

Release 31 - Alpha Tracker Release Notes

New Features / Changes (from SVN3523 to 3738)

1. There is a new feature in this release called the Query Writer which enables you to create, load and save your own data extracts. You can find the Query Writer menu option on the Reports menu. The Query Writer means you no longer have to download lots of data and manipulate it in Excel as you can now specify exactly what data you want from this new tool.

The screenshot shows the 'Query Writer' interface. At the top, there are tabs for 'Home' and 'Query Writer' (with a close icon). Below the tabs is a blue header labeled 'Query'. Underneath, there are two buttons: 'Load Saved Query' (with an upload icon) and 'New Query' (with a document icon). A dropdown menu is labeled 'Where is the data you want to see?'. Below that are three expandable sections: '+ Select Fields', '+ Filter', and '+ Sort'. At the bottom, there is a text input for 'Maximum number of rows to show' (set to 100) and an 'Execute Query' button with a play icon. A 'Results' section is visible at the very bottom.

You first pick the source of the data, such as the Clients table. Please speak to Support to set up your choices here. These are set by using the Query Writer Setup menu option which is restricted to Administrators and Superusers.

Then you choose what data you want to be displayed on screen by selecting from the available fields. You might, for example, select Client Name, Address and Contact.

Select the fields you want to appear in the query.

Select Fields

Available Fields

- ID
- Name
- Address 1
- Address 2
- Address 3
- Address 4
- Address 5
- Contact
- Telephone
- Fax
- Email address

Selected Fields

Select all

Select

Un-select

Un-select all

Move Up

Move Down

You can then search or filter the data to restrict what information is displayed.

Filter

Field Name	Operator	Value	And/Or

+ ×

And finally, you can specify how the data is to be sorted and the maximum number of rows to be displayed.

Sort

Order 1	Direction 1	Order 2	Direction 2	Order 3	Direction 3
	Ascending		Ascending		Ascending

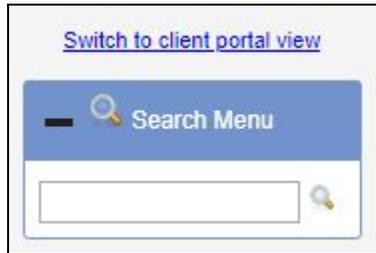
Maximum number of rows to show

305 Execute Query

Click the Execute Query button to display the query results in the Results section, from where you can download the data to Excel and save the query so that you can use it again.

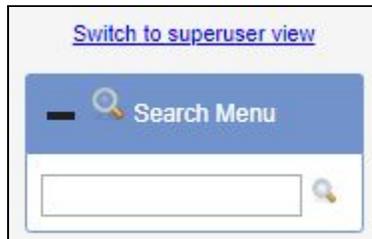
- There is a new feature that is specific to “Superusers” that allows easy switching between the standard Alpha Tracker view and the Client Portal. This feature is likely to be most useful to clients using Alpha Tracker to manage their own property portfolio and provides an alternative to using an incognito window.

When enabled, the Superuser can see a link at the top of their menu:



Clicking the link displays a message asking if you wish to reload the site. Click Reload and the page refreshes to show the Client Portal, displaying the data of the specified Client ID.

From the Client Portal, the Superuser can quickly switch back to their usual view by clicking the link at the top of the menu:



Two settings control this Client Portal impersonation. The first switches it on: "Allow Client Portal Impersonation". The second defines the Client ID that is to be used for logging into the Client Portal: "Client ID to use for Portal Impersonation".

3. Another change that will help clients using Alpha Tracker to manage their own property portfolio is the new button to show the breakdown of the Priority Assessment score. The button is on the View Item Details and the Update Item Details screens from the Register - look for the ... next to the Priority Score.

