Release 42 - Alpha Tracker Release Notes

New Features / Changes (from SVN10277 to SVN10898)

1. This release contains some important updates to the Water Hygiene module - making the app easier to use, water projects easier to manage, as well as improving the data displayed on the Client Portal.

   The Client Portal for Water, for example, has seen some improvements regarding risk supersession to prevent duplication of risks. If your latest water project generates the same risk for the same asset or outlet as has previously been generated, then the previous risk is superseded and will no longer be visible on the Client Portal.

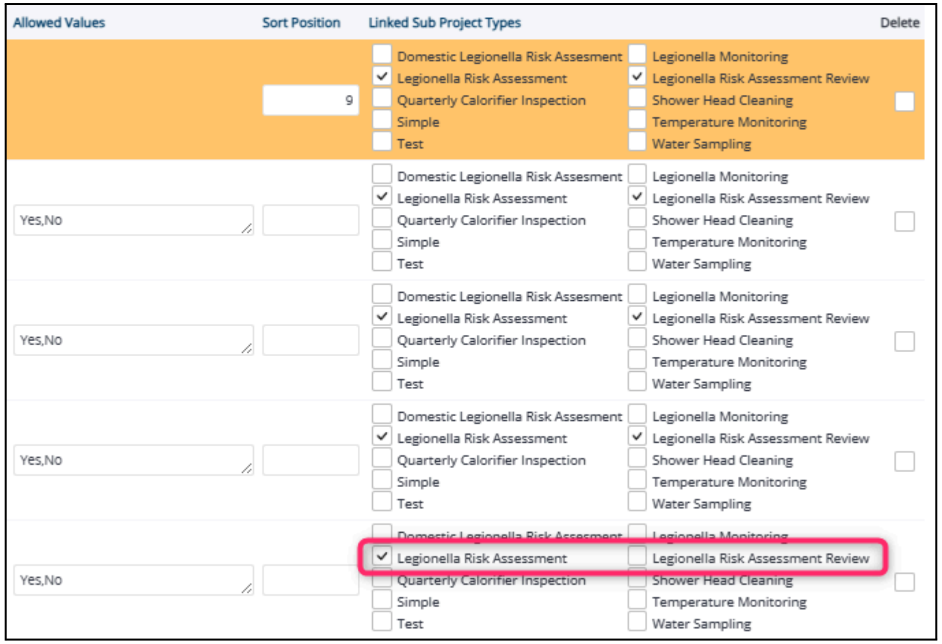
   Also on the Client Portal, on the Water Dashboard, you can now see the Asset ID and Outlet ID displayed on screen. This allows an asset or outlet to be clearly distinguished from other similar assets or outlets. These IDs are also output in the Excel export.

2. A new Water Project Type has been introduced in this release - “LRA Review”. The purpose of LRA Review projects is to revisit data from a previous Legionella Risk Assessment (LRA), therefore when you create a new LRA Review project you have the opportunity to copy the questions & answers, the assets and the outlets from the last LRA. To set up LRA Review projects:

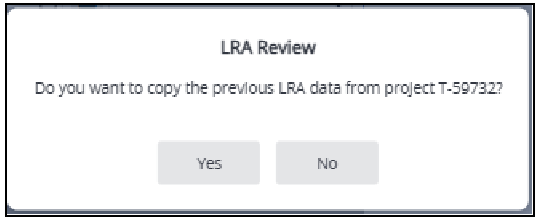
   a. First create a Water Project Type and name it something like “Legionella Risk Assessment Review”. Ensure you select “LRA Review” in the new **Type** field for this new water project type. Also set the **Type** field to “LRA” for your existing LRA-type Water Project Types.

   b. Add a new Project Type which has the **Default Water Type** set to the new Water Project Type, eg Legionella Risk Assessment Review.

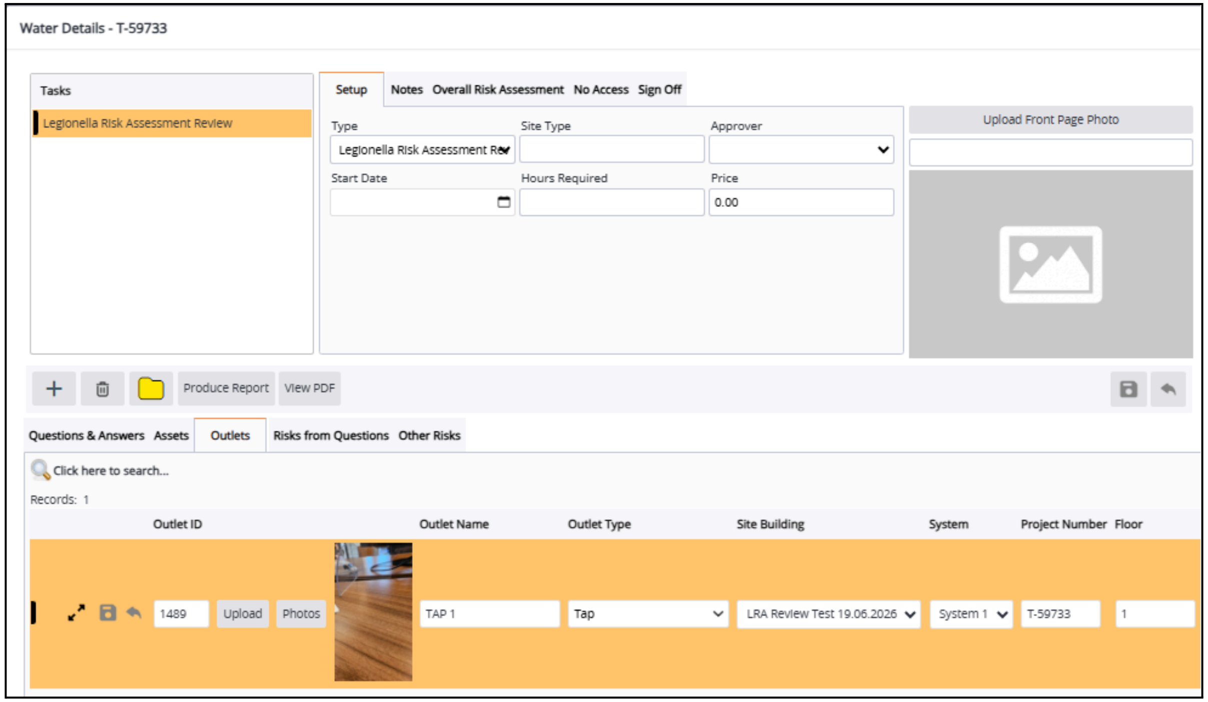
   c. On the Questions screen, review the Questions that appear for your Legionella Risk Assessment projects and select the ones that you want to be copied into the Legionella Risk Assessment Review projects. You make this selection by ticking appropriate **Linked Sub Project Types**. For example, on the Questions screen below the first four questions will be copied to the Legionella Risk Assessment Review project but not the fifth one as it has not been selected as belonging to Legionella Risk Assessment Review projects:



d. Create your new Legionella Risk Assessment Review project, for the same client and same site where you have previously carried out an LRA project. When you save the project the system identifies it as a Legionella Risk Assessment Review project and asks if you would like to copy the previous LRA data. It will specify the project number of the last LRA that it will copy from.



e. The data is copied into the new project. This includes the relevant Questions & Answers, the content of the Assets tab (data and photos) and the Outlets tab (data and photos). Note that the temperatures for outlets are not copied, although the Source Assets and Sentinel indicators are copied.



If you change the Project Type of an existing project to your LRA Review Project Type, then the system identifies it as a Legionella Risk Assessment Review project and asks if you would like to copy the previous LRA data, in the same way as when you create a new LRA Review project from scratch.

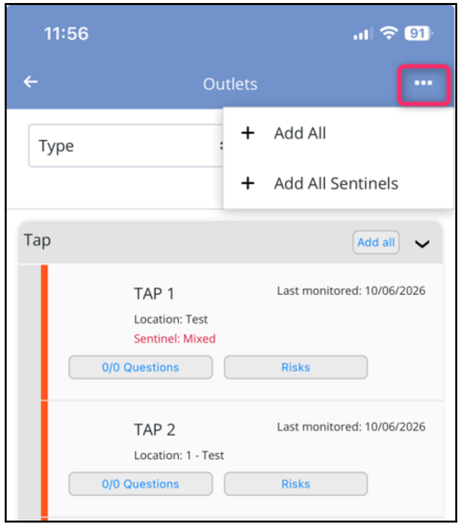
3. Updates to Key Milestones see these extended to include Water Hygiene projects. Two of the Key Milestones, for first day and last day onsite, have been modified to recognise when Water Hygiene data has been received into projects, meaning that you can use these milestones to track progress on your water projects and they will auto populate. They are updated when water assets or outlets are captured (and synced), using the date recorded and completed by columns.

4. To save time when adding assets or outlets to a project from site, you can now add them in bulk from the app. There are a number of options available, you can:

    - add all sentinels for outlets in one go by using the "Add all sentinels" option on the Outlet list. Sentinels are flagged to make them clearly identifiable

    - add all assets/outlets to a project from a site by using "Add All"

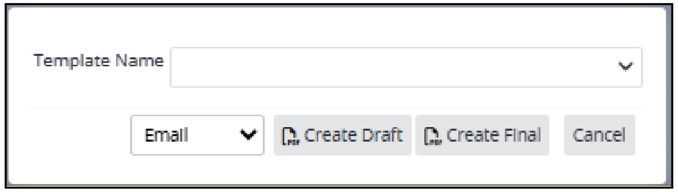
- add all assets/outlets of a certain group to a project (based on location or asset type).



