Release 28 - Alpha Tracker Release Notes

New Features / Changes (from SVN2841 to SVN3056)

1. With the introduction of GDPR, there are some important new features now available in Alpha Tracker.
   There is a new tab on the Client Details screen called "Data Protection Details" that collects together GDPR-related information.

This gives you a "Client Data Link" that you can provide to the client so they can see what information you hold in Alpha Tracker about them. If they click this link they will see the information set out like this:

The client has the ability to edit the details directly by amending the information displayed and clicking the **Save** button, or to request the removal of their details by clicking the **I want to remove my details** button.

The "Data Protection Details" tab also provides a link to your Data Protection Policy, states who your Data Protection Officer is and how the client has

confirmed they may be contacted.

All the settings that control this information are held in one location on your Alpha Tracker, on the Setup menu, in the new Data Protection section.

Here you can specify:

- Data Protection Notification Email Address
- Data Protection Notification Email Body
- Data Protection Notification Email Subject
- Data Protection Officer Name
- Data Protection Officer Wording (the text displayed at the bottom of the summary of data you hold on a client)
- Data Protection Policy Document URL
- Data Protection Policy Wording (the text displayed at the bottom of the summary of data you hold on a client).

2. Alpha Tracker has a new link to the Really Simple Systems CRM software, a CRM system that is proving popular with our clients. You can use Really Simple to track opportunities, sales pipeline, carry out mailshots etc, and then easily bring data into Alpha Tracker. There are three settings in Alpha Tracker: "Really Simple API Client ID", "Really Simple API Client Secret" and "Really Simple API URL", and you can obtain the appropriate details for these settings from Really Simple.

In Alpha Tracker, once you are linked to Really Simple, and you start to enter a new quotation, you will see an **Import from CRM** button. First click **Get**

Next Number then simply click the **Import from CRM** button to select and pull in details of an opportunity from Really Simple.
You can also use the **Import from CRM** button on the New Client screen to pull in new client details.

3. There have been further developments on QR codes, including room-based QR codes, ie items with the same survey ID, building ID, location number and floor. Room-based QR codes can now be generated and used from Alpha Tracker.

4. There has also been work on password-protected QR codes with both public and private QR codes. With private QR codes, you are taken to a "landing page" to enter your name, company, password and to agree to a statement before viewing data. You can specify the text of the statement in a setting "QR Code Agreement Text" and you can enter the QR code password for a client on the Client Details screen:

5. Also on QR codes, there is:
   - New functionality to download reports from project QR codes.
   - Site QR codes can display the PDFs available in the Client Uploads subfolder of the site.
   - Performance improvements have been made to QR code data screens, which include a wait message while data is being requested and 20 items being displayed per page. In addition, the display "auto-fetches more" so that as the user scrolls, the data is requested.

- PDF registers give you the option to select the QR code type that is to be included in the PDF produced. This is available from the site Register and from the QR Code Labels button on the Survey Items screen.
6. The Survey Items screen no longer displays QR codes immediately, you can now access them via a "View QR Codes" button. This is due to the increased number of QR codes that can now be displayed.
7. A new feature has been added to the Client Portal that allows clients to log new enquiries themselves and also to view the status of their enquiries and quotes. You can find these options on the Client Portal, on the Enquiries/Quotes menu if the setting "Show the Enquiry Section on the Client Portal?" is set to yes.
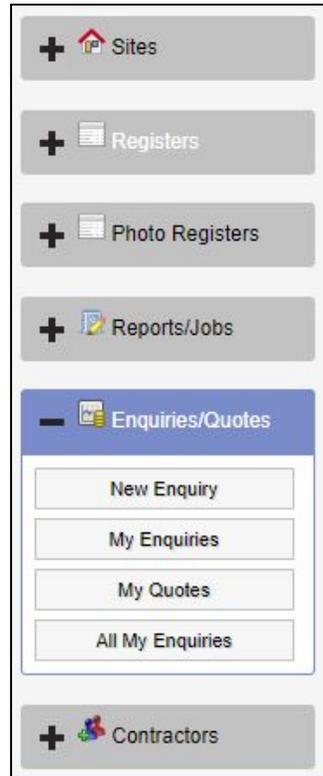
Your clients can log an enquiry by using the New Enquiry menu option:

When an enquiry is raised, an email is sent to the email address specified in the "Client Portal Enquiry Notification Email Address" setting. You can set up messages for a client to inform them that you have received their enquiry. This is controlled by the setting "[client name] new enquiry message". For example:

The office letter used for the enquiry is from the default office letter setting if the client does not have their own default office letter set up.