The screenshot shows the 'Priority Assessment' dialog box in the Alpha Tracker software. The dialog box is titled 'Other' and 'Priority Assessment'. It contains the following sections and fields:

- Priority Assessment Location:** A dropdown menu.
- Normal Occupancy:**
 - Normal Occupancy: Rare Disturbance - Store (dropdown)
 - Secondary Occupancy: Rare Disturbance - Store (dropdown)
 - Normal Occupant Activity: 0 (text input)
- Likelihood of Disturbance:**
 - Location: Outdoors (dropdown)
 - Access: Unlikely to be disturbed (dropdown)
 - Extent of Material: Small (dropdown)
 - Likelihood of Disturbance: 0 (text input)
- Human Exposure:**
 - Number of People: N/A (dropdown)
 - Use: Infrequent (dropdown)
 - Average Time: < 1 Hour (dropdown)
 - Human Exposure Potential: 0 (text input)
- Maintenance:**
 - Type: Minor Disturbance (dropdown)
 - Frequency: Unlikely to be disturbed (dropdown)
 - Maintenance Activity: 0 (text input)

In the background form, the 'Priority Score' field is highlighted with a red box and contains the value '0'. A red arrow points from this field to the dialog box.

Two settings need to be enabled for this to work: “XXX can manually add items via the Client Portal (no/yes)” and “XXX can update items via the Client Portal (no/yes)”

- On the Client Portal, the Building Name on the Register is now a dropdown making it easier to search for asbestos item in a specific building.

5. If Trace Analysis is in use, then a new setting controls whether a warning message is displayed: "Show Trace Analysis Warning Message". The warning message itself has also been updated.
6. A new setting, "Mandatory project letter from quotes", lets you specify the office letter that all projects will have when created from a quotation. This lets you use different office letters in your quotations, but still have all projects created from those quotations using the same project letter.
7. The Calls and Tasks area can now send notification emails to the individual to whom the call/task is allocated. This is designed to make the person aware that they have a task logged, without them having to check the My Tasks section. There are a number of settings that control how this works:
 - notificationEmailsFromTasksAndEnquiries - to switch the feature on
 - notificationEmailsFromTasks_Subject - to specify the subject text of the notification email
 - notificationEmailsFromTasks_Body - to specify the text for the body of the notification email.

The notifications will also work from Enquiries/Quotations if the Assigned To field is filled in. The additional settings that determine the content of the Enquiry notification emails are:

- notificationEmailsFromEnquiries_Subject - to specify the subject text of the notification email
- notificationEmailsFromEnquiries_Body - to specify the text for the body of the notification email.

Please note that you must have Tracker Dashboard running for the emails to send.

8. The Project List screen now includes the Estimated Total Project Value if this is a field that is visible to you on the Projects screen.
9. Two new settings have been created: "Copy Drawings to Reinspection" and "Copy Certificates to Reinspection". When enabled, these copy the drawings and certificates to newly created re-inspection projects.
10. QR codes now show the item history.
11. The ability to download all QR codes from the Survey Data and the Site Register has been added.
12. It is now possible to send the information set up under Extra Info>Scoping to a phone or tablet. An app is required to display the data. A setting switches the feature on ("Send Scoping Data to Handset") and makes a button visible on the Project Details>Notes/Other Info screen, from where a new popup screen can be displayed to enter the Unit ID and generate the XML file into Tracker\AlphaTracker\Scoping\Incoming XML folder.
13. Changes to the Document Requests screen mean that it is no longer possible to make any changes to the requests via this screen. In addition, an Active filter button has been added which will display the currently producing documents. There are also new filter buttons for the Started and Finished date fields.
14. Property Type and Building Age can now be captured against project buildings, with the dropdowns taking their values from the Setup > Lab and Surveys > Building Age and the Setup > Lab and Surveys > Property Type screens.

