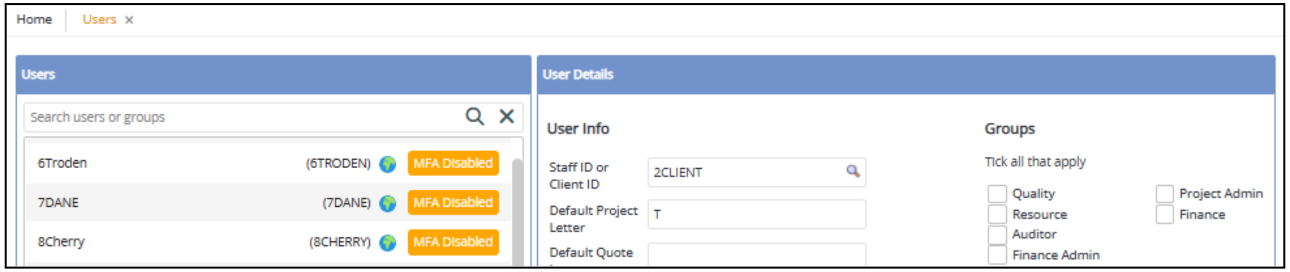
Release 41.6 - Alpha Tracker Release Notes

New Features / Changes (from SVN9859 to SVN10276)

1. Multi-Factor Authentication (MFA) is introduced in this release of Alpha Tracker. Multi-Factor Authentication adds an extra layer of security by requiring a second step to verify your identity when signing in. This second step involves using an authenticator app, eg the Microsoft Authenticator app, Google Authenticator app or something similar.

   If the new setting "MFA Required" is set to yes and a user signs in without MFA being enabled, they will be prompted to set it up.

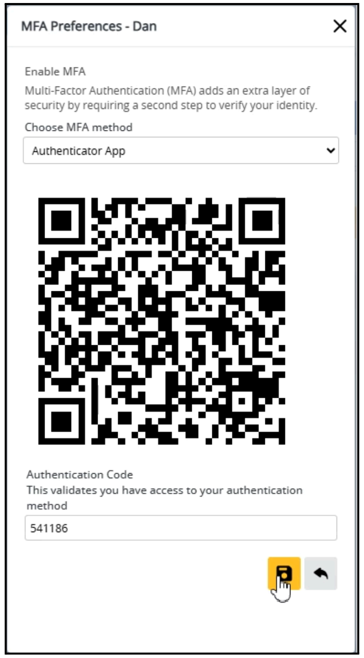
   On the Users screen, you can see which users have MFA enabled (green) or disabled (orange). You can also search the Users screen by "MFA Enabled" and "MFA Disabled" to easily identify those users with MFA enabled or disabled.



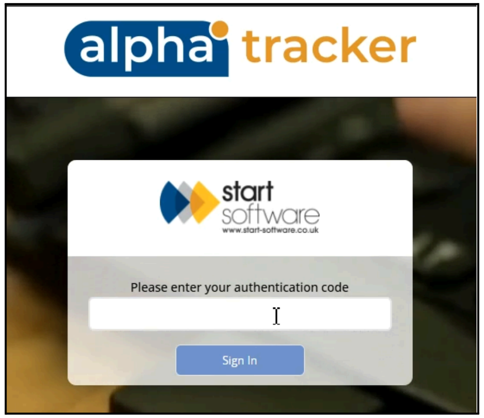
   You can change the MFA settings for your own account from the Users screen by using the **MFA Preferences** button. If you try to switch on MFA for a user other than the one you are logged in as, you see a message explaining that this is not allowed. A Superuser can, however, change the settings to disable MFA for any user - just not to switch it on.

   To switch on MFA for your own account from the User screen:

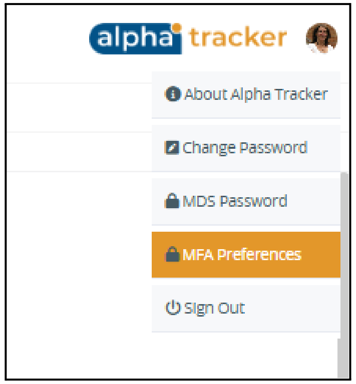
   - Find and select your user account then click the **MFA Preferences** button.
   - Choose your MFA method from the dropdown. A QR code is displayed.
   - Scan the QR code using the mobile device that has the authenticator app.
   - Open the authenticator app and note the code.
   - Enter the code. This validates that you have access to your selected authentication method. A prompt confirms that MFA has been set and the green MFA Enabled indicator is displayed against the user on the User screen..

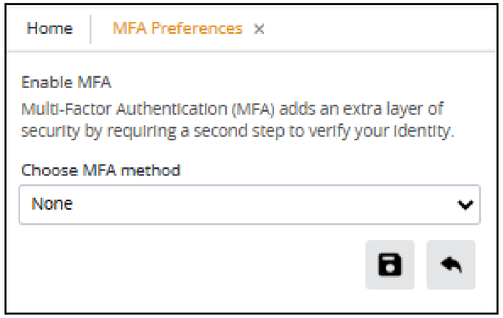


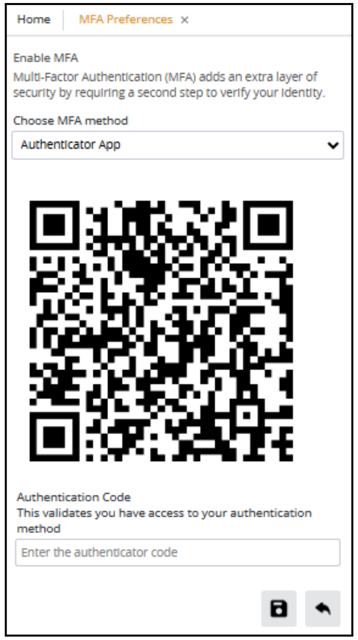
- Once MFA is enabled and the user has entered their username and password to sign into Alpha Tracker, they are asked to provide an authentication code as part of the signing-in process.



If your permissions do not give you access to the User screen, you can set up the MFA preferences for your own account by using the *MFA Preferences* option on the Profile menu in the top right-hand corner:





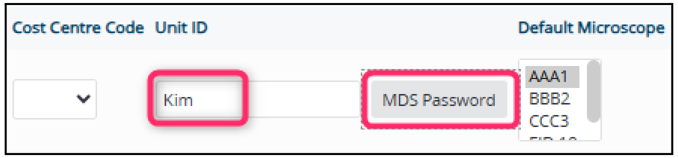


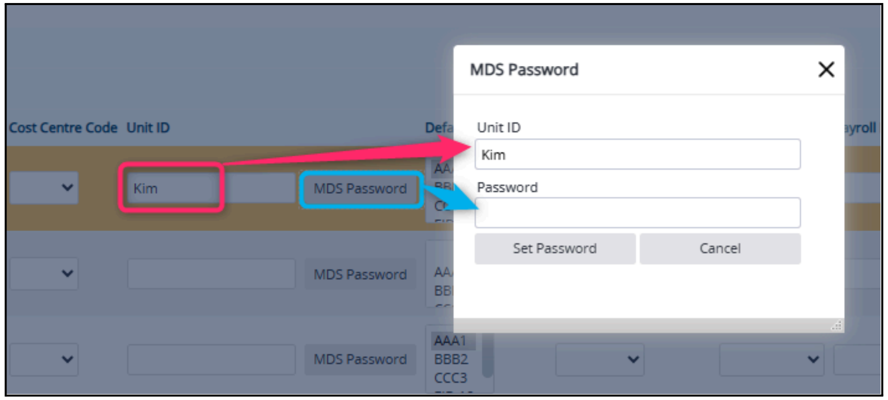
2. If required, you can now set individual passwords for MDS, the software used for survey data capture and many other onsite tasks. This security feature means that instead of having one password per organisation, each person who can connect to MDS and send data into your Alpha Tracker has their own password. Contact Support if you would like to switch to using this security feature.

