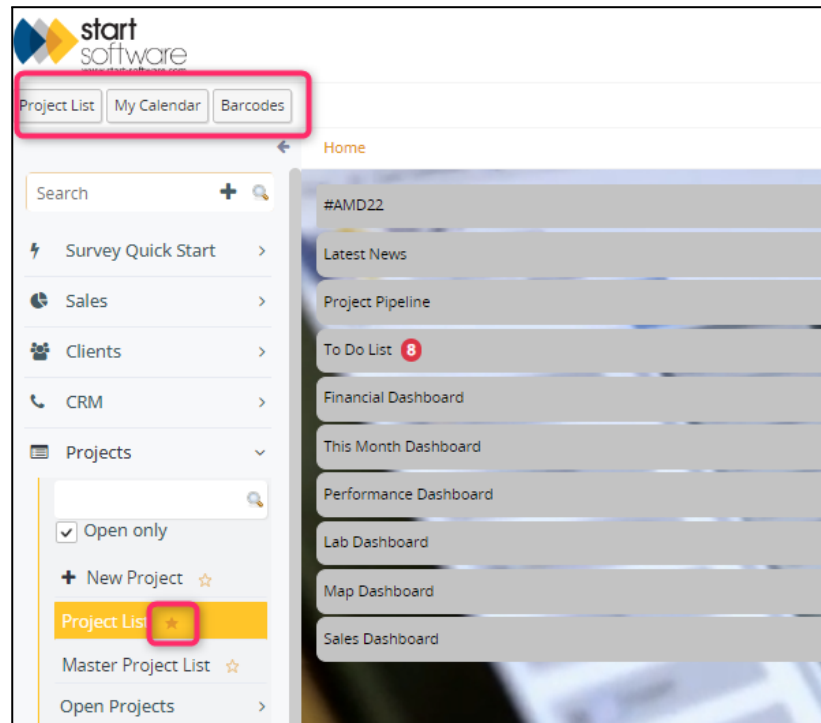


Release 38 - Alpha Tracker Release Notes

New Features / Changes (from SVN6006 to SVN 6666)

1. If you only use a few menu options in Alpha Tracker, you can now benefit from the Favourites feature that lets you mark the menu options as “favourites” and display them at the top of your screen. Simply click the star next to the menu option to get it to appear in your favourites. You can switch it off either by clicking again on the star or by right-clicking on the favourite itself.



2. For users of our drawing app, Alpha Draw it is now even easier to access your drawings from the Survey Details screen due to a new “Open Alpha Draw” button. You will find it right next to the “View Asbestos Data” button. The option is still available from the “Choose Task” menu button and the Projects screen.

Survey Details

1 - Survey Setup 2 - Survey Complete

Summary & Cover Sheet

Choose Task for other options

Asbestos Summary	(non-suspect)	5
	6	3 (3 positive)

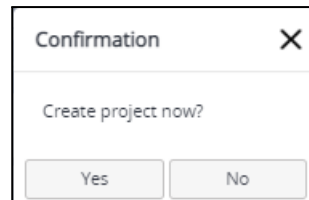
View Asbestos Data Open Alpha Draw

Photo File

Photos\91586.jpg

Approved By Date Sign off report

3. Alpha Tracker has been made more mobile/tablet friendly so that it is now easier to use while you are out and about.
4. The Alpha Tracker Mobile app has had a thorough update, to improve what it does, how it does it and how it looks. If you are interested in using Alpha Tracker Mobile, the companion app to Alpha Tracker, to perform many of the functions of the software from your smartphone or tablet, contact Support.
5. The Quotation screen has changed its layout slightly, including Document Generation and Delivery now having its own area so that it is quicker and easier to request a document. The cosmetics of the screen have been improved.
6. “Type” is now mandatory on the Quotations screen.
7. The Quotations List now features a “Won, No Project” pre-set filter button to help you catch any quotations that have been marked as Won but haven’t been converted into a project.
8. The process of winning or losing a quotation has changed slightly. If you mark a quotation as Won or Lost, today’s date is automatically entered into a new Decision Date field so that you can keep track of that. If the quotation is Won, you are prompted to create the project:



9. A new document production method is available for quotations that avoids the use of document queues, resulting in faster generation of quotation documents and instant display of the generated document. A conversion process is necessary for your templates in order to use this new method - contact Support if you are interested.
10. It is now possible to attach specific Terms & Conditions to your quotations. This feature enables you to choose which of your Ts&Cs you want to attach, if you have multiple versions, rather than having them hardcoded into your quotation template. The Ts&Cs need to be uploaded to Setup>Document Production>Ts&Cs as a PDF or DOCX, and can then be selected when you generate the quotation document. Contact Support if you would like your quotation templates amended to support this feature. Default Ts&Cs can be set per quotation template on the Document Templates screen.

 A screenshot of the "Document Generation & Delivery" form. The form has a blue header with a back arrow icon and the text "Document Generation & Delivery". Below the header, there are four rows of form fields:

- Template Name:** A dropdown menu with "Demolition Quote.docx" selected. To the right of the dropdown are two icons: a folder icon and a document icon.
- Ts&Cs:** A dropdown menu that is currently empty.
- Produced By:** A dropdown menu with "Start Software" selected, followed by the text "on" and a date field containing "29-06-2022" with a calendar icon to its right.
- Delivered via:** A dropdown menu that is currently empty, followed by the text "on" and an empty date field with a calendar icon to its right.

PDF files are only allowed to be uploaded if "Use Python Document Maker For Quotations" is set to yes.

11. Alpha Tracker has a new method to build up the costs on quotations. This method lets you list the typical items to appear in a quotation for a particular type of work, and have the costs of those items displayed. It also allows a margin to be applied to specified items in the list only. It is switched on by using the setting "QuotesFromCosts".

To use this method, you need to set up Cost Categories in your system (Setup>General>Cost Categories), and also Associated Cost Items (Setup>General>Associate Cost Items) where you can list items that can appear on quotations and whether they should attract a margin.

Home | Cost Categories x

Records: 5

ID	Cost Category	Cost Code	Delete
1	Software Development	SDEV	<input type="checkbox"/>
2	Equipment	EQP	<input type="checkbox"/>
3	Server costs	SC	<input type="checkbox"/>
4	TEST COSTS	TST	<input type="checkbox"/>
5	Transport	TRN	<input type="checkbox"/>
* <Aut			
* <Aut			
* <Aut			

10 Records per page

Home | Associated Cost Items x

Records: 4

Search for: Search All

Cost Category	Item Code	Item Description	Item Cost	Unit	Apply Multiplier	Delete
Equipment	LDR	Ladder	20.00	1	<input type="checkbox"/>	<input type="checkbox"/>
Equipment	CHP	Cherry Picker	40.00	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Equipment	GEN	Generator	35.00	2	<input type="checkbox"/>	<input type="checkbox"/>
Transport	MIL	Mileage	0.79		<input type="checkbox"/>	<input type="checkbox"/>
*			0.00		<input type="checkbox"/>	<input type="checkbox"/>
*			0.00		<input type="checkbox"/>	<input type="checkbox"/>
*			0.00		<input type="checkbox"/>	<input type="checkbox"/>

10 Records per page

Submit Cancel

The margin applied to items is as specified in the Quote Multiplier field which you can set up per Client. (The default value is 1, which is no margin. If you wanted 30%, for example, you would set the multiplier to 1.30.)

For each Project Type you can set up a template of Associated Cost Items, which is a list of the items that should appear as standard, the cost of the items, how many you expect to use, what the units are and whether they should attract a margin.

Create a new quotation of the required Project Type, save it and then use the Costs button in the Calculations section to display the template. Update the fields as necessary, eg for the quantities of each item, and save the cost items to recalculate the total. The base total is entered into the Base Value field of the quotation, the Quote Multiplier is applied to any items ticked to attract a margin, and the total including the margin is then displayed in the Total field.

Cost Category	Item	Item Code	Date	Quantity	Cost	Unit	Total	Apply Multiplier	Delete
Equipment	Cherry Picker	CHP		2	40.00	each	80.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Equipment	Generator	GEN		1	35.00	day	35.00	<input type="checkbox"/>	<input type="checkbox"/>
Server costs	Server hire	SEV		1	1,000.00	day	1,000.00	<input type="checkbox"/>	<input type="checkbox"/>
				1	0.00		0.00	<input type="checkbox"/>	<input type="checkbox"/>
				1	0.00		0.00	<input type="checkbox"/>	<input type="checkbox"/>
				1	0.00		0.00	<input type="checkbox"/>	<input type="checkbox"/>

Calculations: Base Value 1,115.00, Multiplier 1.3, Total 1,139.00, Change Log, Costs

Note that if you are using this new method then it is not possible to type a value directly into the Base Value field, you must use the Costs button. It is possible to change the multiplier directly on the Quotations screen, if your permissions allow, but you would then need to access the Costs again in order to recalculate the Total.