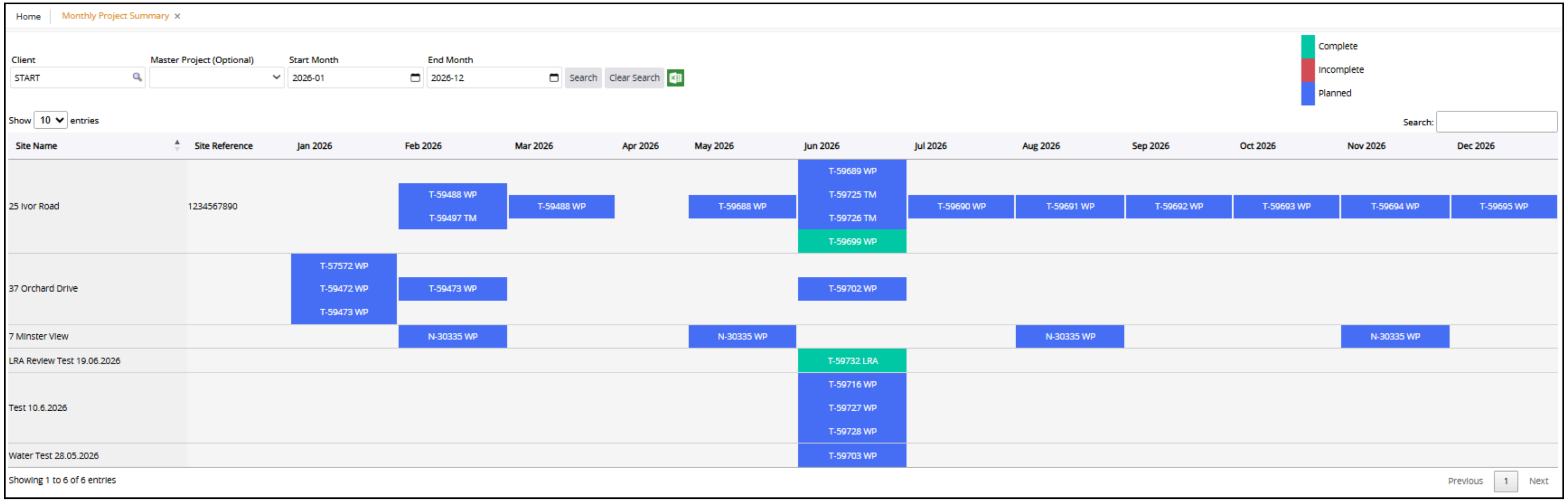
5. The Water Hygiene screen has been tidied up to ensure consistency, make space and display the project data in a clear way. For example, the tabs are now along the top rather than the left, bubble help has been added to buttons, a date picker has been added to the Start Date and the **Approved Date** to the Sign Off section.

   It's easy to fill in the **Approved Date** field as double-clicking on this or on the **Completed Date** inserts the current date/time. In addition, the **Approved Date** is linked to key milestone 10 (Survey Approved), so completing this field will also update any milestones linked to this key milestone.

6. When you produce your report from the Water Hygiene screen you can now choose whether you want to generate a draft or a final report. If you select draft, the name of the document generated is prefixed with "DRAFT". This means that you can also use the "Remove Draft" function in the document folder to change the draft to a final copy. Furthermore, the Draft Report Produced (key milestone 12) and Report Produced milestone are updated when Water Hygiene documents are generated, making it easier for you to track the progress of a job by using the automated milestones.



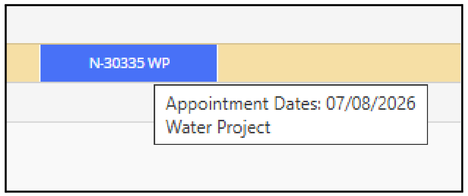
7. For Water Hygiene users looking to get an overview of both their scheduled and completed water projects, the Monthly Project Summary has had a refresh and is now available from the Resources menu. Find it under Water Hygiene > Monthly Project Summary.



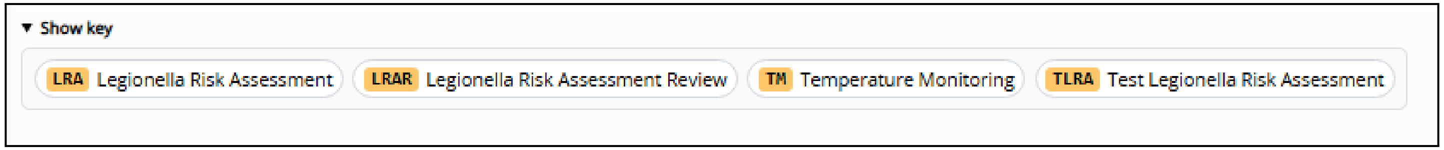
The Monthly Project Summary lets you select a client, optionally a master project, and a time period, and then display details of the work completed (green), incomplete (red) and planned (blue), in the month when it is scheduled. The Site Reference has been added to the columns output.

The default time period for the search is the current year, but you can change this as necessary which means that you can display information relating to contract dates if appropriate. The data displayed on screen can be exported to Excel where projects are shown with Complete, Incomplete and Planned prefixes rather than colours.

Clicking on a project number on the Monthly Project Summary screen opens that project. Hovering on a project number displays the precise appointment date(s) and the project type, eg Legionella Risk Assessment or Temperature Monitoring.



The letters displayed after the project number are a short form of the project type, eg WP for Water Project. A full key of the acronyms can be displayed at the bottom of the screen.

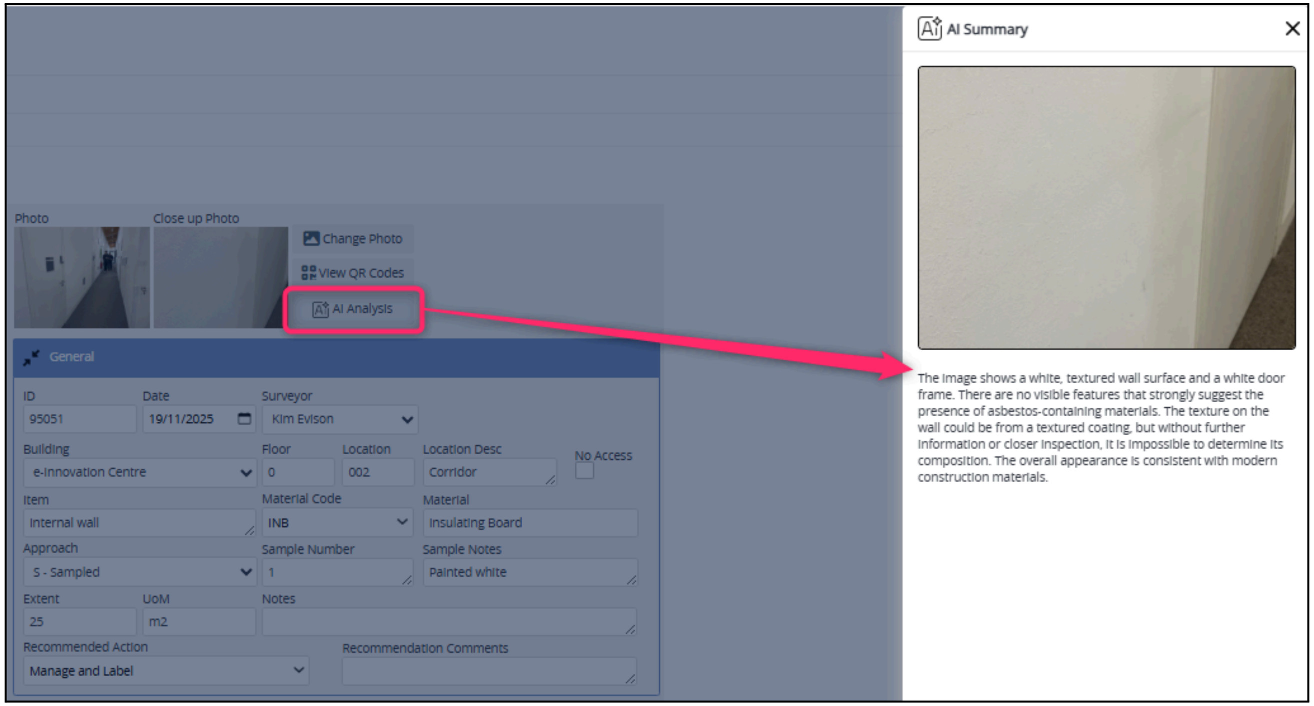


8. Other general water-related updates include:

   - The “Water Temperature History” report on the Client Portal fully respects site restrictions and linked sites, making it easy to get just the figures you require.
   - Export to Excel buttons have been added on the Water tab on the Site Details screen, allowing you to download lists of assets, outlets, risks/actions at a site.
   - If you change the Project Type on a Water project, the Sub-project Type will now change to the default set for the Project Type, making it easier for you to correct mistakes. This will only happen where there are no assets or questions that have been answered.
   - The indexing on water tables has been improved for performance.

9. Get an instant AI analysis of survey items from your survey item photos! The Survey Data screen sees the addition of an “AI Analysis” button to provide an AI summary of photos on a survey item. This integrates the AI tool that was available on our website into Alpha Tracker.

   Simply click on the required survey item on the Survey Data screen to display its full details, and then click the “AI Analysis” button next to the photos. The close-up photo is analysed, or the primary photo if there is no close-up photo, and the results displayed on the right-hand side, describing the content of the photo, the construction and likelihood of ACMs being present.



AI Asbestos Image Analysis is required for this feature.

