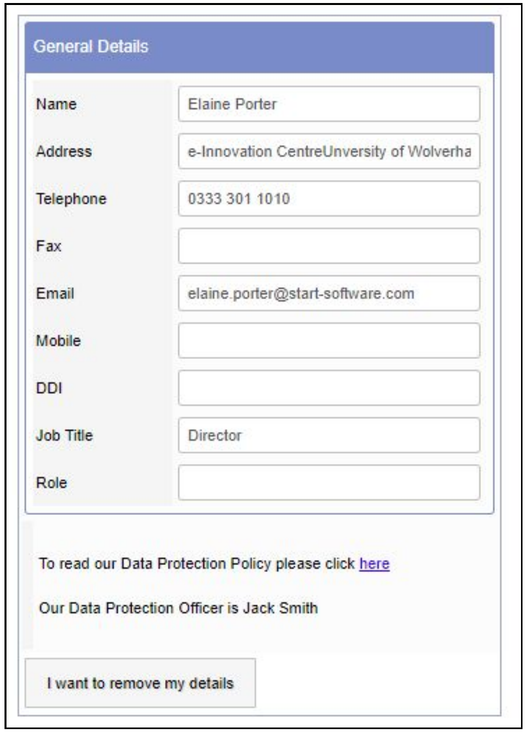
The emails will be sent out via a daily scheduled task on the server, which needs to be set up separately.

16. There is a new Project Status search field on the Projects Dashboard so that you can filter the list of projects displayed to those of a selected status.
17. You can now control how many records are displayed by default on the Survey Items screen. The default has always been 10 records, but you can now use the "Default number of records to display on the Survey Items screen" to change the default to 25, 50, 75 or 100.

18. The GDPR-related Data Protection features have been extended so that you can generate a screen of the personal data held on an individual client contact in the Client Address Book, the Site Address Book and also the Contacts/Address Book. The links to request the data are found on the far right of the Address Books, for example:

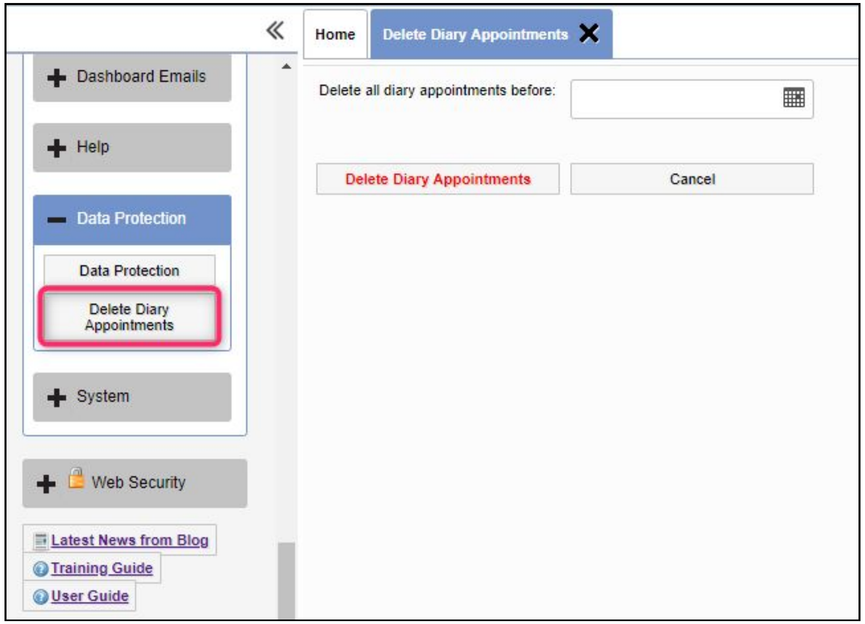


If you click the link, the contact details are displayed on a new page in your browser, read-only, like this:

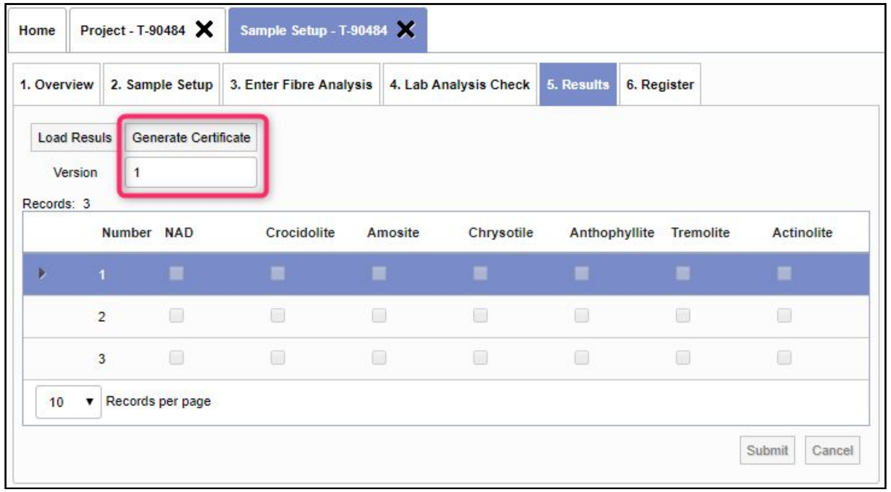


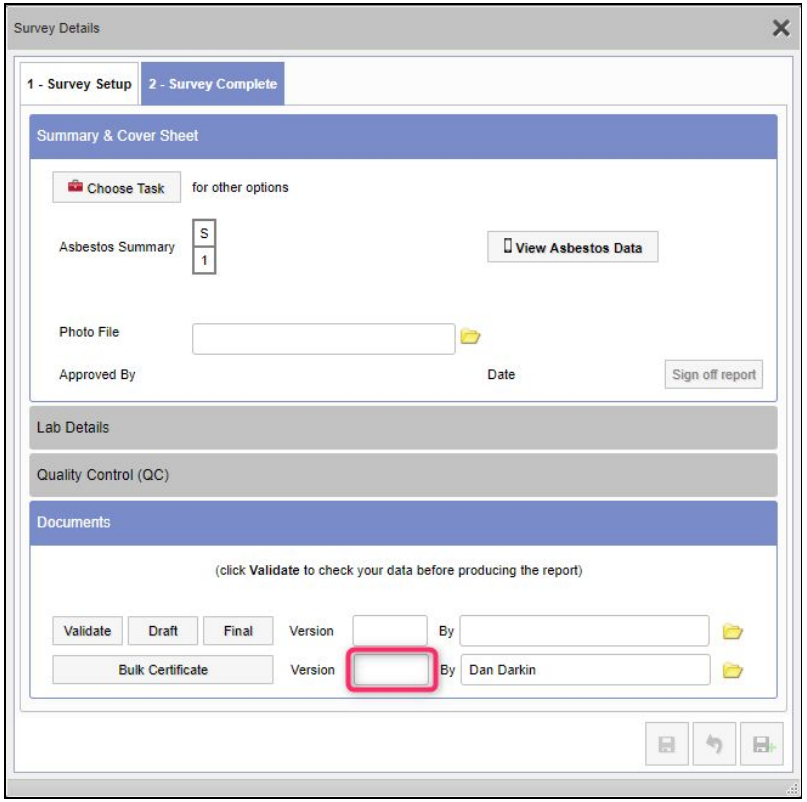
You can copy the page's URL and forward this to your client contact so that they can view the details, download your Data Protection Policy or request their data is removed.

19. Further Data Protection features are included in this release, including the ability to delete all diary appointments before a specified date. Select “Delete Diary Appointments” from the Data Protection section on the Setup menu to display the new screen:



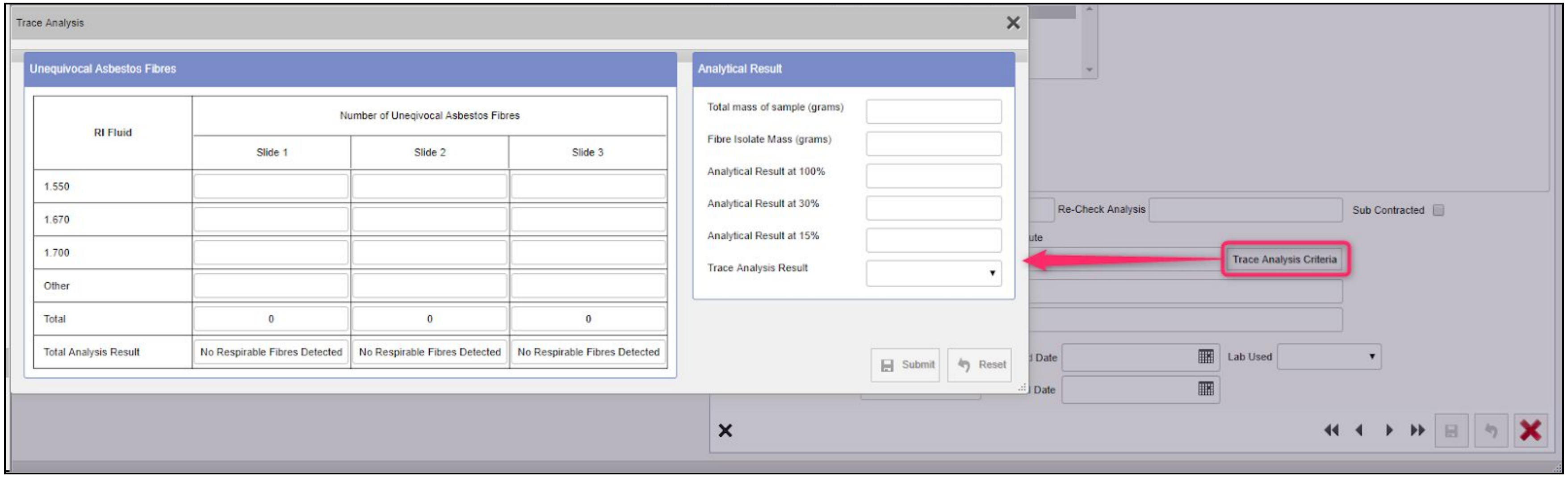
20. It is now possible to copy the non-suspect items to the new project when creating a re-inspection from the Site Register. A setting controls whether or not non-suspects are copied: copyNonSuspectsForReinspection.
21. When generating lab certificates, you can now get the system to calculate and display version numbers - in the same way as on survey reports. The settings that control this are: "ManualProjectBulkCertificateVersionNumber" and "ManualSurveyBulkCertificateVersionNumber". If you would like the version numbers displayed on you certificates, then do call us so that we can amend your certificate templates.
If "ManualProjectBulkCertificateVersionNumber" is set to “no” then the new Version field on the Bulk Sample Results tab is auto-incremented each time you click the Generate Certificate button. You can manually change the version number if required.



