

CLIENT PORTAL USER GUIDE

Version 1.10



DOCUMENT CONTROL

Document

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Current Version

Version	Date	Issued Pages	Reason For Issue
1.10	Apr 2024	All	Logo updated

Previous Versions

Version	Date	Issued Pages	Reason For Issue
1.9	Apr 2022	All	Detail on pre-set filters.
1.8	Dec 2021	All	Additional shortcut buttons. Submitting bulk samples. Hotspotted drawings. Folders on enquiries. New data flag. Signing in.
1.7	July 2018	All	Logging enquiries, web security, contractors
1.6	Nov 2017	All	Active Directory users
1.5	Dec 2016	All	Uploading site plans
1.4	Nov 2016	All	Changed plan images
1.3	June 2016	All	Updates to Site List & Compliance Summary, new Removed Register and details on recording removal or remediation
1.2	July 2015	All	Updates to Site List, new Remediation Register, Archived Report List, Contact Details and Bulk Samples
1.1	April 2015	All	Various minor updates, including removing Site Grid section
1.0	Aug 2014	All	First issue



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1. INTRODUCTION

The Alpha Tracker Client Portal provides direct access to your Alpha Tracker-produced reports, documents, project and other data live over the Internet. It has an easy-to-use interface that lets you drill down to the required information quickly and easily.

The aim of this User Guide is to help you access your online data and work with it as required. It includes information on the following:

- signing in and out
- accessing data on the Alpha Tracker Client Portal
- exploring the Sites section
- exploring the Registers section
- exploring the Photo Registers section
- exploring the Reports/Jobs section
- running data extracts
- maintaining a library of other documents
- updating contact details
- uploading bulk sample details
- recording removal or remediation details.

Please note that some of these options may not be available on your Client Portal.



2. GETTING STARTED

This section describes how to:

- sign in to the Alpha Tracker Client Portal
- use the menu
- sign out of the Client Portal.

2.1 Signing in to the Client Portal

The surveying company will provide you with sign-in details to view your data in Alpha Tracker. Space is provided below for you to record these details for safekeeping:

Note that if you are an Active Directory user, then you do not need a separate username and password to sign into Alpha Tracker and do not see the Sign In screen.

To sign into the Client Portal:

- **1.** Open your Browser.
- 2. Type the URL or web address of your asbestos surveying company's Alpha Tracker in the address line of the Browser and press **Enter** to display the Sign In screen.



Type your user ID and password in the boxes and click the Sign in button.
 If you forget your sign-in details, contact your system administrator to reset them.
 The Home screen is displayed, which may show some or all of the following:



• "Project Pipeline" shows completed and uncompleted milestones for projects marked as Show On Web, to indicate progress through the main phases of work:

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un Pro	_	d Projects All													
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T-64	6334	HII House	Asbestos Survey	Kim Brison	Project Opened	Query Preduced	Ste Hut Boored	Prot Day Onsta	LAST DAY ONSILE SAY	npries Receivies Sampres In Lab	Analysist Pair Corr	owner Quarty Cheor Complete	Project Due De	W Report Produced	Project Involued
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T-54	6317	Chandlers House	Asbestos Survey	Kim Brison	Anglett Opened	Quele Produced	Ste Visit Booked	First Day Onella	Lest Day Onstel Ser	npiez Received Samplez In Lab	Analyzasi Plan Com	pieted Quality-Dieci Comprese	Project Due De	ie Report Produced	Anglect involved

• "Site List & Compliance Summary" lists your sites and also shows summary compliance data:

Records: 9										
Search for:	Search	Al								
OK Activity Due Overdue	Some Activity No	Activity All								
Site Name	Last Activity	Last Inspection	Site Reference (UPRN)	Site Address	Postcode					
The Victoria	16/02/2015	16/02/2015		150-182 The Quays Salford	M50 3SP	٩			Þ	C
Daisy Bank	12/02/2015	12/02/2015		Daisy Bank, Bridgnorth	WV16 4QF	٩			D	C
100 Dublin Street	16/09/2015	16/09/2015		Edinburgh	EH1 3PX	٩			D	C
63 Hay Street	16/02/2015	16/02/2015		Haye-on-Wye	HR3 5AA	٩			Þ	C
25 Ivor Road	19/10/2015	19/10/2015		Corfe Mullen Wimborne Dorset	BH21 3QF	٩			Þ	C
12 The Green	01/01/1900	01/01/1900		Worcester	WR1 18P	٩	Wendy Hill		D	C
Innovation Centre	28/10/2015	28/10/2015				٩			D	C
Squirrel Trees	04/12/2015	04/12/2015		Brownsea Island		٩			Þ	C
Lasyard House	16/02/2015	16/02/2015	ARL123	Underhill Street Bridgnorth	WV16 488	٩			D	2

• "Site Grid" shows site information in a grid pattern:



- "Dashboards" show the following information in graphical format:
 - risk of asbestos (all sites) the number of items at high, medium and low risk across all your sites



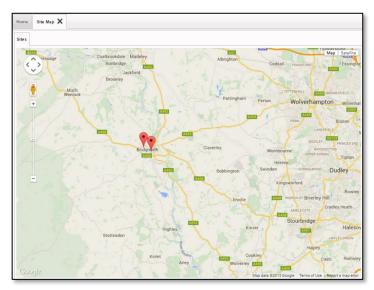
- reports issued the number of reports issued and the month they were issued
- items by recommendation the proportion of items with each different recommendation.



• "Report List" shows a list of all the reports that have been produced across all your sites:

Hom		Report	tList X									
	ds: 4 ch for:		Search									
pearc	ch ior.		Search	AI								
	Site Name							Project Number PO	Site Address	Post Code Site Reference (UPRN)	Project Type	Report Produced Invoiced
×	100 Dublin Street		PDFs (1)	E Summary	Register (6)	😁 Documents	Plans (0)	N-00510	100 Dublin Street Edinburgh		Asbestos Survey	
	Daisy Bank		PDFs (0)	Summary	Register (7)	Documents	Plans (0)	T-00294	Daisy Bank, Bridgnorth	WV16 4QF	Asbestos Survey	12/02/2015
	63 Hay Street	and a P	PDFs (1)	Summary	Register (4)	Documents	Plans (0)	×-00005	63 Hay Street Haye-on-Wye	HR3 5AA	Asbestos Survey	16/02/2015
	Lasyard House		PDFs (1)	Summary	Register 0	Documents	Plans (0)	X-00004	Underhill Street Bridgnorth	WV16 4BB ARL123	Asbestos Survey	18/02/2015

• "Site Map" displays your sites on a map:



These items are also accessible from menu options and their usage is described below with reference to the menu options.



2.2 Using the menu on the Client Portal

Menu items on the left-hand side of the screen give you access to different areas of the Alpha Tracker Client Portal. Where a menu item displays a plus symbol, you can click on it to expand the item and show its menu options. For example:



The menu item now displays a minus symbol. Clicking on it again shrinks the item back to hide the options.

There is also a Menu Search at the top of the menu to help you quickly find any menu option. Type a word into the box and click the magnifying glass to search for matching menu options.

Select a menu option by clicking it. The appropriate screen opens as a tab in the central area of your screen. You can have many tabs open at once and can switch between them by clicking the tab name. Close a tab when you have finished with it by clicking the X next to its tab name.

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Meru Soarch Meru		
Search for Search for Search for Search for Search for Search for Image: Search for Search for Search for Search		Ome Duta Extracts - Management Information 🗙
I see the set of the month that the record of the recor	- 🔍 Menu Search	Search for: Search All
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12119 Liss all insterials to be manged Photo Registers Image: Image: I	🕂 🔶 Site	 129208 All abbestos containing materials Lists all abbestos containing materials (including Presumed and Strongly Presumed)
13214 Uss all states with the monophiline the removal on encapsulation + in Enquires/Quotes 13218 + in Enquires/Quotes 13219 + in Enquires/Quotes 13217 + in Contractors 13217 Non-Addetasis items 132173 132173 Non-Addetasis items that have been sampled (or cross referenced to samples) but are NAD (No Addetsos Detected)	+ Register	129189 All materials requiring management Lists all materials to be managed
1 30198 If High Priority materials requiring removal or encapsulation + is troumes/Quotes 1 30198 + is contractors 1 30207 + is built samples 1 30173 - is built samples - is built samples	+ Photo Registers	129214 Annual Reinspections Due By Site Usts all sites with the month that the reinspection is due
A Contractors A Contr	+ 🝺 Reports/Jobs	129188 High priority materials requiring removal or encapsulation Uss all High priority materials requiring removal or encapsulation
129173 Non-Abbetos items 129173 Usss all non abbetos items that have been sampled (or cross referenced to samples) but are NAD (No Abbetos Detected) Uss all non abbetos items that have been sampled (or cross referenced to samples) but are NAD (No Abbetos Detected) Data Extracts		129207 Non-Accessed areas Usts all areas not accessed
F Pilda Extracts		129173 Lists all non asbestos items that have been sampled (or cross referenced to samples) but are NAD (No Asbestos Detected)
	+ 🛓 Bulk Samples	
Management Info		
User Access Log		

If you are working on a small screen you may find it useful to shrink the menu by clicking the double left arrow symbol indicated above.



2.3 Signing out of the Client Portal

To sign out of the Client Portal, simply click the **Sign Out** link displayed in the top right-hand corner of the screen.



You return to the Sign In screen.

Note that Active Directory users do not see the Sign In screen.

a s



3. **DISPLAYING YOUR DATA**

This section describes how you can use the menu options on the Alpha Tracker Client Portal to view your data, including:

- project pipeline
- site listings and locations
- registers
- photographs
- reports.

s and

If you view data by **site**, then you are looking at the current position for that site, taking into account all projects that have been undertaken at that site. This will give you the current view. If you view data for **reports** then you are looking at a "snapshot", this is the situation at the site when this report was produced and may not be the current situation.

