αLPHATRACKER®

TRAINING GUIDE

Version 2.8

start software

DOCUMENT CONTROL

Document

Alpha Tracker Training Guide

Current Version

Version	Date	Issued Pages	Reason For Issue
2.8	April 2019	All	General updates, new screens

Previous Versions

Version	Date	Issued Pages	Reason For Issue
2.7	Nov 2017	All	Active Directory
2.6	February 2015	All	Extra Info fields
2.5	December 2014	All	Client selection
2.4	November 2014	All	Tabbing out of Identification and screen updates
2.3	September 2014	All	Updating milestones, Contacts & Addresses
2.2	August 2014	All	Updated screens and menu option
2.1	July 2014	All	Data validation added
2.0	July 2014	All	Renumbered
1.1	Mar 2014	All	Next Steps section added
1.0	Jan 2014	All	First issue

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SUMMARY

Objective

To master the basics of setting up a survey project in Alpha Tracker, entering results and producing a report.

Success criteria

We will have been successful if we can demonstrate capability in all of the functionality specified.

Results summary

Adding a new client

☐ Pass   ☐ Fail

Creating a new survey project

☐ Pass   ☐ Fail

Carrying out the survey

☐ Pass   ☐ Fail

Entering lab results

☐ Pass   ☐ Fail

Producing the report

☐ Pass   ☐ Fail

Viewing and editing the finished report

☐ Pass   ☐ Fail

ADDING A NEW CLIENT

This section contains a summary of the steps necessary to create a new client in Alpha Tracker.

Before you can create a project for a new client in Alpha Tracker, you must search for and, if necessary, set up the new client by entering their details on the New Client screen.

To add a new client:

1. In the Survey Quick Start menu section, type part of the client name in the top search field and then press **Enter** or click the magnifying glass to check whether the client is already set up.

| ✎ | *You can also search on the postcode in this field.* |

Any clients matching your search criteria are displayed in a list. If required, select the required client in order to review their details by clicking on the underlined client name. If the client exists, you can skip to setting up the survey project.

If the client does not already exist, click the "New Client" option on the Survey Quick Start menu to display the New Client screen in which you can enter details of the new client.

2. Type the ID which you want to apply to this client in the **Client ID** field.

    Typically, the ID is a short alphabetic code that helps you identify the client, eg "START" for Start Software.

✎   *Do not use the **Get Next Number** button if you want to use alphabetic codes as this button assigns a number as the Client ID.*

3. Type the client's full name in the **Name** field.

4. Use the four **Head Office Address** fields to enter the client's full postal address, and the **Post code** field for the postcode.

5.   Use the **Contact Details** fields to enter name, role, telephone, email and other details for your main contact at the client.

     The **Role** field is a self-learning dropdown, so if the role you require is not on the list simply type it in – it will be added to the list.

     You can categorise clients if you wish by using the **Client Type** field – this is another self-learning dropdown field which enables you to set your own categories.

6.   If you want to enter invoicing and credit check details for the client, click the Credit Details tab and fill in any appropriate fields.

     You have space to enter details of the main invoice recipient. If there are more to add you can do this later from the Client Details screen.

7.   If you want to record additional notes on the client, click the Notes tab and type the text in.

8.   Click **Save** to save the new client.

CREATING A NEW SURVEY PROJECT

This section describes the steps necessary to create a new survey project in Alpha Tracker.

To create a new project for an existing client:

1. From the Survey Quick Start menu section, click the "New Project" menu option to display the New Project tab.

2. Type the alphanumeric project number in the **Project Number** field. This is usually the office letter followed by a dash and then a five-digit number. The default office letter is displayed.

   To get the next project number automatically, simply click **Get Next Number**.

3. Enter the Client ID, if you know it, in the first section of the **Client** field, and tab out of the field to pull through the client's name and any other linked details. Or, if you do not know the ID, click on the magnifying glass in the second part of the **Client** field to search for the client. Type a part of the client details (eg part of their name, address or contact) in the **Search for** field and click **Search** to filter the client list. When you find the required client, click their **Select** link. The client's name and ID are then displayed in the Client field.