- It is now possible to mark clients on the system as "Prospects". When adding a new client, there is a tickbox to indicate that the client is a prospect.

Client ID: Enter a unique Client Code

Name: [] Prospect

General Details | Credit Details | Notes

Address: Head Office Address []

Contact Details: Contact []

This is also visible/amendable on the Client Details, on the Classification tab.

Client Details

Client ID: HILSDONNIA

Name: Hilsdonnia Associates

Buttons: Site, Quote, Job, User

Classification

Prospect:

Key Account:

Private Client:

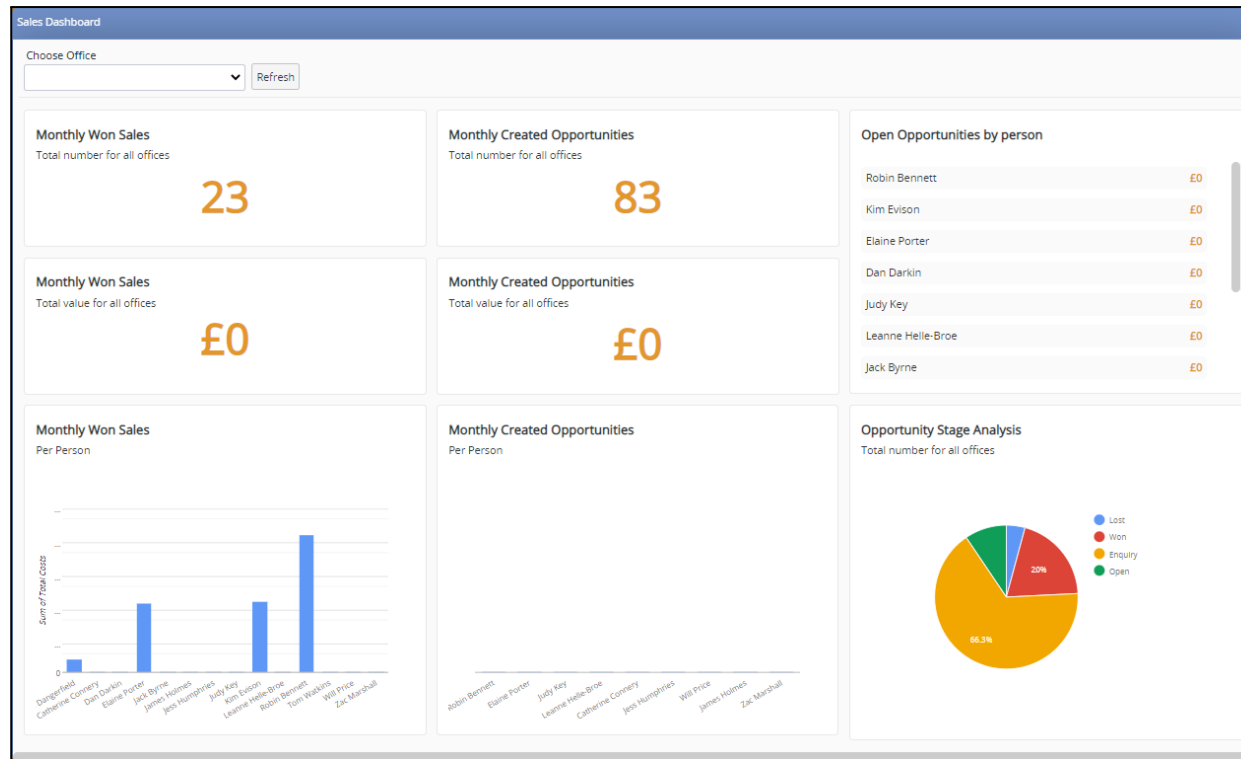
Client Type: [Dropdown]

Industry Type: [Dropdown]

All prospects can be displayed on the Prospects screen, and you can find the menu option on the CRM menu. They can also be clearly identified on the Client List, Enquiry List and Quotation List due to the “Prospect” indicator.



13. A new feature in this release is the Sales Dashboard which you can find on the Home page.



The Sales Dashboard is only available to users in the Superusers, Management and Sales permission groups. Superuser and Management users have a dropdown filter allowing them to select an individual office for which to display data; Sales group users can only see their own data.

Data is displayed in the different elements of the Sales Dashboard as follows:

- Monthly Won Sales, Total number for all offices - a count of all Won quotations where the Decision Date is in the current month.
- Monthly Won Sales, Total value for all offices - the value of all quotations where the Decision Date is in the current month.
- Monthly Won Sales, Per person - the value of all quotations where the Decision Date is in the current month, broken down by person (from the Produced By field) and displayed as a bar chart. Hover on a bar to see values.
- Monthly Created Opportunities, Total number for all offices - a count of all quotations where the Date Produced is the current month.
- Monthly Created Opportunities, Total value for all offices - the value of all quotations where the Date Produced is the current month.
- Monthly Created Opportunities, Per person - the value of all quotations where the Date Produced is the current month, broken down by person (from the Produced By field) and displayed as a bar chart. Hover on a bar to see values.

- Open Opportunities by person - the value of all open quotations, broken down by person.
- Opportunity Stage Analysis - count of quotations / enquiries where the Decision Date or the Date Produced are the current month, broken down by Status and displayed as a pie chart.

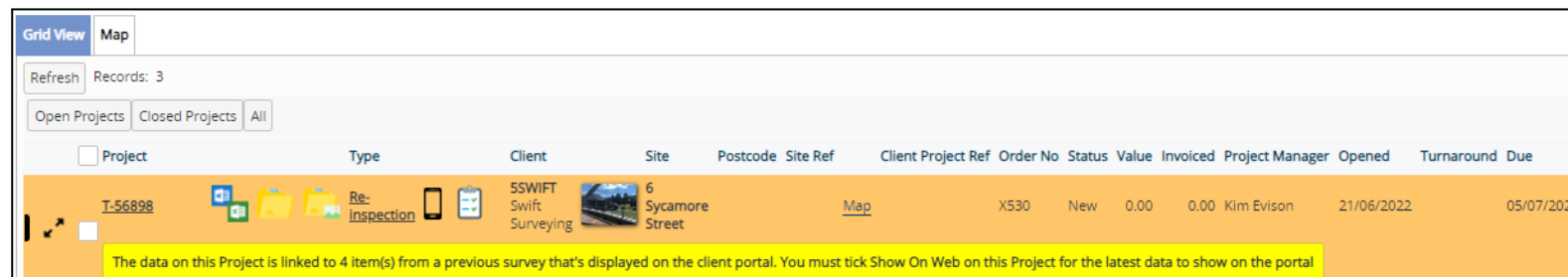
Data is shown for active staff only.

14. Some changes affect how the Report Produced milestone is updated to help clarify the status of items that are visible on the Client Portal.

- Generating a Draft Survey Report no longer updates the Report Produced date, unless the new setting “DRAFTUpdateReportProduced” is set to yes.
- Approved By on Survey Details sets the Report Produced date only when the record is saved.
- A prompt is now displayed to immediately set a project as Show On Web if the project contains items that were previously visible on the Client Portal/site registers (eg re-inspected items). It is displayed when generating a Final Survey Report, selecting the Approved By, filling out Report Produced or removing draft status. Once updated data is approved by using one of these methods, the **project must be marked as Show On Web for any details (current or past) on the items to be displayed.**
- Removing the draft status on a report will update the Report Produced date if the setting “UpdateReportProduced” is set to yes.

The reason for these changes is to ensure that users are aware when data will and won't be displayed on the Client Portal, for re-inspected data in particular. If a Report Produced date is entered manually or automatically against a re-inspection, then the project must be marked as Show On Web for the previous and/or updated version of data for the re-inspected items to be displayed on the Client Portal. Prompts are displayed to help you. Clear warnings are displayed if you choose not to mark a project as Show On Web, and a reason must be entered. For example:

On the Project List:



On the Project screen:

Home | Project - T-56898 X

The data on this Project is linked to 4 item(s) from a previous survey that's displayed on the client portal. You must tick Show On Web on this Project for the latest data to show on the portal

Project Details		Milestones	
Project Number	T-56898	Project Opened	21/06/2022 Kim Evison
Client	SSWIFT Swift Surveying	Quote Produced	

On the Client Portal:

Home | Site Register for Vivien Court [4275] X

The data on this register is currently being updated and the latest information will be available soon. Please contact your account manager to check the status of the register.