Buildings for - H-00007

Grid View Map

Add Site Buildings

Records: 1

Search for: Search All

Included Only Excluded Only All

ID	Project Number	Building Number/Ref/UPRN	Building Name	Property Type	Building Age	Included	
▶	15481	H-00007	1	Argyll and Bute Hospital	Commercial	1990s	<input type="checkbox"/>
*	0	H-00007					<input checked="" type="checkbox"/>
*	0	H-00007					<input checked="" type="checkbox"/>
*	0	H-00007					<input checked="" type="checkbox"/>

10 Records per page Mark all building(s) as Included Mark all building(s) as Excluded

These fields are also on the Survey Items:

Other

Lab Ref	<input type="text"/>	Accessibility	<input type="text"/>	HSE Notifiable	<input type="checkbox"/>
Drawing Ref	<input type="text"/>	External Ref	<input type="text"/>	Licensed	<input type="checkbox"/>
Action Date	<input type="text"/>	Action Required	<input type="text"/>	Hide	<input type="checkbox"/>
External Status	<input type="text"/>	Reinspection Notes	<input type="text"/>		
Property Type	Commercial	Reason For Change	<input type="text"/>		
Approx Building Age	1990s				
Caveats Agreed On-Site	<input type="text"/>				

Remediation Details

15. The “URL for doc download” setting has been removed from Alpha Tracker. It will now be worked out automatically.

16. A button has been added to the Fibre Analysis screen to collapse/expand the left-hand list of samples, thereby giving more space for data entry.

Fibre Analysis - T-56192

Records: 2

ID	Project Number	Sample ID	Analysed By	Analysed Date	Correct Analysis	Analysis
4107	T-56192	1	Dan Darkin	07/05/2019	Original	NAD
4108	T-56192	2	Dan Darkin	07/05/2019	Dispute	Chrysotile

10 Records per page

Fibre Analysis

Fibre Analysis Record ID: 4107

Project Number: []

Sample ID: 1

Site Name: []

Other Ref: []

Sample Size: []

Microscope: AAA1, BBB2, CCC3, FID-10

Objective Lens: []

RI Fluid Equip No: []

Analysis 1 Analysis 2 Analysis 3

Status: Original

Sample Prep: Acetone, Acid Wash, Dry, Grinding

Initial Appearance: Asbestiform, MMMF, Organic, Other

17. Also on Fibre Analysis, the “Resolve Disputes” option on the menu is now restricted to users in the Lab Admin and Superusers groups.
18. Minor changes to the SM2 Survey Items list screen include removing the Total Score, including the Action Code, displaying the Material Description rather than the score.
19. The Client Portal user guide can now be accessed from a link at the bottom of the menu on the Client Portal.
20. Changes have been made to the Asbestos Register screen to allow hyperlinks to be active in the Notes field. This means that hyperlinks in Notes will open other web pages.
21. The Australian Air Monitoring module now includes a new report button to “Generate Fibre Count Sheets”.
22. The sending of invoice emails by using the “Email PDF” button has been changed so that they are sent via Tracker Dashboard.
23. A new feature works with the Diary to let you add Non Working Weekdays quickly. Non Working Weekdays can be recorded against a member of staff so that you do not make appointments for them when they are not due to be working (this is an existing feature on the Staff screen). You can now specify the project number under which you want these days to be booked in the Diary - by using the “Project Number for Non-Working Weekdays” setting. Then, when you click the new Add to Diary button, an appointment for the day is added to the Diary.