4. If appropriate, enter the quotation number in the **Quotation ID** field.

5. Enter the client's order number for the new project in the **Client Order Number** field.

6. Select the Project Manager for the project from the drop-down list on the **Project Manager** field.

7. Select the site for the project from the drop-down list on the **Site Name** field if you have set up sites, or type the name or first line of the address for the site.

   You could use this field to enter a one-line description of the work required for this project. You can also enter a UPRN number or similar in the **Site Reference** field.

8. Use the drop-down list on the **Project Type** field to select the appropriate type for this project.

> *The project type must already exist. To set up new project types, use the "Project Types" menu option from the Setup menu. As part of the project type, you can define the significant events that are usually associated with such projects or jobs, the milestone template – use the plus button on a project type record to set up these milestones. You can also include some standard text in quotations for each project type by typing the text in the **Quotation Template Text** field.*

9. Enter the estimated total value of the project in the **Estimated Total Project Value** field and indicate whether the job is fixed price in the adjacent tickbox.

10. Indicate the current status of the project by selecting from the drop-down list on the **Status** field.

> *The project status must already exist. To set up a new project status, use the "Project Statuses" menu option from the Setup menu. You need only supply a description of the project status.*

You can now complete the optional project information on the right-hand side of the New Project screen:

11. In the Milestones section, enter dates in any milestone that has been completed. For example, you might at this stage complete the **Quote Produced** and **Order Received** milestones.

> *Double click in the **Date** field of a milestone to insert today's date there and your staff name in the **By** field.*

You can complete additional milestones specific to the project type by clicking on the **More Milestones** button and completing the details.

The **Turnaround** field lets you select the priority of the project.

12. In the Contacts & Addresses section, specify the site contact, site address, invoice and report recipient addresses, and who commissioned the report.

Some of these details may have been pulled through from the site and the client.

13. In the Financials/Planning section, specify the estimated number of man days that the project will take.

14. In the Notes section, type any notes and specification details that apply to the project.

15. Save the new project details by clicking the save record icon at the bottom of the screen:

16. You may have additional fields that you need to complete for projects of the type you have specified. To access these fields click on the Notes/Other Info tab and use the **Other Info** and / or the **Scoping** button to display the fields. Complete as many as necessary for your project and save your entries.
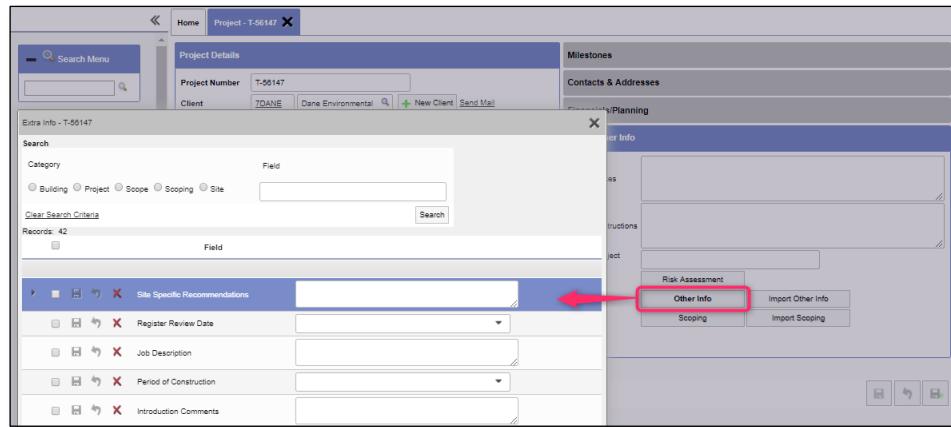
SETTING UP A SURVEY

This section summarises the additional steps necessary to create a new Survey project in Alpha Tracker.

If the project type of the project that you are creating has a category of "Asbestos Survey" (eg project type "Survey"), then a **Buildings** and a **Survey Details** button are available for you on the New Project tab to specify details specific to the survey.