Search (click here to hide)

ID	Job Name	Business Unit	Building Name	Floor	Location	Location Description	Material
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Clear Search Criteria

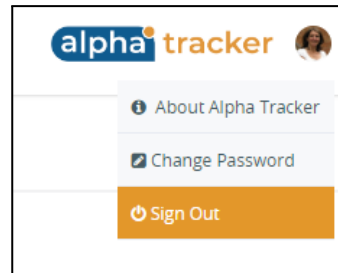
Records: 63

Search for:

Asbestos Register Non Asbestos Register Removed Samples (Positive) All Samples Presumed No Access Areas No Access Items Limited Access Items Exclude NA

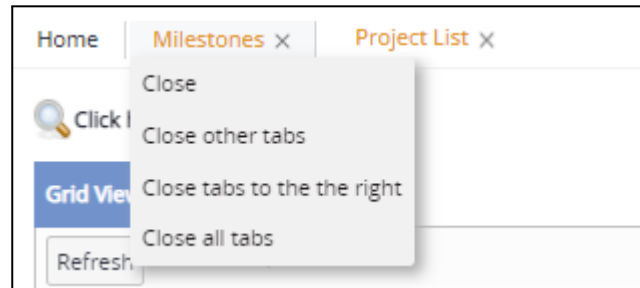
Private QR	Photo	Close-Up	ID	Original Item ID	Job	Business Unit	Building	Floor	Location	No Access	Item	Material	Proje
			115412	114999	Vivien Court		e-Innovation 1 Centre	001	TEST DATA	<input type="checkbox"/>	TEST DATA	Cement	A-1600

15. Sign Out, Change Password and About Alpha Tracker (the information that used to be in the footer and on the App Server Diagnostic screen) can all now be found under your profile picture in the top right-hand corner. If you don't have a profile picture set, you can do this by uploading a jpg file to your Staff record.



The Client Portal also has this change.

16. Right-clicking on a tab now presents you with a really useful menu. Great if you end up with lots of tabs open!



17. At the bottom of the menu, you will find a new Help & Support section. This is the new way to access the Alpha Tracker User Guide, Training Guide and Accessibility. Other features will be coming soon to this area. Note that the Accessibility Statement has moved to the About Alpha Tracker section under your profile picture.
18. Your own appointments are now easily accessible on Alpha Tracker via the new Appointments tab on the Home screen. This feature is particularly useful if you use the Alpha Tracker calendar to plan your day, scheduling meetings, jobs etc, in your diary. You can see today's appointments and overdue appointments in separate sections, with numbers indicated on the title bar and easy access to the project itself and its document folder.

The screenshot shows the 'Home' page of the Alpha Tracker application. It features a 'Latest News' section at the top, followed by an 'Appointments' section with a notification badge showing 3 appointments and 2 overdue. Below this, there are two tables: 'Today's appointments' and 'Overdue appointments'. Both tables have columns for 'Complete?', 'Time', 'Client', 'Job', 'Event', and 'Role'. The 'Today's appointments' table lists three appointments, and the 'Overdue appointments' table lists two.

Complete?	Time	Client	Job	Event	Role
<input type="checkbox"/>	09:00-11:00	JS Asbestos	U-00001	Meetings (Non-Productive Time) Discuss planned work for the rest of the year. With Elaine and Jack.	Bulk Analyst
<input type="checkbox"/>	12:00-17:00	Start Software	T-00514	Lasyard House (Bulk Sample) Lab work	Bulk Analyst
<input type="checkbox"/>	14:00-15:00	JS Asbestos	U-00001	Meetings (Non-Productive Time) Discussion with Dan and Zac about fibre analysis records.	Bulk Analyst

Complete?	Time	Client	Job	Event	Role
<input type="checkbox"/>	13:00-17:00	Bennett Enterprises	T-56200	e-Innovation Centre (Bulk Sample) Lab work	Bulk Analyst
<input type="checkbox"/>	09:00-11:00	JS Asbestos	U-00001	Meetings (Non-Productive Time) Discuss planned work for the rest of the year. With Elaine and Jack.	Bulk Analyst

Mark an appointment as Complete when it is done to prevent it from displaying in the Overdue section.

19. The Project Pipeline has been added to the Home page, so that if you have access to the Project Pipeline menu option you will also see it on the Home page. When opened from the Home page, a preset filter of “My Projects” is applied. This means that the list contains only projects where you are the Project Manager.

If the Project Pipeline is displayed via the Client Portal, site restrictions for the logged in user are now respected.

The Documents folder is also available on the Project Pipeline. If accessed from the Client Portal then it shows all files (excluding filenames containing the blacklisted words).

20. The To Do List on the Home page and the My To Do List screen have new pre-set filter buttons, to help you identify tasks that are overdue, due today, or due x days into the future. The number of days into the future is specified in a setting “To Do List Future Due Number of Days”.

Home | My To Do List X

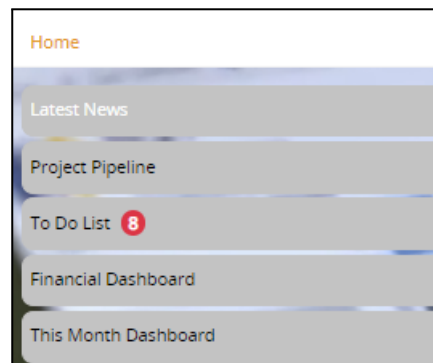
Search

ID	Action Type	Priority	Date Due From:	To:	Contact Name	Client ID	Client Name	Project Number	Quotation Ref
<input type="text"/>	<input type="text" value="v"/>	<input type="text" value="v"/>	<input type="text" value="c"/>	<input type="text" value="c"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Clear Search Criteria](#)

Records: 8

21. You will now see indicators on the Home page if relevant records are present, to draw your attention to records:



22. Static text selection is now possible in Alpha Tracker which means that you can easily highlight any area of a screen and copy the text to the clipboard.

23. Status Notes on the Project screen can now add user name and timestamp data when you click in the box so that you know who has made the comment and when. This behaviour is controlled by a setting.

24. Status has been added to the search fields on the Project List screen making it really easy to find projects at a certain status.

25. This release sees a new Notes feature available from many screens, the Jotter, which helps you to track notes, comments, questions and information on many items. Look out for the icon on screens and lists:



Click it to display existing and add new notes that are automatically date and timestamped, and show your staff name.

Jotter for T-56934

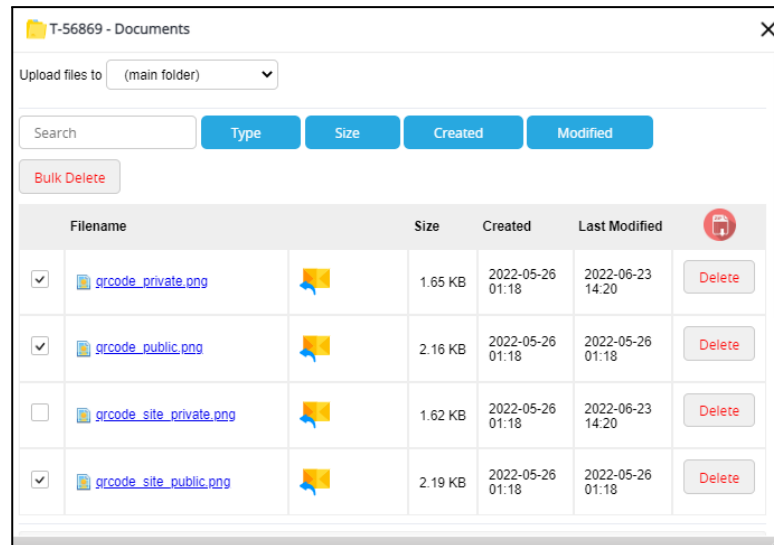
Records: 2

Name	Created Time	Note Type	Note Text
Kim Evison	27/07/2022 12:00 00 am	Remote Meeting	Discussed progress with Catherine
Kim Evison	27/07/2022 12:00 00 am	Phone Call	Agreed to send report by Friday
Kim Evison	27/07/2022 12:00 00 :		