3.1 Displaying the project pipeline

The Project Pipeline shows completed and uncompleted milestones for projects that are in progress. It indicates progress through the main phases of work, with the phases varying by project type. Open projects only are displayed by default, but you can also display closed projects or all projects:

here to search														
pen Projects Cite	and Projects All													
Project Number	r Site Name	Project Type	Project Manager											
				Project Operand	Ounter Produced	Ste Hut Booked	First Day Onsille	Last Day Onable Sam	pres Received Sample	s Analysed Plan Comp	where Quarty Cheve	Project Dare D	ate Report Produced	Project invokant
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				Anglect Opened	Quely Preduced	Site Hold Booked	Rist Day Onsite	Lest Day Onabel Sem	piez Received Sample In Lan	s Anwjows' Rive Comp	ward Quelty Dec	Project Due D	elle Report Produced	Anglect involved
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				Project Opened	Quality Producted	Jite Vitit Booked	Rist Day Onsite	Last Day Onsite Sam	pies Received Sample	t Analysed Ran Comp	ieter Quality Deol Complete	Project Due D	ne Report Produced	Project involced
7-56393	Coownhapen House	Adbestos Survey	y Kim Brison	-					•	 0				
7.46394				Project Opened	Quelle Produced	Due date	More Data	Cara Entry Complete	Suniejor Check Complete	Technical Check Complete	Auport signed off as hiral	Report sent to crient	Report Produced	Project Involati
1-90394	Copenhapen House	Reinspection	Kim Briddy	-								-0-		
7.64363	Conscheren House		Des Restin	Argiect Opened	Quete Produced	Due dete	Main Date	Data Entry Complete	Sunayor Check Comprese	Technical Check Company	Aeport signed off es Final	Report sent to client	Report Produced	Anglect involved
1-96969	COURSE AND INCOME.	Ne-repetition	panganen	-								-0-		
7.64350	25.Leigh.Road	Reinspection	B B	Project Opened	Cuore Produced	Due case	Mpc Date	Cara Ency Complete	Durneyor Check Complete	Technical Check Complete	мероторнео об ас Асмі	Report percep client	Керогт Рголисел	Project Involted
1-95204	23.1496.5383	Ne-rapector	Davidance.	•								-0-		
7.64330	25.Leisth.Road	Advector Survey	- Das Davido	Argiect Opened	Quark Produced	Die Voc Booker	Prot Day Onsta	Last Day Onsite Sam	pies Receiled Sample In Lab	c Analyses Plan Cong	ieter Qualty-Cheo Сотупния	Project Due D	пе Верогс Різоцово	Project involced
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T-56334	HII House	Advector Survey	r Kim Brinne	Project Opened	Query Preduced	SIN HUEBOOLNO	Prot Day Onsta	Last Day Onatal Sam	pres Received Sample In LAD	s Analyses Pain Cons	Construction Construction	Project Due D	HIR REPORT Produced	Project Involved
				-		-0-			•	 0				
7-56317	Chandlers House	Arbestes Survey	r Kim Brison	Anglett Opened	Quela Produced	Ste Vitt Booked	First Day Onsta	Lest Day Onstel Serry	piez Receilent Sample In Lab	z Analyzast Plan Cony	ieted Quality/Deed Complete	Project Due D	eter Report Produced	Anglect involved
				-						 0				

On the Project Pipeline each project's milestones are displayed as a dot.

- If the dot is green, then the milestone has been completed hover over the dot to see the completed date.
- If the dot is grey, then it has not yet been completed.





3.2 Exploring the Sites section

Site-related information shows you the current position for that site, taking into account all projects that have been undertaken at that site.

Options in the Sites section of the menu on the Client Portal let you view your sites as a list or as a grid. You may also have sites displayed as points on a map on the Home tab. You can choose whichever view suits you best. For example:

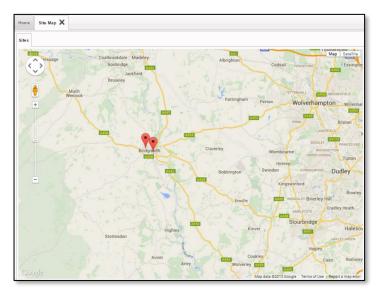
Home Site List	& Compliance S	ummary X									
Records: 9		,									
Search for:		Search	AI								
OK Activity Due	Overdue Some	e Activity No	Activity All								
Site Name		Last Activity	Last Inspection	Site Reference (UPRN)	Site Address	Postcode					
The Victoria		16/02/2015	16/02/2015		150-182 The Quays Salford	M50 3SP	٩			Þ	0
Daisy Bank		12/02/2015	12/02/2015		Daisy Bank, Bridgnorth	WV16 4QF	٩			D	2
100 Dublin Street		16/09/2015	18/09/2015		Edinburgh	EH1 3PX	٩			D	<u></u>
63 Hay Street	ann Al	16/02/2015	18/02/2015		Haye-on-Wye	HR3 5AA	٩			D	
25 Ivor Road		19/10/2015	19/10/2015		Corfe Mullen Wimborne Dorset	BH21 3QF	٩			Þ	0
12 The Green		01/01/1900	01/01/1900		Worcester	WR1 1BP	٩	Wendy Hill		Þ	>
Innovation Centre	平	28/10/2015	28/10/2015				٩			Þ	>
Squirrel Trees		04/12/2015	04/12/2015		Brownsea Island		٩			Þ	>
Lasyard House	100	16/02/2015	16/02/2015	ARL123	Underhill Street Bridgnorth	WV16 488	٩			Þ	<u></u>
First Prev 1 of 1 Ne	xt Last 100 🔻	Records pe	r page								

• "Site List" lists your sites and also shows summary compliance data:

• "Site Grid" shows site information in a grid pattern:







• The "Site Map" (on the Home tab) displays your sites on a map:

3.2.1 The Site List and Compliance Summary

The Site List and Compliance Summary displays all your sites and gives an indication of activity at the sites.

1. Display the Site List and Compliance Summary by selecting the "Site List" option from the Sites menu, or see it on the Home tab.

Records: 9										
Search for:	Search	Al								
OK Activity Due Overdue	Some Activity No	Activity All								
Site Name	Last Activity	Last Inspection	Site Reference (UPRN)	Site Address	Postcode					
The Victoria	16/02/2015	16/02/2015		150-182 The Quays Salford	M50 3SP	٩			D	2
Daisy Bank	12/02/2015	12/02/2015		Daisy Bank, Bridgnorth	WV16 4QF	٩			D	2
100 Dublin Street	16/09/2015	18/09/2015		Edinburgh	EH1 3PX	٩			D	2
63 Hay Street	18/02/2015	18/02/2015		Haye-on-Wye	HR3 5AA	٩			Þ	C
25 Ivor Road	19/10/2015	19/10/2015		Corfe Mullen Wimborne Dorset	BH21 3QF	٩			Þ	C
12 The Green	01/01/1900	01/01/1900		Worcester	WR1 1BP	٩	Wendy Hill		Þ	C
Innovation Centre	28/10/2015	28/10/2015				٩			Þ	C
Squirrel Trees	04/12/2015	04/12/2015		Brownsea Island		٩			Þ	C
Lasyard House	16/02/2015	16/02/2015	ARL123	Underhill Street Bridgnorth	WV16 488	٩			D	2

The Site List & Compliance Summary includes Sites which have had no activity. The **Last Activity** column shows the date for the last project marked as "Show On Web" (not including pending projects). The **Last Inspection** column shows the date of the last survey or re-inspection. This list is colour-coded to give you an instant impression of status:

• Green indicates activity within the last 9 months.



- Yellow indicates activity due, where the last activity was between 9 and 12 months.
- Red indicates overdue activity, ie last activity was more than 12 months ago.
- There is no colour if there are no ACMs at the site.

Other columns may also be displayed, some of which are colour-coded in the same way.

Next to the **Postcode** is a magnifying glass icon from which you can display a map of the Site. After the **Postcode**, the contact details are displayed. The Register, Summary, Reports and Documents Folder buttons are also available. There may also be a Client Notes button.

2. Use the buttons to access the following information:



- shows the up-to-date Asbestos Register for the site:

ie Name		ulding Name	Fier	Location	Long	tion Descriptio	n Naterial						Servis Norther Ide	othesian			
er Search Or														Search			
ovis: 13	and a																
ampled Items	Presumed Terre	No Access Areas	o Access Ta	ang Al													
Photo	Site Norse	Building Name Flor	r Losation	Location Description	No Assess	itere.	Material	Project Numbe	Approach	Sample Num	ber Exter	t Us M	I Identification	Material Score	Printity	Total Recommended Actio	
		100 Dublin Street 0		Perception	•	Duets	Insulating Doard	N-00510	8	•	•	-2	Chrysettle, Crossibilite	,	•	7 Manage	,
The same	materia/was pres	eri insughout the first	loor.														
	100 Dublin Street	100 Dublin Street 0	001	Reception		Celling	Conorete	N-00510									
The same	material was prea	err throughout the frat	faar														
	100 Dublin Street	100 Dubin Steet 0	001	Recepton		Vial	Concrete	16-00510									
The same	material was pres	ent throughout the first	foor														
	100 Dublin Street	100 Dublin Street 0	001	Recepton		Fiest	Viry! Sled	16-00510									
The same	material was pres	erc throughout the frot	fear														
2	100 Dublin Street	100 Dublin Street 0	002	Stairs				16-00510	9.P						0	0	
	100 Dublin Street	100 Dubin Street 0	002	Stain		Celling	Concrete	16-00510									
	100 Dublin Street	100 Dubin Steet 0	002	Stairs		Well	Conomia	16-00510									
	100 Dubin Street	100 Dubin Street 0	002	Stain		Flaar	Virgisited	16-00510									
	100 Dublin Street	100 Dubin Street 0	024	Ladies WD		Celling Void		1600810	,			=3	Crostituitte		0	0 No action required	
	100 Dublin Street	100 Dubin Street 0	023	Käshen		Duets	Insulation	16-00510	8	2	6		Crosiduite	10	0	10 Enceptulate and Mana	



- displays an Asbestos Summary for the site, showing the number of items present for each material score and an indicator of the risk level. The risk results are colour-coded for clarity, with a key in the bottom left corner:

		_	_			_						
ere is the Asbestos Summary f	for Site: 4148											
NAG Items: 0	12											
No Access Items: 0												
Presumed Items: 2	9											
Sampled Items: 4	6											
(ey: /ery Low Risk - Black ow Risk - Green	3											
ledium Risk - <mark>Orange</mark> ligh Risk - Red	0	2	3	4	5	6 Material S	7 Score	8	9	10	11	12



– gives access to the reports produced for the site, with a separate row displayed for each report:







– allows you to access the Client Upload folder where you can store files that are relevant to the site:

Filename	Size Created	d Last Modified
-	Drop files to	o upload
	(or click)	T

- lets you type free-text notes related to a site.