To set up the additional details for a survey:

1. Click the **Buildings** button to display the Buildings screen for the current project.

2. Enter the details of the buildings included in the survey into the blank rows marked with an asterisk.

You need only enter information in the **Building Name** field, you may optionally number the buildings by using the **Building Number/Ref/UPRN** field.

An automatic entry may be set up for you from the **Site Name**. Ensure that buildings included have the **Included** tickbox ticked and any that you specifically want to exclude have the tickbox left blank.

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3. Click the **Save** button to save the building details and then close the Buildings screen.

4. Click the **Survey Details** button on the New Project screen to display the Survey Details screen.

When setting up a survey initially, you need only complete some of the first tab – 1-Survey Setup.

5. Select the **Survey Type** that you are adding, for example Management or Refurbishment.

> 🖉 *You must complete the Survey Type or the project will not be visible to surveyors on their phones/tablets.*

6. Enter any notes for the surveyor in the **Notes to Surveyor** field. These appear on the phone/tablet when the surveyor is capturing data onsite.

7. Optionally click the **Read from Buildings** button to pull through the included and excluded survey areas from the Buildings screen and amend or complete these as necessary.

8. Click the **Save** button at the bottom of the Survey Details screen and then close the screen to return to the New Project tab.

CARRYING OUT THE SURVEY

This section contains an outline of how to record survey details on your mobile device using Tracker Mobile.

All open projects are automatically downloaded to your mobile device the next time you synchronise, usually on a 5- or 10-minute cycle.

The process of recording the results of a survey on Tracker Mobile involves the following steps:

- start Tracker Mobile

- synchronise

- record survey items

- check items or revise entries

- synchronise.

To start Tracker Mobile:

1. Start Mobile Data Studio on your phone.

2. Tap on the Tracker Mobile icon:

3. Tap **Synchronise** to pull down all the latest data from your Alpha Tracker.

If a message asks you whether you want to update the project, click Yes. You should hear a beep and be returned to the Tracker Mobile icon which is now red to indicate that it has been updated.

Tap on the Tracker Mobile icon again.

You are now ready to start the survey.

4. Tap **Active Sessions** then **New Session**, complete the survey information for the first location, then tap **Finish**


🖉 *Tip: You can enter up to eight non-suspect items per sheet (session) and a maximum of one suspect item. For more non-suspect or suspect items in a room, create additional sheets (sessions) for the same room.*

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5. Once you have recorded items, they appear in your Active Sessions list which is displayed after you tap on *Finish*. Use this list to check your data before sending it in.

- You can review or edit any item on the list by simply tapping on it to open it.

- Ensure you complete a session for the Location 000, for your front page photo and other general information.

- Sort the Active Sessions list in different ways to check your data makes sense. Tap on a column heading to sort by that column. For example, sort the sessions by sample number to check that you haven't entered any duplicate sample numbers or missed any.

6. To send the data back in:

- from the "list" screen
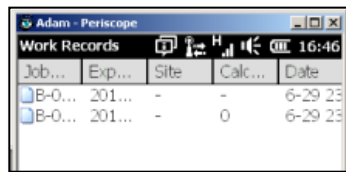
- tap **Menu** then select *Mark for Send*
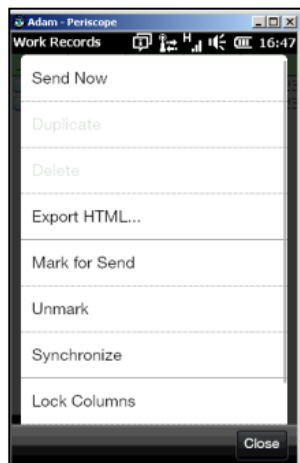
- tap **Menu** again and select *Synchronise*.