Staff Training Working Weekends **Non Working Weekdays**

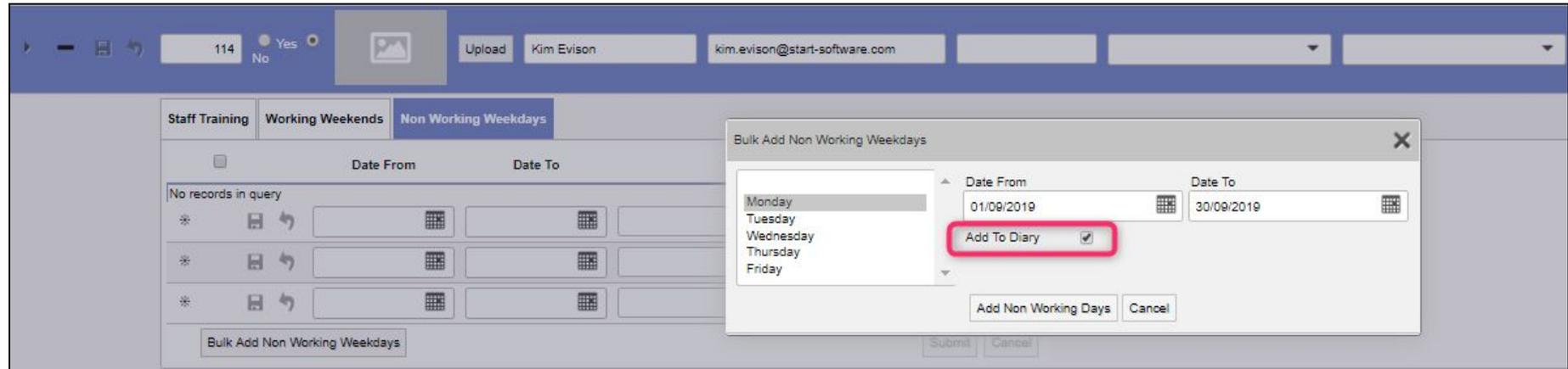
Records: 5

	Date From	Date To	Notes	Delete
<input type="checkbox"/>	02/09/2019	02/09/2019	Entered in diary 21/08/2019 15:47	Add to Diary <input type="checkbox"/>
<input type="checkbox"/>	09/09/2019	09/09/2019	Entered in diary 21/08/2019 15:47	Add to Diary <input type="checkbox"/>
<input type="checkbox"/>	16/09/2019	16/09/2019	Entered in diary 21/08/2019 15:47	Add to Diary <input type="checkbox"/>
<input type="checkbox"/>	23/09/2019	23/09/2019	Entered in diary 21/08/2019 15:47	Add to Diary <input type="checkbox"/>
<input type="checkbox"/>	30/09/2019	30/09/2019		Add to Diary <input type="checkbox"/>
<input type="checkbox"/>				
<input type="checkbox"/>				

10 Records per page Bulk Add Non Working Weekdays Submit Cancel

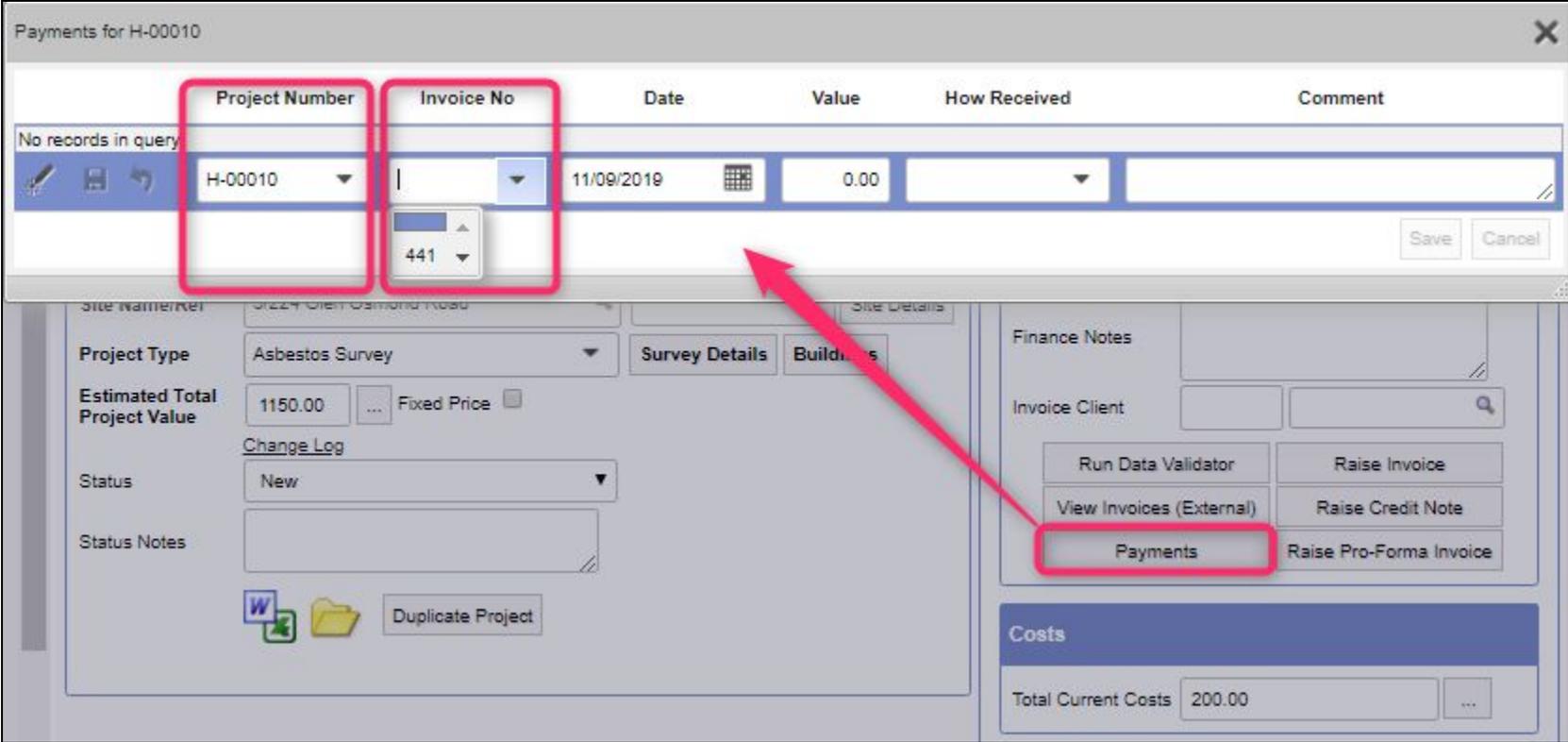
If you have already added the non-working weekday to the diary, then the button is not available.