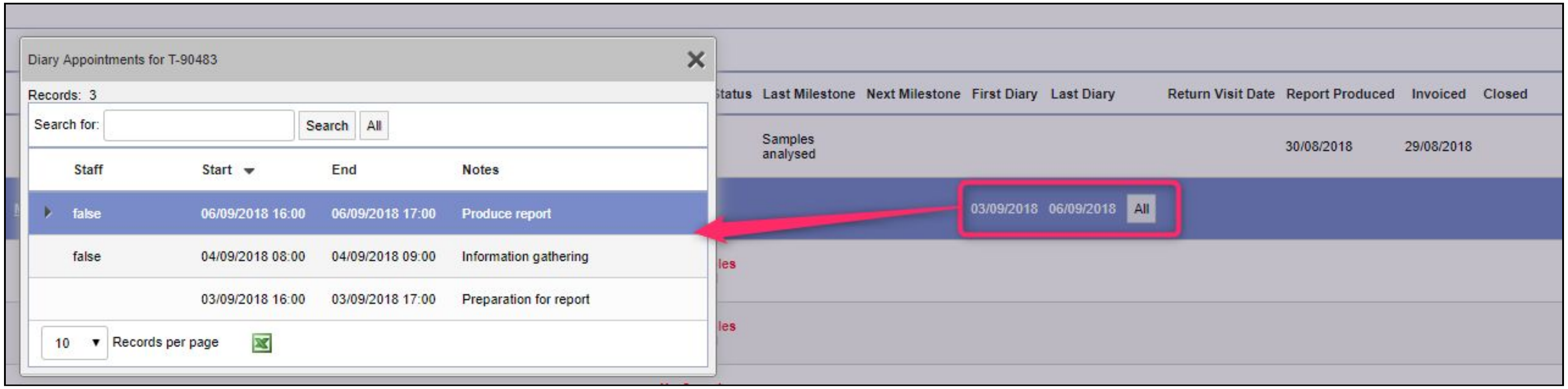


If "ManualSurveyBulkCertificateVersionNumber" is set to “no” then the Version field on the Survey Details screen is auto-incremented each time you click the Bulk Certificate button. You can manually change the version number if required.

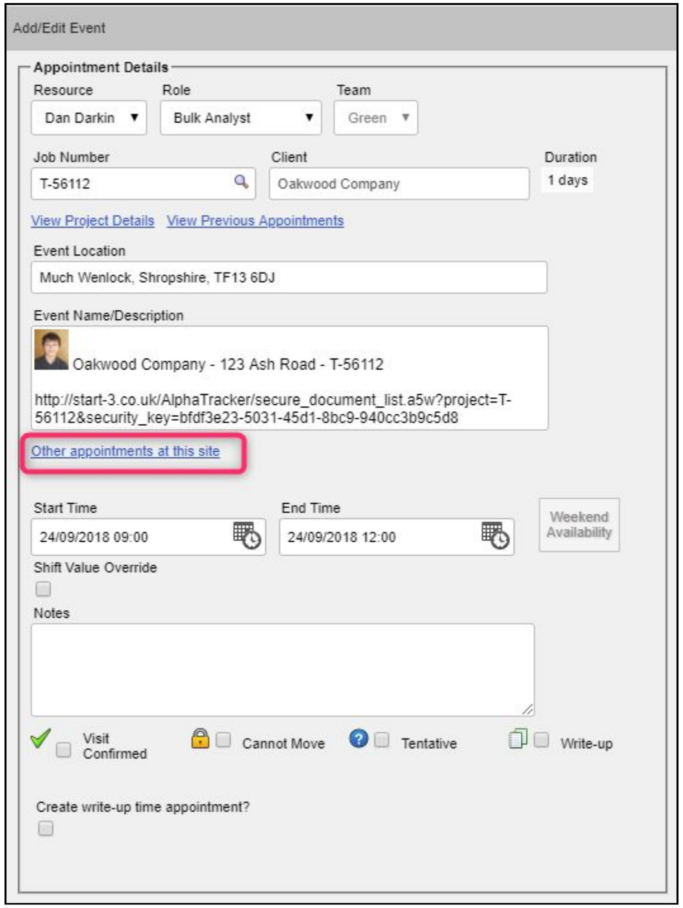
22. Developed specifically for Australian labs, it is now possible to record Trace Analysis when asbestos fibres present in certain samples is at low concentrations, unevenly distributed or too small to be identified accurately.
    If the new setting “TraceFibreAnalysis” is set to yes then the Non-Homogenous Samples Included tickbox is displayed on the Projects screen. If this is ticked, then new “Trace Analysis” fields are available on the Fibre Analysis screen to record the required details.



23. It is now possible to delete diary appointments automatically when project staff are deleted. If project staff are deleted, the system asks whether all appointments for that staff member and project are to be deleted. This behaviour is controlled by a setting.
24. You can quickly access a list of diary appointments for a project from the Project List screen by using the new All button. This button is only displayed if appointments have been made for the project. It is displayed just after the First Diary and Last Diary columns on the Project List. The details displayed are read only and briefly tell you who the appointment is for, the start and end time, and any notes.