- **3.** Use the filter buttons above the list to filter the display with one click. Sites without ACMs will not show under the Activity Due and Overdue filter buttons.
 - OK the next inspection date is more than three months away (ie green sites).
 - Activity Due the next inspection date is less than three months away and the site contains asbestos (ie yellow sites).
 - Overdue the next inspection date is in the past and the site contains asbestos (ie red sites).
 - Some Activity the site has had a report completed.
 - No Activity the site has not had a report completed.

If it is switched on in your Client Portal, there may be a new data flag displayed to draw your attention to updates to data. The new data flag can be seen on the left of the site name on the Site List & Compliance Summary and on the left of the items on the registers, for example:



ecords:	3						
Search fo	ar:	Se	arch All				
OK Ac	tivity Due Overdu	e Some Activi	ty No Activity All				
	Site Name 🔺		Last Activity	Last inspection	Last Survey Issued	Last Survey Site Date	Last Re-inspection Issued
new	The Birches		29/04/2021	29/04/2021	29/04/2021	29/04/2021	
	The Firs		09/03/2017	09/03/2017	09/03/2017	03/03/2017	
	The Oaks		12/12/2016	12/12/2016	12/12/2016	01/12/2016	

If you want to see all the new data and only the new data on a register, you can filter the records on the register by using the New Data pre-set search button.

3.2.2 The Site Grid

From the Site Grid you can see almost the same information as on the Site List –the layout and the buttons however are slightly different.

The Site Grid displays summary data related to your sites and allows you to:

- see the front page photo of the report
- see a location map of the site
- display the Asbestos Register for the site
- display an Asbestos Summary for the site
- access the Reports List for the site
- access the Client Uploads folder for the site
- display the Site Plans for the site.
- 1. Display the Site Grid by selecting the "Site Grid" option from the Sites menu.



Multiple properties are displayed in the Site Grid. The front page photo and location map are both prominently displayed in the grid layout.

2. Use the Register, Summary, Reports, Documents Folder and Site Plans buttons to display information about the site.



3.2.3 The Site Map

The Site Map on the Home tab displays the location of all your sites as points on a map. You can manipulate the map in the usual ways:

- zoom in and out of the map by using the wheel on your mouse or the plus and minus buttons on the map
- pan left/right/up/down by clicking and dragging the map or using the pan controls in the circle in the top left-hand corner of the map
- Nome
 Site Map
 X

 Sites
 Image: Collaboration of the second of
- drag the person icon onto the map to use Streetview.



3.3 Exploring the Registers section

The Registers section of the Client Portal lets you explore four registers:

- Asbestos Register all positive asbestos items across all your sites
- Non Asbestos Register all negative surveyed items across all your sites
- No Access Register all areas not accessed across all your sites
- Removed Register all items that have been removed across all your sites
- Remediation Register all items that have had remedial work undertaken across all your sites.

You can filter any of the registers by site so that you can see the register of your choice for a selected site only.

1. Display the required register by selecting the "Asbestos Register", "Non Asbestos Register", "No Access Register", "Removed Register" or "Remediation Register" option from the Registers menu.

The layout is the same for the first three registers, with the Removed and Remediation Registers showing additional removal or remediation details. The differences in the first three registers are the items selected to display in the register.

rch												
e Name	Build	ng Name		Floor Loca	tion	Location Description	Material	ltem	Sample Number	Identifica	ation	
ar Sean	ch Criteria										Search	
ords: 8												
ampled	Items Presumed Items	o Access	Areas No A	Access Items All								
Phot	o Site Name Buildin	Name F	loor Locati	ion Location Descriptio	n No Acces	s Item Materi	al ProjectNumber Approach Sample Numbe	er Extent Uo M Identifica	ion Material Score	Priority T	otal Recomme	nded Action II
_	63 Hay Street 63 Hay				N		X-00005			0	0	29
Acce	ss was not possible becau	e the roon	n was looked	d and a key was not avai	lable.							
	63 Hay Street 63 Hay	Street 0	010	reception	×.		×-00005			0	0	29
Acce	ss was not possible becau	e the roon	n was locked	d and a key was not avai	lable.							
	63 Hay Street 63 Hay	Street 0	008	Board Room	×.		X-00005			0	0	26
Acce	ss was not possible becau	e the roon	n was locked	d and a key was not avai	lable.							
	The Victoria 63 Hay	Street 0	011	Exploration Office			X-00011			0	0	20
Acce	ss was not possible becau	e the roon	n was locked	d and a k e v was not avai	lable.							
	The Victoria 63 Hay	Street 0	010	reception	2		X-00011			0	0	20
	ss was not possible becau											
Aute				Board Room	ave.						0	
	The Victoria 63 Hay						X-00011			0	0	29
Acce	ss was not possible becau	e the roon	n was locked	d and a key was not avai	lable.							
	Lasyard House	1	002	Kitchen	۲	Ceiling Void	X-00004	no		8	8	31
		ank 1		Utility Room	×		T-00294			0	0	33
Acce	ss was not possible becau	e the roon	n was locked	d and a key was not avai	lable.							

2. Use the search fields at the top of the register to search and filter the list as required. You might, for example, want to list only the Chrysotile asbestos items in a specific building.

There are also filter buttons, such as **Sampled Items** and **Presumed Items**, that let you apply pre-configured filters.

Use the navigation controls at the bottom of the page to display subsequent pages of data.

 You can also sort the data displayed in a Register by clicking on the column headings. For example, clicking once on the Location Description column heading sorts the data A-Z by the room description – clicking a second time reverses the order, Z-A.



X

 If required, you can export the data displayed on a Register to Excel[™] by clicking the Export to Excel button at the bottom of the screen:

The data is downloaded to your PC as an *.xls file for you to use as you wish.

Or you can click the **Print/PDF** button at the bottom of the screen to display a preformatted pdf of the Site Register Print. Hover on the pdf screen to display controls that let you download or directly print the register.

Home Removed Register 🗙 Remediation Register	r 🗙 Non Asbestos Register 🗙		
Search			
Site Name Building Name	Floor Location Location Description Material	ltem	Sample Number Identification
daisy			
Clear Search Criteria			Search
Records: 5	Site Register Print - Daisy Bank		×
Asbestos Register Non Asbestos Register Removed S			
			<u> </u>
Photo Site Name Building Nam			Identification Material Sco
Daisy Bank Daisy Bank	Register Print Daisy Bank		
	BUILDING FLOOR LOCATION ITTM MATERIAL REF NO EXT UNM IDENTIFICATION	MAT PRI TOT RECACTION II	
	Daisy Bank 1 004 Bathroom 2 Ceiling Void Insulating Board T-00294 P 10 m2	0 0 0 339	61
5			
Daisy Bank Daisy Bank	Dalsy Bank 0 001 Hall T-00294	0 0 0 339	62
Daisy Bank Daisy Bank	Daisy Bank 0 001 Hall Ceiling Plaster Board T-00294	• • • 339	63
Daisy Bank Daisy Bank			
	Daiay Bank 0 001 Hall Window SilkTimber T-00294	0 0 0 339	**
Daisy Bank Daisy Bank		3 0 3 339	
	Daisy Bank 1 006 Bathroom 2 Floor Vinyl Products T-00294 X 1 5 m2 Chrysotile	3 0 3 339	65
(VIII)			
Daisy Bank Daisy Bank			Chrysotile
SHOKEN -			
	1		
10 • Records per page A Print/PDF			



3.4 Exploring the Photo Registers section

The Photo Registers section of the Client Portal lets you view the photos and related item details in three registers:

- Asbestos Register all positive asbestos items across all your sites
- Non Asbestos Register all negative surveyed items across all your sites
- No Access Register all areas not accessed across all your sites.
- 1. Display the required photo register by selecting the "Asbestos Register", "Non Asbestos Register" or "No Access Register" option from the Photo Registers menu.

The layout is the same, whichever register you select. The difference is in the items selected to display in the register. The photo for the item is displayed on the left-hand side and the item details are displayed on the right.