You can also use the tickbox on the Bulk Add Non Working Weekdays screen to add the diary appointments at the same time as recording the non-working days.



24. There have been quite a few changes to the way in which the system geocodes from postcodes. These changes are designed to speed up the geocoding and to make it more efficient.
25. The new feature that can generate emails from diary appointments now does not generate emails for appointments that are for U projects, have been marked as aborted or have been marked as a write-up.
26. When a new task is added, the task now remains displayed on the screen and you can immediately upload related documents into the document folder. Also, when calls and tasks are listed, there is now a specifiable sort order. This is controlled by a setting, "Calls and Tasks List Order". The field names need to be listed in the required order, eg "CRM_Actions.Date_Due".
27. The "Generate Document" button on Air Monitoring is now shown to users in the Administrators and Quality groups, as well as to Superusers.
28. Further work on diary auto suggestions means that it now provides suggestions on people who are at nearby appointments.
29. To give you further control over which survey items are visible on the Client Portal, and to allow quick editing of many items at a time, the Quick Edit Survey Data screen now includes the Show On Web field.

30. The Payments screen, which is displayed from the Payments button in the Financials/Planning section on a project, now generates dropdown values for the Project Number and the Invoice Number.



31. It is now possible to capture the details of the person who generated a Certificate on a Bulk Sample-type project. The Produced By field will populate with the logged in user's name.

Home Project - A-00224 X Sample Setup - A-00224 X

1. Overview 2. Sample Setup 3. Enter Fibre Analysis 4. Lab Analysis Check 5. Results 6. Register

Load Results Version

Generate Certificate Produced By

Records: 3

Number	NAD	Crocidolite	Amosite	Chrysotile	Anthophyllite	Tremolite	Actinolite
1	<input type="checkbox"/>						
2	<input type="checkbox"/>						
3	<input type="checkbox"/>						