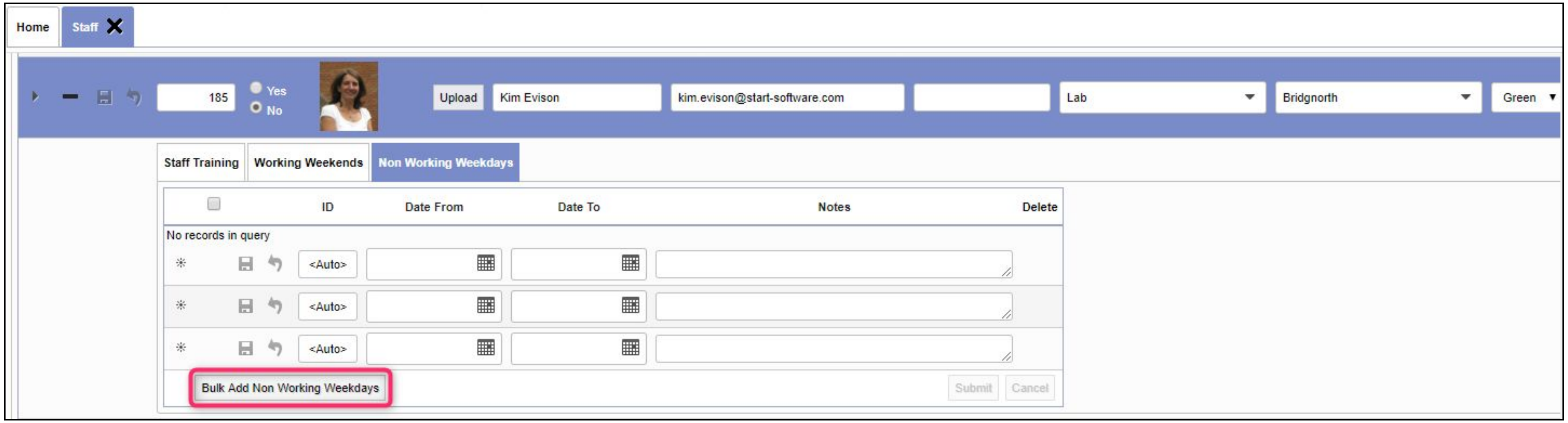


25. If you change the Project Type on a project, for example from an Asbestos Management Survey to an Asbestos Refurbishment Survey, you will now find that the appointment is updated with the new project type.
26. The documents via the document link in appointments are now mobile friendly and show within a folder structure, so sub-folders can be seen and navigated easily.
27. There is a new link on the Appointments screen in Alpha Tracker's Calendar to view other appointments at the same site. The link is shown under the Event Name/Description. Clicking the link opens a new tab on your Browser displaying the list of other appointments for the site.

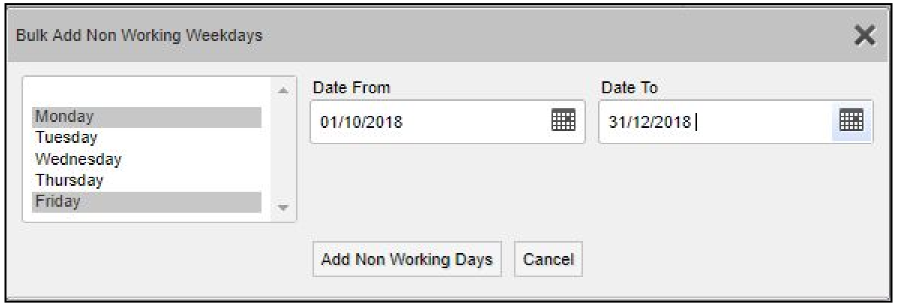


28. A new feature allows you to record non-working dates for a member of staff in batch. You can select a day or days from the working week (eg Monday and Friday) and a date range, and mark these days as "non-working days" for a particular member of staff. The Calendar will then display warnings if you attempt to schedule an appointment for that member of staff on one of their non-working days.

To mark the days as non-working days, go to the Staff screen (*Setup/General/Staff*) and click the plus button next to the required member of staff. Click onto the Non Working Weekdays tab, then click the Bulk Add Non Working Weekdays button.

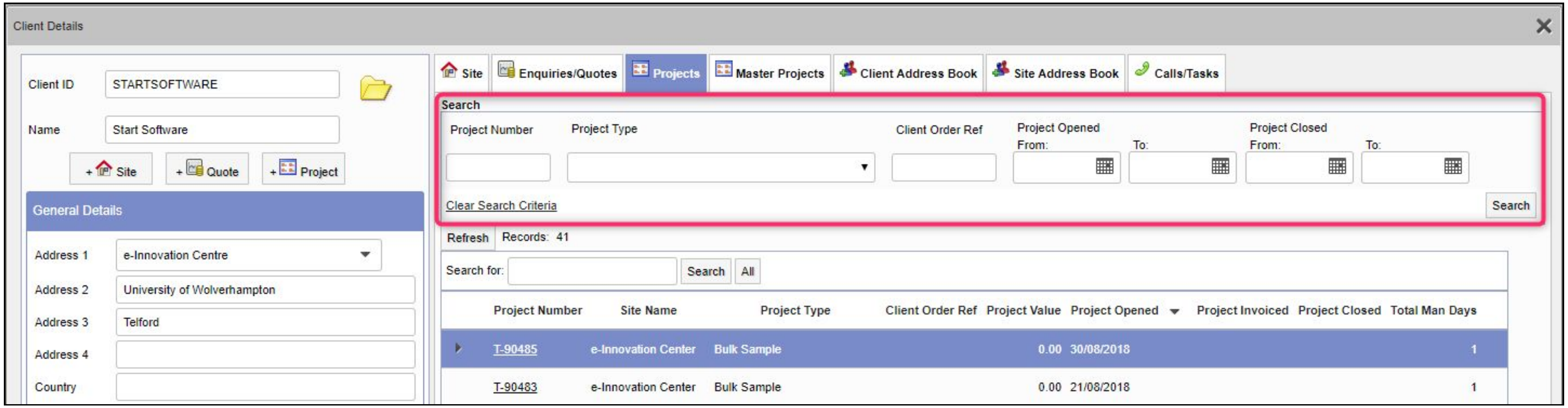


This opens the Bulk Add Non-Working Weekdays window in which you can specify the day(s) of the week and the applicable date range, for example:

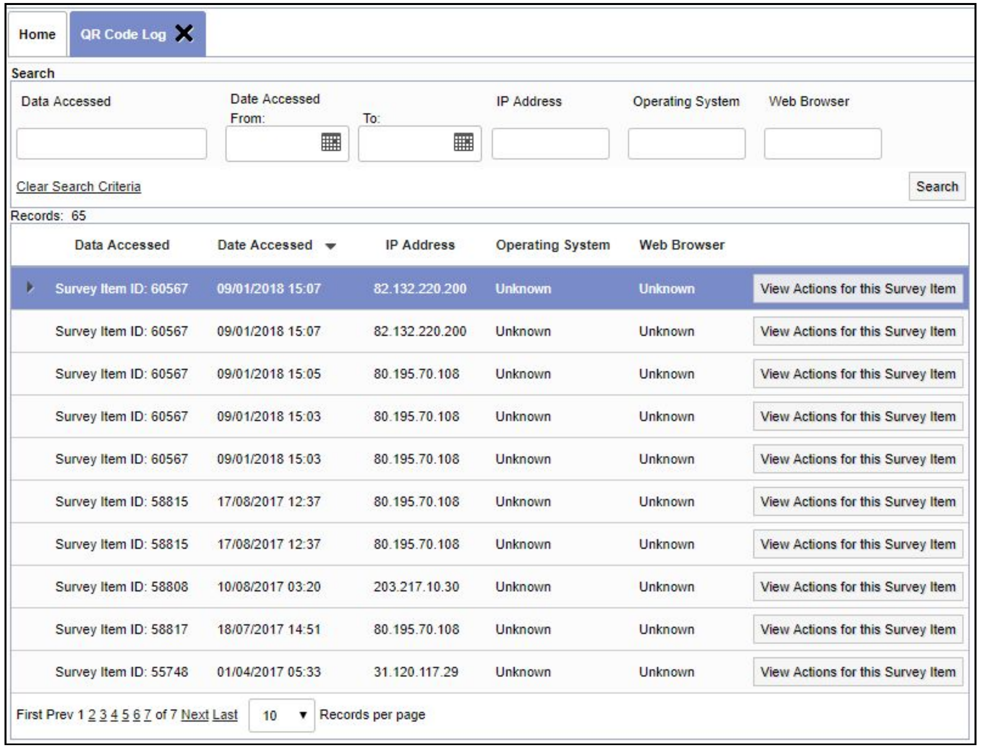


Click the Add Non Working Days button to create the batch of non-working days and display them on the Non Working Weekdays tab.

29. The Projects tab on the Client Details screen now lets you search for projects using the standard search fields.

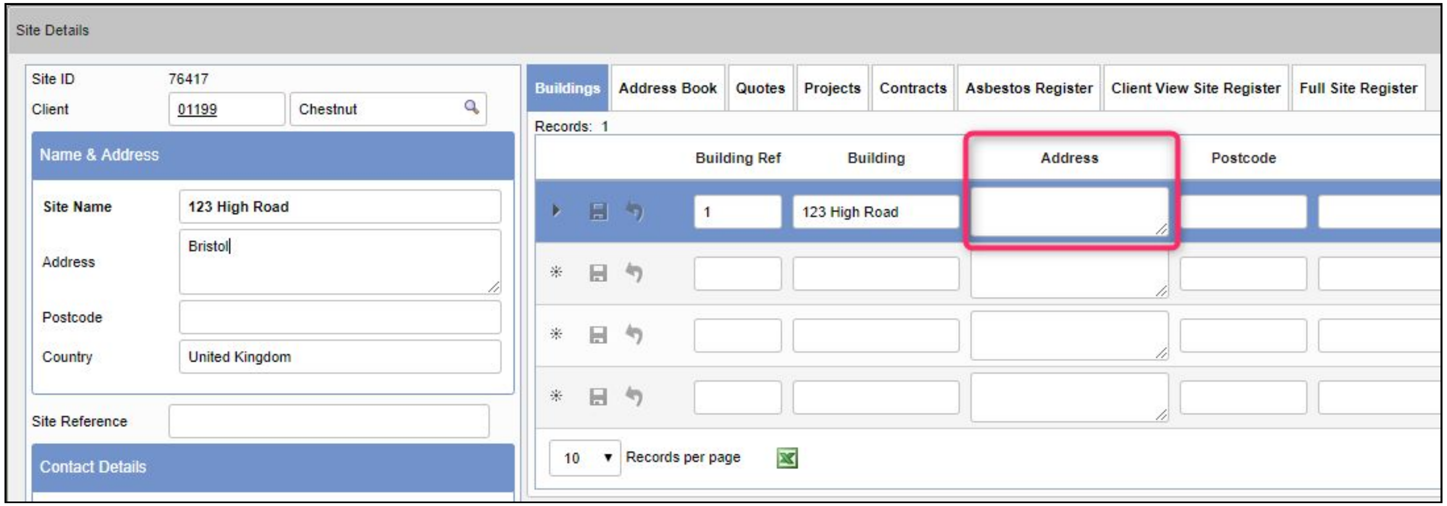


30. System logging has been added for accessing QR codes, including:
    - Recording the operating system and web browser used, and whether a sign in was required.
    - A new menu option Setup / System / QR Code Log showing the data accessed.
    - Logging when data is accessed via public or private QR codes.