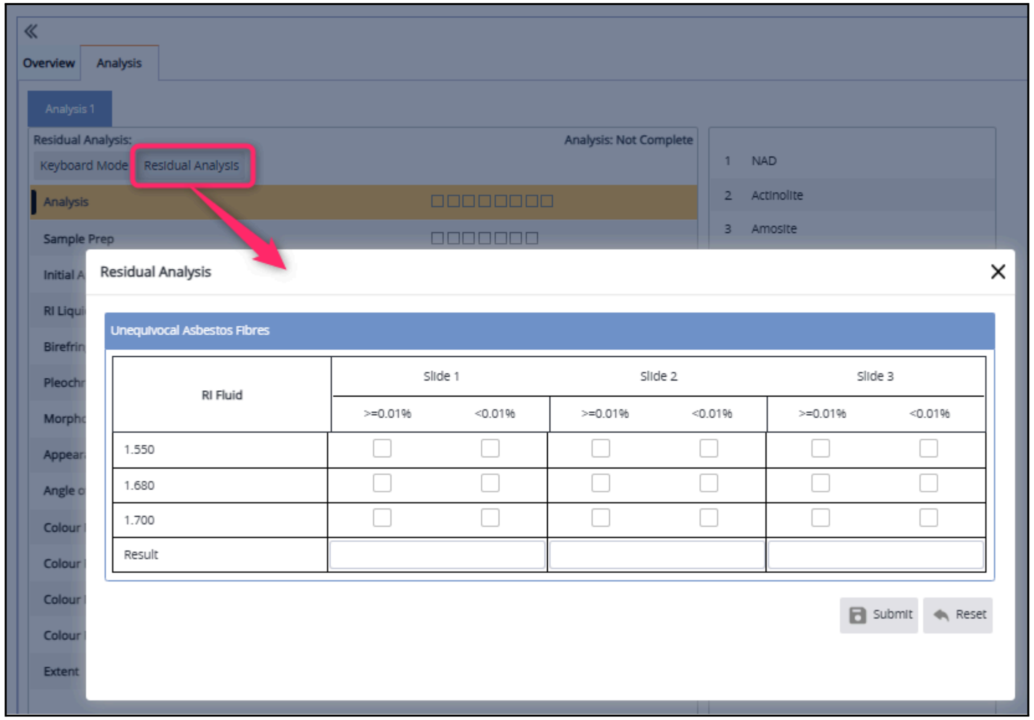
10. This release includes the screens to support the new scoring method (SM3) for material risk assessments in Australia. To use this scoring method, Clients must be set to use SM3 in the Client Details. There are some setup screens which can be found under Setup > Lab and Surveys > SM3 Setup. The options available cover:

- Building Rating
- Condition
- Disturbance Potential
- Product Risk.

Settings in the System Repository control the band boundaries for the ACM risk score.

All screens displaying site register data and survey data have been amended to include fields for this new scoring method, including the Quick Edit Survey Data and Quick View Survey Data screens. Accommodation has also been made on QR codes and the Client Portal, and features such as Move and Copy data between projects are available for SM3.

11. Also as part of the new Australian standard, a new "Residual Analysis" option on Fibre Analysis has been created. This is similar to Trace Analysis. A tick box on the Overview section of the Fibre Analysis screen switches on the residual analysis functionality. If required, this can be set to default on. When the **Residual Analysis** tickbox is ticked, a Residual Analysis button is displayed on the first Analysis tab. The window displayed from this button lets you enter the required details:



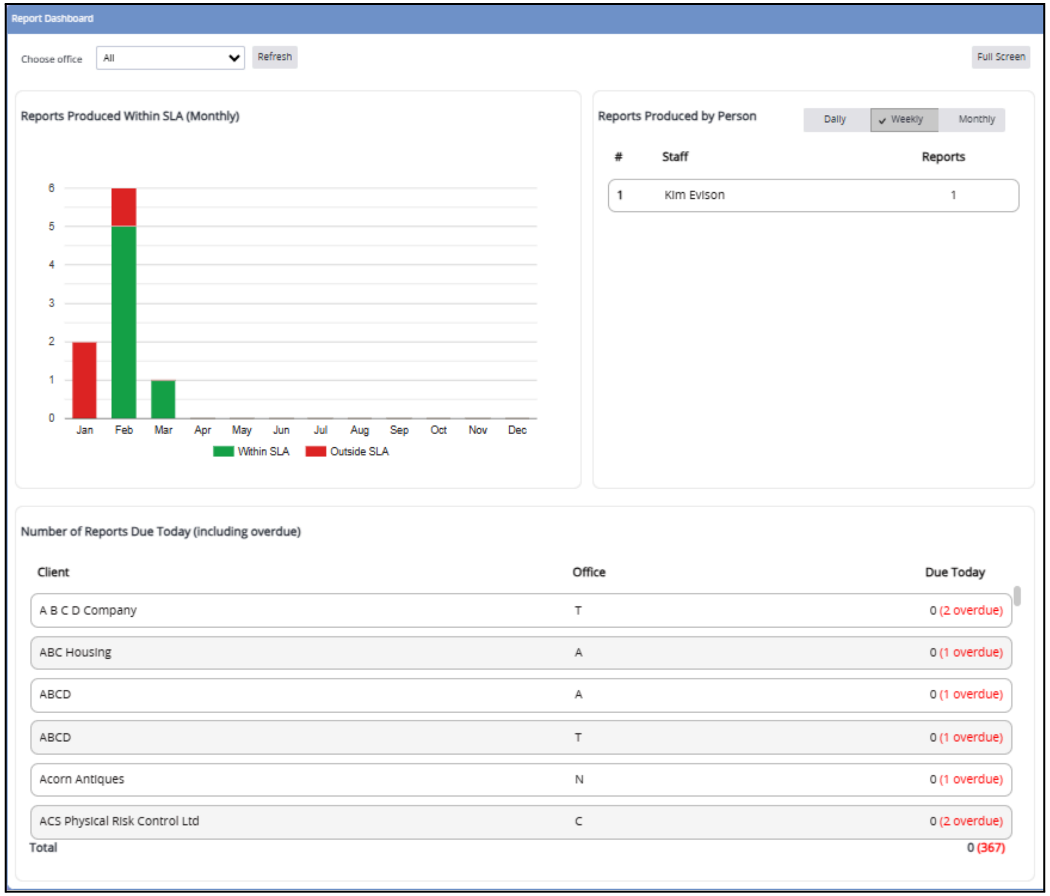
Simply tick the boxes to select your results. The results are for three slides, and within each slide there is a row for each RI liquid (3 main for 1.550, 1.80 and 1.700 - ie Chrysotile, Amosite and Crocidolite). There are two columns for each slide for >=0.01% and <0.01%. If the results for slide 1 and slide 2 are different, slide 3 should be completed.

12. There has been a lot of work behind the scenes in this release, including an updated version of our software framework. This brings benefits across the board but especially in terms of better performance.

13. SSO (Single Sign On) is now fully available with the Alpha Tracker Mobile app.

14. A new Report Dashboard is available on the Home screen to give you an overview of reports produced today, this week, this month. The new dashboard:

- provides clear visibility into reporting performance
- allows filtering by office
- presents actionable KPIs in a clear, visual way.



There are three main sections to the Report Dashboard:

- Reports Produced Within SLA (Monthly)
- Reports Produced by Person (Today, This Week, This Month)
- Number of Reports Due Today (including overdue in brackets).

15. There have been some updates related to the Solvares Visitour (previously FLS) integration:

    - You can manually send to Visitour in order to re-send some appointments - this is useful if a user deletes them in Visitour and wants to re-send. Details are displayed of how many were sent.
    - We can now support multiple external systems for appointments. For example, it would be possible to use both Sage HR and Visitour for appointments.
    - FLS Priority has been added to the Turnaround screen to enable Visitour users to map their Turnaround values to priorities in Visitour.
    - An Exclude From FLS flag has been added to the Staff List. If ticked, appointments for this member of staff are not sent to Visitour for optimisation.
    - Changes to the site address, postcode, turnaround, and notes on the project now causes the appointments to be re-sent to Visitour to ensure correct information.
    - An FLS indicator has been added to appointments.
    - The Make Suggestion feature now displays any error messages to the user to help resolve what went wrong.

16. Cloud Document Maker (CDM) can now be used to produce invoices even if your invoices use a Word template. When CDM is used, you can also use the Send Email and Batch Print features that are not normally available with Word invoice templates.

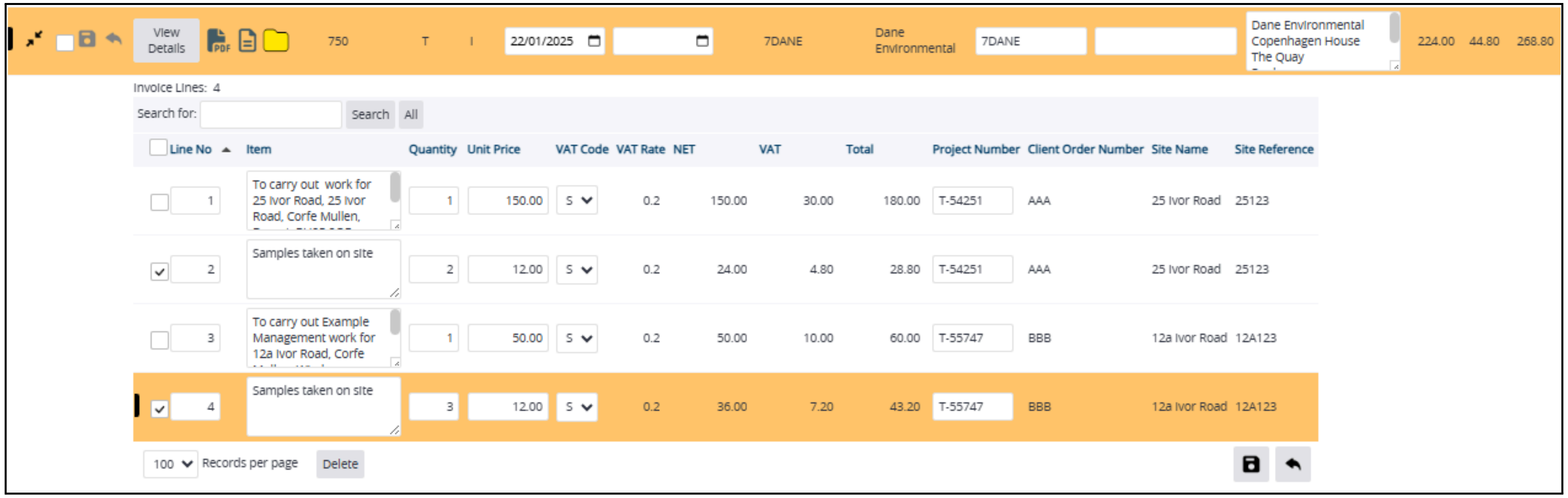
    CDM can also be used to generate site-level documents and documents from the Client Portal.