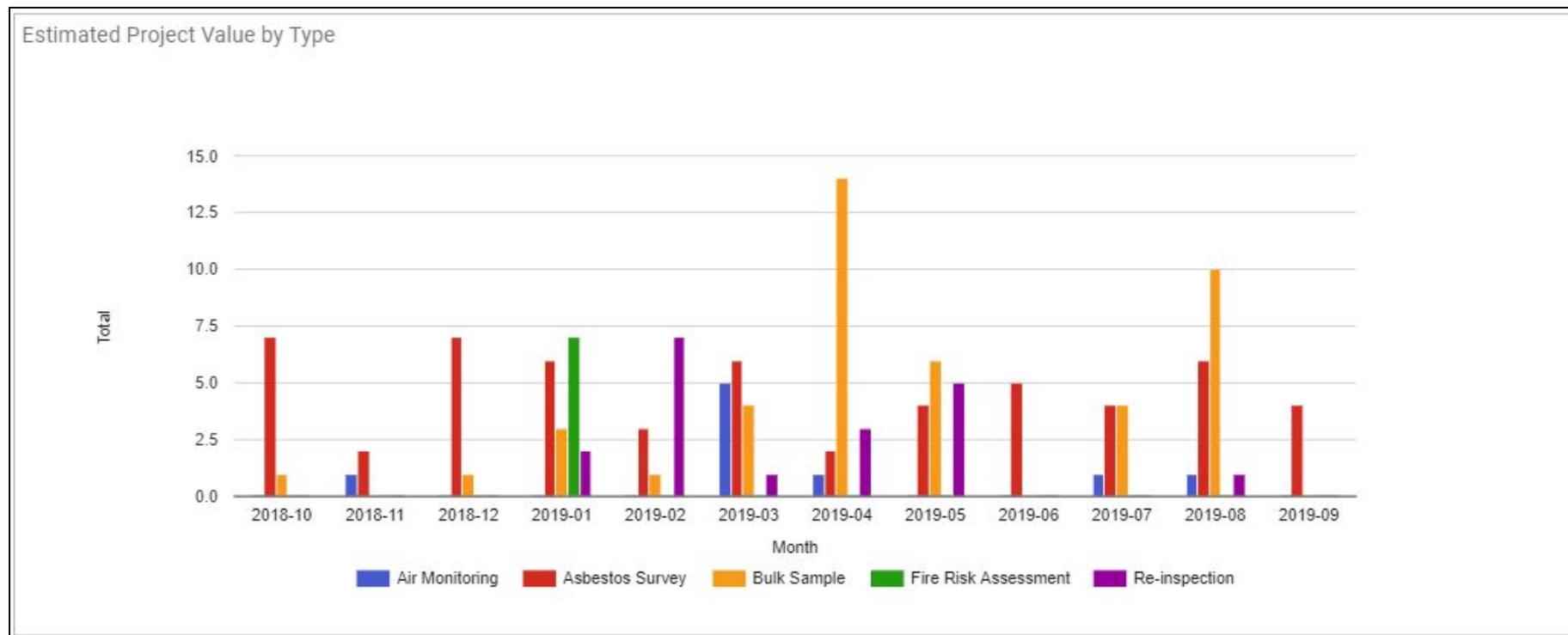
10 Records per page

Submit Cancel

32. Asbestos Type, Condition, Surface Treatment and Product Type have been added to the Excel export for Site Registers.

33. QR codes for survey items can now be printed in an "Avery format" in dimensions of 45 x 45mm and 35 x 35mm. See here for more information <https://www.avery.co.uk/labels/retail/qr-code-square-labels>.

34. There is a new chart on the Financial Dashboard which is available to Superusers. This chart displays estimated project value broken down by project type, over the last 12 months.



35. Some automated maintenance tasks are now run, for example, to auto-delete log files older than 14 days, detect PPD files that have become larger than 250MB and check database size in certain circumstances.

36. There is a new addition to the Import options available, Project Staff Import.

This import works in exactly the same way as the other imports, ie: Click button “1. Template” to download the template. Populate the template and upload it by using button “2.Import”. Check the data on screen, make any amendments then accept and process the data by using “3. Process”.