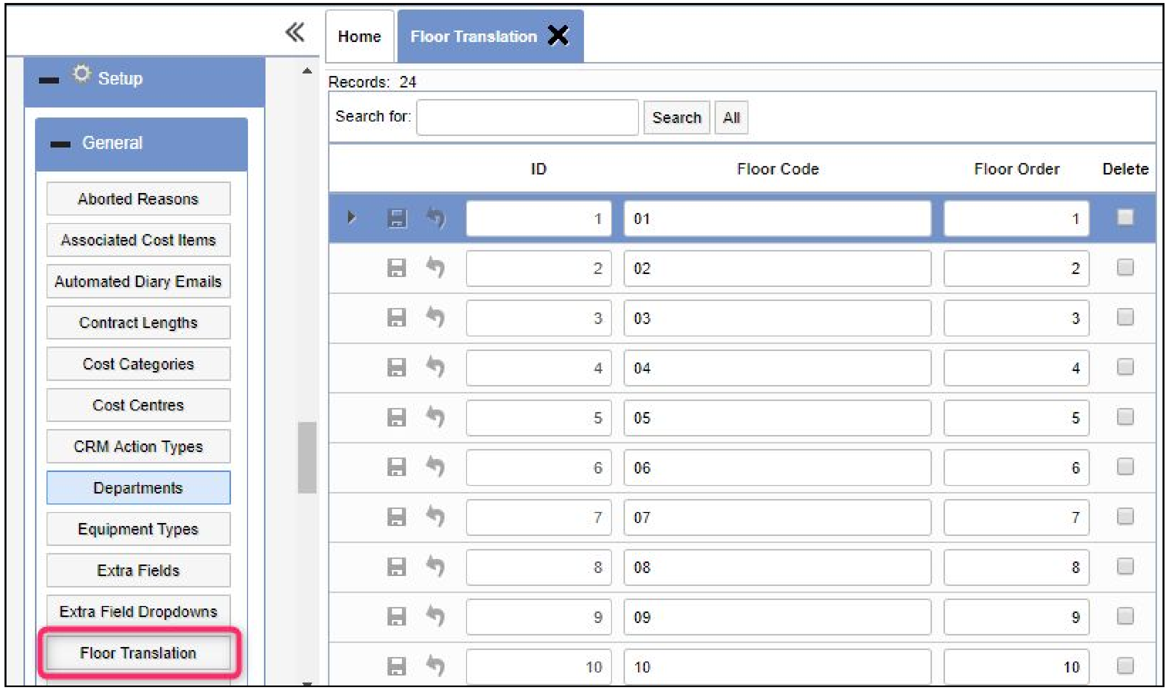


31. The Extent and UoM have been added to the Edit/View Suspect Items screen so that you can now edit these by using the Edit/View Suspect Items option from the Choose Task menu.
32. When you are entering a new project/job and click in the Site Name/Ref field to select the site, you will now see the New Site button is displayed twice on the site selection window - at the top and at the bottom. This will make it easier to select the button if you have a long list of sites for the client.

33. Our New Zealand clients can now benefit from using ACOP scoring, which excludes the Asbestos Type from the scoring. Amendments have been made to the Survey Items screen and to the Site Asbestos Register, Client View Site Register and Portal Site Register to allow for this type of scoring. It is switched on by using the setting “NewZealandACOP”.
34. Improvements to the "Move Survey Data" option have been made including:
    - Checking that a connection to the database can be made
    - Improvements to the SQL that is run
    - Checking that the XML folder is created
    - Only checking records that have photo file names when moving photos
    - Only displaying relevant messages.
35. The Address field on Site Buildings is now a text area so that you can enter line breaks in the address:



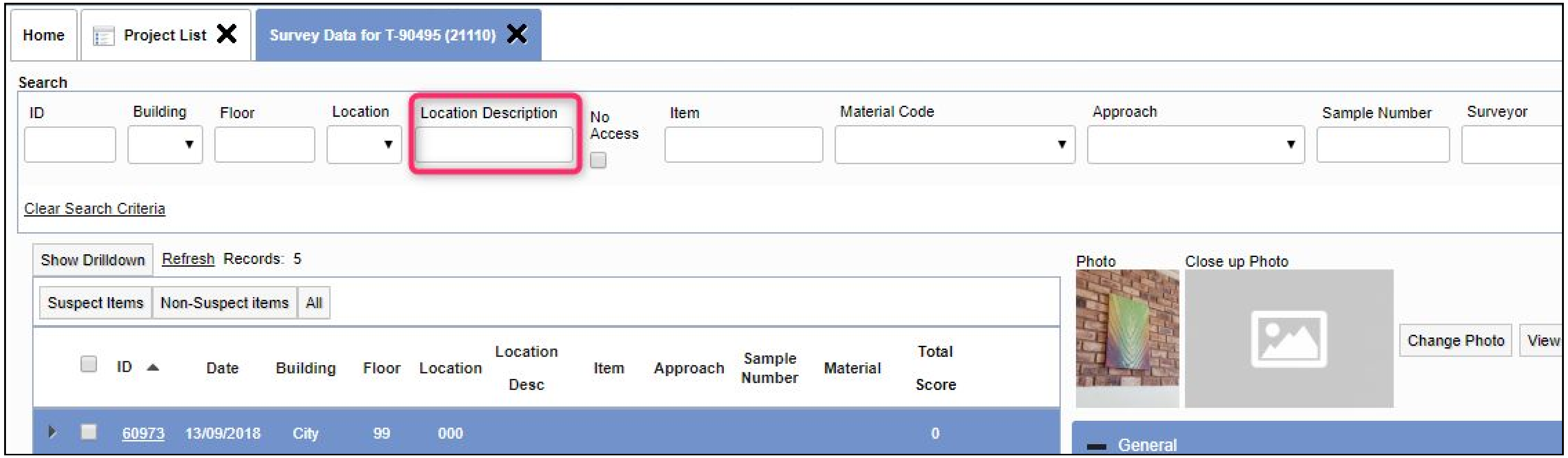
36. It is now possible to define your own floor translations by using the new “Floor Translation” option from the General section of the Setup menu. This has been done to enable you to specify how floors should be output in your reports without making changes to report queries.



If, for example, you use B, LG, G, F, S, T for floors rather than numeric values, you might list these values in the Floor Code column and use the Floor Order column to specify the order in which they should be displayed.