Two emails confirm the data you have sent in:

- The first is a confirmation email that you receive summarising the number of items sent in on a project. You will always receive this email and are advised to keep it in case of queries regarding the survey data. For example:

From: Alpha Tracker
Sent: 24 June 2014 15:27
To: Kim Evison
Subject: Tracker Mobile data received for A-00002

Project Number	A-00002
Surveyor	Dan Darkin
Sessions	27
Site Name	Lasyard House
Unit ID	Judy
Cover Sheet(s)	4
Samples [S]	8
Presumed [P]	3
Strongly Presumed [SP]	4
Cross-Referenced [X]	1
No Access Areas	6
Photos	23
Close-up Photos	13
Samples	2 [photo] 1 [photo] 3 [photo] 1 [photo] 2 [photo] 1 [photo] 2 [photo] [photo]
Duplicated Samples	

Please keep this email in case of queries about this survey data. Contact your Tracker/Alpha Tracker administrator if you believe that the information shown here is inaccurate

- The second is the results of AlphaValidator tests run on the data to test for completeness. AlphaValidator must be enabled on your system for this to be sent. A subset of the tests enabled on your system is run. The email shows the tests applied listed in the left-hand column and the results in the right-hand column. All "passes" are displayed in green and "failures" in red. For example:

AT   alphatracker@start-software.com   Kim Evison   10/05/2018
     AlphaValidator report for T-00004   ⌄

Test	Result
[B] Front Page Photo taken?	Yes - location 000 record found
[C] All items have buildings?	Yes - all items have associated buildings
[E] No duplicate samples?	No - 1 sample(s) duplicated - S1(x4)
[F] All no access rooms have reasons?	Yes - notes recorded in all no access rooms
[G] All items have surveyor and date?	Yes - all items have surveyor and date
[H] All suspect items have photos?	Yes - all suspect items have associated photos
[J] All suspect items have close-up photos?	No - 6 suspect item(s) with no close-up photo - P2, P1, S1, X1, X1, X1
[M] All suspect items have sample notes?	No - 3 suspect item(s) without specific notes - X1, X1, X1

ENTERING LAB RESULTS

This section describes how to enter lab results for the survey details that have been sent in by your surveyors using Tracker Mobile.

When the surveyor has sent in the results of a survey, these details are available for checking and editing in Alpha Tracker. Any samples that have been taken require laboratory analysis. If you receive summary results from an external lab, when the results are received you must update the survey with the analysis results.

To check the survey details sent in:

1.   From the Survey Quick Start menu section, click the "Check Survey Data" menu option.

2.   Click the magnifying glass icon in the **Choose Project** field and search for and select the project for which you want to check details and then click **OK.** The survey details are displayed.

There is a row for each item in the survey on the left-hand side. Click on a row to display its details on the right-hand side.

3.   Check the details displayed, ensuring that items are complete, sensible and text is spelled correctly.

4.   Make any corrections that are necessary and click **Save** to save your changes.

To enter the received lab results:

1.   From the Survey Quick Start menu section, click the "Enter Lab Results" menu option.

2.   Click the magnifying glass icon in the **Choose Project** field and search for and select the project for which you want to enter results and then click **OK**. The Enter Lab Results tab is displayed listing all the samples from the survey.

3. Select or type into the bright yellow **Identification** field the analysis result as received from the laboratory analysis. This screen is very wide and you may have to scroll over to the right.

   The **Asbestos Type, Material Score** and **Total Risk Score** are automatically completed according to the asbestos identification selected.

> ✎ *Ensure that you tab out of the last **Identification** field before saving so that all the scores, including those for the last sample, are set.*

   If multiple asbestos types are identified in the analysis, type these in separated by a comma (eg "Crocidolite, Amosite") – the details from the highest scoring type are used.

4. Save any changes you have made to the survey data by clicking the **Save** button and close the Enter Lab Results tab.

PRODUCING THE REPORT

This section describes how to generate a survey report in Alpha Tracker once the survey data has been entered and the lab analysis completed.

To generate the report:

1. From the Survey Quick Start menu section, click the "Produce Report" menu option.

2. Click the magnifying glass icon in the **Choose Project** field and search for and select the project for which you want to produce a report and then click **OK**.

   The Survey screen is displayed for the selected survey project.

3. Tap on the second tab – 2-Survey Complete – to display a summary of the survey data and the front page photo.

4. Run the automatic data validation checks by clicking the **Validate** button.

A message informs you when the checks have completed. Click **OK** to close the message. The validation results are displayed.