   A setting controls which method is used: “MDS Unit ID Method” can either be blank to continue with the previous one-password-per-organisation behaviour, or set to “Staff UnitID” or “UserID”. If one of these last two values is entered, then Alpha Tracker manages the users in MDS.

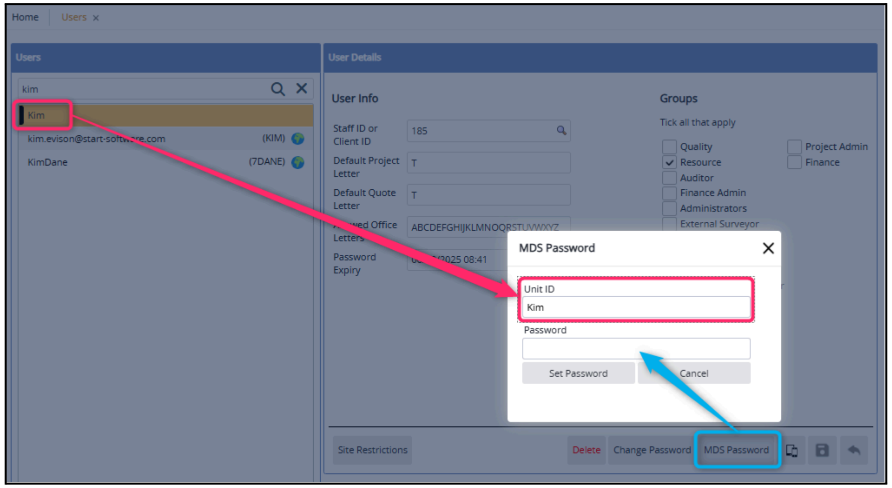
   When Alpha Tracker manages the users in MDS, two elements are needed for each connection to MDS: a **Unit ID** and a **Password**.

   If “StaffUnitID” is entered, then the **Unit ID** from the Staff Setup screen is used as the **Unit ID** in MDS. The password can be set by using the **MDS Password** button next to this field. (It can also be set from the Users screen.)





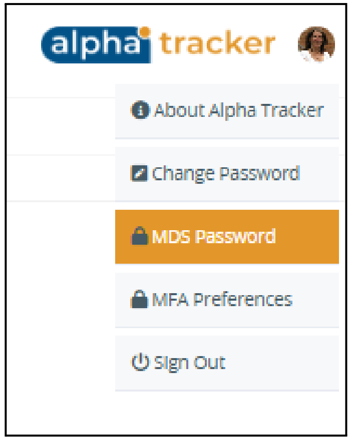
If “UserID” is entered, then the **User ID** is used as the **Unit ID** in MDS. This is the username as entered/displayed on the Users screen in Alpha Tracker. The **Unit ID** field is hidden on the Staff Setup screen as it is no longer being used. The password can be set by using the **MDS Password** button on the Users screen.



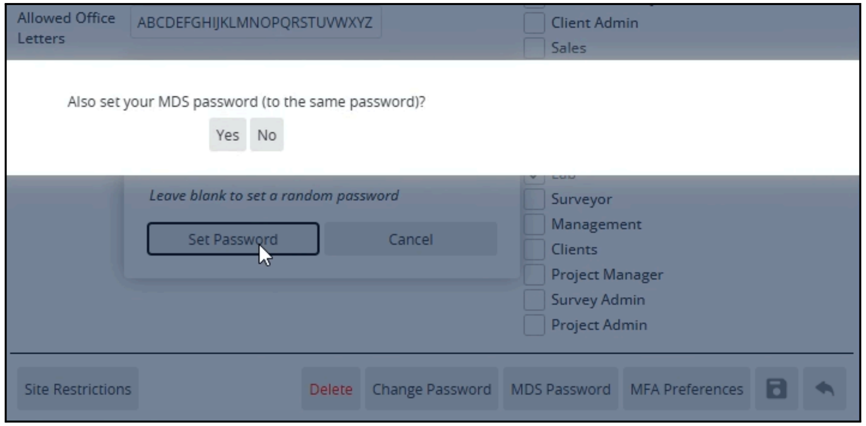
All passwords are encrypted when stored in the database.

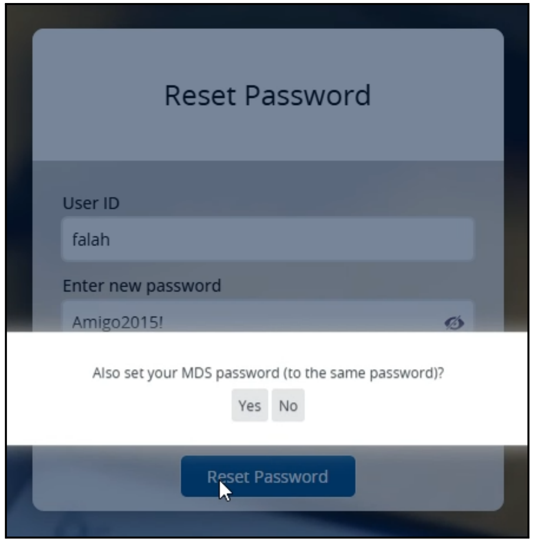
3. If you do not have access to the Users screen or Staff Setup, you can still manage and change your MDS password by using the *MDS Password* option on the Profile menu in the top right-hand corner. There are certain conditions under which this option becomes available:

- You are in the Surveying permission group and “User ID” is set in “MDS Unit ID Method”.
- “Staff UnitID” is set in “MDS Unit ID Method” and you have a **Unit ID** specified in the Staff Setup screen.
- You already have an MDS password set.



If this option is available to you, then you can use it to change your MDS password. You will also find that Alpha Tracker will ask if you want to change the MDS password whenever the sign-in password is changed. The MDS password will be set to the same value as the sign-in password so that you can keep the two in sync. For example, this is offered from the Users screen and from the Reset Password screen:





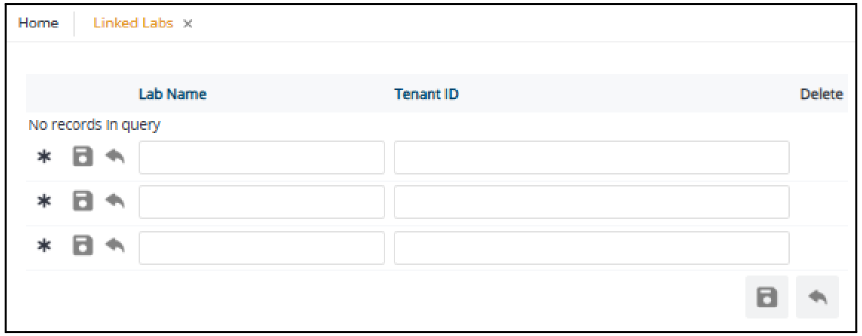
The same options are available on Alpha Tracker Mobile, from the Profile menu and when changing your sign-in password.