    Further work on CDM has added default tags for “SurveyorList”, “AssistantSurveyorList”, “SurveyorSignatureList” and “AnalysedDatesList”. This data is always sent to CDM.

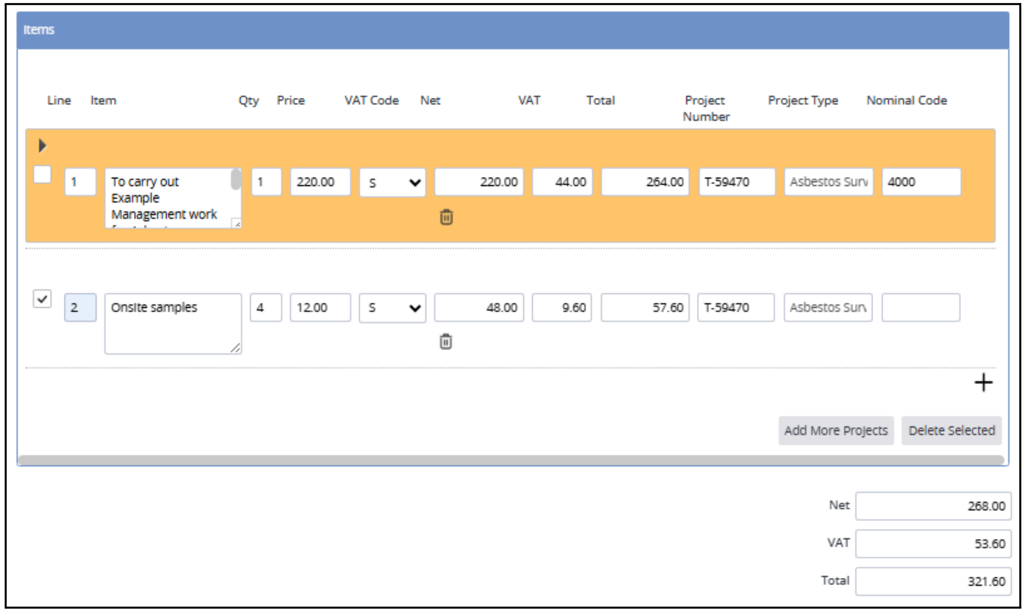
17. Performance improvements when invoicing selected projects have improved the speed of invoice generation.

18. Although you can already delete invoice lines in bulk by using the row expander on an invoice, you can now also do this from the Invoice/CreditNote Details screen. A checkbox is displayed on the left of each line so that you can select the required lines and then delete them without leaving the screen.

    Using the row expander on Draft Invoices to select and delete multiple lines:

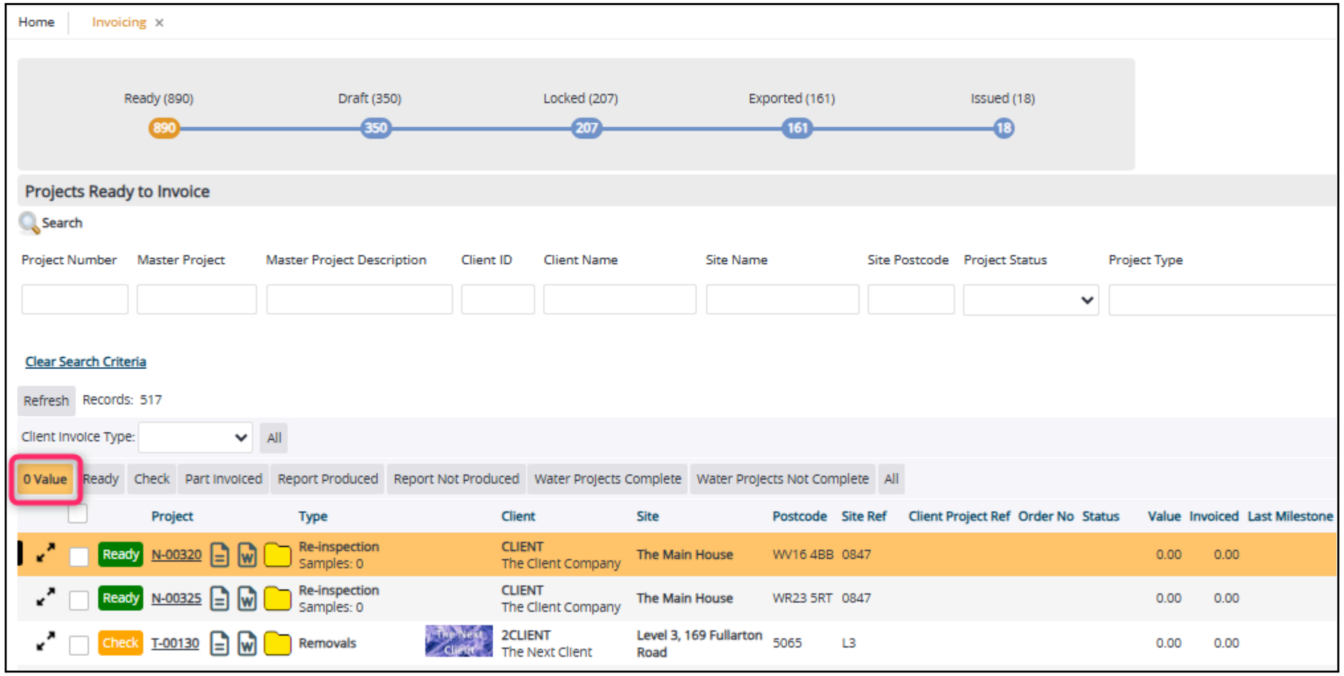


Using the checkboxes and **Delete Selected** button on the Invoice/Credit Note Details screen to delete invoice lines:



19. Bulk unlocking of invoices can now be done from Locked Invoices. Simply select the locked invoices you want to unlock and use the new **Unlock** button at the bottom of the screen.

20. There is a new pre-set filter button available on Projects Ready to Invoice. The new button lets you display all zero-value projects that are ready to invoice in one click.



21. Invoice PDFs from draft invoices, ie those that don't have a Locked Date, are now clearly marked as "DRAFT" to avoid any confusion. Both the pop-up window and the downloaded filename are marked as "DRAFT". (The actual file remains the same.)

22. To allow for late changes to projects, the value on a draft invoice will now be updated if you change the **Estimated Total Project Value** on the related project. This update only takes effect if there is just one draft invoice for the project - if there are more, no change happens.

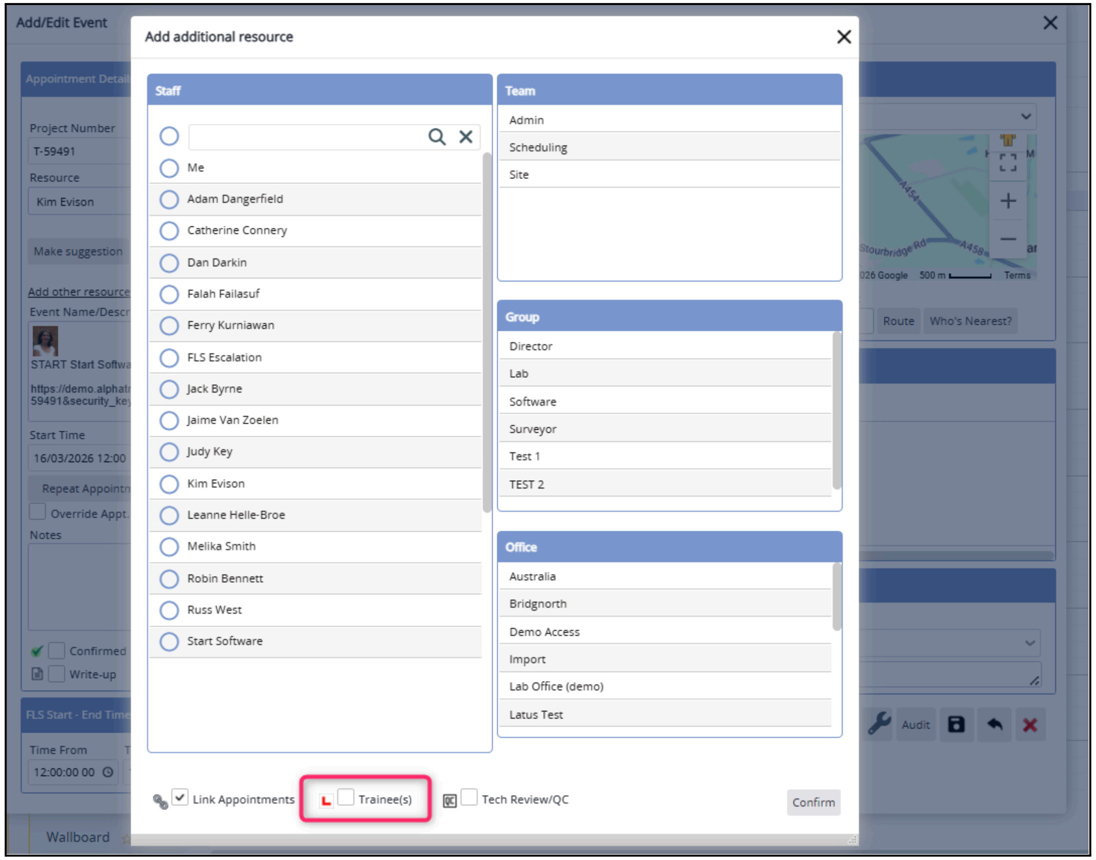
    Similarly, the **Your Ref** field on a draft invoice will be updated if you update the **Client Order Number** on the related project. This update only happens if the invoice is draft (no locked date) and the invoice contains only invoice lines for that one project, ie multi-project invoices are not updated.