The tests applied are listed in the left-hand column and the results in the right-hand column. All "passes" are displayed in green and "failures" in red.

A data_check.htm file is created and stored in the project folder each time you run the validation checks. This is backed up and renamed _1, _2 etc like other generated files to provide a history of data validation checks run.

5. If there are any red results from the validation check, display the survey data and make corrections as necessary. You can use the View Asbestos Data button on the same screen to display the survey data.

6. Re-run the data validation checks until you are happy the survey data is complete and the report is ready to be run.

7. When you are satisfied with the survey data and you are ready to produce the report, click the **Draft** or **Final** button to begin document generation.

   The difference between the **Draft** and the **Final** buttons is in the naming of the filename. The draft report has "DRAFT" at the front of the filename so that it is clear that this file is a draft report and this also prevents the file from appearing on the Client Portal by mistake.

   Draft status can easily be removed from a file by clicking the "Remove Draft Status" button on the View Documents list.

8. When the report has been generated you will receive an email notification with the report attached. The report document and PDF will also appear in the View Documents list.

✎ *You can produce the report any number of times. All previous versions are saved as numbered backups.*

VIEWING AND EDITING THE REPORT

The section explains how to locate reports you have created, and to review and edit the contents of the report.

When a report has generated, you receive an email notification with the Word document and PDF attached. This is the easiest way to access the generated report.

The report is also available for download to your PC from the Documents folder. You can edit the downloaded report and, when it is complete, upload the report again so that the Documents folder always contains the most up-to-date copy.

To view and edit the report:

1. Search for the survey project.

    You can search for the project in a number of ways:

    -   entering a key word or project number into the quick search field at the top of the Projects menu
    -   selecting the "Project List" menu option and entering search criteria to find the required project
    -   selecting one of the "Open Projects by …" menu option and finding the required project.

2. Click on the required project number to open the survey project.

3. Display the Documents folder by clicking the **Open Document Folder** icon at the bottom of the Projects screen.
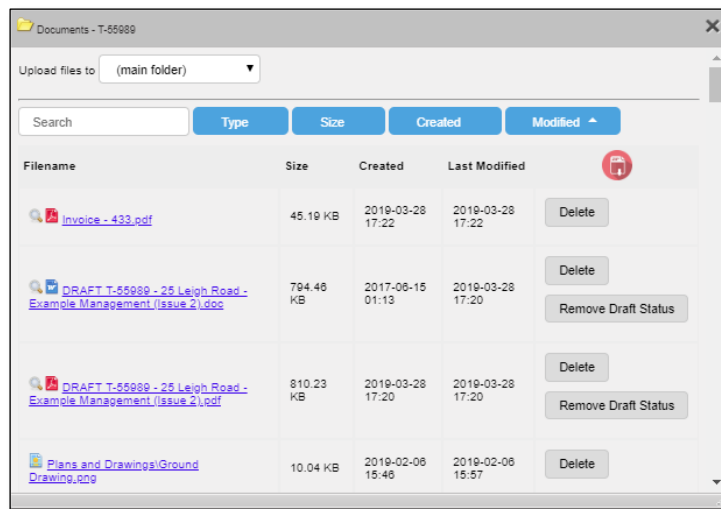
4. Find and click on the project report that you want to review. The document is downloaded to your PC where you can open the report in Word and edit the content as required.

5. Save the amended report and PDF it.

6. Upload the amended document and PDF back to the Documents folder.

    • Ensure **Upload files to** is set to the correct destination. By default, it is set to the main folder, but if you want to upload files to a subfolder you must select the subfolder here