4. The Lab Sample Exchange is fully launched in this release.

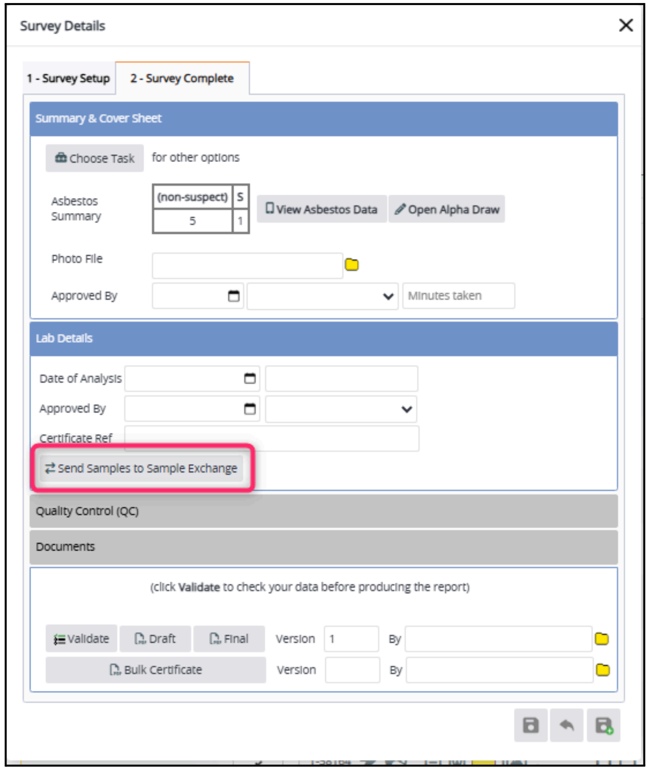
   This feature enables surveying companies to easily send sample data to external labs who use Alpha Tracker for fibre analysis, and for those labs to return the analysis results at the click of a button. This means that if you do not have sufficient capacity in your lab to analyse all the samples you have received, you have a method to send the sample details quickly and easily over to another lab. Similarly, if you are a lab with spare capacity, you can pick up additional work, book it in really quickly and once the analysis is done send the results and certificate back electronically.

   The Lab Sample Exchange works through OpenAsbestos™ to enable the sharing of sample data electronically from other Alpha Trackers and also from some other external systems.

   There is a separate user guide for the Lab Sample Exchange on our website, containing full instructions. In summary, to use the Lab Sample Exchange, you must register your Alpha Tracker system with Open Asbestos and then link your system to one or more labs who use Alpha Tracker.



You can then choose to send samples from a project to a linked lab by clicking a button on the Survey Details screen.



The lab receives a notification and can see the samples sent in the Lab Sample Exchange. From there they can receive the samples, which books them into a Bulk Sample project in their Alpha Tracker.

When the Lab has completed the analysis of the samples, they can send the results back to the Surveying company. The Surveying company can first check the results and then, if OK, can update their survey data with the analysis results.

5. There has been some work done to progress the link with FLS and improve the content of the related screens. Watch this space for details of the full launch of this feature.

   The Add/Edit Event screen that is displayed from the Calendar has been slightly re-organised to allow for the FLS-related fields that will be coming when this is launched. Some minor fixes have also been applied to this screen, including validation of the appointment length as compared to the default appointment length set on the project. There have also been some formatting changes, eg to the display of links, and **Repeat Appointment** is now a button instead of a link.

6. Control over who can edit diary appointments has been extended and refined. If you want to restrict who can edit appointments, then you need to do two things:

   - set “OnlyResourceGroupCanEditDiary” to yes in the System Repository
   - ensure that the users who are to have these edit permissions are either Superusers or are in the “Resource” user group.

   If this is done then it has an effect everywhere appointments can be made or amended, ie on the Add/Edit Event screen on the Calendar, on Diary Appointments, on the New Appointment and Map Scheduling menu options, on the Diary Appointments button on the Financials/Planning tab on the Project screen, on Projects Not In Diary, and on the Wallboard.

7. Milestones will now regenerate from the template if you change the **Project Type.** If you have a different set of milestones for the new **Project Type** then these will replace the previous set. Previously this only happened when you changed the **Turnaround**. A warning message is displayed if some of the milestones have already been completed.

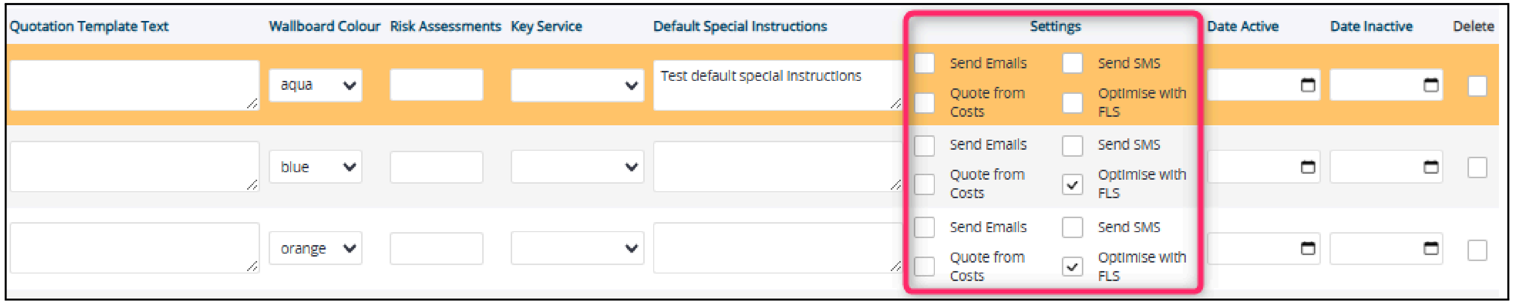
8. Also on milestones, there have been some additions to clarify when the dates on milestones linked to Key Milestone 2 and 3 (Surveyor First Day On Site and Surveyor Last Day On Site) are updated. This change is designed to help with situations where data is sent in for a project but that data indicates no access to the site was gained. If the surveyor only sends in a Location 000 record marked as No Access, then the milestones that indicate data has been received into the project will no longer update.

   The dates are updated if a) any data has been recorded that isn’t Location 000, or b) a Location 000 record not marked as No Access has been recorded.

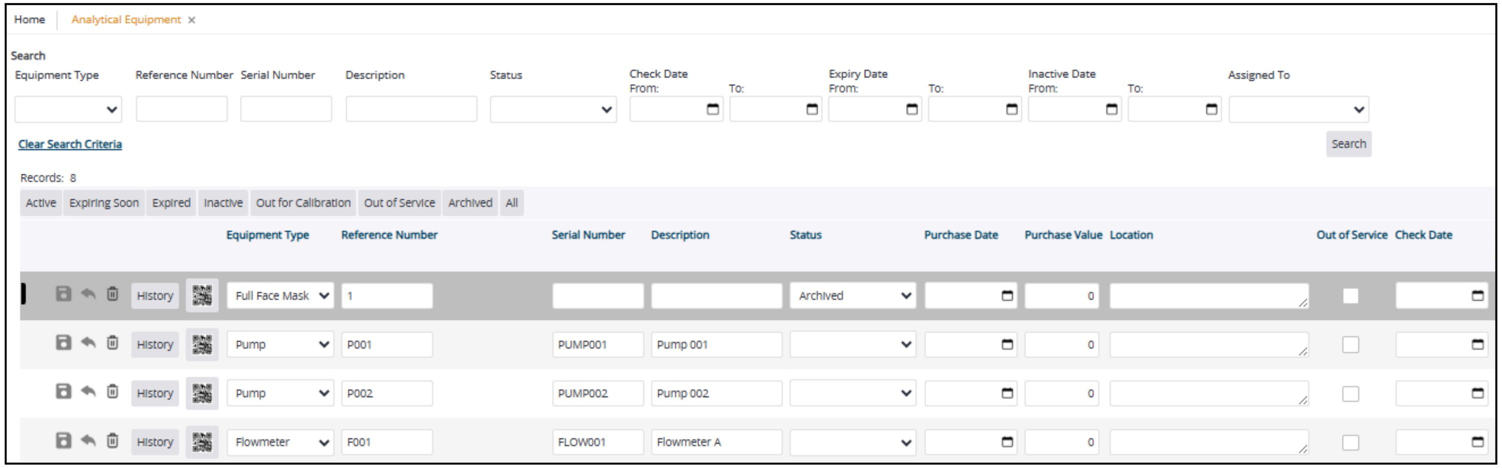
9. If you use **Sub Types** on your quotations, you will now find that this can carry through to the **Survey Type** on projects created from a quotation. For this to happen, the **Sub Type** must match an existing **Survey Type**.