	Photo - Asbesto	os Register 🗙	Photo - Non Asbest	os Register 🗙 Ph	oto - No Access Reg	ister 🗙	
arch							
Site Nam	1e	Building Name	Floor	Location	Item	Sample Number	Identification
Clear Sea	irch Criteria						Search
ecords: 8	3						
- AND - F				Site Name Building Name Floor Location Description Namerial Approach Sample Humber Extent Uo M Identification Material Score Priority Total	01 009 Plant Rom. Pipe work. Gaskets (compresse S 4 No. Visible Chrysotile 3 3	a)	
Notes			Can sa Cangana cagoo	Site Name	1744		
Notes	-	Alexandre		Site Name Building Name	1764		
Votes		Alana Const. og					
lotes				Building Name	di Paulo		
lotes				Building Name Floor Location Location Description	01 009 n Plant Room.		
lotes				Building Name Floor Location Location Description Item	01 009 n Plant Room. Pipe work.	_	
lotes				Building Name Floor Location Location Description Item Material	01 009 n Plant Room. Pipe work. Gaskets (compresse	d)	
lotes				Building Name Floor Location Location Description Item Material Approach	01 009 n Plant Room. Pipe work. Gaskets (compresse S	d)	
Votes				Building Name Floor Location Location Description Item Material Approach Sample Number	01 009 n Plant Room. Pipe work. Gaskets (compresse S	d)	
Notes				Building Name Floor Location Location Description Item Material Approach Sample Number Extent	01 009 n Plant Room. Pipe work. Gaskets (compresse S	d)	
Notes				Building Name Floor Location Location Description Item Material Approach Sample Number Extent Uo M	01 009 Plant Room. Fipe work. Gaskets (compresse S 6 10 No. Visible	d)	
Notes				Building Name Floor Location Location Description Item Material Approach Sample Number Extent	01 009 n Plant Room. Pipe work. Gaskets (compresse S	d)	

Use the search fields at the top of the register to search and filter the list as required. You
might, for example, want to see only the photos relating to a specific floor of one
building.

If no photo was taken for an item, as is often the case for non-suspect items, the item details are still displayed but you will see white space in place of a photo.





3.5 Exploring the Reports/Jobs section

The Reports/Jobs section of the Client Portal provides an overview of the reports that have been produced for you on Alpha Tracker. You can select an option to view:

 "Report Grid" – to see all the reports that have been produced across all your sites in a grid, with front page photos and location maps prominently displayed.

This display is similar to the Site Grid. Refer to Section 3.1.1, The Site Grid, for details on accessing information from a grid display.

- "Report List" to see a list of all the reports that have been produced across all your sites
- "This Month" to view a list of only those reports that have been produced during the current month
- "Pending" to display a list of jobs that are currently in progress, where the report is not yet available
- "Archived Report List" to display a list of reports that have been marked as archived, for example for properties that are no longer in your portfolio. Any projects marked as archived no longer show in the Report List or Site List, but they can be seen under this "Archived Report List" menu option.
- 1. Display the list of reports by selecting either the "Report List", "This Month", "Pending" or "Archived Report List" option from the Reports/Jobs menu.

Horr		Report	List X									
	ds: 4											
Sear	ch for:		Search	All								
	Site Name							Project Number PO	Site Address	Post Code Site Reference (UPRN)	Project Type	Report Produced Invoiced
×	100 Dublin Street		PDFs (1)	II Summary	Register (6)	Documents	Plans (0)	N-00510	100 Dublin Street Edinburgh		Asbestos Survey	
	Daisy Bank		DFs (0)	Summary	Register (7)	Documents	Plans (0)	T-00294	Daisy Bank, Bridgnorth	WV16 4QF	Asbestos Survey	12/02/2015
	63 Hay Street	and a Pa	PDFs (1)	Summary	Register (4)	Documents	Plans (0)	×-00005	63 Hay Street Haye-on-Wye	HR3 5AA	Asbestos Survey	16/02/2015
	Lasyard House	-	PDFs (1)	Summary	Register	Documents	Plans (0)	X-00004	Underhill Street Bridgnorth	WV18 488 ARL123	Asbestos Survey	16/02/2015

The layout of the screen is the same, whether you select the "Report List", "This Month", "Pending" or "Archived Report List" option. The difference is in the jobs selected to display on the list. It enables you to:

- see the front page photo of the report
- access a PDF of the report, with the number of PDFs available displayed in brackets
- display an asbestos summary for the survey
- display the asbestos register from the survey, with the number of Asbestos Containing Materials (ACMs) in the survey displayed in brackets
- access any documents you have uploaded related to the site
- display site plans, with the number of files available displayed in brackets.
- 2. Use the search field to filter the list by searching across the site name, project number, site address, postcode, site reference (UPRN or equivalent) and project type. For example, typing "re-insp" in the search field will find all those projects that have a project type of "Re-inspection".



- **3.** Click the **PDFs**, **Summary**, **Register**, **Documents** or **Plans** button to display the required information.
 - **PDFs** gives access to the PDF of the report produced. There is a link to download the document. Holding down the Ctrl key and clicking on the link opens the document in a separate tab. Controls in the top right-hand corner of the screen let you zoom in or out, or view the document full-screen in a separate tab from where you can also download and print the PDF.

Project Documents	×
αlphatrack	
Asbestos Management Survey Report	
100 Dublin Street	
<stepostcode></stepostcode>	
On behalf of	
Dublin Housing Reference: N-00310	
Kar Ankar Mana Mana Mana Mana Mana Mana Mana Mana	
	-

• Summary – displays an Asbestos Summary from the survey data showing the number of items present for each material score and an indicator of the risk level as identified at that survey. The risk results are colour-coded for clarity, with a key in the bottom left corner.

Asbestos Summary		×
Here is the Asbestos Summary f	or Project: N-00510	
NAG Items: 0	12	
No Access Items: 0		
Presumed Items: 2	9	
S Sampled Items: 4	6	
Key: Very Low Risk - Black Low Risk - Green	3	
Medium Risk - Orange High Risk - Red	0 1 2 3 4 5 6 7 8 9 10 11 12 Material Score	

• **Register** – shows the survey data for the report, with one row for each asbestos item. You can search and filter the list by using the search fields at the top of the screen.





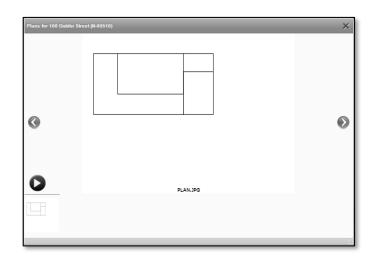
earch																		
Site Name		Building Name		Floor Loo	ation Loo	ation Descriptio	n Material			lter	•		Sample Number	dentification				
lear Search (2/teria													Search				
ecords: 4																		
Sampled Iten	ns Presumed Ib	ms No Access An	No Acce	ess liems All														
Photo	Site Name	Building Name	Floor Loo	ation Location De	scription No Acces	s Item	Material	Project Number	r Approach	Sample Numbe	r Exteri	Uo M	Identification	Material Score	Priority	Total	Recommended Action	ID
. 🖭	100 Dublin Stre			Reception			Insulating Boar						Chrysotile, Crocidolit				Manage	
The sam	se material was p	esent throughout th	e fint floor.															
3	100 Dublin Stre	et 100 Dublin Stree	и 0 002	2 Stairs				N-00510	SP						c	•		340
	100 Dubin Stre	et 100 Dublin Stree	et 0 004	Ladies WC		Celling Void		N-00510	Р			m3	Crocidolite			0	No action required	340
	100 Dublin Stre	et 100 Dublin Stree	et 0 003	8 Kitchen		Ducts	Insulation	N-00510	5	2	5	m3	Crocidolite	10		10	Encapsulate and Manage	340

- **Documents** lets you upload, store and access your own files that are relevant to the survey in some way, for example you might want to store procedures or general information relating to the site.
 - Click the Choose File button to upload a document that you want to file with the site or drag a document to the drop zone.
 - Click the underlined filename to download a document to your PC.
 - Click the **Delete** button if you want to remove a document from the document folder.

Client Uploads				×
Filename	Size	Created	Last Modified	^
Entry Procedures.docx	11434	22-Apr-15 13:18:22	22-Apr-15 13:18:22	Delete
Office Occupants.docx	11434	22-Apr-15 13:18:44	22-Apr-15 13:18:44	Delete
Upload file: Choose File No file chosen				
- Dro		es to upi click)	load	

• **Plans** – lets you display any plans that have been uploaded for the survey. All images stored in (or uploaded into) the \Drawings sub-folder (or other named sub-folder) of the project folder are displayed. If no plans are available then the button is greyed out.



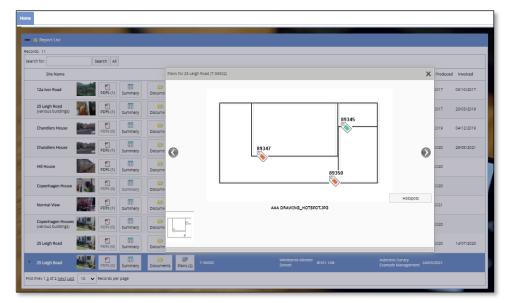


3.5.1 Viewing hotspot drawings on the Portal

Drawings that have had hotspots added in Alpha Tracker (automatically generated tags for survey items) can be displayed on the Client Portal and all tags viewed. These drawings are linked to individual projects.

To display the hotspot drawings:

1. Find the required project on the Report List and click the **Plans** button. The hotspot JPG file is displayed, for example:



If there is more than one drawing available, then the different drawings are displayed at the bottom of the screen, and you can click on the one you want to view or use the left/right arrow buttons to move between them.

2. Click on the **Hotspots** button and then on the link "**Click to view live plan...**" to access the hotspot drawing if one is available.