23. The standard invoice template "A" now has Payment Terms included in the header section.

24. There is further admin automation including better population of client information on a project. As part of this, site contacts are now excluded from the population of report recipients and the main contact is excluded on additional report recipient lists to prevent duplication. The **Report Recipient Address** is also populated.

    In addition, the population of the report recipient lists will also occur when a project is created from a quotation, in the same way and following the same rules as when using the New Project option.

25. To help with scheduling, especially when controlled by the Staff Training Matrix, it is now possible to mark additional members of staff as Trainees or Tech Reviewers/QC at the point of adding them as an additional resource on an appointment.



The list of Additional Resources excludes people already associated with the appointment, and the **Link Appointments** tickbox is automatically selected when you are adding extra people to an appointment.

Also on appointments, additional warnings and controls are now in place to prevent write conflicts.

26. There have been some changes made to the Master Project Import which now uses the Alpha Tracker Work Queue for the validation and verification step.

    - One change affects the **Estimated Total Value** of the created jobs. When you use the Master Project Import, the jobs that are created take on many of the field values of the master project itself. This now also includes the Estimated Total Value. If the master project has a value in the **Estimated Total Value** field, and the row in the import file has no such value, then the job that is created inherits the Estimated Total Value from the master project. On the other hand, if the master project has a value in the **Estimated Total Value** field, but the row in the import file also has a value, then the value from the import file is used.

    - **Client Project Ref** has been added into the Master Project Import. If the master project has a value in **Client Project Ref** and the field on the imported project is empty, then the value from the master project is copied.

    - Verification now occurs when the data is uploaded.

    - Record insertion is faster.

27. The Project Import has also been re-written to use the Work Queue so that imports do not affect the performance of the system.

    - Validation of the data you are importing has been improved, with a table displaying any errors.

    - **Turnaround** has been added to the import.

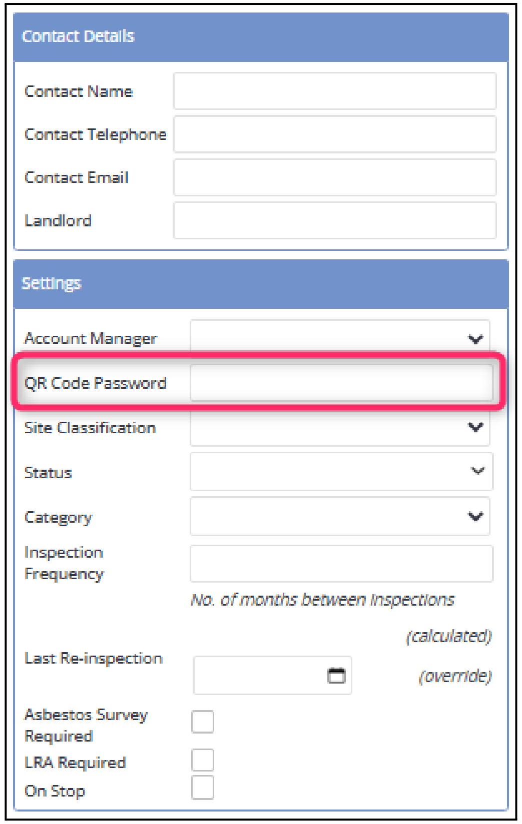
    - The Project Import will now help you to complete details. If the created project doesn't have a value for **Client Order Number**, but it has a master project which includes a Client Order Number, then that Client Order Number will be used.

    Ensure you download the new template from the Project Import screen when trying the updated Project Import; the old one will no longer work.

28. The Diary Import has also been updated to use the new Work Queue import method.

29. Some improvements have been made to how QR codes work, for both asbestos and HazMat. In particular, it is now possible to have separate passwords for site QR codes, not just one password for the client. This allows you to introduce site level security with your QR codes. If the setting "QR Code Site Level Passwords" is switched on, then any private site QR codes will require the site password to display the data, not the usual client-level QR code.

    You set the site passwords on the Site Details screen, in the newly-renamed and re-organised Settings section:



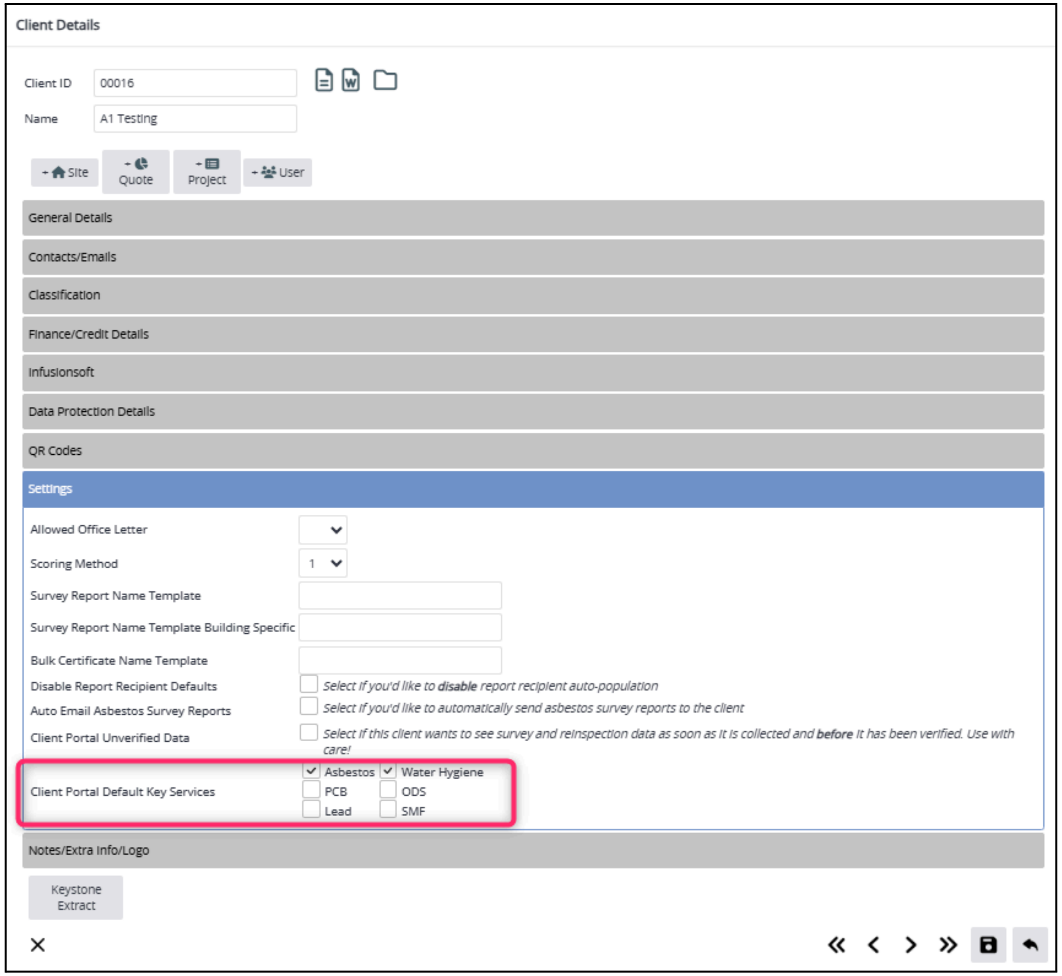
30. You can control whether your system shows both private and public QR codes, or just one of them. This is done by using the setting "QR Code Types Visible". The QR codes displayed on the Client Portal are also affected by this setting.

31. All activity on Alpha Tracker's QR codes (of any sort) is logged and can be queried via the QR Code Log screen. The information displayed in these logs is now much friendlier and more detailed - eg you can see when a QR code was accessed to the second.

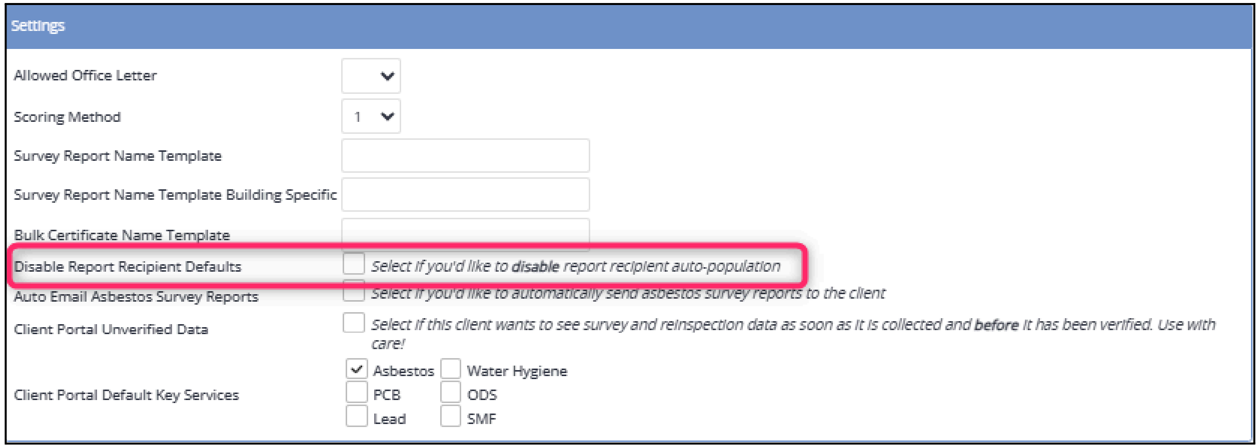
32. If the text displayed when you scan a QR code and get no items on the register is not to your liking, you can now change it to text of your choice. There are three separate settings that control this "no records message" text, one each for Asbestos, Hazmat and PFAS registers so that the different registers can display different text.

33. Key Milestone ID 6 (Bulk Samples Analysed) is now calculated when Fibre Analysis records are deleted to enable the progression of the project through the milestone flow.

34. When creating new Client Portal users manually or via SSO, it is now possible to set a default value for the Client Portal Key Services. You set this default value on the Client Details screen, in the Settings section. All Client Portal users created will then automatically have the selected Key Services enabled as soon as they are created. Note that the Key Services available vary between Alpha Tracker systems so your system may show different tickboxes for **Client Portal Default Key Services**.