10. Some changes have been made to improve the automated emails that can be generated as diary reminders. The emails now use the **Site Contact** instead of the **Report Recipient** as the person to whom the email should be addressed. This has been done to match the generation of SMS messages. Additional measures ensure that assistant surveyors and multiple appointments on the same day are handled in the generation of the emails to avoid duplication.

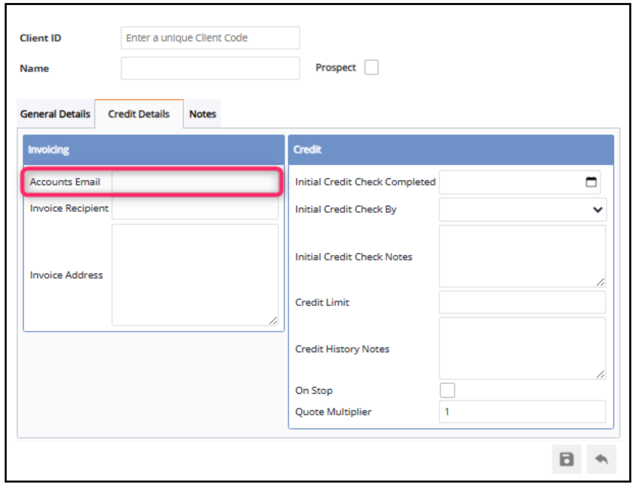
You can choose which Project Types are eligible for the emails by ticking the new **Send Emails** box on the Project Types screen. The tickboxes have been reorganised and grouped together on the far right-hand side of the screen (note that **Optimise with FLS** is only displayed if you have this feature enabled):



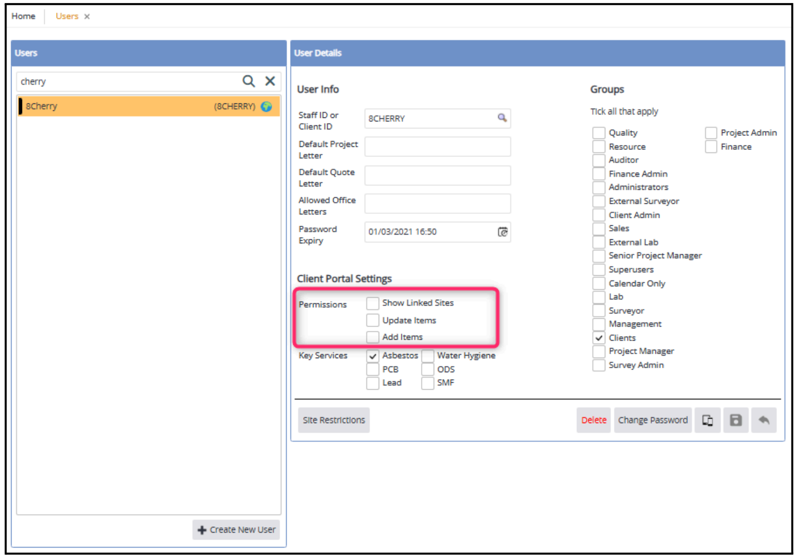
11. To help manage equipment, when you archive an item on an Equipment screen, it will now be greyed out and will become read-only. Only Superusers can change the status out of archived.



12. When adding new clients, you can now add the **Accounts Email** with the initial details. You can do this on the New Clients screen which makes it quicker to add the new client's accounts details. This field has also been added to the Clients Import so that if you choose to create clients via a spreadsheet then you can also include the **Accounts Email**.

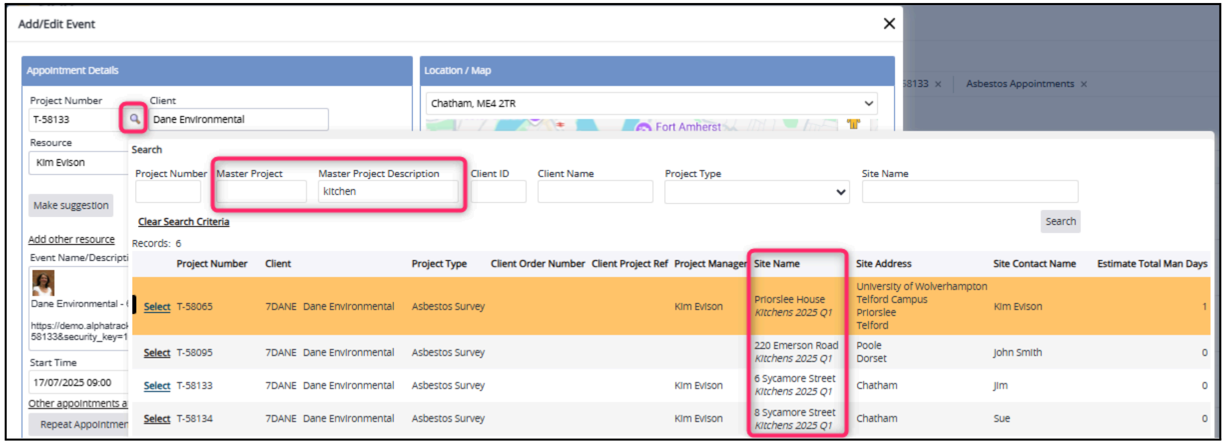


13. Managing user permissions for your Client Portal logins should now be easier as these have now been removed from the Repository Settings and instead placed on the Users screen. The settings affected are: “can manually add items via the Client Portal (no/yes)” and “can manually update items via the Client Portal (no/yes)”. The values of these settings are automatically copied to their respective user records so the permissions remain the same but are simply found in a different location.



14. You can now easily search for a project by **Master Project Number** or **Master Project Description** when selecting a project for an appointment. Searching by the **Master Project** gives you a much shorter list of projects to select from, making it easier to find the project you require.

    The **Master Project Description** is displayed below the **Site Name** in the list of projects for confirmation.



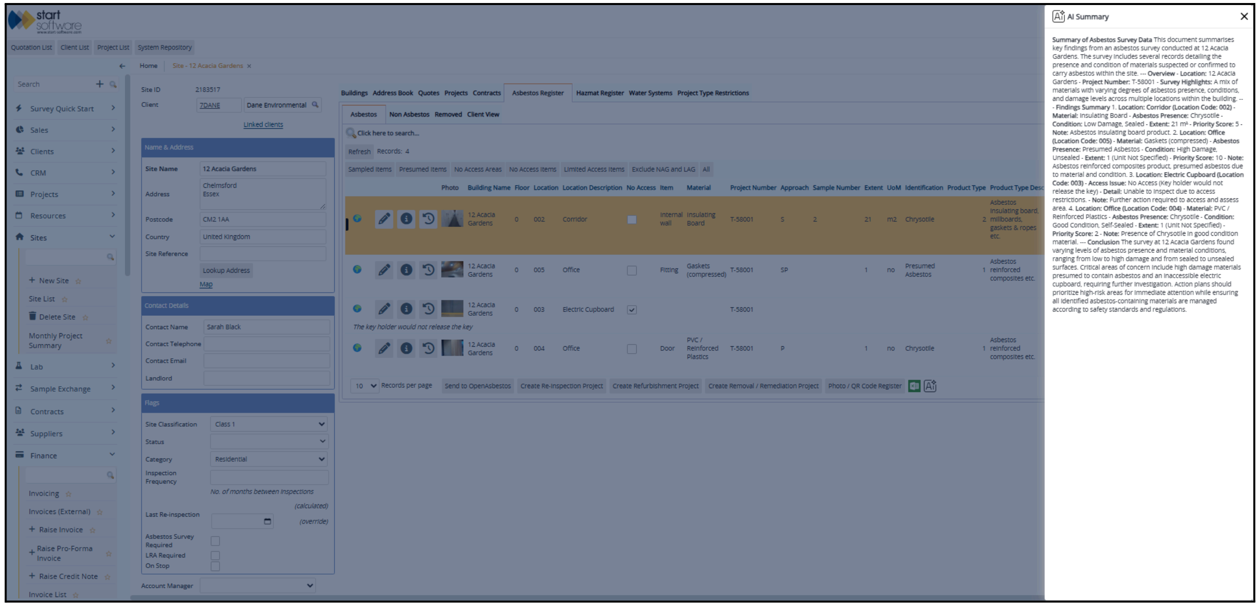
15. Improvements have been made to the performance of the diary scheduler. It opens quicker, the **Quick Edit** button has been removed (tip: use the **Diary** button on the Project screen instead) and the monthly ‘blocks’ clearly display the month and year when you hover over them. You will also find the calculation of the appointment values significantly faster.