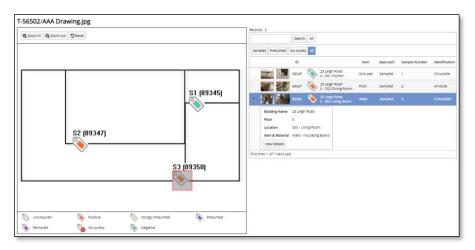
The live plan is displayed, with the drawing on the left and the list of survey items on the right:

	Records: 3
Q Zoom In Q Zoom out DReset	Search All
	Samples Presumed No Access All
	ID Item Approach Sample Number Identificat
	🔸 🚃 🚮 pasas 🔊 25 Leigh Raad Sink paid Sampled t Chrysottle
S1 (69 	Building Name 23 Jargh Rusd Roor 01 - Krothen Landim 01 - Krothen Rome Marterial Sink pild - Bisummous Product Vere Statis
S2 (89347)	BB3.47 Select Road Roor Sampled 2 Amoste
L.S.	09350 📎 25 Leigh Road Valis Sampled 3 crocoloin
\$3 (99350) •••	First the 1 of 1 her Last
🔉 Lincolaured 🔖 Positive 🦠 Stongly Presumed 🔖 Pr	
Removed No Access 🗞 Negative	

On the live plan you can:

- Easily see whether an item is positive, negative, presumed, no access etc by the colour of the tag on the drawing.
- Use the wheel on your mouse or the **Zoom in** and **Zoom out** buttons above the drawing to zoom in and out.
- Click and hold on the drawing and move the mouse to move the image in any direction.
- Use the **Reset** button to return to the default zoom and view of the drawing.
- Filter the list of items by using the buttons above the item list, eg to show only Samples or only No Access items.
- Click on a survey item on the list and see the hotspot flash making it easy to locate it on the plan.
- Click on a tag on the drawing to view summary details of the item on the item list on the right-hand side:





• See more item details, including the risk score breakdown and larger versions of the photos, by clicking the **View Details** button.



The hotspots cannot be amended from the Client Portal.

3.5.2 Viewing CAD drawings on the Portal

It is possible to view CAD drawings (DWG files) on the Client Portal, in the same way as you view hotspot drawings (see above). These drawings are linked to individual projects.

Find the required project on the Report List and click the **Plans** button to display project plans/drawings.

In order to view the DWG files stored with a project, you need to have a DWG viewer installed. Also there must be a JPG version with the same name saved in the same location as the DWG file.

The system displays only JPGs in the Plan viewer. If however the name of the DWG file is the same as the JPG, eg "Plan1.JPG" and "Plan1.DWG", then clicking the "i" icon displays the DWG file.

If you do not have a DWG viewer, then you can see the JPG. Any user who does have a DWG viewer has the ability to click through to the DWG version.



4. RUNNING REPORTS ON YOUR DATA

The Alpha Tracker Client Portal enables you to query your data using pre-defined data extracts. You can display the results on screen, search the results and, if required, download the data to manipulate further as you wish.

4.1 Running data extracts

The data extracts that you can run on the Alpha Tracker Client Portal are listed as Management Info reports. To run these:

1. Select "Management Info" from the Data Extracts menu. A list of the available reports is displayed.

Home	Data	a Extracts - Management Information 🗙	
Search	for:	Search Al	
	ID		
► 61	6562	All asbestos containing materiais Lists al asbestos containing materiais (including Presumed and Strongly Presumed)	
66	6564	All materials requiring management Lists all materials to be managed	•
66	6563	High priority materials requiring removal or encapsulation Lists all high priority materials requiring removal or encapsulation	•
6	6565	Non-Accessed areas Lists all areas not accessed	•
66		Non-Asbestos items Lists all non asbestos items that have been sampled (or cross referenced to samples) but are NAD (No Asbestos Detected)	1
64		Reinspections due Lists all sites with the month that the reinspection is due (ordered by reinspection due date in ascending order)	•

2. Select the report that you want to run and click the monitor icon to extract the data and display the results on screen, below the list of reports.

earch for:	Search All							
ID OI								
66562 All asbestos containi Lists all asbestos contai	ing materials ning materials (including Presumed and Strongly Pr	esumed)	Ę.	2 🛅				
66564 All materials requiring Lists all materials to be	g management managed		5	2 🛅				
66563 High priority material Lists all high priority material	is requiring removal or encapsulation lerials requiring removal or encapsulation		5	2 🛅				
66565 Non-Accessed areas Lists all areas not acces	and		Ģ	7 🛅				
66566 Non-Asbestos items Usts all non asbestos ite	erns that have been sampled (or cross referenced t	o samples) but are NAD (No Asbe	istos Detected)	2 🛅				
Obsecutions due	ems that have been sampled (or cross referenced is onth that the reinspection is due (ordered by reinsp			2 🛅 2 🛅				
Obsecutions due				2 🛅 2 🛅				Search:
66567 Reinspections due 66567 Reinspections due Lats al siles with the m	onth that the reinspection is due (ordered by reinsp	ection due date in ascending orde	r) Projec	2 🛅	Survey Type	Floor	Location	Location Description
06567 Reinspections due 66567 Lists al stes with the m Site Name 5-45 Benksia Road	onth that the reinspection is due (ordered by reinsp Building Name 46-46 Darksin Road	ection due date in ascending orde Servey Date 27/02/2014	r) Projes X-00003	2 🛍	Australia Survey	Floor 0	602	Location Description Bedroom
06560 Lists all non asteritos fe 06567 Reinspections due Lists all sites with the m Site Name 5-45 Danking Road Hay Street	onlih that the reinspection is due (ordered by reinsp Building Name 46-45 Danisla Froat 63 Hrs/ Sheet	ection due date in ascending orde Servey Date 27/02/2014 12/03/2014	r) Projec X-00003 X-00005	2 🛍	Australia Survey Australia Survey		002 005	Location Description Bedroom Board Room
Uses al non-astestos & 66567 Reinspections due Lists al stes with the m Site Name L45 Banksa Road I hay Sheet	onth that the reiespection is due (ordered by reiesp <u>Building Name</u> 46-40 Eastato Road 63 Hay Steet 63 Hay Steet	ection due date in ascending orde Survey Date 27/02/0314 12/03/2014	r) Projec X-00003 X-00005 X-00005	2 🛍	Australia Survey Australia Survey Australia Survey		802 608 010	Location Description Bedroom Board Room recepton
GEGEF Lists at non-astestos & GEGEF Reinspections due GEGEF Lists al sites with the m Site Name Site Name Hay Sheet Hay Sheet	onlin that the reinspection is due (ordered by reinsp Building Name 46-46 Sentaia Paol 43 FMy Street 43 FMy Street 43 FMy Street 43 FMy Street	ection due date in ascending orde Servey Date 27/02/0314 12/03/2014 12/03/2014	r) Project X-00003 X-00005 X-00005 X-00005 X-00005	2 🛍	Australia Survey Australia Survey Australia Survey Australia Survey		002 005 010 011	Every Section Description Every Room Every Section Every S
OLDER Late at non advertor ife OLDER Late at non advertor ife OLDER Late at size with the m Size Name Ab Dankis Road Hay Sizeet Hay Sizeet	onlin that the reinspection is due (ordered by reinsp 46-40 Building Name 46-40 Building Name 46-40 Startson Road 40 Hay Steet 40 Hay Steet 40 Hay Steet 40 Hay Steet 40 Hay Steet 40 Hay Steet	dise date in ascending order Servey Date 27/02/0314 12/03/2014 12/03/2014 12/03/2014 12/03/2014	r) Projec X-00003 X-00005 X-00005 X-00005 X-00005	2 🛍	Aastralia Sarwey Aastralia Sarwey Aastralia Sarwey Aastralia Sarwey Aastralia Sarwey		002 008 010 011 006	Exection Description Bedroom Board Room reception Exploration Office Stativel
Course Late al non-advertor & GESS7 Reinspections due Late al sites with the m Site Name Hay Sheet Hay Sheet Hay Sheet Hay Sheet	onth that the reinspection is due (ordered by reinsp Building Name 4-46 Daviasis Rossi 4-31 Hay Direct 4-31 Hay Direct 4-31 Hay Direct 4-31 Hay Direct 1-32 Hay Direct 1-32 Hay Direct 1-34 Hay Direct 1	edion due date in ascending orde 27/02/0914 12/03/2014 12/03/2014 12/03/2014 12/03/2014 12/03/2014	r) Projec X-00003 X-00005 X-00005 X-00005 X-00005 X-00005 T-00294	2 🛍	Aastralia Survey Aastralia Survey Aastralia Survey Aastralia Survey Aastralia Survey Aastralia Survey Example Management		602 605 610 611 606 603	Location Description Dedreom Beard Reem reception Exploration Office Starrowt Utility Room
USB List at non axbestos Re G6567 Lists at sites with the m Site Name -45 Elenkina Rood Hay Sheet Hay She	orth that the reinspection is due (ordered by reinsp 4-46 bankso Road 3) Hay Steel 4) Hay Steel	edion due date in ascending orde 27/02/0314 12/03/0314 12/03/0314 12/03/0314 12/03/0314 12/03/0314 12/11/0314 12/11/0315	r) Projet X-00003 X-00005 X-00005 X-00005 X-00005 X-00005 X-00005 X-00005 X-00005 X-00005 X-00005 X-00005 X-00005 X-00003	2 🛍	Australia Survey Australia Survey Australia Survey Australia Survey Australia Survey Example Management Example Management		002 005 010 011 006 003 003	Location Description Bedroom Board Reem reception Exploration Office Statmeti Utity Recent Reception
debails Littls all non asbestos fei de6547 Reinspections due Littls all alles with the en- Sittle Name Sittle Name Jing Zibert	Building Name Building Name Given State	Conception Survey Date 2702/2014 2003/2014 12003/2014 12003/2014 12003/2014 12003/2014 12013/2014 12011/2014 12013/2014 12011/2014 12013/2014 12011/2014 12013/2014 12013/2014	r) Project X-00003 X-00005 X-00005 X-00005 X-00005 X-00005 T-0224 N-03129 X-00011	2 🛍	Asstrate Survey Austrate Survey Austrate Survey Austrate Survey Austrate Survey Example Management Example Management Example Survey		602 008 010 011 006 003 003 008	Location Description Bedrom Board Room Exploration Office Starves Utility Room Reception Beard Room
Debisis Lafts all room asthetion Re de655 ² . Reinspections due de655 ² . Reinspections due def and the with the state Name field Reinstein Road dia Vag Direct dia Vag Di	orth That The reimpaction is due (ordered by reimp Beidding Name 4-6-0 Eartistic Float G 31 kg 70 Eart G	ection due date is ascending order 27/02/0914 12/03/0914 12/03/0914 12/03/0914 12/03/0914 12/03/0914 12/03/0914 12/03/0914 12/03/0914	r) x.00003 x.00005 x.00015	2 🛍	Asstratis Survey Asstratis Survey Asstratis Survey Asstratis Survey Asstratis Survey Esampis Management Esampis Management Asstratis Survey Asstratis Survey		002 008 010 011 006 003 003 003 003 008 010	Location Description Bedrom Board Rison reception Exploration Office Stativet Utility Room Reception Bard Rison Reception
66567 Reinspections due 66567 Lists all sites with the m	Building Name Building Name Given State	Conception Survey Date 2702/2014 2003/2014 12003/2014 12003/2014 12003/2014 12003/2014 12013/2014 12011/2014 12013/2014 12011/2014 12013/2014 12011/2014 12013/2014 12013/2014	r) Project X-00003 X-00005 X-00005 X-00005 X-00005 X-00005 T-0224 N-03129 X-00011	2 🛍	Asstrate Survey Austrate Survey Austrate Survey Austrate Survey Austrate Survey Example Management Example Management Example Survey		602 008 010 011 006 003 003 008	Location Description Bedrom Board Room Exploration Office Starves Utility Room Reception Beard Room