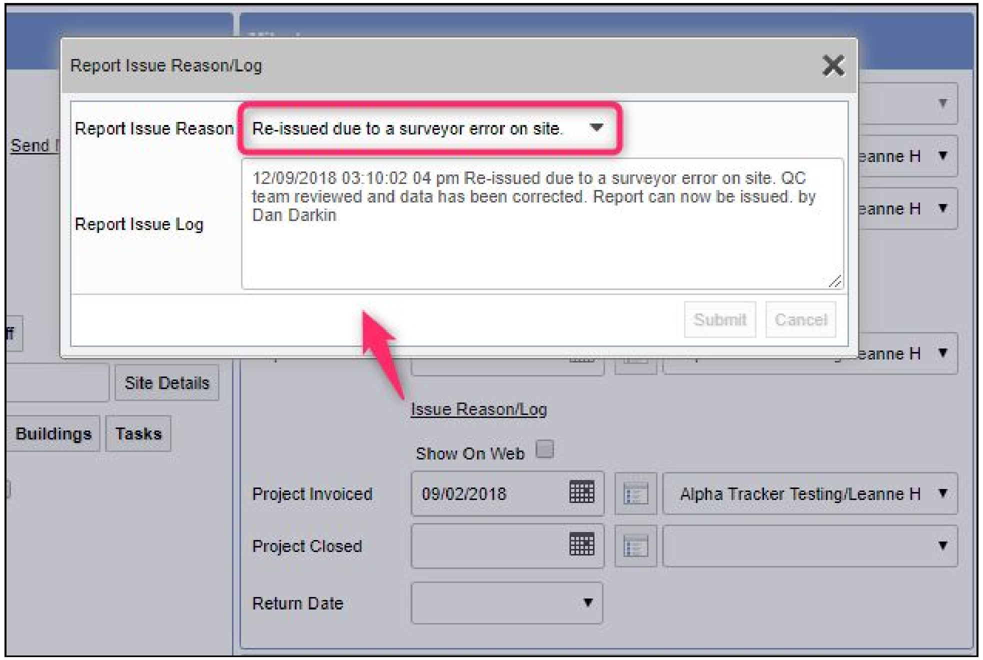
37. There are additional fields on the Survey Items Import screen which allow you to:
    - Import non-suspect items. Eight pairs of fields have been added, for the Item and the Material Code of non-suspect items. Scroll to the right of the Survey Items Import screen (or the downloadable spreadsheet) to see these fields.
    - Import a “Default PA Score ID”. The Process button has been updated to check if a Default PA Score ID is entered and if so to get all the associated default PA scores and insert them with the new record.
38. A change has been made to Fibre Analysis so that the survey item ID is also stored. If fibre analysis is moved between projects then the survey item ID, if it exists, is used.
39. Users of Hazardous Materials will find a new PCB column “Disturbance Potential” and also a new hazmat lookup “PCB Disturbance Potential”. In addition, for Lead Paint, the Result column dropdown values now only include lookups with a category of 'Lead Paint Result', and the Lead Dust Status dropdown values come from lookups with a category of 'Lead Dust Status'.

40. You can now use more than one type of Risk Assessment at a time in your Alpha Tracker. This feature is particularly useful if you use Asbestos Risk Assessments and also want to use another format of Risk Assessment for other Project Types.
    - Specify the types of Risk Assessment to be used in the “Risk Assessment” setting, eg “A,B”.
    - Ensure the labels for the Risk Assessment buttons (in the Notes/Other Info section on the Project screen) are set so that you can identify the different Risk Assessments. There is a range of settings for these labels, eg “Name: Risk Assessment (A)”, “Name: Risk Assessment (B)”.
    - Link individual Project Types to Risk Assessment Types by using the new Risk Assessments field on the Project Types screen. When a project of this type is displayed, then only the button for the linked Risk Assessment Type will be displayed. If there are no values specified, then the default is used.
41. Location Description is now available as a search field on the Survey Items (form style) screen.