16. This release sees the introduction of AI Summaries on various screens in Alpha Tracker, eg:

    - Quotation List
    - All Call/Task(s)
    - Master Project List
    - Site List
    - Site Asbestos Register (all tabs)
    - Ticket List.

    Filter the display on the screen to include only those elements/items to be included in the summary, then click the AI button below the list:

The text summary of the items is displayed in a window on the right.



There is a setting to hide this feature if it is not required.

17. This release sees the introduction of the new scoring method for the new Australian regulations in the National Guide for Asbestos Surveys developed by the Asbestos and Silica Safety and Eradication Agency (ASSEA).

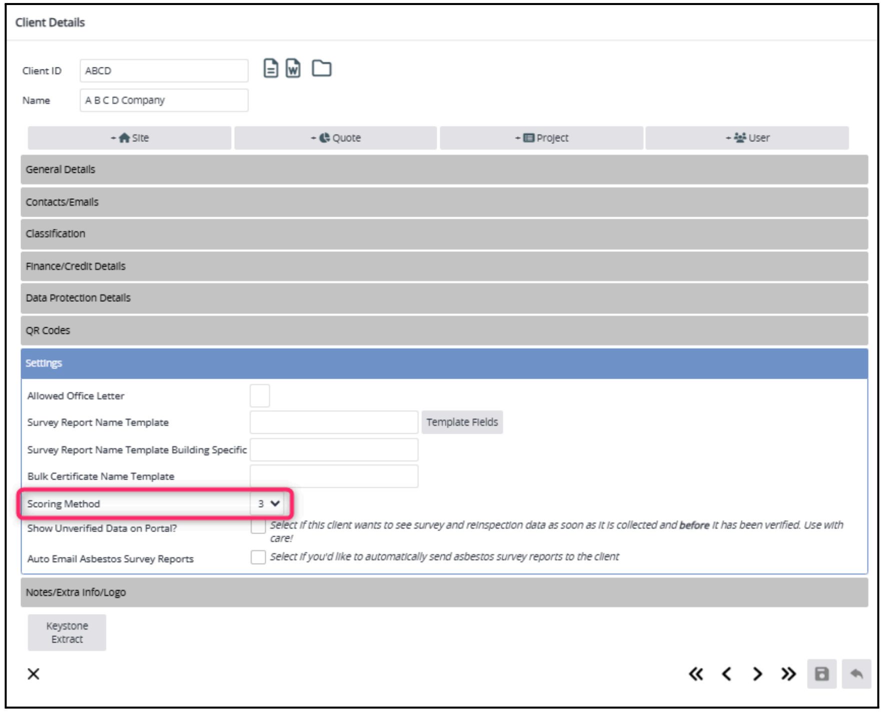
Consultancies in Australia can now undertake surveys for their clients using this new risk assessment method. Further development is planned to extend this risk assessment through to the Client Portal.

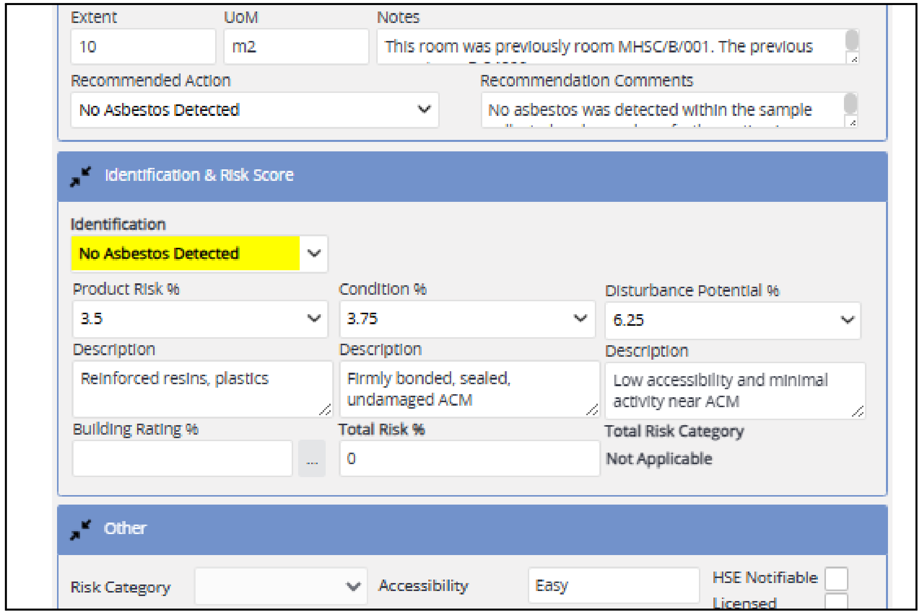
The risk assessment uses four factors to determine the overall risk of the asbestos item:

- Product Risk (percentage weighting up to 35%)
- Condition (percentage weighting up to 15%)
- Disturbance Potential (percentage weighting up to 25%)
- Building Rating (percentage weighting of up to 25%).

The scores are then added together to provide a total out of 100, which depending on the score is rated high (>= 69), Medium (>50 and <69) or Low (<=50).

You can use this scoring method for individual clients, simply set the Scoring Method field on the Client Details to “3”. When this is set, the Survey Data screen for survey projects for the client changes and a different Identification & Risk Score section is displayed:

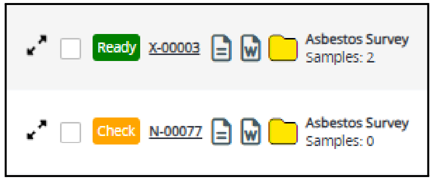




Data for this scoring method must be captured using a special version of the Tracker Mobile app. Contact Support if you need this.

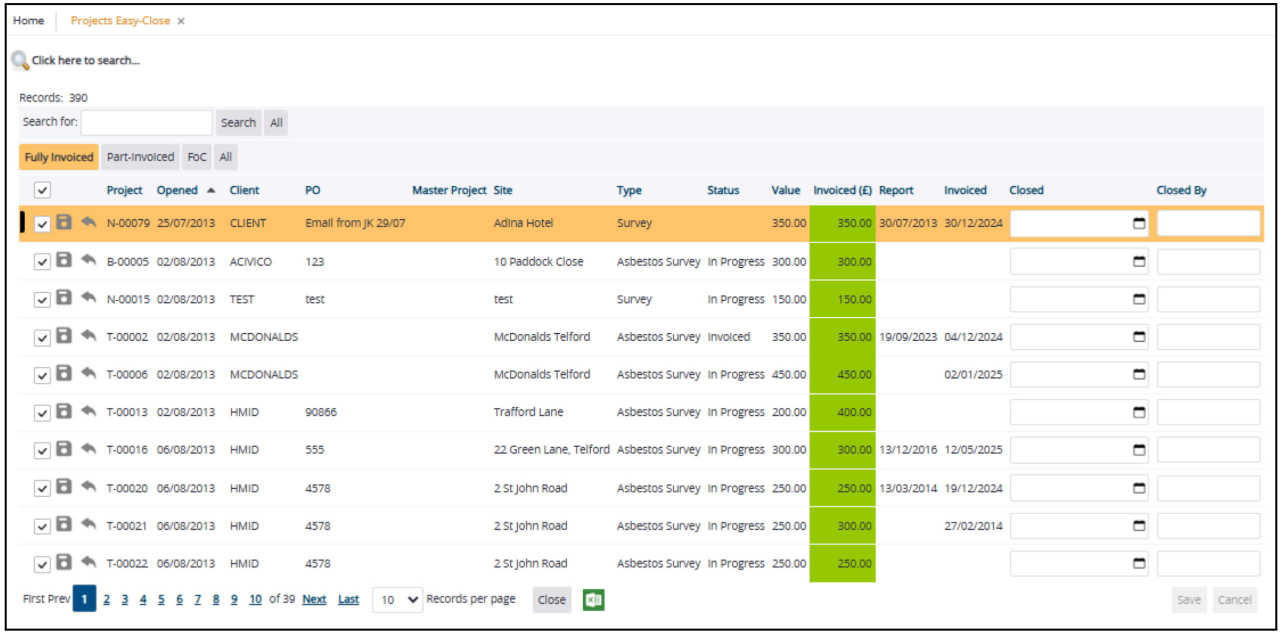
18. Minor adjustments have been made to the projects displayed on the Projects Ready To Invoice tab on the Invoicing screen. A Ready / Check indicator is displayed against each project which gives you an idea of why the project is on the list. Hover over the button to see an explanation of the indicator:

- the Ready indicator means that Report Produced has been completed or the Project Status indicates the project has been completed
- the Check indicator highlights the fact that work has been undertaken since the latest invoice (eg future diary appointments have been booked in).



19. Improvements have been made to the Projects Easy-Close screen, making it even easier to close projects in bulk. Usually, you use this screen to review the estimated value of a job against the invoiced amount. Double-clicking in the **Closed** field to close the project. Now you can use a tick box against all the projects to be closed, and close them by clicking a **Close** button below the list of projects.

    Make this even quicker by filtering the screen to show those you know you want to close, eg by using the Fully Invoiced filter button, increasing the number of records displayed per page, eg to 100, and then ticking the selection box in the header row to select all records on the page. Simply click the **Close** button to close them all in one go.

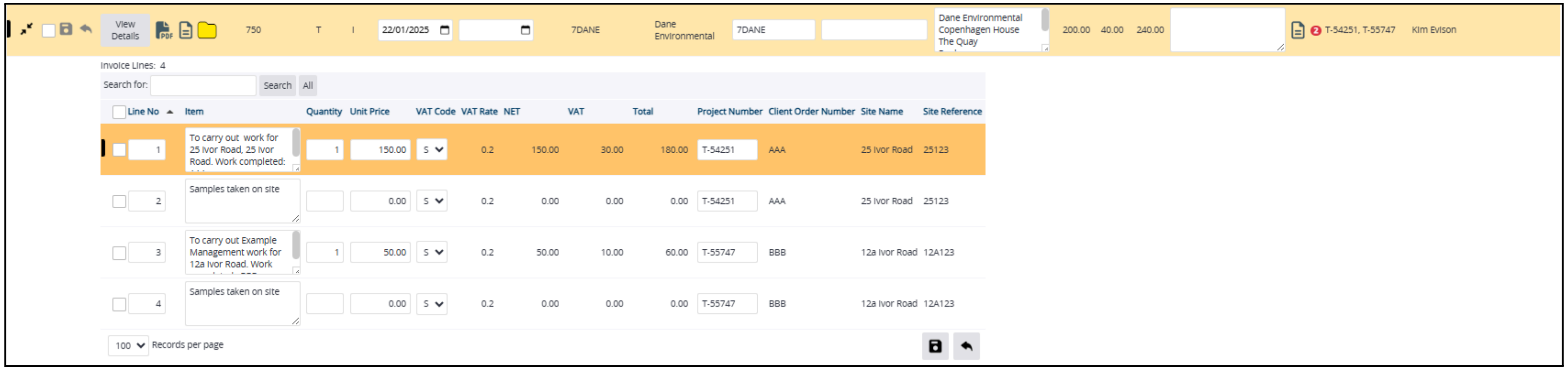


Project	Opened	Client	PO	Master Project	Site	Type	Status	Value	Invoiced (£)	Report	Invoiced	Closed	Closed By
N-00079	25/07/2013	CLIENT	Email from JK 29/07		Adina Hotel	Survey		350.00	350.00	30/07/2013	30/12/2024		
B-00005	02/08/2013	ACIVICO	123		10 Paddock Close	Asbestos Survey	In Progress	300.00	300.00				
N-00015	02/08/2013	TEST	test		test	Survey	In Progress	150.00	150.00				
T-00002	02/08/2013	MCDONALDS			McDonalds Telford	Asbestos Survey	Invoiced	350.00	350.00	19/09/2023	04/12/2024		
T-00006	02/08/2013	MCDONALDS			McDonalds Telford	Asbestos Survey	In Progress	450.00	450.00		02/01/2025		
T-00013	02/08/2013	HMID	90866		Trafford Lane	Asbestos Survey	In Progress	200.00	400.00				
T-00016	06/08/2013	HMID	555		22 Green Lane, Telford	Asbestos Survey	In Progress	300.00	300.00	13/12/2016	12/05/2025		
T-00020	06/08/2013	HMID	4578		2 St John Road	Asbestos Survey	In Progress	250.00	250.00	13/03/2014	19/12/2024		
T-00021	06/08/2013	HMID	4578		2 St John Road	Asbestos Survey	In Progress	250.00	300.00		27/02/2014		
T-00022	06/08/2013	HMID	4578		2 St John Road	Asbestos Survey	In Progress	250.00	250.00				

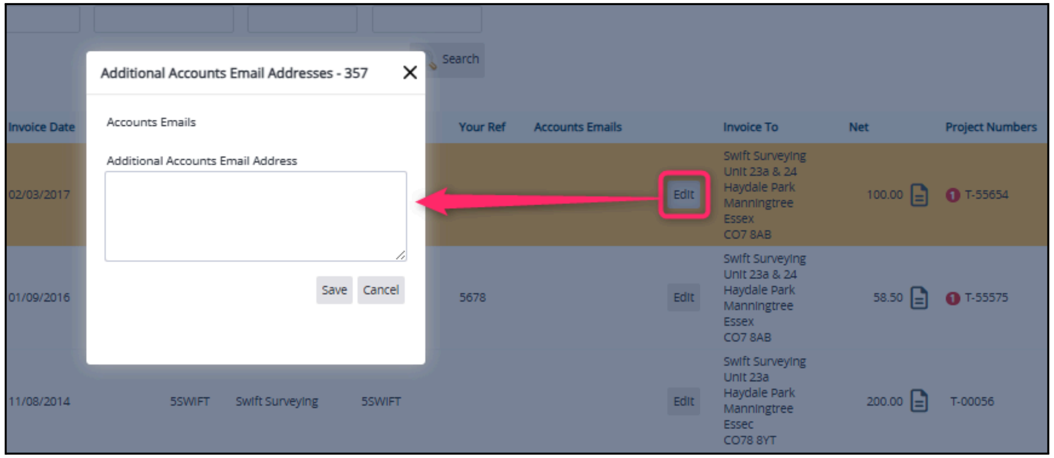
Today’s date and your logged-in user name are entered into the **Project Closed** fields on the projects.

20. The details displayed on the row expander from the Draft tab on the Invoicing screen are now clearer.

    Expanding the row displays the line items on the invoice and lets you edit them. More information is now displayed, including the **Client Order Number**, **Site Name** and **Site Reference**. If you need to delete rows, simply tick the box on the left and then the **Delete** button that displays at the bottom of the list.