You can also download the data to an Excel[™] spreadsheet by clicking the spreadsheet icon instead of the monitor icon.

- 3. Work with the data as required, for example you might:
 - scroll through the displayed results by using the scroll bar on the right
 - search for specific entries by using the Search field on the right.



5. UPLOADING DOCUMENTS

This section describes how you can upload and store a range of documents related to the management of asbestos. Any documents that you upload are easily accessible to anyone with access to your Alpha Tracker Client Portal.

Users of the Client Portal can upload documents to folders on the Client Portal in three places:

- on each Site this folder is for documents that relate to the whole site
- on each Project this folder is for documents that are specific to individual projects/surveys
- in the "Other Documents" section these folders allow you to maintain a library of documents related to your management of asbestos.

5.1 Uploading site-related documents

Site-related documents might include the current site plan as well as general site files. Users with standard access permissions can upload or download general site files. Users with higher access permissions have the additional ability to upload the current site plan into a separate section of the Client Uploads and to delete files. With higher access permissions you might also have the ability to create subfolders in the Client Uploads section.

To upload and download documents that relate to a whole site:

1. From the Site List & Compliance Summary or from the Site Grid, click on the folder icon for the selected site:



- 2. Click the top **Choose File** button, next to Upload File, to upload a document that you want to file with the site, or drag a document to the drop zone.
- 3. Click the underlined filename to download a document to your PC.
- 4. Click the **Delete** button if you want to remove a document from the document folder.



Size	Created	Last Modified	
5705	22-Dec-16 13:00:14	22-Dec-16 13:00:14	Delete
	Created		
17374	22-Dec-16 13:02:01	22-Dec-16 13:02:01	Delete
15210	12-Dec-16 12:12:39	12-Dec-16 12:12:39	Delete
	Size 5705 Size 17374	Size Created 17374 22-Dec-16 13:02:01	Size Created Last Modified 5705 22-Dec-16 13:00:14 22-Dec-16 13:00:14 Size Created Last Modified 17374 22-Dec-16 13:02:01 22-Dec-16 13:02:01

Note that only users in the permission group "Client Admin" have the ability to delete documents. Users in the "Clients" group can upload and download but cannot delete documents.

It is also only users in the "Client Admin" group who can upload the current site plan. Users in the "Clients" group can only download this file.

5.2 Uploading project-related documents

To upload and download documents that relate to an individual project:

1. From the Report List, This Month, Pending or Archived Report List, click on the folder icon for the selected project:



- 2. Click the **Choose File** button to upload a document that you want to file with the project, or drag a document to the drop zone.
- 3. Click the underlined filename to download a document to your PC.
- 4. Click the **Delete** button if you want to remove a document from the document folder.



Client Uploads				×
Filename	Size	Created	Last Modified	
Entry Procedures.docx	11434	22-Apr-15 13:18:22	22-Apr-15 13:18:22	Delete
Office Occupants.docx	11434	22-Apr-15 13:18:44	22-Apr-15 13:18:44	Delete
Upload file: Choose File No file chosen				
- Dro		es to up _{click})	load	•

Note that only users in the permission group "Client Admin" have the ability to delete documents. Users in the "Clients" group can upload and download but cannot delete documents.

5.3 Maintaining a library of other documents

The Alpha Tracker Client Portal lets you upload any number of documents and displays them in a list from where you can easily download them at any time or delete them when no longer required. The "Other Documents" that you can upload to the Client Portal are grouped into three categories:

- Policies/Procedures
- Training
- Contractors.

You might, for example, want to store copies of training certificates for staff qualified to work with asbestos in the Training category or details of contractors with whom you are allowed to work in the Contractors category.

To upload a document:

1. Select "Policies/Procedures", "Training" or "Contractors" from the Other Documents menu depending on the category of document you are uploading.



Nome Other Documents - Policies Procedures 🗙 Other Doc	ouments - Training 🗙 Other Documents - Contractors	×	
Search Type Size	Created Modified		
Filename	Size Created	Last Modified	
Sabestos Management Policy.pdf	368560 2015-02-16 08:34	2015-02-16 08:34 Delete	
Search Strate St	368560 2015-02-16 08:35	2015-02-16 08:35 Delete	
Jpload file: Choose File No file chosen			
		- Drop file	

2. Click the **Choose File** button, browse to the file that you want to upload and select it. Your file is displayed on the list. Alternatively you can drag and drop the file onto the drop zone at the bottom of the screen, then when you next open the screen the file is added to the list.

	Other Documents - Tra	ining X Other Documen	nts - Contractors 🗙		
Search Type	Size	Created Modi	ied		
Filename	Size	Created	Last	Modified	
Search Strangement Policy.pdf	368560	2015-02-16 08	:34 2015	5-02-16 08:34	Delete
S 2 Working at Height Policy.pdf	368560	2015-02-16 08	:35 2015	5-02-16 08:35	Delete
Upload file: Choose File No file chosen					
On site procedures pd 85.2 KiB					
Home Other Documents - Policies/Procedures X Other D					
Other Documents - Policies/Procedures A Other D	locuments - Training 🗙	Other Documents - Contractors	×		
Search Type Size	e Created	Modified			
Search Type Size	Created	Modified	Last Modified	Datata	
Search Type Size	Created	Modified		Delete	
Search Type Size	Created Size C 368560	Modified	Last Modified	Delete	
Search Type Size	Created Size C 368560 87286	Modified Created 2015-02-16 08:34	Last Modified 2015-02-16 08:34		
Search Type Size	Created Size C 368560 87286	Modified created 2015-02-16 08:34 2015-04-22 13:58	Last Modified 2015-02-16 08:34 2015-04-22 13:58	Delete	

-

To download a document:

- 1. Select "Policies/Procedures", "Training" or "Contractors" from the Other Documents menu depending on the category of document you want to download.
- **2.** Scroll to the required document and click on its underlined name. The file is downloaded to your PC for you to open it and work with it as required.

You can also get a preview of a document without downloading it by clicking on the magnifying glass icon to the left of its name.

If you make changes to a document you have downloaded and want to make the new document available to others via the Client Portal, you will need to delete (or rename) the original from the Client Portal and upload a new version.

To delete a document, simply click on its **Delete** button.

Note that only users in the permission group "Client Admin" have the ability to delete documents. Users in the "Clients" group can upload and download but cannot delete documents.



6. MAINTAINING CONTACT & USER DETAILS

This section describes how you can update the contact details that are stored for you in Alpha Tracker. This means that you can maintain your name, address, contact and logo details yourself. You also have the ability to create additional sign-ins to your Client Portal.

Both these features are restricted to "Client Admin" users.

6.1 Updating your contact details

To display your contact details and update them as necessary:

1. Select "Our Contact Details" from the Contact Details menu to display the Our Contact Details screen.

Home Our Contact De	etails 🗙
The Next Cl	ient
General	
Address	9 Woods Street Norwood Adelaide
Contact	Joe Bloggs
Telephone	0414 700 489
Fax	
Email Address	joe.bloggs@thenextclient.com.au
Invoice	
Invoice Recipient	Janet Brown
Invoice Address	9 Woods Street Norwood Adelaide
Logo	
Company Logo	The Next Client
<u>></u>	

- **2.** Amend or update the details as necessary. You can upload a new or changed logo by using the Upload Logo link in the Logo section.
- 3. Save any changes you have made.

Note that only users in the permission group "Client Admin" have the ability to amend the details. Users in the "Clients" group can only view the details.



6.2 Creating additional users

You can create additional users for your Client Portal and manage the users by, for example, changing passwords and restricting which sites a user has access to. Only "Client Admin" users can see this menu option.