10 Records per page

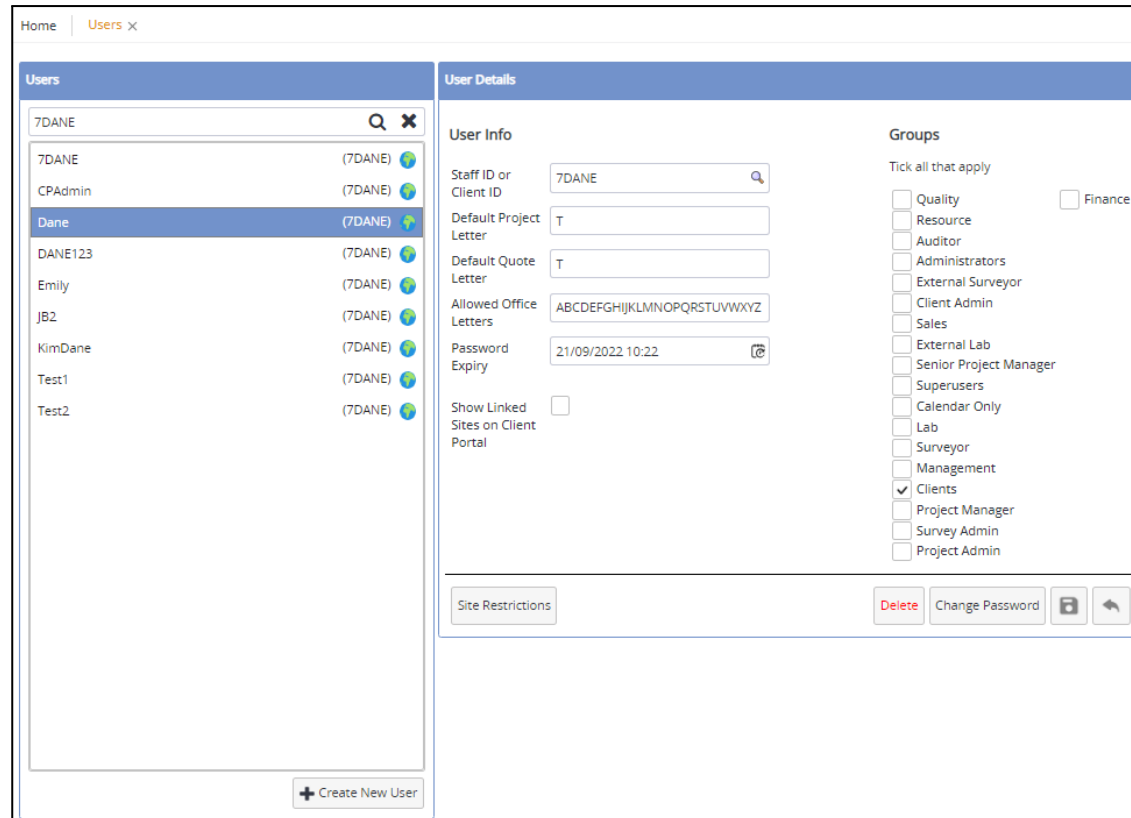
You can set the values that display in the Note Type dropdown by using Setup>General>Lookups. Superusers can edit and delete Jotter notes.

26. In the Project Documents folder you can now delete multiple documents at a time. Simply tick the items that you want to delete, then click Bulk Delete.



This feature can be switched off by changing the setting “Show Delete button on the Project Documents folder” to no.

27. The Web Security menu that controls the creation and setup of system users has changed. It now contains only one option, Users, which opens a new User Management screen. This screen first displays a list of users which you can scroll through or search. Selecting a user displays its details on the right-hand side. The search field above the list of users works on user names, staff/client IDs and groups, so you can, for example, find a specific username, all users linked to a specific client ID, and also all users in a specified permission group.

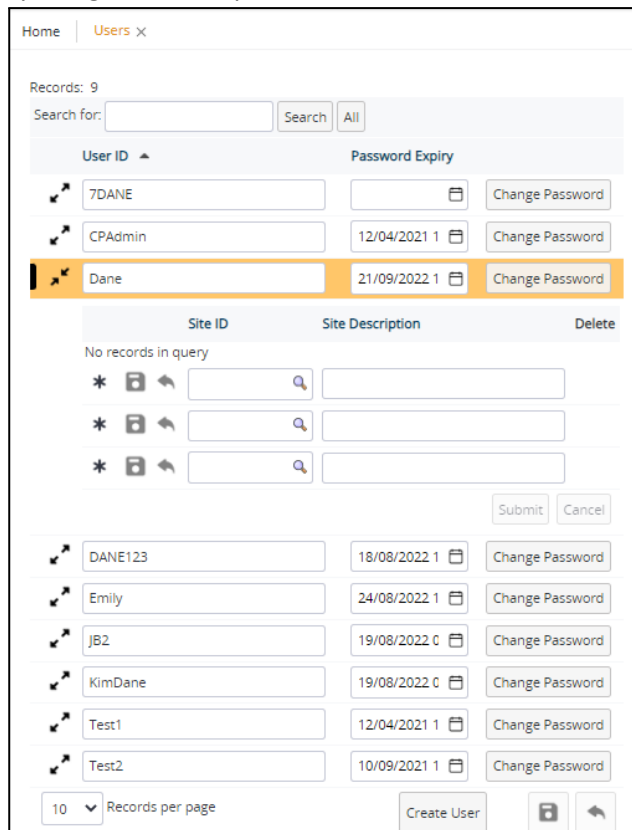


Create a new user by clicking the Create New User button, and entering the username and password (which can be left blank to auto-generate). You can then set the User Details (right-hand side) to specify which staff or client ID the user is linked to, which office letters they can access etc. In addition, you can now see and specify when a password is to expire. The setting “Number of days before a new users password expires” sets the password expiry on creation.

A user must be linked to a staff or client ID and must also be in at least one permission group. If the user is a Client Portal user, ie it has a client ID not a staff ID, then the web symbol is displayed against their username (left-hand side), the Show Linked Sites on Client Portal tickbox and the Site Restrictions button are available (right-hand side).

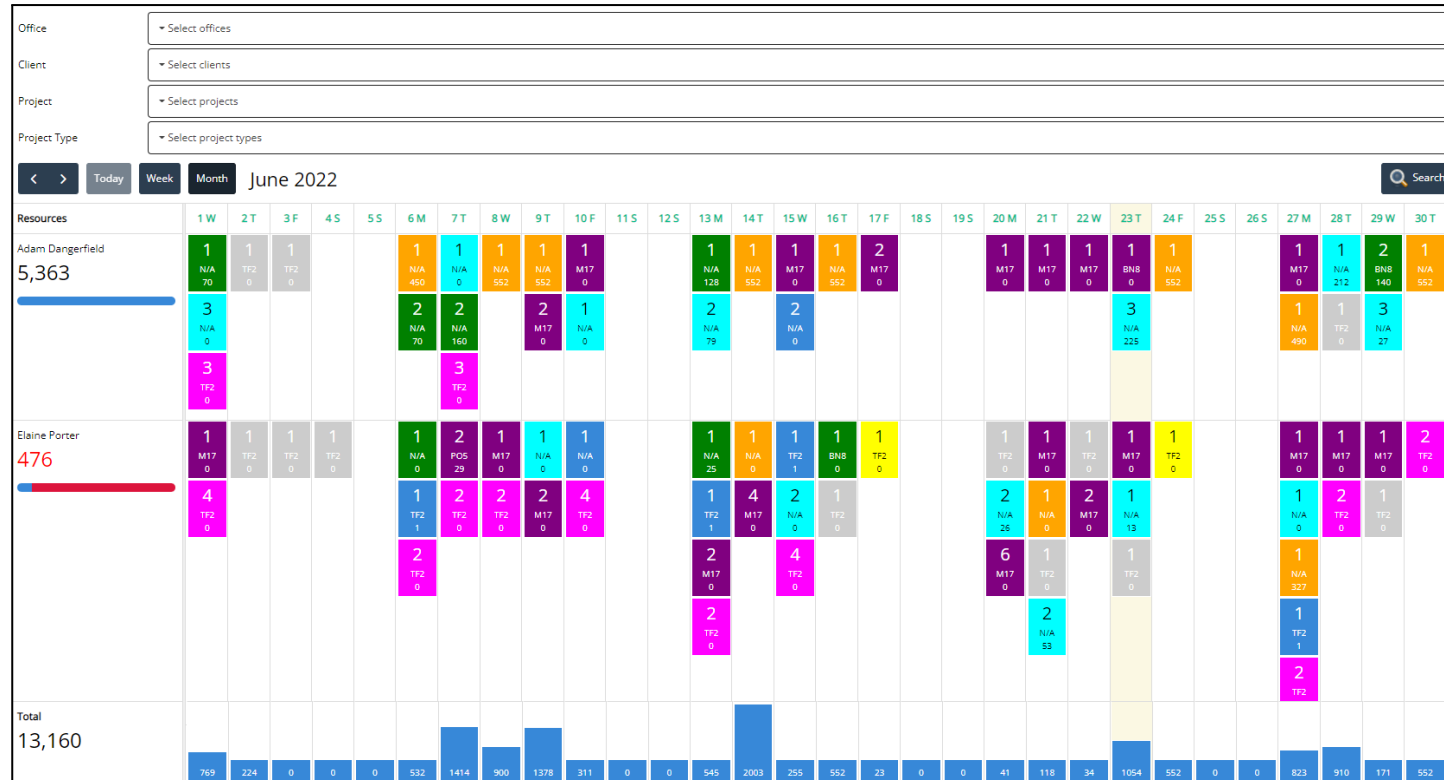
28. Web security changes (linked to the new Users screen) have been made throughout the system to accommodate IIS and Active Directory users.