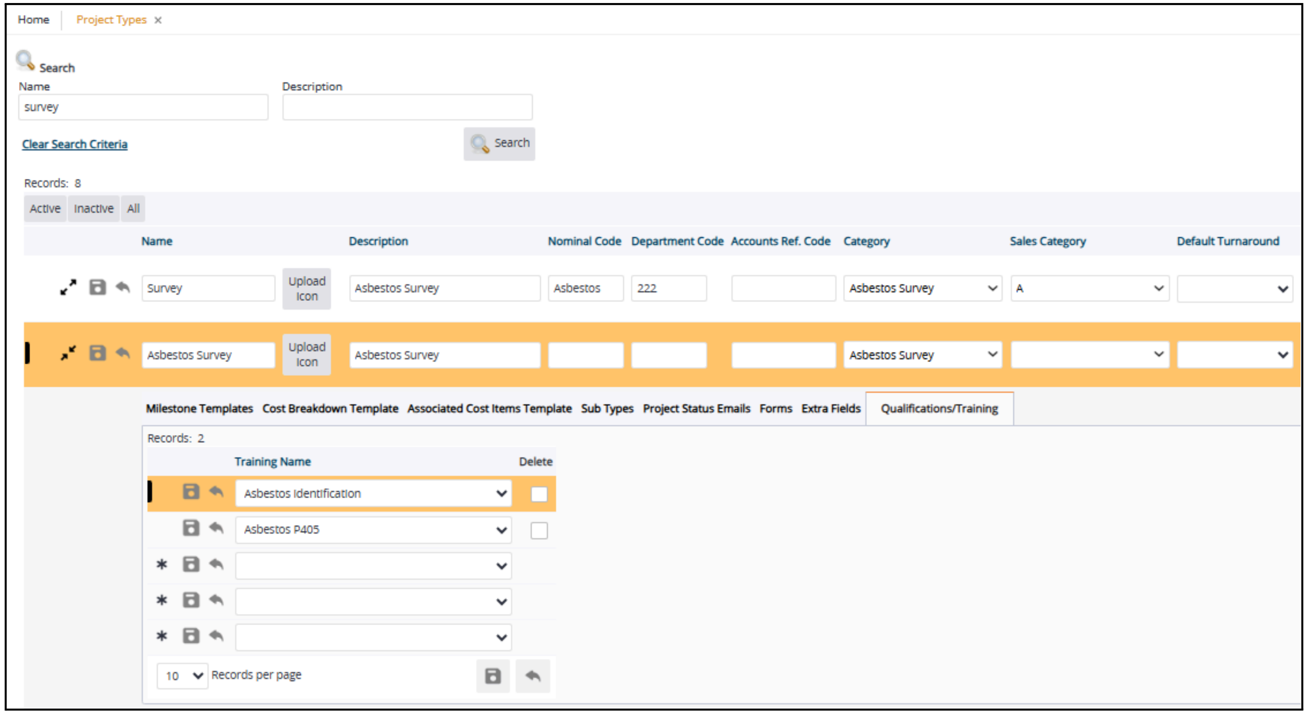


21. The quickest way to add **Accounts Email** addresses while invoicing is now from the Exported tab on the Invoicing screen itself. A new **Edit** button can be found after the **Accounts Email** column. Click this button to open a window into which you can type any additional email addresses. If you want to enter multiple addresses, simply separate them with a comma.



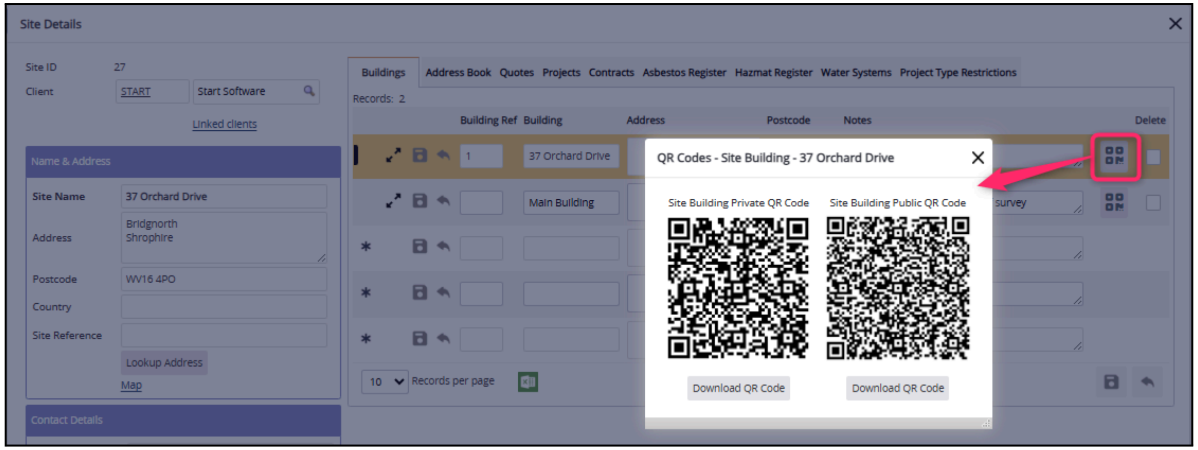
The entered email addresses are validated and if this is successful they are displayed in the **Accounts Email** column.

22. Users of the Staff Training Matrix in Alpha Tracker will benefit from the addition of a Qualifications/Training tab on the row expander on Project Types. This allows you to easily see which qualifications are required for the Project Type.

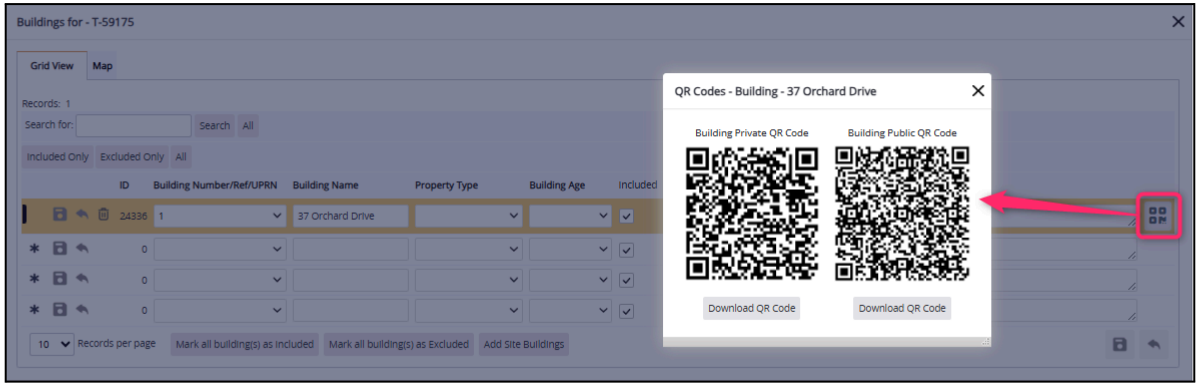


23. Building QR codes have been extended to include services other than Asbestos, eg HazMat, and if switched on are now available from screens associated with buildings. Both the public and the private versions of the QR code are available to download.

From the Site Details screen, you can find the Building QR codes on the Buildings tab:



From a Project, you can display the Building QR codes from the Buildings screen:



Fixes/Minor Changes

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

- A change has been made to line and total rounding on invoice template D.
- The filters controlling the display of annual invoice totals, both summary and detailed, on the Account Management screen have been standardised.
- An adjustment has been made to the height of the invoice message on Invoice Type C.
- The **Payment Due Date** is now visible on the Draft Invoice screen and is set when changing the **Payment Terms** or **Invoice Date**.
- Small changes have been made to ensure VAT is recalculated when a new VAT code is selected.
- Changes have been made to tighten the controls on moving appointments when the Staff Training Matrix is validating qualifications.
- Improvements have been made to tidy and integrate the code to request survey reports and bulk certificates, for both Cloud Document Maker and Document Request styles of document production.
- There have been further enhancements and additions to the Cloud Document Maker (CDM), the alternative, faster way to generate reports. Work has been continuing on the Cloud Document Maker to provide the same features employed in Document Requests, eg updating the **Report Produced Date**, incrementing survey numbers, updating **Report Issue Reason** on final reports, increasing certificate version number, updating milestones, setting drawing sizes, generating filenames.
- The **Title** dropdown box on the Staff Setup screen now displays inactive roles in brackets at the bottom of the list.
- The Asbestos Appointments screen will now only count items in a project if those items have a date. This is to distinguish between items that are sent into the project from Tracker Mobile and items that are copied in by the system (eg when creating re-inspections). Hidden items have also been excluded from the displayed counts.
- An issue with the bulk creation of tasks from Projects Not In Diary has been fixed.
- Minor changes have been made to the way the expiry dates and PAT test dates are calculated on the Equipment list.
- When using the quick search box at the top of the Projects menu, you can now also search for Client Order Numbers.
- The Projects Dashboard can now be sorted on columns that contain various types of data, eg date, “no” and “N/A”.