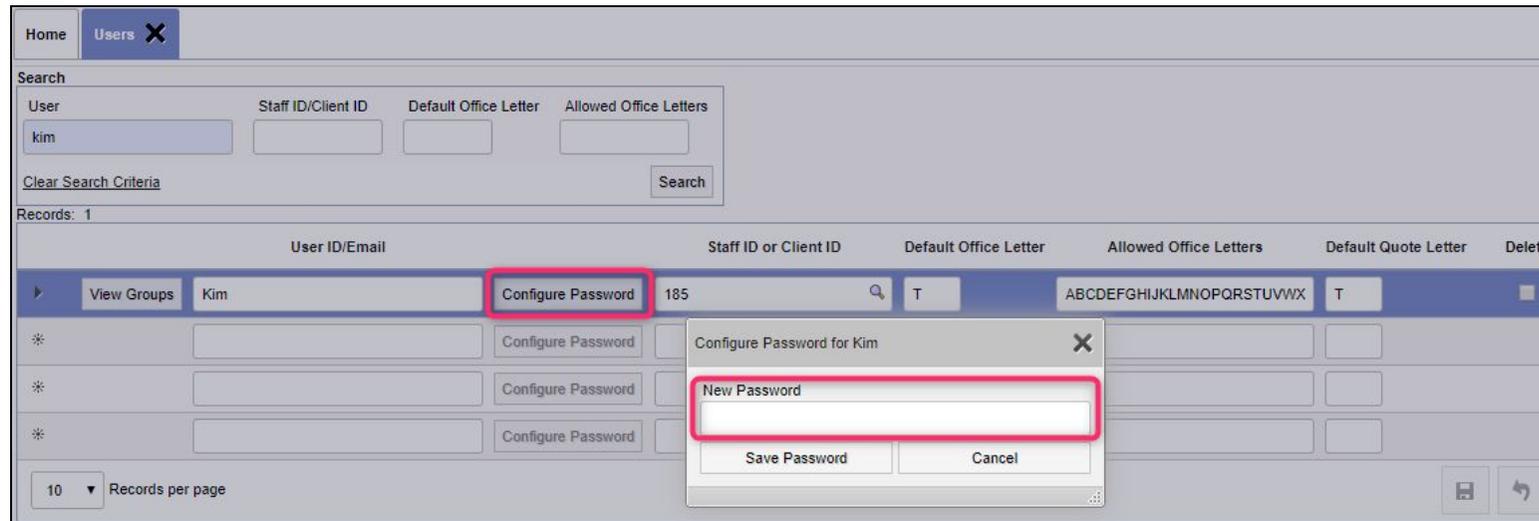
The importer includes validation for missing project numbers, staff names and roles.

37. Another change to the imports sees the Client Project Ref field added to the Project import.

38. The Materials screen now includes an Export to Excel button so that you can download your material lists.

39. It is now possible to allow specified users, in addition to Superusers, to delete projects. There is a new setting that lets you specify the users who are to be allowed to delete projects - “List of external surveyors who can delete projects”. If you leave the setting blank, only Superusers can delete projects. If you specify users, then only those users and Superusers can delete projects.

40. Alpha Tracker has encrypted passwords to improve security. When creating new users using Web Security>Users, you must now first create a user, and save the user record, before you can set a password for them. To set a password, click the new Configure Password button on the user record, then enter the new password. The password must still adhere to the rules - minimum length of eight characters, minimum of one number, one uppercase letter, one symbol...



Fixes/Minor Changes

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

- An issue with the population of Analysed By on the Overview tab after analysis is completed has been fixed.
- A missing image and typo in the save message on Fibre Analysis has been fixed.
- A fix has been applied to filtering boxes on survey items screen.
- Improvements have been made to the speed of saving of Fibre Analysis records but expect further changes to come in this area.
- Performance improvements have been made to the opening of the Quick Edit Survey Data screen. The width of the date columns has also been increased. In addition, the search fields have been updated to use dropdowns where possible.
- An incorrect count of Removed items on the Asbestos Summary chart on the Client Portal has been fixed.
- An issue with the Find & Replace function on Survey Items where it was replacing the entire value in the field rather than just the text that was required has been fixed.
- Code improvements have been made to the saving of invoices.