29. Client Portal Admin users, who can maintain users, by using their Web Security>Users menu option have the ability to specify site restrictions on their users by using the row expander:



(If no site restrictions are specified, all sites are available. Otherwise, only data related to the specified sites is available.)

30. The Wallboard has had a few changes to help with scheduling, including a facelift. Changes affect both the time and financial versions of the Wallboard.



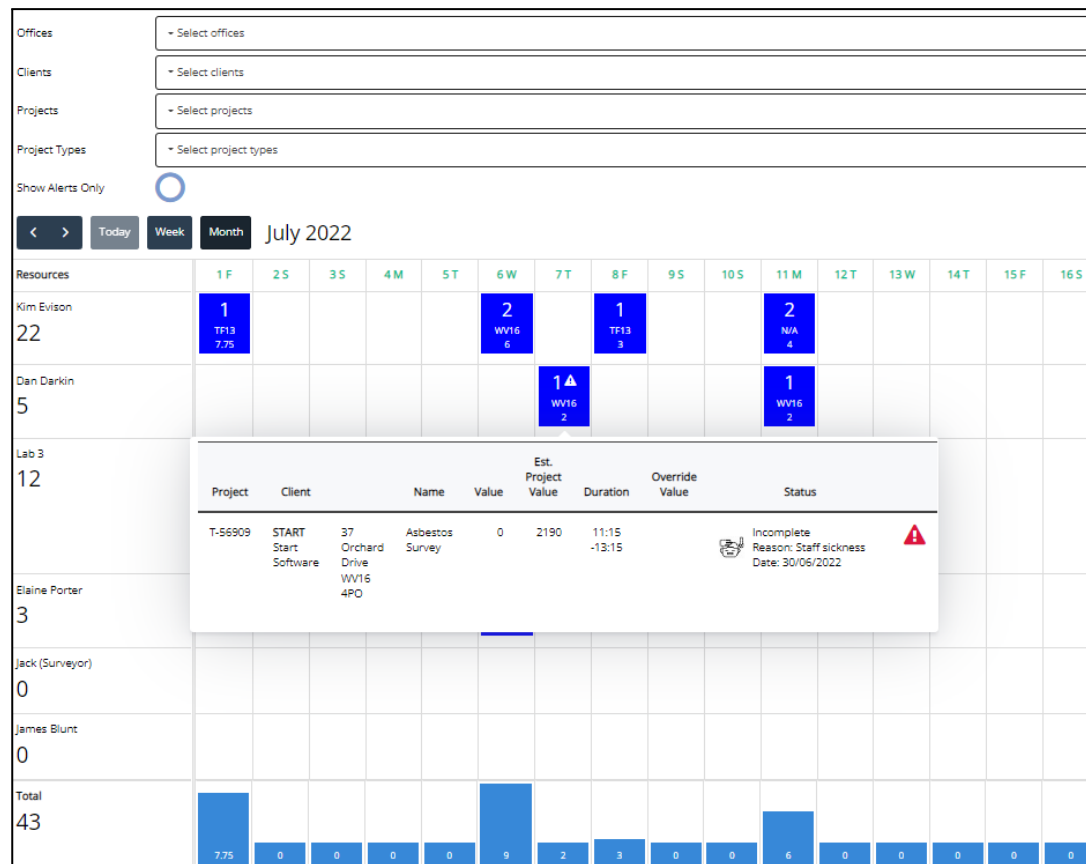
New fields have been added for filtering the Wallboard by office, client, project and project type at the top of the screen. Each filter allows multiple selections.

The Totals row is fixed to the bottom of the screen so that it is always visible if you have many people selected. In addition, the totals act as a barchart, so the bigger the number, the deeper the total box.

The Resource column on the left now gives you an indication of progress against target.

A Wallboard option has been added to the Resources menu so that you can select the staff, teams, groups, offices and display them on the Wallboard directly.

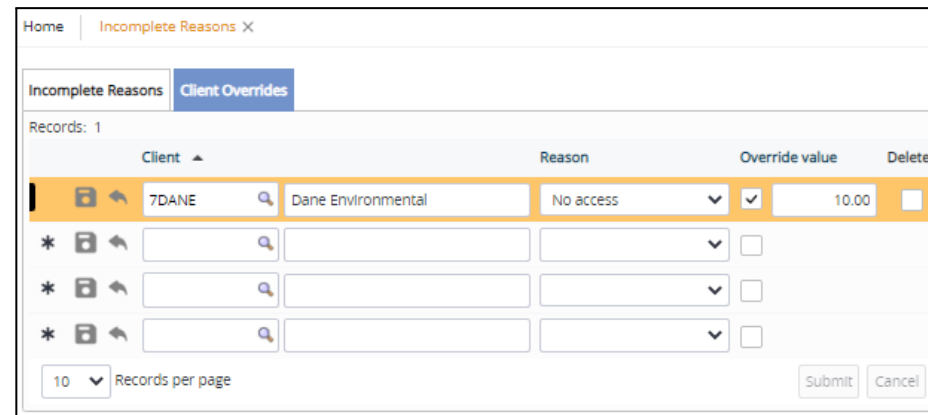
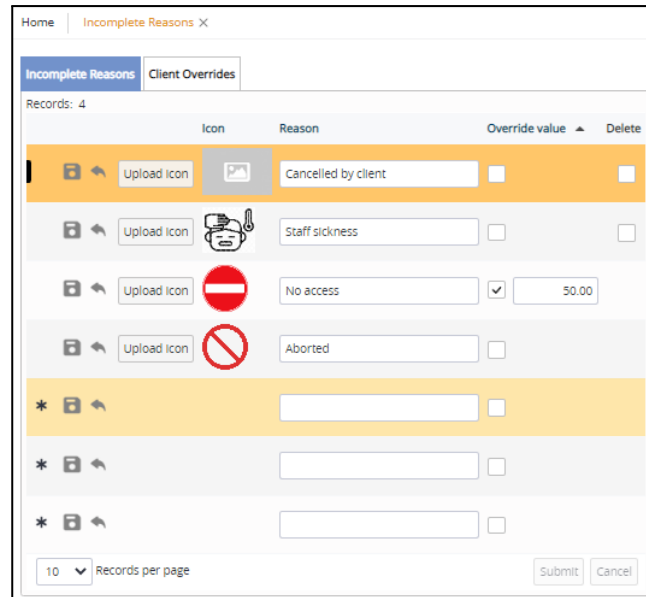
Alerts are now easy to see on the Wallboard as a warning triangle is displayed on the cell and also against the relevant appointment when the hover information is displayed. Incomplete appointments show the icon applicable to the incomplete reason. There is a tickbox in the search criteria at the top of the screen so that you can easily display only the appointments with alerts.



31. New settings allow you to set the number of records per page that will be displayed by default on the Project List and the Quotation List screens. The settings are: “Project List records per page” and “Quotation List records per page”, and the default value for both is 10.

32. The Aborted Appointments section on calendar appointments has been renamed as Incomplete Appointments.

You can now store an icon for each incomplete reason eg no access, staff sickness etc, by using the new Incomplete Reasons menu option in Setup>General. As this screen now has two tabs, you can record your standard reasons, icons and override values as well as client-specific overrides. The override value on Incomplete Reasons allows you to override the value of the appointment, eg to apply a charge for a no access visit. Client Overrides allows you to enter specific override values for individual clients. The override values are displayed when a reason is selected from the dropdown on the appointment.



"No Access" and "Aborted" are default entries that are locked and cannot be edited.

The process for recording a "No Access" to the whole site is as follows:

- The surveyor sends in a Location 000 record with "Accessed OK?" marked as X (ie "No"), indicating that no access has been gained to the whole location/site.
- If one of these No Access Location 000 records is received, then any previous 000 records on that project are marked as hidden.
- If a 000 record is marked as no access, and there is no data for any other location numbers, then the project is automatically marked as "Show On Web".
- If a 000 record is marked as no access, then the appointment for that project number on the same day as the date on the survey item will be marked as incomplete. The Reason will be set to "No access" and the PPCNotes will be put into the Incomplete Notes. If a value override is specified for "No access" then that will also be applied to the appointment.
- If a 000 record is sent in that is NOT no access and the project is marked as Show On Web, then the project will have the Show On Web flag removed.
- A no access project that is marked as Show On Web is visible on the Client Portal. You can see it on the Report List where it will be displayed without a Report Produced Date and with incomplete reason icons - multiple icons if there have been multiple visits for that project. In addition, the Site List and Compliance Summary shows an incomplete icon in the Last Inspection column if the last visit to the site was marked as incomplete, otherwise it continues to display the date as previously.

33. There is a new Weekly Timesheets feature in this release, that lets you quickly enter your timesheets for a week. The menu option can be found in Resources>Timesheets>Weekly Timesheets.