- The Projects Dashboard also has some new filter buttons:

    - **Reports Pending** shows projects that have a **Site Completion** date but do not have a **Report Produced** date
    - **Site Work Overdue** shows projects that have appointments in the past and no appointments in the future, and do not have a **Site Completion** date.

  These will work alongside the **Reports Incomplete** button which shows projects without a **Report Produced** date, disregarding the **Site Completion** date.

- An issue with moving barcode locations has been fixed.

- There have been some improvements made to the Master Project Import when the import key is “UPRN” to check for multiple site references. In addition, the Master Project Import can now work from just a list of UPRNs. It “fills in the blanks” where it needs to, from the site information already on file.

- The role is now imported when using the Diary Import to ensure that Project Staff are added.

- Minor changes have been made to geocoding on the Project Importer and others.

- An issue with importing the priority score for Average Time in the Survey Items Import has been fixed.

- A problem with opening projects from the Project Pipeline has been fixed.

- A change has been made to enable viewing the document folder from the Client Portal Project Pipeline and searching the Project Pipeline on the Client Portal has been improved.

- Key service filtering in the Report List on the Client Portal has been improved.

- Performance improvements have been made to the Client Portal making it faster to load.

- A change has been made to the Client Portal filters for showing project numbers on the Risks section.

- Improvements have been made to the performance of the Report List on the Client Portal so that it now generates much faster. This change affects all areas where a list of reports is displayed. As part of these changes, the *Report Grid* option from the menu has been removed and the *Report List - This Month* menu option has been changed to return reports for this calendar month rather than for the last 30 days.

- If you use **Linked Client IDs** on the Project screen to share a project to another client’s Client Portal, then you will notice some minor changes:

    - Double clicking on **Linked Client IDs** has been removed
    - The reports from these linked projects no longer display in a separate Linked Reports section in the Client Portal; they are now shown as part of the normal Report List. (The setting to show the Linked Report section has been removed.)

- A new fix prevents Air Monitoring projects from being hidden on the Client Portal when the Asbestos key service is enabled.

- Risk Categories are no longer defined by the setting “Survey Items Risk Category Values”. Instead, they are now managed in the Lookups screen, under the new Category “Survey Items Risk Category Values”. Any existing values will be automatically transferred to the Lookups screen and the Client Portal Dashboards will use the values from there.

- The **Site Ref/UPRN** is now displayed on the Site List on the Client screen.

- The **Project Type** has been added to the search pop-up displayed when booking an appointment. In addition, the display of the **Project Manager** and **Project Ref** fields on this pop-up have also been corrected.

- If a member of staff has only incomplete or aborted appointments in their diary for a project, they will now be removed from the list on Project Staff.

- Deleting appointments in Alpha Tracker now deletes the project staff if there are no appointments remaining for that person. This also happens if the resource is changed so that there are no appointments left for that person.

- Minor changes have been made to searching the project list from the Appointment screen.

- LAG items are now treated as suspect when clicking the **Suspect Item** button on the Survey Data screen.

- The warning that is displayed about changing milestones when the **Turnaround** is changed and milestones have already been will now also be displayed.

- When setting up your re-inspection projects, if you have non-suspect items copied to the re-inspection project, then you will benefit from the new checks that ensure the non-suspects aren’t already present in the project so as to avoid duplication.

- Also in re-inspections, when creating re-inspections from the site register, only buildings from previous projects that contain data are copied. This is to prevent duplicates.

- The two settings for copying files with re-inspections, “Copy Drawings to Reinspection”and “Copy Certificates to Reinspection”, now work with re-inspections from both the project and the site register. Previously they only worked when creating the re-inspection from the project. As there may be multiple projects in play when re-inspecting from a site register, and therefore multiple drawings and certificates, the system identifies a list of distinct project numbers in the data sent from the register and copies the drawings and certificates from these. The filenames are prefixed with the originating project number so that you can identify which is which. These settings also work with re-inspections from the Hazmet register.

- **Risk Category** and **Action Required** have been added to re-inspection XMLs.

- A bug in the population of the **Project Opened By** field when creating re-inspections has been fixed.

- If you have the settings enabled to copy data into a new project when creating a re-inspection, eg to copy negatives and removed items, then the copy will now automatically convert the **Approach**. Items that were Sampled (S) will be converted into Previously Sampled items (PS).

- The *Copy Data to Another Project* option that is available from the Choose Task menu on Surveys now lets you copy to a new project without selecting a building.

- In Ticketing, the ID search on the All Ticket List is now an exact match to improve performance.

- There have been some small changes to the population of **Report Recipients** on projects. Contacts from the Site Address Book are now available for selection as well as contacts from the Client Address Book. Anyone already selected is also included, eg the contact on the quotation where the project originated from a quotation.

- New validation prevents you from deleting a site if there are any linked projects or quotations.

- Building- and room-based QR codes are now available for Hazmat. And for room-based QR codes, the heading and page title are built from the location and location description.

- The **Log Call/Task** button on the sub-project list from the Master Project List is now fully working.

- Sub-project lists can be ordered by column headings.

- Water asset risks can now generate with all lengths of trigger value. Furthermore, a bug has been fixed with water asset risk creation where there are multiple risks for the same question, linked to the same sub-project type restriction, but for different values.

- You can now search the Risk Triggers and Outlet Risk Triggers screens by Sub Project Type.

- The completion of Water Asset Risk Actions is now much easier and the fields have been tidied. The risk recommended completion date populates from the date recorded until activities are logged. If a risk is a one-off, it's closed once an activity is added.

- Minor improvements have been made to the Water Temperature History.

- When recording Water data in Alpha Tracker Mobile, saving a water asset now updates the **Date Recorded**.

- Report sign-off in Alpha Tracker Mobile is now faster.

- Some changes have been made to how Forgot Password and Change Password work from Alpha Tracker Mobile.

- Also in Alpha Tracker Mobile, you can now open an address in the native map application. Open My Diary and tap on an appointment. Tap the "..." in the top right corner and select *Open in Maps*.

- The generation of Project Status emails has been improved and made faster.
- The **Analysed By** dropdown on the Lab Analysis Check tab on Bulk Samples is now built in a different way.
- A change has been made to QR code sign-ins to ensure iOS Safari sign-ins reliably set session variables.
- The Recommendation Comments has been added to the Quick Edit Survey Data screen and the **Recommendation** is a dropdown as on other screens.
- There have been performance improvements made when inserting buildings and inserting bulk sample records.
- A minor fix has been applied to the function calculating the business days between dates.
- The map has returned to the New Client screen, showing you the location of the new client's address.
- The email address of the **Sales Contact** and **Sales Contact 2** have been included on the JSS, below the names.
- There have been some minor changes to the styling of the display of priority scores and new settings control the label settings which allow the renaming of the priority assessment elements.
- When points are accumulated in Fibre Analysis, NADIS is recognised as a NAD identification.
- If you aren't a Superuser, in the Lab group or the Lab Admin group, then you will no longer be able to use the Enter Fibre Analysis button via Bulk Samples. This is to prevent other users from accessing the fibre analysis records.