    • Scroll down to the bottom of the files listed in the Document folder until you reach the Drop zone.
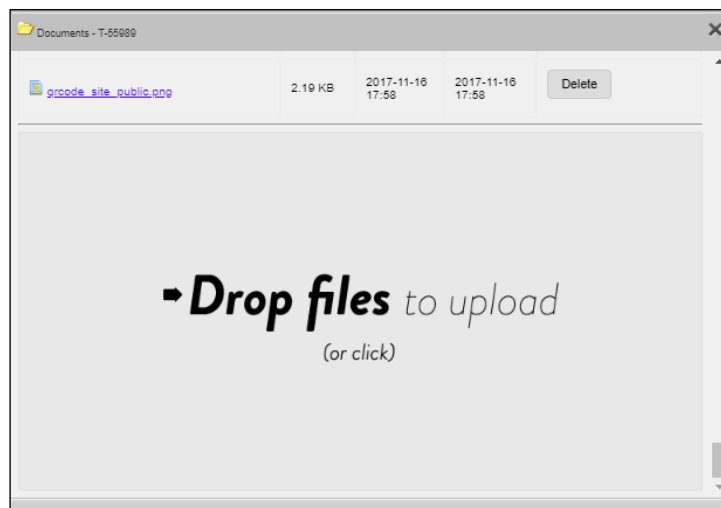
    • In the Drop zone, use either of these methods:

        – click in the Drop zone, which opens a file selection window, and browse to and select the files to upload

        – open File Explorer, browse to the files you want to upload then drag and drop the files onto the drop zone.

NEXT STEPS

Practise

Practise using your new Alpha Tracker software so that you become more familiar with how it works and to make best use of the information learned from the Training. In particular, make sure you use Tracker Mobile to practise capturing survey data on your phone or tablet.

There are YouTube videos to help remind you of the process. To find these videos, go to www.youtube.com and search for "Tracker Mobile #1". There are seven videos in total, each covering a different topic, simply change the final number in the search text to find all seven, eg "Tracker Mobile #2", "Tracker Mobile #3" etc.

The videos are:
- Tracker Mobile #1 – intro
- Tracker Mobile #2 – recording a sample
- Tracker Mobile #3 – no access to room
- Tracker Mobile #4 – cross referenced sample
- Tracker Mobile #5 – duplicating a room
- Tracker Mobile #6 – presumed items and no access areas
- Tracker Mobile #7 – completing and sending.

Check your data setup

Your next steps are to check the setup items in your Alpha Tracker to ensure that the system will work with the correct base data for your company. This means checking the following:
- staff
- materials
- project statuses
- project types
- recommendations
- standard comments.

Checking staff

You must set up staff details before you can record the involvement of members of staff in projects. Staff must also be recorded on the Staff tab before they can be assigned a user ID and given access to the system.

> ✎ *Tip: When a member of staff leaves, keep their details recorded on the system as this enables the regeneration of reports in which they appear. Simply mark them as inactive (Not Current) and change their login details.*

To maintain staff details:

1. Open the General submenu from the Setup menu and select "Staff" from the Setup menu to display the Staff screen.

Scroll to the right to see all the fields on this screen. You can enter search criteria against the name of the member of staff in the top of the screen to filter the list as required. There are also ready-made filter buttons to display current or former members of staff only.

2. To add a new member of staff, in a blank row marked with an asterisk, enter the full name and contact details of the member of staff in the **Name, Email Address** and **Mobile Number** fields. The **Staff ID** is automatically generated.

3. Make the member of staff active on Alpha Tracker by clicking the No button for **Not Current**. If you ever want to mark staff as having left you can click the **Yes** button to make them not current.

4. In the **Group** field set the group to which the member of staff belongs. Staff groups are the role types or the employee groups that take part in projects. If appropriate, you can also set a **Sub Group**.

5. Select the office to which the member of staff belongs in the **Office** field and their title for reports in the **Title** field.

6. Specify whether the member of staff is to appear in the drop down list of Project Managers by clicking on the appropriate **Can Project Manage** radio button.

7. Type the staff member's name as it is to appear on reports in the **Name For Reports** field.

8. Enter postcode and contact details in the **Home Postcode**, **Office Postcode**, **Notes** and fields.

9. If you are using the Calendar Sync tool, enter the member of staff's Calendar ID in the **Google Calendar ID** field to link their Google Calendar™ and Alpha Tracker. Alternatively, if you are linking your Microsoft Outlook™ Calendar and Alpha Tracker, complete the **Exchange Email** field.