When you open Weekly Timesheets, your name and the date of Monday this week are displayed in the search fields by default. (If you are not a Superuser or Administrator, then the name is fixed as your name, ie you cannot see anyone else's data.) Clicking the Search button will display any timesheets you already have for this week. Quickly create timesheets based on your appointments in the Calendar by clicking **Import from Calendar** and choosing to overwrite existing or add new timesheets - using this on a Friday is a very quick way to create all your timesheets for the week! Even if the Calendar doesn't exactly match your time worked, you can quickly edit the timesheets that this button creates. Simply click on the row and make your changes.

You can also use the Add Row button to add timesheets individually. And the Summary section at the bottom of the screen shows a helpful summary of the time logged by project.

34. The Finance menu in Alpha Tracker has a new Invoicing menu option to help link together the invoicing process.

Home | Invoicing X

Ready (127) Draft (130) Locked (244) Exported (80) Issued (12)

Jobs Ready to Invoice

Search

Job Number Client ID Client Name Site Name Site Postcode Job Type Client Project Ref Project Manager First Diary Date To: Last Diary Date To: Job Opened To: Report Produced From:

Clear Search Criteria

Refresh Records: 127

Job	Type	Client	Site	Postcode	Site Ref	Client Project Ref	Order No	Status	Value	Invoiced	Project Manager x	Opened	Last Milestone	First Diary	Last Diary	Report Produced	
N-00133	Survey	CLIENT The Client Company	The Main House	WV16 4BB		1458/956	123213	In Progress	451.25	0.00	Robin Bennett	11/09/2013		31/07/2013	29/12/2014	All	20/03/2014
N-00134	Survey	CLIENT The Client Company	The Main House	WV16 4BB		1458/956	123213	In Progress	451.25	0.00	User	11/09/2013		04/04/2014	04/04/2014	All	20/03/2014
N-00135	Survey	CLIENT The Client Company	The Main House	WV16 4BB		1458/956	123213	Job Rejected	451.25	0.00	User	11/09/2013		31/07/2013	29/12/2014	All	20/03/2014
N-00170	Survey	CLIENT The Client Company	The Main House	WV16 4BB		1458/956	123213	In Progress	451.25	0.00	Robin Bennett	11/09/2013	Site Visit Booked	26/11/2021	26/11/2021	All	14/04/2014
N-00171	Survey	CLIENT The Client Company	The Main House	WV16 4BB		1458/956	123213	In Progress	451.25	0.00	Robin Bennett	11/09/2013		31/07/2013	29/12/2014	All	14/04/2014
A-00015	Survey	ROBSON Robson Environmental	Rabbits House						1,500.00	0.00	Judy Key	08/05/2014	Data Entry Checked and Completed	30/10/2014	21/02/2018	All	27/10/2014
N-00179	Survey	CLIENT The Client Company	The Main House	WV16 4BB		1458/956	123213	In Progress	451.25	0.00	Robin Bennett	11/09/2013		31/07/2013	29/12/2014	All	16/05/2014
N-00180	Survey	CLIENT The Client Company	The Main House	WV16 4BB		1458/956	123213	In Progress	451.25	0.00	Robin Bennett	11/09/2013		31/07/2013	29/12/2014	All	16/05/2014
N-00181	Survey	CLIENT The Client Company	The Main House	WV16 4BB		1458/956	123213	In Progress	451.25	0.00	Robin Bennett	11/09/2013		31/07/2013	29/12/2014	All	16/05/2014
N-00182	Survey	CLIENT The Client Company	The Main House	WV16 4BB		1458/956	123213	In Progress	451.25	0.00	Robin Bennett	11/09/2013		31/07/2013	29/12/2014	All	16/05/2014
									Total	82,746.30	0.00						

First Prev 1 2 3 4 5 6 7 8 9 10 of 13 Next Last 10 Records per page

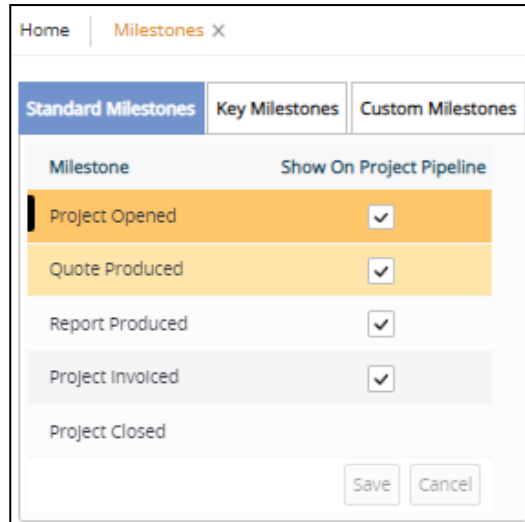
The timeline at the top of the screen is clickable, displaying the projects/invoices at the various stages. The numbers in the timeline tell you how many projects/invoices are at each stage. The stages are:

- Ready - These are the projects ready to invoice. This is the same list as displayed on the Projects Ready to Invoice screen. Tick the box against the projects for which you want to raise invoices, then click the Invoice Selected button that is displayed below the list once some projects are selected. Invoices are raised for the selected projects, and the projects drop off the Ready list. Totals of the Value and Invoiced columns are displayed at the bottom of the Projects Ready to Invoice.
- Draft - These are the draft invoices that have been raised but not yet authorised/locked or issued. Buttons allow you to view the invoice details and generate a preview of the PDF, as well as adding notes and accessing the document folder. Check the invoices on this list and, if they are OK, tick the box against the invoices, then click the Lock button that is displayed below the list once some invoices are selected. The invoices are generated and filed in the invoice folders, and locked to prevent further changes and they move into the Locked list. The date locked is recorded in the invoice details.
- Locked - These are the approved/locked invoices. From here you can view the invoice details, unlock an invoice (return it to draft status), as well as adding notes and accessing the document folder. Tick the box against the invoices that you want to export to your accounting package. Depending on your setup, you may be selecting Xero, Sage 50, Sage 200 or Excel, and the link may be direct. The date exported is recorded in the invoice details. Exported invoices move to the Exported list.
- Exported - These are the exported invoices that you can print in batch if required. When the selected invoices have appeared on screen and the window is closed, a message offers to mark all as 'issued'. These move to the Issued list.
- Issued - These are the invoices that you have exported and printed.

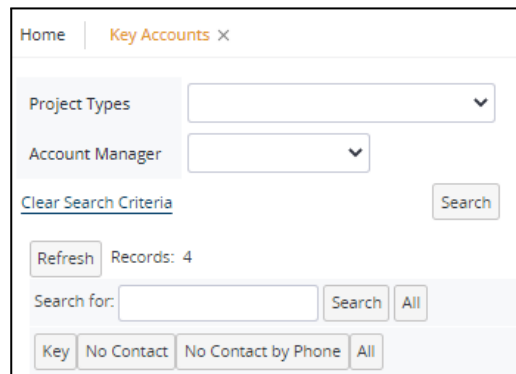
35. A new setting, “Show Closed Projects on Projects Ready to Invoice”, accommodates users who close projects before they invoice them. Simply set the setting to “yes” for the Projects Ready to Invoice screen to automatically include closed projects.

36. You can now find all milestone-related information together on one screen. The Setup>General>Milestones screen includes:

- A new Standard Milestones tab to control which of the standard milestones are displayed on the Project Pipeline if you use this feature. Note that the Project Closed milestone does not have a tickbox as closed projects drop off the Project Pipeline.
- The Key Milestones tab which was previously a standalone menu option. This lets you rename the key milestones.
- A new Custom Milestones tab which provides another way of accessing the milestones that you have set up for Project Types (these are still available under the Project Types).



- 37. Site QR codes are now available on the Client Portal, on the Site List & Compliance Summary.
- 38. The Client Portal Dashboard Charts now take into account both restricted sites (where a user can only see certain specified sites) and sites shared with the user (additional sites shared with the client).
- 39. The Account Management and Key Accounts screen have a new pre-set filter button called “No Contact by Phone” to help you find clients that you haven’t spoken to recently.