1. Select "Users" from the Web Security menu to display the Users screen.

Home	sers 🗙	
Records: 1		
Search for:	Search All	
	User ID/Email 🔺	Password
+ +	EG1	
*		
10 🔻	Records per page	日 ち

- 2. Add a new user by typing the username and password into the blank row at the bottom of the list.
- **3.** Save the new sign-in details. The sign-in is valid immediately and is automatically assigned the permissions for a standard Client Portal user, ie not Client Admin.
- 4. If required, restrict the sign-in to specific sites by clicking its plus button and specifying the sites to which this user is to have access. If no sites are specified, the user can access all sites.



7. UPLOADING BULK SAMPLES

In this section you can find instructions on how to enter and upload bulk sample details directly into Alpha Tracker for processing, if you have the option switched on in your Alpha Tracker Client Portal, and how to review your bulk samples.

7.1 Reviewing samples

You can see details of submitted bulk samples by using the Review Samples menu option. If results have been recorded you can see these by drilling down into the details.

1. Select "Review Samples" from the Bulk Samples menu to display the Review Samples screen.

arch												
oject N	lumbe	er		PO		Site Name			Sample Number	Records per page	Select Value	,
ear Se	arch	Criteria									Se	arc
cords:	3											
1	DF	Project Number PO	Site Name	•	Date Samples Taken	Date Analysed	Sample Number	Item Descript	tion			
13	<u>24</u> N	1-00603	12 The Gree	en 21/				Floor tile				
13	<u>25</u> N	4-00803	12 The Gree	en 21/	07/2015 01:54:41 28 pm		S02	Ceiling				
	-	4-00603	12 The Grou	210	07/2015 01:54:41 26 pm		S03	Toilet				

2. Drill into the details to see any results by clicking on the underlined ID on the required sample record. A summary of the asbestos sample analysis is displayed.

Asbestos Sample Analysis 🗙					
Detail View					
ID	1326				
Project Number	N-00603				
Site Name	12 The Green				
Sample Number	S03				
Item Description	Toilet				
NAD					
Crocidolite					
Amosite					
Chrysotile					
Anthophyllite					
Tremolite					
Actinolite					
Other					
× •• •	())>				

3. View each record in turn by clicking the next record navigation button at the bottom of the screen. If a sample has a positive result, the sample number is displayed in red, on the both the Review Samples screen and the Asbestos Sample Analysis screen.



7.2 Entering new samples

You can supply the details of your bulk samples that require analysis by your surveying company by typing them directly into Alpha Tracker, using the Enter New Samples screen. This creates a project for the surveying company and also sends notification emails.

1. Select "Enter New Samples" from the Bulk Samples menu to display the Enter New Samples screen. This is the first step of a two-stage process.

Home Enter New Samples	×
Name & Address	
Site Name	
Address	
Postcode	
Country	United Kingdom
Site Reference	
Contact Details	
Contact Telephone	
Contact Email	
Step 1 of 2 steps. Next >	

2. Fill in the fields to specify the site to which the samples relate, and the site contact details.

In the **Site Name** field enter the first line of the address, eg "77 Windermere Drive". Type the rest of the address in the **Address** field, eg "Priorslee, Telford".

Then click **Next** to display the screen for step 2.

3. Select the office to which you are submitting the samples from the list displayed. If there is only one office displayed, select this. Then click **Confirm**.

A screen is displayed for you to list the samples that you are submitting.

Home	Enter New Samples 🗙
Once ye	our samples in the form below. ou have added all the required samples, simply press "Submit Samples for Analysis" lew Sample" to get started!
Action	IS
•*	New Sample Submit Samples for Analysis



4. Click **New Sample** and enter the details of the first sample. You need only enter the Location eg "Kitchen" and the Item Description eg "Vinyl floor tile". Optionally you can also enter your own reference number. Then click **Save**. The saved sample details are displayed in a list on the right of the screen.

Home Criter New Samples X							
Enter your samples in the form below. Ince you have added all the required samples, simply press "Submit Samples for Analysis" Inch "New Sample" to get started!							
				Sample Number	Client Ref		
Sample Number	Additional Client Ref	Location	Item Description	1	ABC1	Kitchen	Vinyl floor tile
1	ABC1	Kitchen	Vinyl floor tile				
Actions							
▶® New Sample 🗙	Delete Sample 🛃 Submit Samp	les for Analysis					

5. Repeat step 4 for all the samples you are submitting.

Note that there is a **Delete Sample** button which you can use if you find you have made a mistake. Select the sample on the right then click the **Delete Sample** button to delete it.

6. When your list of samples is complete, click the **Submit Samples for Analysis** button and confirm the submission.

A message informs you that the samples have been submitted and that you will be signed out of the system.

7. Click OK to sign out.

Once the samples are submitted, the system sends an email to the email address given in the site contact details. The email confirms the site name, project number and list of samples. Your surveying company will also receive an email informing them of the submission.

Use the *Review Samples* menu option described in Section 7.1, Reviewing Samples, to track the status and results of your submitted samples once analysis is underway.

7.3 Uploading new samples

Instead of entering the details into a screen, you can use a spreadsheet to upload new sample details directly. A template spreadsheet is available for you to download, you need only complete the details and then upload it.

1. Select "Download Excel Template" from the Bulk Samples menu to display the Download Excel Template screen.

Version 1.10

F



Home Downlo	oad Excel Template 🗙					
Client ID	Sample Number	Building	Floor	Location	Extent	Item Description
Click the Excel but	tton below to download a	a template sp	readsheet.			
In the first colum	n, enter your "client ID"	'-ask your a	ccount ma	anager if you	are not sure	what this is.
Once you have co	mpleted the spreadshee	et, use the Up	load Excel	Template but	ton to send t	his data in for processing.
🕱 Click her	e to download the temp	ate				

2. Click the button at the bottom of the screen to download the template spreadsheet. The spreadsheet is blank apart from the column headings which inform you of the information required.

```
If you do not know your client ID please ask your account manager as this is required data.
```

- 3. Complete the spreadsheet with the bulk sample details and save it.
- 4. Use the **Upload Excel Template** button to upload the completed spreadsheet and submit it for processing.



8. RECORDING REMOVAL/ REMEDIATION DETAILS

It is possible to update survey items between surveys to reflect remediation or removal work. This can be done from within Alpha Tracker by your surveying company but may also be available in your Client Portal.

If it is available within the Client Portal, click the **Remediation Details** button on an item on the Asbestos Register. For example:

h																
Name	84	ilding Name		Floo	r Locatio	n	Location Description	Material		ltem	Sample Nu	mber Identificat	tion			
Search Criteria													Search			
ds: 33																
	Non Asbesto	s Register Rem	oved	Sampled	Items Presumed I	Items No A	coess Areas No Access	Items Limited Ao	cess items Exclude NAG and	LAG AI						
Photo	Cito Name	Pull-fing Name	Elec	r Locatio		intion No A	ccess Item Ma	tarial Project	Number Approach Sample N	umber Extent He	M Identification	Material Second	Delogity	Total Recommender	diffetion ID Externa	I Status
THOSE	Sile Hallie	Danany Hann	1100	T LOCAUC	in cocasion perci	ipaton no A			tumber Approach sample i		in identification	Haterial Score	Thomy	Total Hecciline Ide		_
							Celling Insula Board	T-00294			Tremolite					Remedia Details
							Remediation Details				×					
	Daine Dank	Daisy Bank		005	Bedroom		ID.	80990				0	0		81039	Remedia
	Dany Bank	Daisy Bank		005	Bedroom		Survey ID Floor	0	Remediation Type		•	0	0	°	61039	Deta
							Location	002	Remediation Status		•					
	Lasyard	Banksia Road	0	001	reception		Location Description	Ceiling	Estimated Cost			0.		6 Manage	29329	Remedia
	House						Material Code Material	INB Insulating Board	Actual Cost							Deta
							S/ P/ SP Extent	S 10	Cost Band		•					
	Lasyard House	Banksia Road	0	003	Beth's Office		Sample Number	2 Tremolite	Contractor			5	0	6	29330	Remedi
									Remediation Spec							
	Lasyard House	Banksia Road	1	001	Kitchen							0	0	9 Remove	31610	Remedia
goodbye kim									Remediation Complete		IB					
	Lesvard								Remediation Notes							Remedi
	House		1	002	Kitchen	8			100000000000000000000000000000000000000				8	8	31015	Detail
							Xz B									
							(13)									

This screen allows you to record remediation or removal details. The item will be marked as "Removed" if it has a **Remediation Type** of "Removal" AND either a **Remediation Status** of "Complete" or a **Remediation Complete** date. The following screen shows an example:

ID Survey ID	33965 71302	Remediation Type	Removal 🔻
Floor Location	1 006	Remediation Status	Complete 🔻
Location Description tem	Bathroom 2 Floor	Estimated Cost	
Material	VNP Vinyl Products	Actual Cost	
S/P/SP Extent	X 5	Cost Band	•
Sample Number Identification	1 Chrysotile	Contractor	
		Remediation Spec	
		Remediation Complete	
		Remediation Notes	



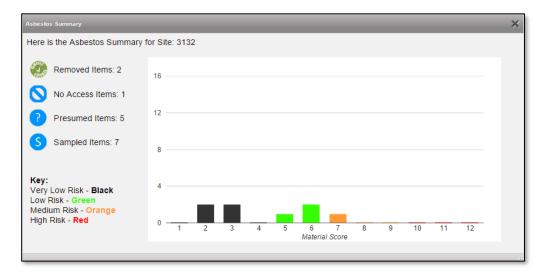
Positive items are marked as "Removed" on the Client Portal if any of the following are true:

- they have an **Approach** of "R"
- they have an **Identification** of "Removed"
- they have a **Remediation Type** of "Removal" AND either a **Remediation Status** of "Complete" or a **Remediation Complete** date. The following screen shows an example.