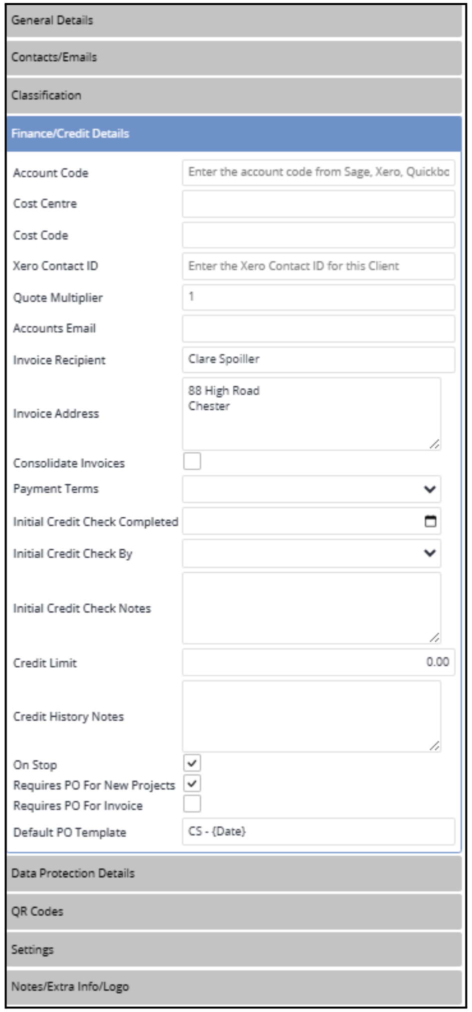


35. Another new setting on the Client Details screen allows you to disable the population of report recipients on new projects for that client. Simply tick the box if you do not want projects for the client to be pre-populated with report recipients.



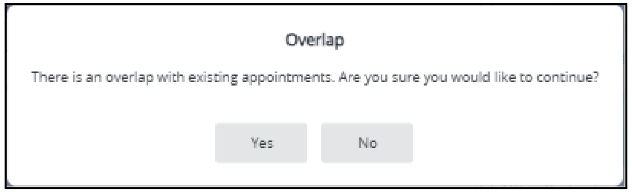
36. To help you track changes to your clients' financial status in your Alpha Tracker, a jotter note will be written each time On Stop is modified. You can view the jotter notes from the button on the Client List. In addition, changes to On Stop and the other financial fields are now only editable by users in the following groups:

- Superuser
- Administrator
- Management
- Finance
- Finance Admin.



37. You can now set the Latest News blog feed that appears on the Home Page of Alpha Tracker to display news relating to your geographical location. A setting lets you choose which area is suitable - UK or Australia/NZ.

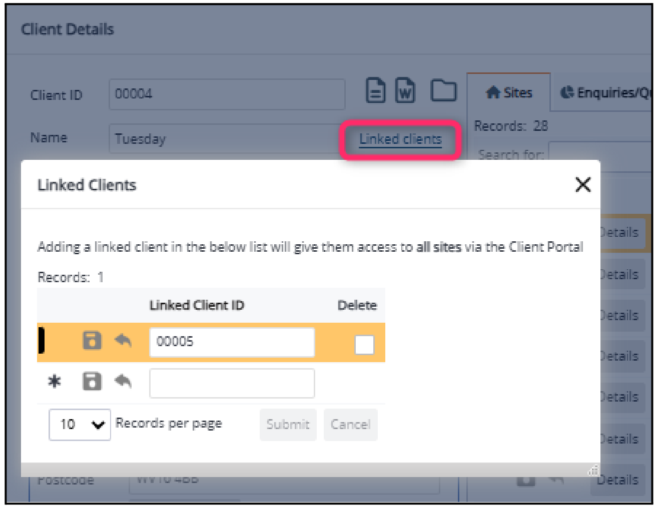
38. When booking appointments through the Calendar, you will now see a warning message if the appointment you are booking overlaps an existing one.



39. A new method for dealing with linked sites and site restrictions is active on the Client Portal. The new method gives better performance and is used in all aspects of the Client Portal including the Dashboard charts which are now capable of displaying data for users with shared or restricted sites. The Reports Issued Dashboard chart has been renamed to "Reports Issued Last 12 Months" to better reflect the selection criteria used with this chart.

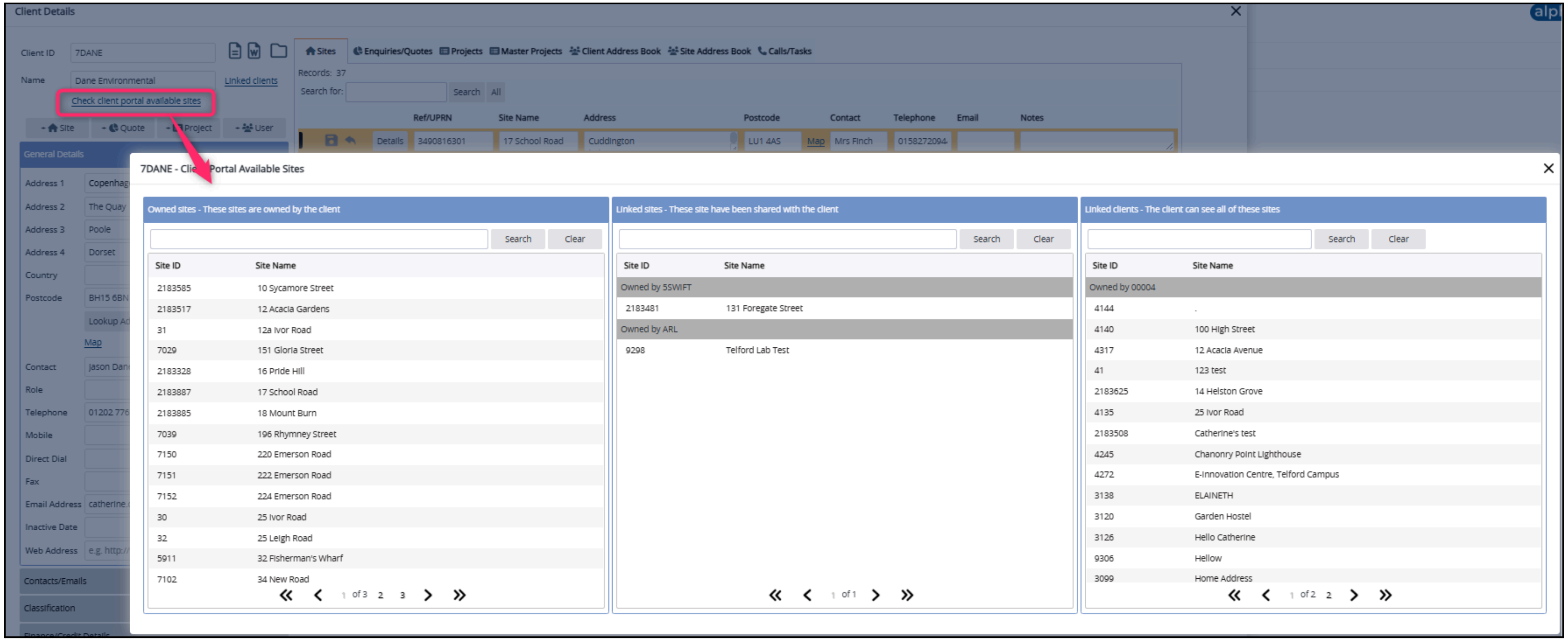
40. A new way to share sites on the Client Portal has been introduced. This is to make it easier for one client to view the data for sites that belong to another client. The existing method allowed for individual sites to be shared with a list of other clients. The new method lets you share **all** sites that belong to one client with other clients, in one go.

    To share all sites belonging to Client A with Client B, so that Client B can see them on the Client Portal as if they were their own, open the Client Details screen for Client A, then click on "Linked Clients" and add Client B to the list.

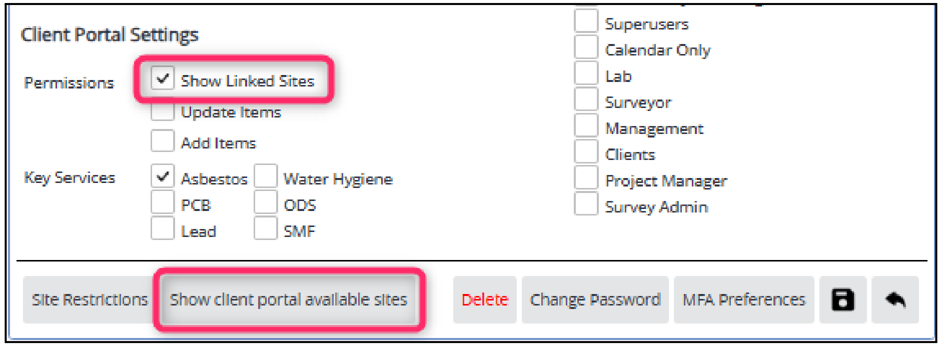


Note that the existing constraints are still in place in that Client B must have a login to the Client Portal and **Show Linked Sites** must be ticked in their user permissions for the shared sites to be displayed.

You now have greater visibility of how sites are shared too. There is a link on the Client Details screen ("Check Client Portal Available Sites") that clearly displays the sites owned by the client that are visible on the Client Portal, the sites that have been shared with that client, and the sites that the client can see from any linked clients. You can search in each of the lists, and page through the lists.