> ✎ *If you are using the Calendar Sync tool, refer to the separate documentation to set up the user's Google Calendar™. Contact Start Software if you want to synchronise with Microsoft Outlook™ Calendars.*

10. If the staff member uses a phone or tablet for capturing survey details, enter the ID of their device in the **Unit ID** field.

11. Save any changes you have made and close the screen.

Checking materials

Material codes are used to identify materials surveyed and consist of a three-letter code and a description. Materials are assigned product type scores and may be defined as Asbestos-Containing Materials (ACMs). You must set this list to be your list of materials before you start surveying.

To maintain the materials list:

1. Open the Lab and Surveys submenu from the Setup menu and select "Materials" to display the Materials screen.

2. To add a new value, in a blank row marked with an asterisk, type the three-letter code and description in the **Material Code** and **Material Description** fields.

3. Select a radio button to indicate the **Product Type Score** for this material – 0, 1, 2 or 3 – and tick the **ACM** box if the material contains asbestos.

4. If you have your own lab, indicate the number of **Lab Points** accrued by analysing this material.

5. Tick both the **Show In Lab** and **Show On Mobile** boxes for the material to be generally available.

6. To delete a material code, click on the red cross on the appropriate row.

7. Save your changes and close the Materials screen.

Checking project statuses

Alpha Tracker has a list of descriptions that are used to indicate project status. You apply these project status descriptions to projects as they progress.

To maintain the project status descriptions:

1. Open the General submenu from the Setup menu and select "Project Statuses" to display the Project Statuses screen.

Any project statuses already defined are displayed.

2. To add a new status, in a blank row marked with an asterisk, type the required new project status description.

3. To delete a status, click on the red cross on the appropriate row.

4. Click the **Save** button on the record or at the bottom of the list to save the status changes.

Checking project types

Each project or job in Alpha Tracker must have a type assigned to it. As part of the project type, you can define the significant events that are usually associated with such projects or jobs. These significant events form a milestone template for the project type.

To maintain project types:

1. Open the General submenu from the Setup menu and select "Project Types" to display the Project Types screen.

A list of project types is displayed. You can enter search criteria in the top of the screen to filter the list as required.

2. To add a new project type, in a blank row marked with an asterisk, type the **Name** to use for the project type, the **Description** to help you identify how this type is used and the **Category** to define the additional buttons and screens available to this project type.

3. Use the plus button on a project type record to set up the milestones for projects of this type:

   - Type a number to indicate the position of the milestone in the sequence in the **Position** field.

   - Type a description of the event in the **Milestone** field.

   - Specify how to calculate the target date for this milestone by entering a number of days in the **Target** field. The target date is calculated as the specified number of days after the Project Opened date or after the completion of the previous milestone.

   - Save the milestone changes and close the screen.

4. You can also include some standard text in quotations for each project type by typing the text in the **Quotation Template Text** field. Contact Start Software to change your template instructions if you want to use this feature.

5. To delete a project type, click on the **Delete** tickbox on the appropriate row(s).

6. Click the **Save** button on the record or at the bottom of the list to save the details.

Checking recommendations

You can set up short forms of recommendations for surveyors to select and link these to longer paragraphs for insertion in reports. If required you can also set a timescale for action.

To maintain the recommendations:

1.   Open the Lab and Surveys submenu from the Setup menu and select "Recommendations" to display the Recommendations screen.

2.   To add a new value, in a blank row marked with an asterisk, type the short description of the recommendation in the **Description** field.

3.   If you want to link the recommendation to a longer piece of text, type this text in the **Comment** field.

4.   If you want to associate a timescale for action with the recommendation, type this in the **Timescale** field.

5.   Save your changes and close the Recommendations screen.

Checking standard comments

If standard comments are used in Tracker Mobile, then you can set up the short form for use in Tracker Mobile and the longer version for use in your reports.

To maintain standard comments:

1. Open the Lab and Surveys submenu from the Setup menu and select "Standard Comments" to display the Standard Comments screen.

2. To add a new value, in a blank row marked with an asterisk, type the short description of the standard comment in the **Short Description** field.

3. If you want to link the comment to a longer piece of text for your reports, type this text in the **Description** field.

4. Save your changes and close the Standard Comments screen.