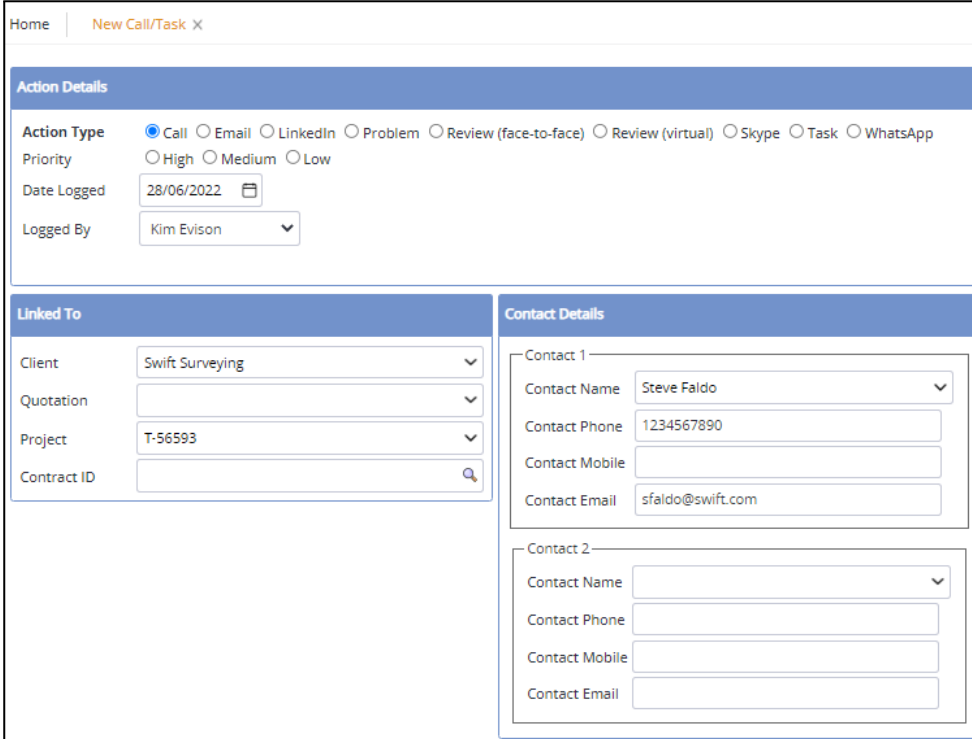


40. If you log a call/task that is linked to a quotation, then a follow-up record is now automatically created showing the ID of the call/task.

41. There have been some changes to Calls/Tasks in the system, including:

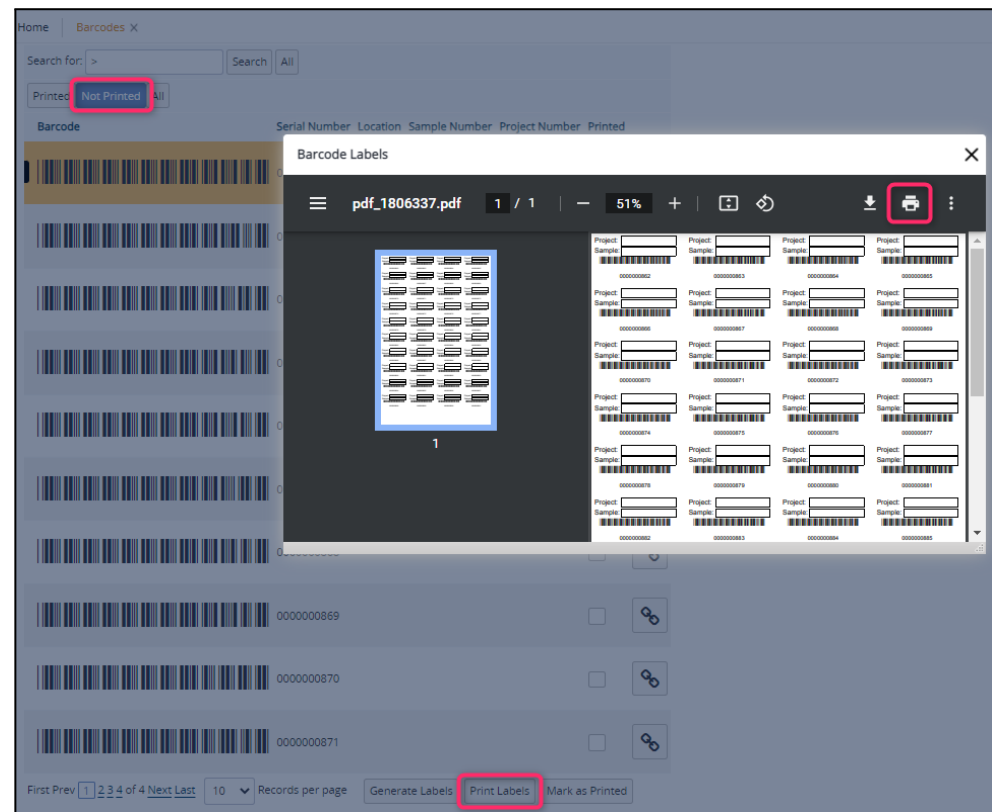
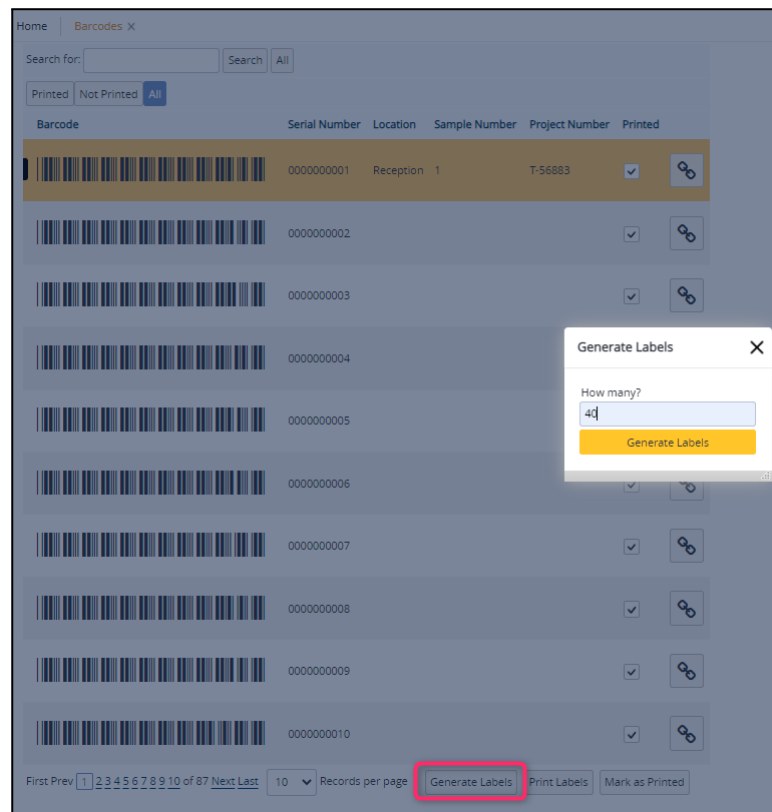
- The To Do List has a “Refresh” button
- Calls/Tasks can now easily be duplicated via a “Duplicate” button
- Action Type is now mandatory
- All Calls/Tasks can be searched by ID number
- Client, Quotation and Project will now auto-suggest as you start typing
- New Call/Task auto-closes when you save.

42. Contact details on calls/tasks have changed slightly. The contact’s mobile number now pulls through on calls/tasks. Also, you can enter details of more than one contact. If you fill in details for one contact, fields are displayed for you to enter details of another. Up to five contacts can be entered.



43. Another new feature in this release is Sample Traceability, otherwise known as Chain of Custody. This feature is designed to track and log sample locations using barcode technology, so that you can easily identify where a sample is, whether it is with the surveyor, has been dropped at Reception, received in your lab or moved into storage. The new barcode options can be found on the Resources menu, under Barcode Tracking.

The first step is to generate some barcodes. These can be printed out onto standard Avery labels and given to surveyors ready for them to attach to their sample bags. Use the Barcodes option to open the Barcodes screen which lists all barcodes that have been generated, and use the “Generate Labels” button to create a new batch of barcodes. The screen filters to show the new batch of barcodes and a print screen opens. You might for example create a batch of 40 barcodes and then print them as 40 will fit on one standard label sheet. When you close the print screen, you can mark the barcodes as successfully printed. You could also choose to print and mark unprinted labels manually at any time after generating them.



Surveyors attach the labels to their sample bags, writing on the project number and sample number. In Tracker Mobile, they tap the Sample Barcode field and scan the barcode on the label to associate that barcode with those sample details.

Item Wall ▼

Product Type INB Insulating Bo... ▼

Sample Notes

Approach
S
SP
P
X
PS

Sample No 1 ▼

Sample Barcode

Quantity

When the data is synchronised and Alpha Tracker receives the survey data, the tracking against the specified barcode shows the sample as being with “Surveyor”. You can see this by searching the Barcodes screen and clicking the “View chain of custody” button.