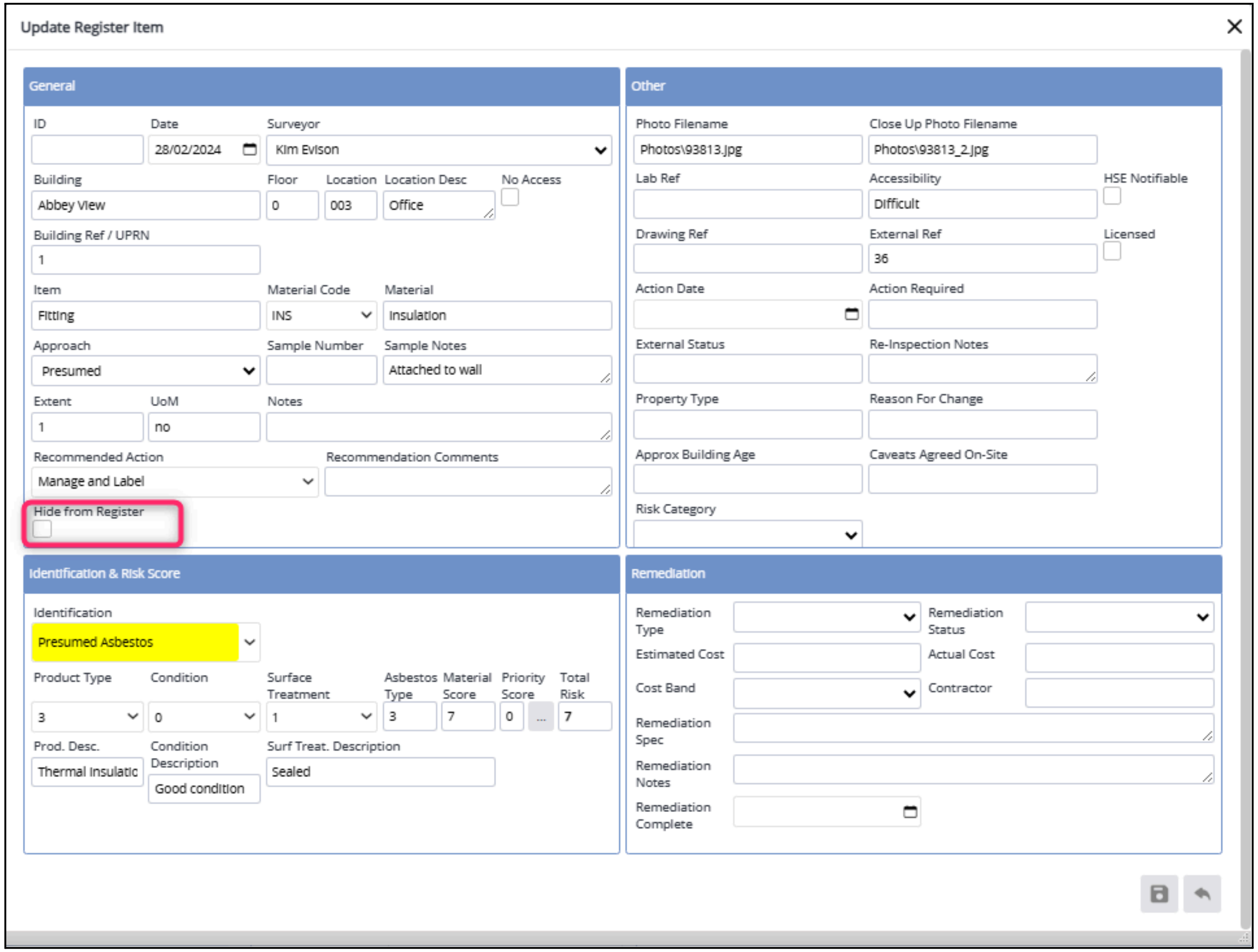
You can see the same new screen from the Users screen when you have a Client Portal user selected who has **Show Linked Sites** selected. This enables you to check which sites a user can see when you are setting them up. Click the **Show Client Portal Available Sites** button to see the screen.



41. The Client Portal Site List & Compliance Summary screen has a new Export to Excel button allowing you to download the contents of the list.

42. A change makes it easier for you to hide items from the Client Portal Registers as it allows you to mark items as hidden from the Site Register. First click the **Update** button on an item on the Site Register:

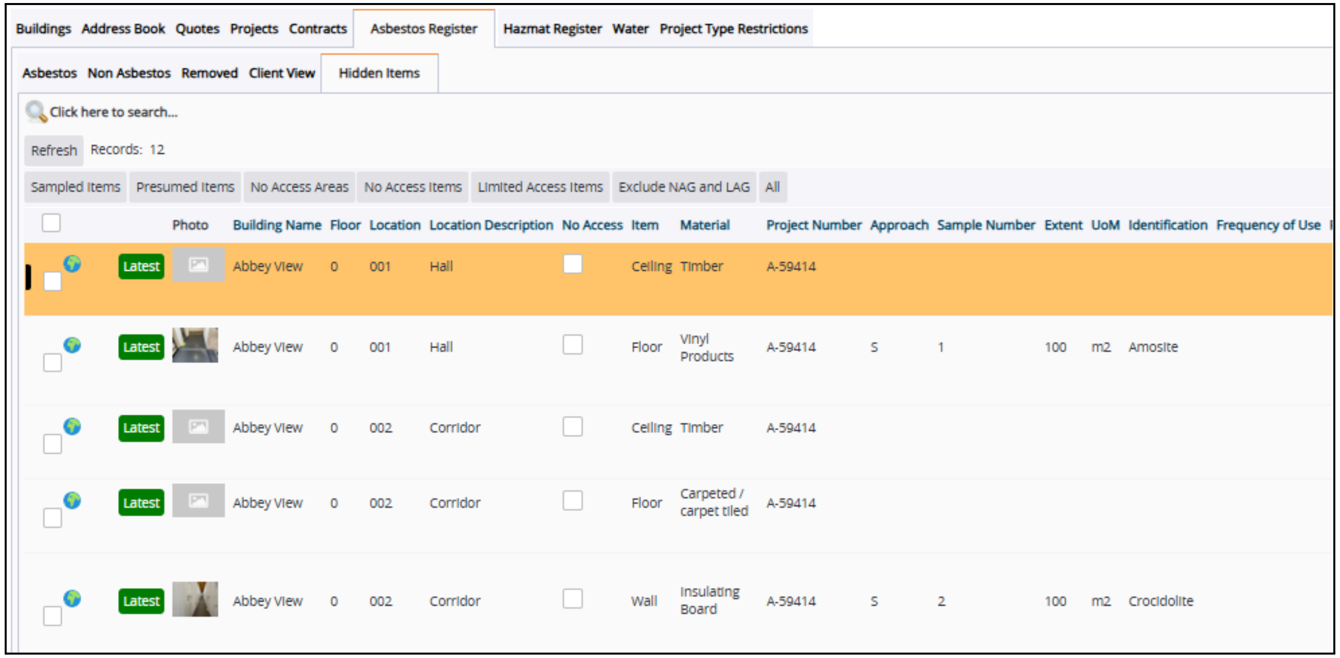
Where a “Show On Register” flag used to be displayed on the Update Register Item screen, there is now a “Hide from Register" tickbox:



You are advised to use this feature with caution as it causes the item to be invisible on the Client Portal. Note that this tickbox is not available to Client Portal users of this screen.

43. The Register tab on Site Details has a new section to display hidden items. Previously you had no view of hidden items from the Register, you could only see them in the project where they were marked as hidden.

The new tab gives you a view of all the hidden items for the site and allows you to “unhide” items if required. Select the rows for the items you want to unhide and then click the **Unhide Selected Items** button.



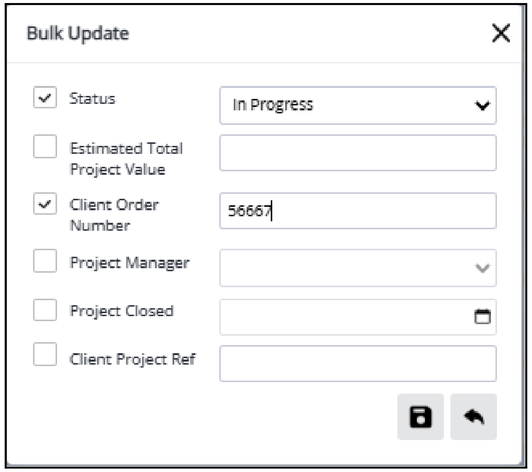
A “Latest” indicator makes it clear when the record you can see is the latest version of the item, which means if you unhide the item it will be added to the site register. “Historic” items are flagged in grey. If you unhide one of these, it will become visible in the history of the item; it will not be added to the site register.

44. An update makes it possible to create reinspections when there are no items shown on the Asbestos Register. This feature has been introduced to allow you to carry out a reinspection of non-asbestos items, even when there are no asbestos items. It works only if the setting “SendBackAllData_reinspection” is set to yes as this allows non-asbestos records to be sent out for reinspection.

45. If you use external surveyors and give them access to your Alpha Tracker, using the External Surveyor permission group, you can now control which sub-folders these external surveyors can access and whether they can access the main folder. This is controlled by two new settings: “External Surveyor Allowed Site Folders” and “External Surveyor Allowed Project Folders”. When the settings are left blank, the external surveyor has no access. If they are to be given access to the main folder, enter “root”. Separate the elements of the list with commas, eg “root,photos,drawings”.

External surveyors can only see the project and site document folders, so only access to these is controlled in this way. External surveyors can no longer delete files from folders.

46. It is now possible to update multiple projects with the same information at the same time. This time-saving measure works from the Project List and is great for bulk updates such as entering the same Client Order Number onto a range of projects. Simply select the projects that you want to update by ticking them on the left-hand side, then click the **Bulk Update** button. Select the fields that you want to update - updates are limited to the listed fields - and enter or select the values with which to update them. For example:



Messages inform you how many records will be updated and then how many have been updated.