The client can view a list of their enquiries by using the My Enquiries option:

If you create any quotations for the client, then any open quotations for the client are listed on the My Quotes screen. From here your client can accept or reject a quotation at the click of a button:

If a quotation is rejected, your client is prompted to enter some reject notes. The quotation is marked as Lost and the client's reject notes are displayed in the Reason field.

There is both a My Quotes option and an All Quotes, the latter allows your client to see all their processed quotations - accepted and rejected - and lets them accept a quote that has previously been rejected.

Quotes that are accepted from the portal are assigned a new status of "Accepted". You can search the Quotation List by this status to find them. In addition, the system emails the address specified in the setting "Client Portal Enquiry Notification Email Address" when quotations are accepted or rejected.

The plus button next to a quotation on the All Quotes screen lets your client view details of projects created from a quotation. For example:

It is also possible to control some of the information shown here by using two new settings: ShowProjectStatusOnClientPortalQuotes and ShowDiaryDatesOnClientPortalQuotes. Click on the underlined project number to see this additional information.

8. Additions have been made to the Contractors section on the Client Portal to:
   ● allow the use of a postcode lookup for addresses (Lookup Address button)
   ● allow the upload of supporting documents
   ● show the folder icon on the list and detail screens to allow easy access to uploaded documents
   ● add colour-coding on the status of contractors on the All Contractors list.

9. The "Linked Report List" on the client portal will now, if switched on, only be displayed to client logins that are not restricted by site.

10. If your client portal is set to hide recommendations for NAD items, then the recommendation is also hidden on the PDF register.

11. By default, registers on the client portal (and also the Client View Register) are now ordered by Building, Floor, Location.

12. There have been some updates to the optional Training module, including:
   ● ordering all reports by expiry date
   ● excluding award training from certificate expiring reports
   ● some alignment, cropping and downloading fixes
   ● adding validation to staff training courses setup to prevent overlong (max. 128 characters) names and allow name changes
   ● adding a subgroup dropdown box to the Training Matrix.

13. Some changes have been made to the Xero processes for credit notes, including:
   ● a new function generates the credit note XMLs
   ● a different function generates the XML based on the type (I or C)
   ● the Xero Export screen now shows both invoices and credit notes.

14. For Hazmat users, there has been an update to all Hazmat material MDS process triggers to process the PPC Building Name so that building records are created and assigned to the relative records.

15. The Sites screen has a new layout which groups the fields together in a more logical order, the name and address fields are kept together, as are the contact details:

16. From the Project Details screen, if you click the Word/Excel button you can no longer type directly into the Template Name field but are forced to select from the dropdown list. The Send Document Request button is disabled until a valid selection is present in the Template Name field.
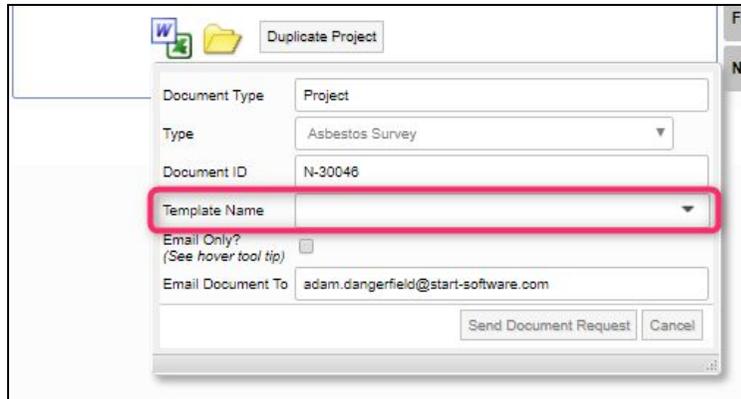
17. Risk Assessment Type A now includes the Surveyor name, as a dropdown, and the date, so that it is possible to display the name, date and signature on a Risk Assessment document.
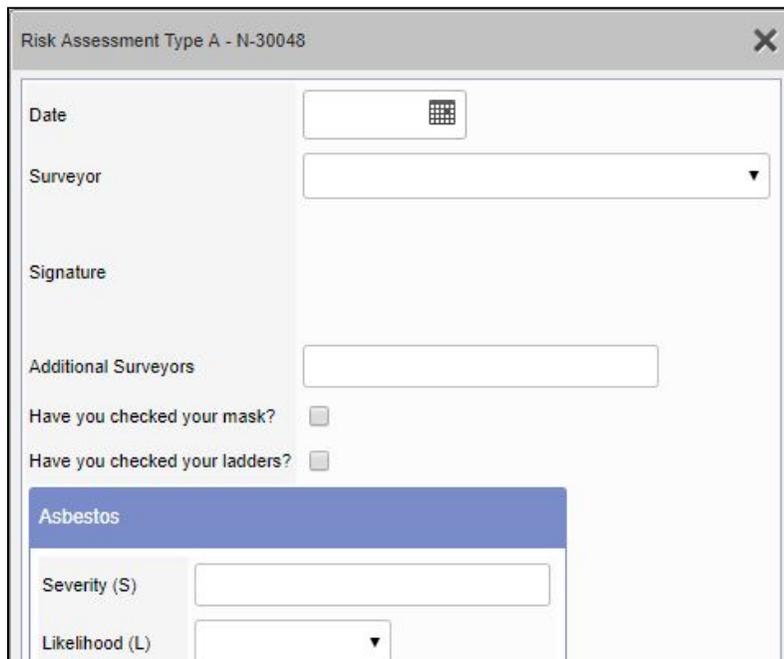
18. Risk Assessment Type B (the summarised version) now works with all types of projects, not just surveys. So if you want your surveyors/analysts to use the risk assessment data capture when working on projects of any type they now can.

19. There is a new menu option that lets you export survey items for a project. It can be found under Setup, Import/Export and is called Survey Items Export. Simply specify your project number, click Search, then check you have the right data and click the Download to Excel button at the bottom of the screen.

Home	Survey Items Export ✕								
Search									
Project Number	N-30046								
Clear Search Criteria		Search							
Records: 12									
Date	Surveyor	Building	Floor	Location	Location Desc	Item	Material Code	Material Desc	Approach	Sample No.	Sample Notes
26/04/2018	Robin Bennett		0	000						
26/04/2018	Robin Bennett		3	001	Office					
26/04/2018	Robin Bennett		3	001	Office	Ceiling	PLB	Plaster Board		
26/04/2018	Robin Bennett		3	001	Office	Internal wall	PLB	Plaster Board		
26/04/2018	Robin Bennett		3	001	Office	Floor	CPT	Carpetted / carpet tiled		
26/04/2018	Robin Bennett		3	002	Office	Door	INB	Insulating Board	S	1

20. When your login to Alpha Tracker is about to expire, you are now presented with a session timeout warning which means you have the chance to reactivate your login before it expires. There is also a message displayed once your session has timed out so that you are aware and can immediately log back in.

21. If you are using the video feature in Alpha Tracker, there is a new setting that lets you control the transition time between slides. The setting is "slideTransitionSpeedForVideosFromReports".

22. A new setting allows you to specify that Alpha Tracker is to update the Report Produced Date on a project when Bulk Certificates are generated. If this setting ("Update Report Produced Date when Bulk Certificates are generated") is set to yes, then clicking the **Generate Certificate** button from a Bulk

Sample project will update the Report Produced milestone.

23. Improvements have been made to the Bulk Sample Setup screens, especially to the auto-numbering feature, allowing you to work with more than one Sample Setup screen open at the same time and making it easier to auto-number additional samples added later.

24. There have been changes to the Get Next Number function in that a new setting allows you to automate the process. The setting is "Automate Get Next Number". If this is set to yes then the project number or quotation number will be set automatically when the screen is opened. If this is set to no than the Get Next Number function will work as it did and set your default office letter.

25. Additions to the Project Import mean that you can now import many more fields, including: Report Recipient Name, Report Recipient Email, Invoice Recipient Name, Invoice Recipient Address, Estimated Total Man Days, Site Contact Number, Site Contact Email and Master Project Number.
The system will check to ensure that the master project number exists, and the Status field is now a dropdown reading from the Project Statuses table.