These removed items are easily identified on the Client Portal by a green "Removed" stamp and can be viewed on the Removed Register:



They are also visible on the Asbestos Summary graph:



Similarly, any items that have had remediation work recorded are visible on the Remediation Register.



9. MAINTAINING CONTRACTORS

In this section you can find instructions on how to enter and maintain contractor details, if you have the option switched on in your Alpha Tracker Client Portal. This option enables you to maintain a database of approved contractors.

9.1 Displaying contractors

You can see details of all contractors, including approved, pending approval and suspended contractors, and update them as necessary, by using the All Contractors menu option.

If you want to work with approved contractors only, then use the Approved Contractors menu option instead.

1. Select "All Contractors" from the Contractors menu to display a list of all your contractors.

The status column is colour-coded to help you quickly identify approved (green), suspended (yellow) and expired contractors (red).

Home	All Con	tractors 🗙									
Records:	3										
Search fo	or:		Sear	rch All							
Pending	g Approval	Approved	Not Approved	Suspended	Expired All						
ID		Contractor	Address	Post Code	Telephone	Email Webs	ite Status	Contact Name	Contact Mobile	Contact Email	Expiry Date
1		Start Software					Approved				14/03/2018
56		Tim Evison	2 The Row Much Wenlock Shropshire	TF13 6DW			Pending Approval	Tim	2222	eee	
▶ 57		AR Removals	High Street Newtown		0987654321		Expired	Harry Smith			
New Rec	ord 1	0 V Record	ds per page	×							

2. Double click on a contractor to open the Contractor Details screen.



Contractor Details	×
ID .	56
Contractor	Tim Evison
1	2 The Row Much Wenlock Shropshire
Post Code	TF13 6DW
Telephone	0987654321
Fax	
Email	
Website	
Status (Pending Approval Approved Not Approved Suspended Expired
Date Last Update	09/05/2018
Contact details -	
Contact Name	Tim
Contact Telephon	ne 1111
Contact Mobile	2222
Contact Email	info@email.com
Notes	
Restrictions	tions
Live Date	
Expiry Date	
	
×	田 「

3. Amend the details as necessary.

Note that you can also file documents against a contractor by using the folder icon. You might, for example, want to store certificates or agreements.

4. Save the changes.

9.2 Adding a new contractor

To add a new contractor:

1. Select "Add Contractor" from the Contractors menu to display a blank screen into which you can enter the new contractor details.





Home All Contractor	rs 🗙 Add Contractor 🗙	
Setup		Contact Details
ID	<auto></auto>	Contact Name
Contractor		Contact Telephone
Address		Contact Mobile
		Contact Email
Post Code	Lookup Address	Others
Telephone		
Fax		Notes
Email		
Website		Restrictions
Status	Pending Approval Approved Not Approved Suspended Expired	Live Date
Date Last Update		Expiry Date
L		
		+ E 9

2. Fill in the contractor details, using one of the radio button to indicate the status.

You can look up an address from a postcode by completing the **Postcode** field and clicking the **Lookup Address** button.

3. Save the new details.

A message asks if you would like to upload any files for the new contractor.

Confirmat	lion	×
Do yo ι	u want to upload file	(s) to this record?
	Yes	No

4. Select **Yes** to open the document folder.



Contractor 57 file(s)				×
Upload file: Choose File	No file chosen			
Upload to client uploads fold	er: Choose File No file ch	nosen		
Search	Туре	Size Created	Modified	
Filename	Size	Created	Last Modified	6
•	•Drop fi	les to up	pload	
	(0	or click)		

5. Use the **Choose File** button next to **Upload file** to select the files to upload.

9.3 Changing a contractor's status

If a contractor changes their status, for example by becoming approved or suspended, you can change their status on the contractors database.

- 1. Display the contractor's record on the All Contractors, Approved Contractors or Suspended Contractors screen.
- 2. Double click on the contractor to display their details.



Contractor Det	ails 🗙
ID	57
Contractor	AR Removals
Address	High Street Newtown
Post Code	
Telephone	0987654321
Fax	
Email	
Website	
Status	Pending Approval Approved Not Approved Suspended Expired
Date Last Upo	date
Contact de	
Contact Na	Harry Smith
Contact Te	lephone 0987654321
Contact Mo	obile
Contact En	nail
Notes	
Restrictions	
Live Date	
Expiry Date	10/07/2018
ĺ	
×	

- 3. Amend the details as require, eg by changing the Status.
- 4. Save the changes.



10. LOGGING ENQUIRIES

An optional feature on the Client Portal allows you to log new enquiries with your surveying company and also to view the status of your enquiries and quotes. You can find these options on the Client Portal, on the Enquiries/Quotes menu if this is switched on.

🕂 🏫 Sites
╋ 🔳 Registers
+ Photo Registers
+ 😰 Reports/Jobs
- Enquiries/Quotes
New Enquiry
My Enquiries
My Quotes
All My Enquiries
+ 🏶 Contractors

10.1 Logging an enquiry

Log an enquiry regarding asbestos surveys with your surveying company by using the New Enquiry menu option.

1. Select "New Enquiry" from the Enquiries/Quotes menu to display the New Enquiry screen.



Home New	Enquiry 🗙
Reference	Your reference number will be automatically generated
Contact	Kim Evison
Email	kim.evison@start-software.com
Telephone	0333 301 1010
Mobile	
Enquiry Details	What would you like us to do?
	E 5

- 2. Amend the Contact, Email and Telephone details if necessary.
- 3. Enter details of your enquiry in the Enquiry Details field.
- **4.** Save the enquiry.

An email is sent to your surveying company and the enquiry is logged in their Alpha Tracker. You may receive a message acknowledging your enquiry and giving you the reference number. The folder icon is then displayed on the screen for you to upload any supporting files, for example:

Home New Enquiry	×
Reference	TQ21-0009
Contact	Jason Dane
Email	jdane@daneenvironmental.co.uk
Telephone	01202 776883
Mobile	
Enquiry Details	4 x management reports required for October





10.2 Displaying your enquiries and quotation

You can view a list of the enquiries you have raised with your asbestos surveying company by using the My Enquiries and My Quotes options.

1. Select "My Enquiries" from the Enquiries/Quotes menu to display the My Enquiries screen. All your enquiries are listed.



2. Click on the underlined **Reference** to display and optionally amend the enquiry details.

10.3 Accepting or rejecting a quotation

Any open quotations raised by your surveying company are listed on the My Quotes screen. These open quotations are waiting for action by you. From here you can accept or reject a quotation at the click of a button.

1. Select "My Quotes" from the Enquiries/Quotes menu to display the My Quotes screen. All your quotations are listed.

Refresh Records: 2												
Search for. Search All												
	Reference Date	e Produced	Produced By	Туре	Site Name	Status	Value	Contact	Telephone	Email		
•	<u>AQ18-0006</u> 11/0			Management Survey	Squirrel Trees	Open	£1,000.00			kim.evison@start-software.com	Accept	Rejec
	AQ18-0005 07/0	6/2018	Elaine Porter	Asbestos Survey	Daisy Bank	Open	£250.00	Kim Evison	0333 301 1010	kim.evison@start-software.com	Accept	Rejec

Only summary details of the quotation are displayed on the screen. Please refer to the quotation sent to you by the asbestos surveying company for full details.

2. Click the **Reject** button if you do not want to accept the quotation.

You are prompted to confirm the rejection and then to enter some reject notes, where you can explain why you are not accepting the quotation.

3. Click the Accept button to accept the quotation and confirm your selection.

Accepted or Rejected quotations drop off the My Quotes screen.



4. Display all processed quotations (accepted and rejected) by selecting the "All Quotes" menu option.

Hom	e	All Q	uotes 🗙	:										
Refresh Records: 4														
Searc	ch for				Search All									
		Re	ference	Date Produced	Produced By	Туре	Site Name	Status	Value	Contact	Telephone	Email	Reject Notes	
•	+					Management Survey	Squirrel Trees					kim.evison@start-software.com		Accept
	+	TQ	18-0014	07/06/2018	Dan Darkin	Asbestos Survey	63 Hay Street	Accepted	€250.00	Kim Evison	0333 301 1010	kim.evison@start-software.com		
	+	AQ	18-0005	07/06/2018	Elaine Porter	Asbestos Survey	Daisy Bank	Accepted	£250.00	Kim Evison	0333 301 1010	kim.evison@start-software.com		
	+	TQ	18-0012	24/05/2018	Dan Darkin	Asbestos Survey	Daisy Bank	Won	£300.00	Andrew Greenfield	08 6253 1234	kim.evison@start-software.com		
10	•	Re	cords per	page										

You can accept a quote that has previously been rejected from this screen.

The plus button next to a quotation on the All Quotes screen lets you view details of projects created by the surveying company from a quotation. For example:

Home	e	All Quotes 🕽	۲									
Refre	sh	Records: 2										
Searc	h for			Search	All							
		Reference	Date Produ	ced Produced E	Зу Туре	Site Name	Status	Value	Contact	Telephone	Email	Reject Notes
	+	<u>TQ18-0014</u>	07/06/2018	Dan Darkin	Asbestos Survey	/ 63 Hay Street	Accepted	£250.00	Kim Evison	0333 301 1010	kim.evison@start-software.com	
•	-	<u>TQ18-0012</u>	24/05/2018	Dan Darkin	Asbestos Surve	/ Daisy Bank	Won	£300.00	Andrew Greenfield	08 6253 1234	kim.evison@start-software.com	
		Records: 1 Proj <u>T-56</u> 10	<u>052</u>	24/05/2018	Project Type Asbestos Survey		f					
10		Records per	page									