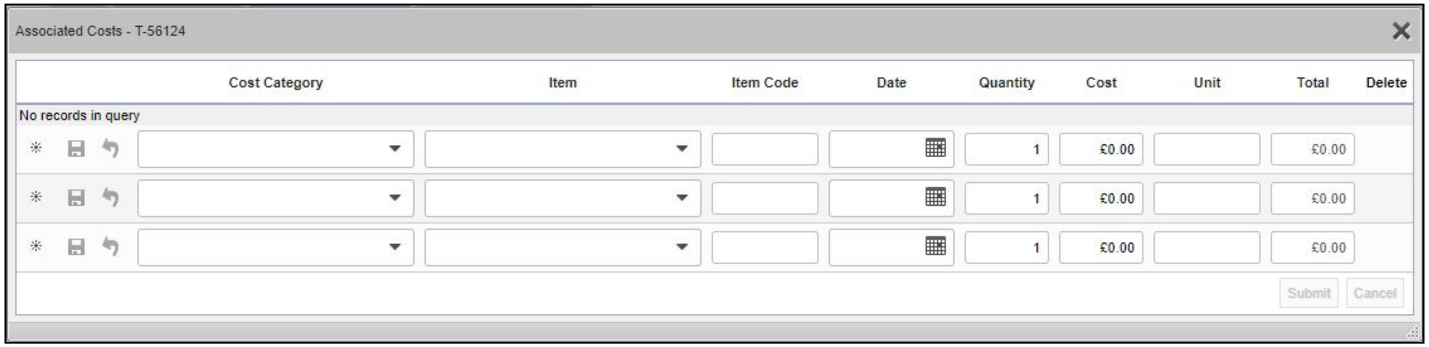


42. It is now possible to hide Lab-related menu options by using the setting that enables the Lab menu, ie “Show Lab Frame”. The options that can be hidden in this way are “Lab Backfill”, “Lab Lookup” and “Labs” under Lab and Surveys, and Enter Fibre Analysis under Choose Task.
43. There is an additional field available that allows surveyors to specify the external lab to which they are sending project samples from Tracker Mobile, and for the Lab field on the Survey Details to be populated from this. Call Support if you would like to use this.
44. An addition to the Payment Terms screen means that it is now possible to calculate the due date based on either a set number of days after the invoice date or on a specific day of the month. You can either complete the Days To Pay field, eg specifying 30, 60 or 90, to specify how long after the invoice date that payment becomes due, or you can complete the Day of Month field to specify when the payment is due, eg specify 20 for the payment to be due on the 20th of the next month.
45. When importing survey items, the validation on the Asbestos Type score has been removed to allow entries higher than 3. The reason for this is that some clients set the Asbestos Type to 12 for presumed items.
46. Validation has been added to the Bulk Sample and Bulk Soil Sample entry so that duplicate sample numbers cannot be added to existing samples.

47. The Report Issue Reason field on the Issue Reason/Log has been extended so that it will now accept up to 250 characters.



48. A new module has been created for Tracker Air in Australia to record and print certificates for the testing of airborne asbestos fibres. Call Judy if you are interested in having this module.
49. Improvements have been made to the Associated Costs screens, including being able to hide the Supplier, Reference Number and Commission columns. This is controlled by repository settings. Improvements have also been made to the display of the screen and totalling.



Fixes/Minor Changes

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

- The Caveats Agreed On-Site field on the Survey Data screen is now a text area rather than a textbox.
- Minor cosmetic changes have been made to the Client Portal Site Register.
- The settings to hide and show menu options on the Client Portal can now also use the User ID, not just the user’s linked Staff or Client ID.
- A minor improvement has been made to performance when logging in to the Client Portal.
- The export on the Client View Register screen now uses the advanced report export option as per the Client Portal.
- On the Client Portal minor changes have been made to the Other Documents to ensure Client Admin users can delete documents and the size of documents is displayed in a standard format.
- Some fixes have been applied to New Enquiry from the Client Portal and Edit Quotation. These include adding in the date the enquiry was received, including the client multiplier, and a fix to the calculation issue on the Quote Total.
- The NonACMsInRoom function on the Client Portal now excludes "Removed" identifications from the list.
- When duplicating a project, the Project Opened By field is updated to reflect the name of the user is performing the duplication.
- If the Product Type Score on the Survey Items screen is updated, then the Product Type Description is also updated.
- There have been various small changes to the Site Register for Scoring Method 2 (SM2), including adding the External Reference field to the Full Site Register screen.
- The width of the Project Category, Date Active and Date Inactive fields on the Project Types screen have been fixed.
- Minor changes have been made to the display and update of the approach and the update of cross references from the Enter Lab Results / View Sample Survey Data screen.
- A problem with the Push to Register button on the Bulk Sample screens has been fixed.
- Minor performance improvements have been made to the multi-site and multi-type quotation screens.
- Sorting on the Open Projects screens has been improved.
- The display of fields on the Samples Setup screen (Bulk Samples) has been improved.
- When duplicating Re-inspection projects, the survey record is now also created.
- All site contact details are copied with Re-inspection projects.
- Improvements have been made to the sending of the initial findings email. It should now be more reliable and inform the user if something goes wrong.
- The calculations in soil analysis have been updated.
- A change to how the quotation total is copied to any projects created from the quotation.
- Performance improvements and the behaviour of settings have been made to the Fibre Analysis screen.
- When photos are received from other Alpha Tracker systems, they are now renamed to allow for subfolders in the receiving system.
- An issue with photos not copying into sub-folders when moving survey data has been fixed.
- A misspelling on the Bulk Samples Results tab has been corrected.

- Adjustments have been made to the training matrix to display expiry dates correctly.
- When duplicating a project, the Site Contact email is now also copied.
- The size of the Client Name field on Calls/Tasks has been extended.
- A blank option has been added to the Lab dropdown on Survey Details to allow for the removal of a selected lab.
- When creating re-inspections from the Client View Asbestos Register from a filtered list, XMLs are created only for the filtered records not for all records.
- The Project Type dropdown on Setup/General/Staff Training Course just shows the Project Type name, not null values.
- A problem with entering appointments on the calendar when using the Training Matrix has been fixed.
- The site country has been added to project duplication.
- The Open Projects screens are now ordered by Project Type description rather than ID.
- Auto-alert emails are now being sent each and every time an analyst exceeds the number of points identified in "Lab points limit #3 - level".
- The "Enter Lab Results" and "View/Edit Samples" options will now show samples where custom approaches are being used.
- The missing Generate button from the first Air Monitoring tab on Tracker Air projects has been reinstated.
- The display of the £ symbol on invoice type C has been fixed.
- There have been some minor bug fixes to client contacts and the data protection links. Client contact data is no longer amendable via the Client Data Link which is sent to clients.
- A problem with moving older survey data between projects has been fixed by ensuring the date format matches.
- The re-use survey data option now reflects the "Clients with separate re-inspection app" setting - code has been added so it'll work in the same way as the re-inspection function.
- A problem with the validation when comparing the quote total to the cost breakdown total has been fixed.
- A message is now displayed if the route can't be plotted via the "Route" buttons on the appointment screen. This may happen if the appointment does not contain longitude or latitude values.
- Setting changes have been made to the Initial Findings email.
- The "Caveats agreed on-site" field has been added to the Quick Edit Survey Data screen.
- A problem with PDFs not previewing in the Client Portal due to file names containing special characters has been fixed.