26. A new setting now lets you copy or move files from quotation folders to project folders when creating new projects from quotes. This means that if you want to have all the quotation folder files present in the projects folder when you open the project, then you can now have this without having to download and upload the files. Note that you can still see and access the linked quotation folder from a project.
The setting is "Quotation documents available in project folder" and its possible values are no, copy and move. The default value for this setting is not to copy or move files. If set to copy, then the files are copied into the project folder within a sub-folder which is named the same as the quote number. If set to move, then the files are moved into the project folder within a sub-folder which is named the same as the quote number.

27. The External Ref field has been added to the generation of re-inspection XMLs so that this field can now be included in re-inspections..

28. Changes have been made to the Xero invoicing module to accommodate and show credit notes. You can now see both invoices and credit notes on the Xero export screen.

29. Further logging has been added to the Fibre Analysis screen which means that you can search for more details in the Lab Warnings screen. The additional logging includes when the Analysed By and Analysed Date fields are changed and by whom.

30. The document folders have been updated to give you the ability to upload multiple files to subfolders. This facility is available on the project folder, site folder and general documents (only places that currently support subfolders).

The single upload buttons for Drawings and Certificates have been removed, and have been replaced by a single dropdown list of subfolders. The default option on this subfolder dropdown is the "main folder". If you select a different subfolder option, when you drag and drop files they are uploaded to the selected folder.
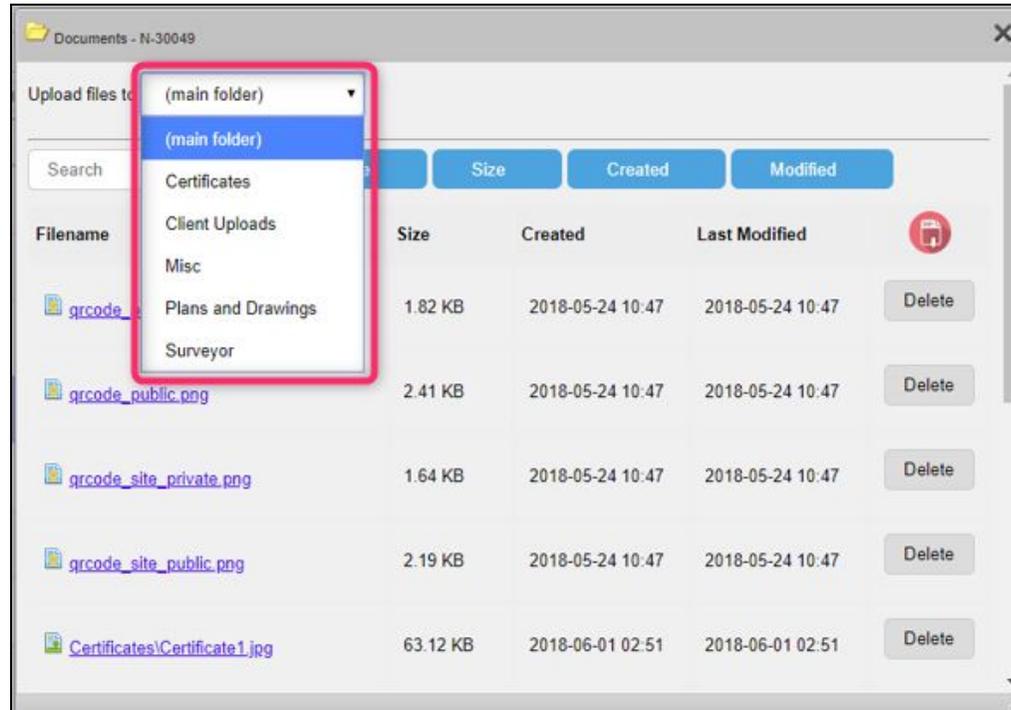
So, if you want to upload two drawings files, select your Drawings subfolder from the dropdown, then scroll down the screen and use the drag and drop area to upload your two files.

31. The project number has been added to the beginning of document names generated in the standard Tracker Air module.

32. A new setting and key milestone have been created to give visibility to Tracker Air data being received. The setting "Automate Tracker Air End Date" needs to be set to yes and the key milestone "Tracker Air data received" must be included in the Milestone Template for your Air Monitoring projects.
When data is received into an Air Monitoring project from one of the Tracker Air apps, the milestone linked to the key milestone "Tracker Air data received" will be automatically completed. This new key milestone will work in the same way as the "Surveyor last day on site"key milestone does with survey data.