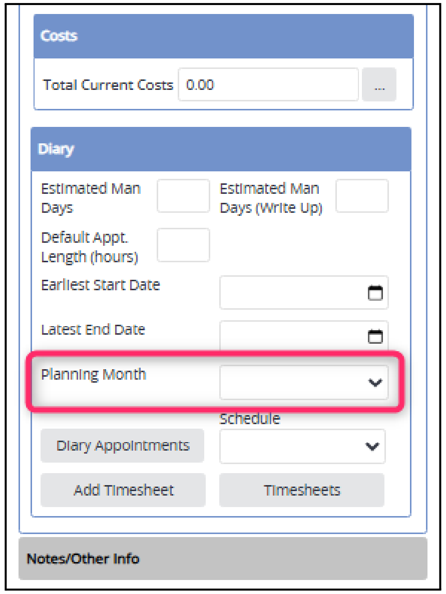
47. More hyperlinks have been added to the Project List screen, enabling you to open related records quickly and easily on separate tabs. Click on the underlined **Site Name** to open the site record; click on the **Client ID** to open the client record.

48. The “Report Sent” milestone is used to record when the report for a project has been sent to the client, either automatically or manually. If you have this milestone displayed, then it will now also be displayed on the following screens:

- Project List
- Project Dashboard
- Master Project List / row expander

- Query Writer.

49. For clients who want to be able to record the month in which a job should be scheduled, there is a new **Planning Month** field available on the Project screen. The field is displayed in the Financial/Planning section if the setting “Show Planning Month” is changed to yes. The dropdown list on the fields allows you to select the month in the format YYYY-MM, eg 2026-11.



When the **Planning Month** field is switched on, it will also be visible on a range of other screens to help with planning and scheduling, eg Project List, Projects Not In Diary, Project Import, Projects Dashboard and Project Pipeline.

Fixes/Minor Changes

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

- On the Invoice Details screen, the **NET**, **VAT** and **Total** fields can no longer be manually edited; they are calculated from the **Quantity**, **Price** and **VAT Code** fields.
- An issue with messages when raising consolidated invoices has been fixed.
- The row expander on the Draft screen of Invoicing has been tidied and simplified.
- If you use our invoice template D, you will find the address section in the footer is now slightly larger to better accommodate longer address text.
- The "Add More Jobs" process on invoices is now much faster due to performance improvements.
- The pipeline in Invoicing is now faster and is displayed more quickly. The selected step in the pipeline is highlighted more clearly. Drafting and Locking invoices directly updates the pipeline counts and refreshes the views.
- The Priority Assessment screen can show the NZ ACOP Material and Total Score columns if applicable.
- The **Remediation Spec** field, where present, now allows unlimited text.
- If you use the Appointments tab on the Home screen to review your appointments for the day, you will find that clicking on the Project Number now opens the Edit Event window. This shows you the details of the appointment (rather than opening the project).
- Australian Air Monitoring has two new label settings for the Samples screen, for **Cowl Number** and **Limit of Quantification**. And the **Counted By** field will be completed automatically when the sample's Fibre Value changes (previously it only set the **Counted By** if the Sample's Fibre Value was updated manually).
- The **Project Ref** and **Order Number** columns on the Project List will now only be displayed if they are included in the "showProjectFields" setting. This is to ensure the content of the Project screen and Project List match.
- SQL exports that generate files will now handle invalid filename characters that may come from the data, eg slashes in site names.
- Minor improvements have been made to the performance of milestone triggers.
- The **Risk Category** and **Friable** fields have been added to the Update and View Survey Item screens. They are displayed depending on a setting.
- Some changes have been made to how buildings are created for site reinspections to prevent "duplicates".

- The Project Type Restrictions tab on Site Details will now use language tags. Both Project Type and Staff will only show active records, with inactive records in brackets.
- Performance improvements have been made to large .zip exports. Also, ZIP or 7z can be used to create the final file, and there is a new option to include PDFs (any PDF) in a document folder, with the ability to blacklist certain words in the filename.
- A fix has been applied to the display of the Financial Wallboard button to Superusers.
- Some improvements have been made to the speed of Fibre Analysis.
- The **Client** has been added to the Project Pipeline and you can filter by Client too.
- On the Equipment screen, you can now edit the **Expiry** field irrespective of whether it is blank or already completed.
- There have been updates to the way Client Portal users are created when connecting via SSO.
- It is now possible to set domains against Client IDs for Single Sign-On (SSO) users. This feature allows multiple SSO users to go to different Client IDs when accessing the Client Portal.
- Site Register report production from the Client Portal has been improved to enable you to continue working while the document is produced.
- The alerts that can be sent when milestones complete are now more flexible and have access to all fields in the Projects view allowing you to include more tags in the alert messages.
- Duplicate reports should no longer show under the Reports menu options.
- **Property Type** and **Building Age** now also update on Site Buildings when updated from Project Buildings (the **Site Name** already behaves in this way).
- Improvements have been made to the External Surveyor feature to further restrict what can be viewed in Alpha Tracker when a user signs in with this permission group. This includes menu options, office letter restrictions, client restrictions etc.
- Some selection issues when using the Firefox browser have been addressed.
- In quotations, you will find the template dropdown is disabled until a Project Type or multi-type is selected.
- The “Overdue not Completed” and “Completed not Produced” filter buttons on the Water and Asbestos Appointment screens have been adjusted to allow appointments for invoiced projects to be displayed.

- There have been changes made to how the audit on appointments works to provide a database level audit.
- The Project Number is now clickable on the Lab Project List making it easy to move from the fibre analysis to the project, especially if you generate your certificates separately before inserting into survey reports.
- When using Lab Check Results to select the samples for checking, you can see the Analyst's Assessment of the material so that you can make informed decisions on which samples to recheck.
- The performance of the CRM Actions To Do List has been improved.
- Tweaks to adding/editing Timesheets allow the screen to filter type options based on the office letter of the project.
- You can now easily deselect an allowed office letter on a Client and then use that Client on projects with other office letters.
- A fix has been applied to ensure staff photos always change with a resource change on appointments.
- Performance of the Project List and Calendar has been improved with better indexing.
- The export to Excel from the Projects Not In Diary screen has been tidied up.
- There have been minor amendments to the Previous Appointments screen from a calendar appointment for consistency and performance.
- Error reporting is now better if project duplication from the Project List fails.
- A timeout issue when receiving survey items via transfer (linked Alpha Tracker systems) has been fixed.
- If you use the Projects Dashboard and have multiple similar values for **Project Status** and **Turnaround**, then you will find the searching has been improved. Exact matches only will now be returned.
- An issue with capturing quotation photos in Alpha Tracker Mobile on iOS devices has been fixed.
- Deletion of sites, projects and clients now has the username logged in the audit.
- There have been some minor changes to the Document Templates screen that is used to configure document templates. To avoid possible mistyping issues, **Template Filename** is now a dropdown with document type indicators. The indicators show whether the document is "Data Source" or "Report Format" and also indicate if the report format uses ATDM or CDM. A "Use CDM" setting automatically populates if a CDM report format is selected. Individual templates can therefore use either ATM or CDM.

- Further validation has been added to the Quick Edit screen to ensure the same restrictions and behaviour apply here as on the Project Details screen if you change the Client without changing the Site.

- For users of the Ticket module, the cause of the ticket must now be selected before you can close the ticket.

- Performance improvements have been made to the Client List.

- Query Writer allows you to define your own queries for bespoke reporting purposes. A new setting lets you hide the Query Writer from the menu if required. There are new additional checks to ensure the user is accessing valid data sources and they have the required permissions.

- Additional columns have been added to the Dashboards screen to allow you to specify staff to whom a dashboard email should be copied (**CC Staff List**) and other email addresses that should also receive the email (**Additional Email Addresses**). In the **CC Staff List** column, you enter a list of Staff IDs separated by a slash, eg "3/7/41/". In **Additional Email Addresses**, you enter a list of email addresses separated by a semicolon, eg "user@example.com;other@example.com;". A single email address without a final semicolon will also work.

- An issue with editing and saving weekly timesheets has been fixed.

- Non-current/inactive members of staff have been removed from the list of available Unit IDs when creating reinspections.

- Text displayed in the Sample Exchange is now wrapped so that long descriptions, references, notes etc can be seen in full. And sample lists are displayed in numeric order - if text is also present in the samples, they are first sorted alphabetically, then numerically.

- Also in the Lab Sample Exchange, sample analysis completed in this way now updates the relevant project milestone. When you receive the analysis, the milestone linked to the Samples Analysed key milestone in your project is updated with a completed date. This update occurs as long as the count of samples matches the count of analysed samples. Note that the date used in the milestone update is the date the sample analysis is accepted, not the date the lab carried out the analysis.

- The effect of the "ChangeRecommendedActionOnNegative" setting has been extended to cross reference items marked as negative.

- A change has been put in place to prevent large images from being transferred to Alpha Draw. This is to stop potential issues with the file size of annotated images.

- The Sage 50 Detailed invoice export has been updated to take the second nominal code field from invoice lines instead of the office.

- On the Fibre Analysis screen, if a re-check happens when there is no **Analysed Date**, only the **Checked Date** is updated.

- Problems with adding CRM actions in bulk from the Projects Not in Diary screen and accessing the document folder have been resolved.

- Performance improvements have been made to the Asbestos Registers.
- Performance improvements have also been made to the Diary Import making it significantly faster when importing large numbers of appointments.
- A “Calculate All” button has been added to Australian Air Monitoring / Clearances to calculate samples. It excludes samples where the Test Type is “blank”.
- A fix in the Alpha Tracker Mobile app has improved downloading of files for Client View reports and Company documents.
- There has been a small change to the order of score calculations on new Survey Items to allow for Survey Item imports where the material score is not directly inserted.
- Secondary Occupancy on the Priority Assessment window is now hidden if “UseSecondaryOccupancy” is set to no.
- An issue with duplicating projects from the Project List has been fixed.
- A problem with the selection of multiple documents in folders when sending via email has been fixed.
- An issue with deleting some users has been fixed.
- The Change Log has been removed from the Project screen as it has been superseded by the audit.
- When you need to see or make a change to survey data in multiple items, the Quick Edit Survey Data and Quick View Survey Data screens are really helpful and quick to use. **Reinspection Notes** has been added to these screens so that these notes can also be easily edited across records.
- It is now possible to delete all SMS messages waiting to send in one go, which helps if you have built up a backlog.
- When Form documents are generated, the **Report Produced** milestone is now updated.