- A problem with the invoice download pop-up not showing after a Word invoice was requested has been fixed.
- Fixes have been made to the performance of the ACM flags on sites. A further change updates the ACM flag when a survey item is inserted, only when the inserted item's "Show on Web" flag is set to true.
- It is now possible to create re-inspections for some non-standard project number formats.
- Non-current staff are no longer shown on the Training Matrix reports.
- A previous change has been reverted so that the Suspect and Non-suspect Item buttons on the Survey Items screen no longer check on the Identification.
- An issue with hidden fields being displayed when opening multiple quote/enquiry screen instances has been fixed.
- A problem with the "Open Projects by..." screens not saving records has been fixed.
- A fix has been applied to the Add Site Buildings button on the Buildings screen so that it handles a project without a Site ID
- The Search has been added back into the Lab Dashboard on the Home screen.
- A bug in the function which creates re-inspection XMLs from an import has been fixed.
- The Client and Date fields on Training Course Attendees are now wider.
- A change has been made to the fibre analysis trigger to ensure scores are set correctly when the "Overwrite Survey Item Material and Description..." settings are both set to yes.
- An issue with overwriting start and end times of appointments has been fixed.
- An error when "showNonACMSRoomSummaryOnSiteRegister" setting is set to "yes" has been fixed on the Site Register.
- Validation now prevents spaces being entered into project numbers.
- When copying survey data, the Approach is no longer changed. Previously, an "S" would change to a "PS" irrespective of the project type..
- It is now possible to enter longer roles in the system, eg Business Development System, as the length of the role field has been extended to 50 characters.
- The Floor field has also been extended.
- Issues with the Site Register not loading for restricted Client Portal logins have been fixed.
- An issue with sample number not showing on the sample setup screen has been fixed.
- The sort in the documents folder has been tweaked.
- A setting change has resolved an issue when trying to download/preview files in the Client Portal.
- "Data Extracts" has been removed from the normal "Clients" login as no menu options in this frame are accessible for this type of user.
- Problems with the Edit Event screen not saving have been fixed.
- "Object not found" when closing down a quotation should no longer occur.
- Language tags on the Task screens have been improved.
- There has been a minor change to the Drawing app data request and receive pages so that they now abandon the session once the request is complete.
- Survey Exclusions & Inclusions have been added onto the Project Import screen so that this information can easily be brought into the system.
- A problem with cost breakdown items not copying across if they were present in the template but missing on the quotation has been fixed.
- Searching by site name in the Client Portal on the general, ie not site-specific, register has been improved. The same changes have been made to the photo register.
- Loading speed of the Projects List has been improved and the summary total from the Estimated Project Value has been removed.
- The All Calls/Tasks screen now displays the Assigned Type

- The Timesheet List export now includes the Staff Name rather than a Staff ID.
- We have changed the way in which client logos are displayed throughout the system to make them more efficient.
- A problem with photo subfolders when creating new re-inspection projects has been fixed.
- A problem with the archived data under the transfer XMLs has been resolved.
- The ID number is now displayed on the My To Do List and All Call/Task(s).
- The size of the error message field on the Validation for Fibre Analysis screen has been extended so that you can supply additional details in your message.
- A problem with Diary Appointments opening from projects has been fixed.
- Some small changes have been made to the Survey Items screen to help with editing and refreshing of data, and also to prevent the screen from “jumping” to the top when rows are selected with the checkbox.
- An already-used quotation number cannot now be generated via Get Next Number.
- The Push to Register button on Bulk Samples will now allow a register update if there is more than one approach configured as type “S”.
- The field type has been changed on Construction Date so that it is now nvarchar(255).
- A problem with the copying of drawing files to re-inspection projects and the “Copy Drawings to Reinspection” setting has been fixed.
- The Quick Edit Survey Data screen has had the search on the approach changed so that it now does an exact match.
- Validation will now prevent the creation of sites with the same site name for a client.
- The Alpha Tracker logo is now included in the build to ensure consistency between systems.
- The alignment of menu options has been improved.
- The Notes field has been excluded from the quick search on the asbestos register on the the Client Portal.
- There have been some minor adjustments to the Timesheets screen, including cosmetic changes.
- Serial Number and Expiry Date have been added to the Survey Equipment, Lab Equipment and Other Equipment screens.
- An issue with vehicles not being available for selection when adding a new vehicle check has been fixed.
- A fix has been applied for Get Next Number when sequential project numbers across all offices are used.
- The Building Name has been removed from the generated re-inspection XMLs.