33. It is now possible to choose your own name for the Specifications field on the Quotations screen. The setting that controls this is "Name: Specifications".

34. When you click the **Create Project** button on a quotation the status of the quotation will now automatically change to Won.

35. Improvements have been made to the Suspect Items and No-Suspect Items buttons on the Survey Items screen so that they will display the expected results even if you use non-standard approaches.

Fixes/Minor Changes

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

- The New Site button is hidden on the Client Details screen if the user is prevented from creating sites.
- Re-inspection subfolders now have underscores in the Unit ID rather than spaces.
- The Web Address field on Client Details now accepts both http and https web addresses.
- Site names in XMLs being sent to another Alpha Tracker can now include apostrophes.
- There have been various small changes to the method for transferring XMLs to improve the procedure.
- Improvements have been made to the speed of the Alpha Validator.
- Extra wait messages have been added to options on the "Choose Task" menu.

- Import error messages are now always displayed if generated.
- You are now forced to select one or more members of staff before you can display the Wallboard or Financial Wallboard.
- The Print PDF report and Excel downloads also work for Client Portal users who are restricted to viewing specific sites only.
- Repeat appointments now get the correct staff photo.
- Users of the Training matrix can save diary appointments via the project screen, even if the project type has no linked training types.
- "My Open Projects" excludes projects that have a Closed date.
- Problems with project creation from a multi-site quotation where the site name contained an apostrophe have now been fixed.
- Longitude and latitude are now entered onto the project when a site is selected. This is for the geocoding and display of maps.
- Problems with the filtering on the Excel download of the Site Register on the portal have been fixed.
- Invalid project numbers will no longer prevent the copying of invoice PDFs to project folders.
- If no files are found in a folder then the Documents link in appointments will now display a message to indicate "No files found for {project number}".
- The Documents link in appointments will now recognise a "key" parameter for a shortened URL. This means that URLs can now be generated as a "tiny url" which has benefits for viewing on mobile devices.
- A fix has been applied to the Lab Dashboard on the Homepage so that the number of samples booked in today, samples analysed today and number of unanalysed samples better reflects the current status by ignoring deleted projects.
- Invoice Type C now uses the existing system settings to display the "VAT" label and "£" symbol.
- Further changes have been made to ensure accented names are displayed correctly.
- To prevent the duplication of records in project imports, there are new checks to confirm that there are no duplicate unprocessed project numbers before the records are imported. If there are duplicates in the import table, the process will exit and nothing will be imported. A message informs you that there are duplicate projects in the import table so that you can review and correct the data.
- Problems with the timestamp used by Xero have been resolved.
- A small change has been made to the soil calculations to prevent rounded numbers being used in other total calculations.
- There have been performance and reliability improvements to how the asbestos type score is set when selecting an identification from the dropdown list on the survey items screen.
- The speed and general performance of geocoding via the Geocode Records option have been improved.
- Appointments with linked appointments can be easily deleted from the calendar and general performance improvements have been made to the creation and update of appointments.
- Improvements have been made to the display of Building Name and Recommended Action on the Survey Items row expander (ie from the plus button).
- Minor changes have been made to the Site Details screen Projects tab.
- A bug has been fixed that was duplicating the description on new surface treatment and condition records.
- The Vehicle List now includes a delete function.
- A wait message has been added to Excel download of SQL reports to prevent performance issues if the button is clicked multiple times.
- Improvements in information displayed have been made to some error messages.
- A wait message has been added to project duplication via the **Duplicate Project** button on the Project List and Project Details screens.

- The **Generate Certificate** button on bulk and soil samples now assigns document requests to the queue specified in the bulk certificate queue number setting and the size is calculated from the number of fibre analysis records.
- Names on the Fibre Analysis Analysed By and Checked By dropdown are now limited to the members of the Lab permission group.
- The Site Import now inserts the client name into the site record.
- An error message is now displayed if a file fails to upload in the drop zone of the Document folder.
- Improvements have been made to register updates when sharing data with another Alpha Tracker.
- Changes to the Lab Project List have been made to improve performance when sorting on certain columns.
- Display improvements have been made to the Training matrix.
- Speed improvements have been made to the Lab Check Results screen.