Home
Barcodes X

Search

Location Serial Number Sample Number Project Number

[Clear Search Criteria](#) Search

Records: 1

Search for: Search All

Printed Not Printed All

Barcode	Serial Number	Location	Sample Number	Project Number	Printed	
	000000822	1		T-56004	✓	

10 Records per page Generate Labels Print Labels Mark as Printed

Barcode History X

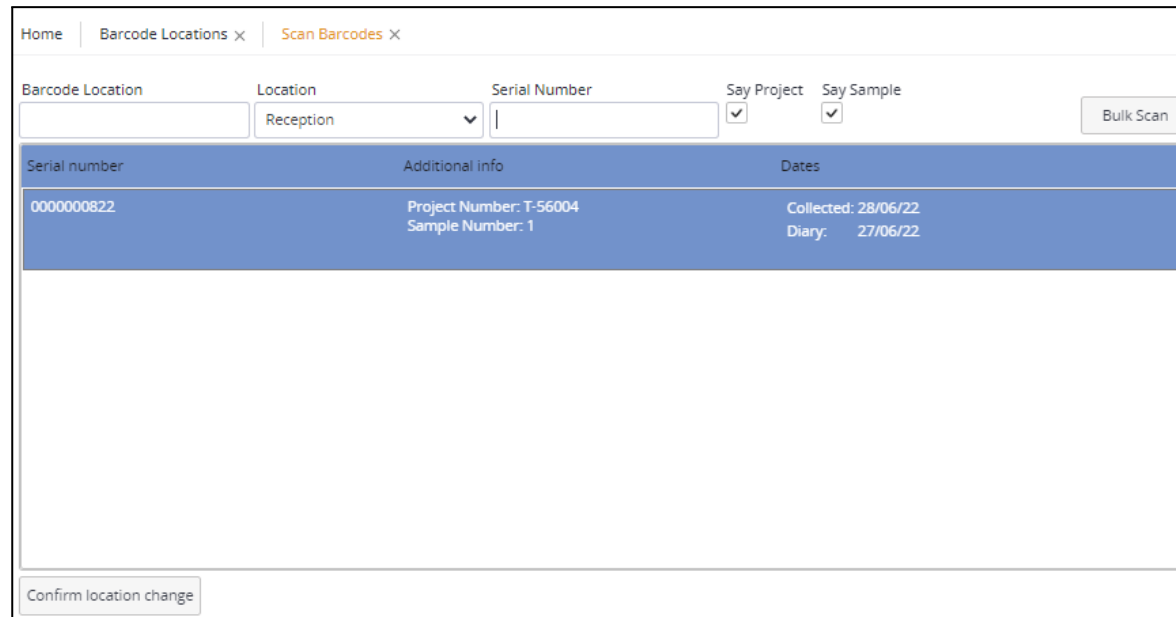
Records: 1

Search for: Search All

Serial Number	Current Location	Old Location	When	Who
000000822	Surveyor		28/06/2022 18:42	Kim Evison

10 Records per page

Further changes in location of the sample can be logged by scanning the barcode and using the Scan Barcodes screen. First set up your locations by using the Barcode Locations screen to define and print a barcode for each location, eg you might have a location for Reception and Lab, and place printed copies of the barcodes in those locations. Then, to log a sample into a new location, open the Scan Barcodes screen, select or scan in the location and scan the barcode. The sample is added to the list, the project number and sample number will flash up on the screen to confirm - and if you have Say Project and/or Say Sample ticked, and speakers, it will read out the project number and sample number.



Serial number	Additional info	Dates
000000822	Project Number: T-56004 Sample Number: 1	Collected: 28/06/22 Diary: 27/06/22

Confirm the location change to update the barcode record.

Barcode History [X]

Records: 2

Search for: Search All

Serial Number	Current Location	Old Location	When	Who
0000000822	Reception		28/06/2022 19:01	Kim Evison
0000000822	Surveyor		28/06/2022 18:42	Kim Evison

10 Records per page

There is also a bulk scanning feature which enables you to record a change of location for a whole batch of samples in one go rather than individually. Click the Bulk Scan button on the Scan Barcodes screen, record the details by selecting the Location, scanning any one of the project's serial numbers (barcodes) to input the project number, then enter the range of sample numbers and Confirm.

Bulk Scan Barcodes [X]

Location

Serial

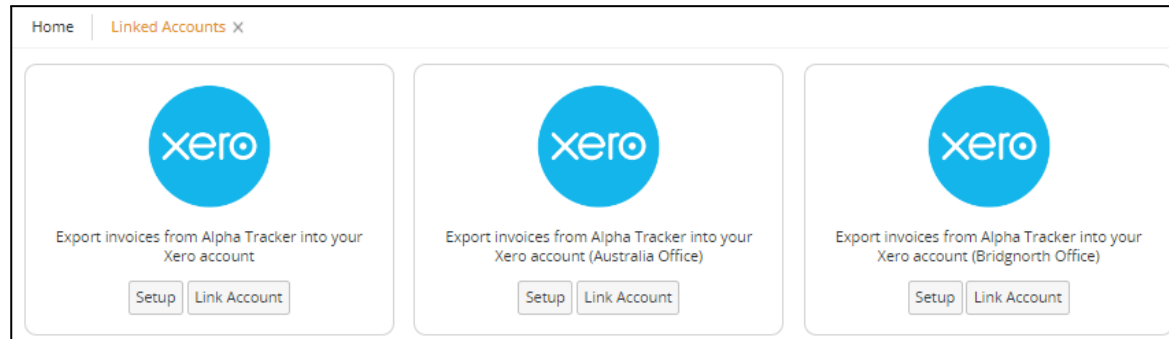
Project

Sample # from to

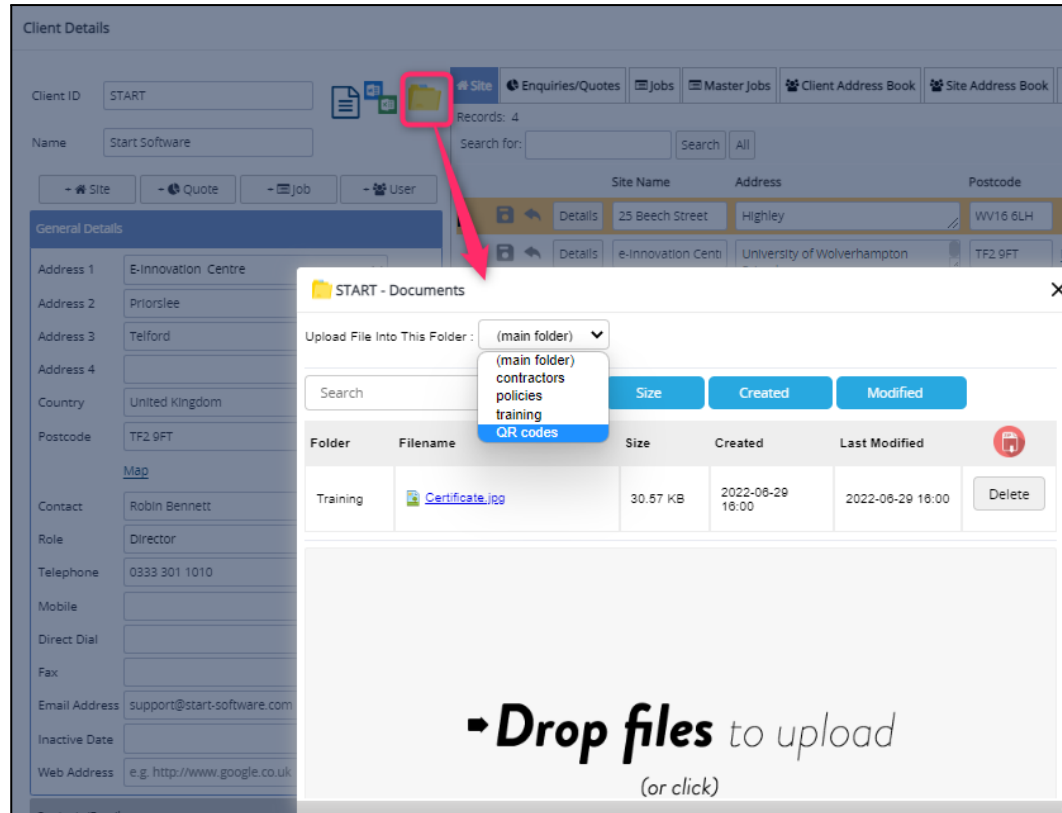
Confirm Cancel

The View chain of custody button is also available on the Fibre Analysis screen and the Fibre Analysis Records screen, allowing you to check a sample's location history from there too.

44. The Linked Accounts process for clients using Xero with multiple accounts has been improved and streamlined to work with offices. Setup is a process that we and you do in collaboration, and you can now log into your linked accounts via the Link Account button on the Linked Accounts screen (Setup>General>Linked Accounts) and remain logged in indefinitely (or for up to 60 days of no use).



45. A new setting allows the export of invoices to Xero automatically on creation.
46. You can now make documents available when someone scans a QR code. When a code is scanned and the Site Register opened, there is an additional tab called Documents available from which the documents can be opened. These documents are specific to individual clients. To upload the documents, place them in the "QR codes" subfolder of the Client documents:



Alternatively, upload the documents via the Client Portal by using the new Other Documents>QR Codes menu option.

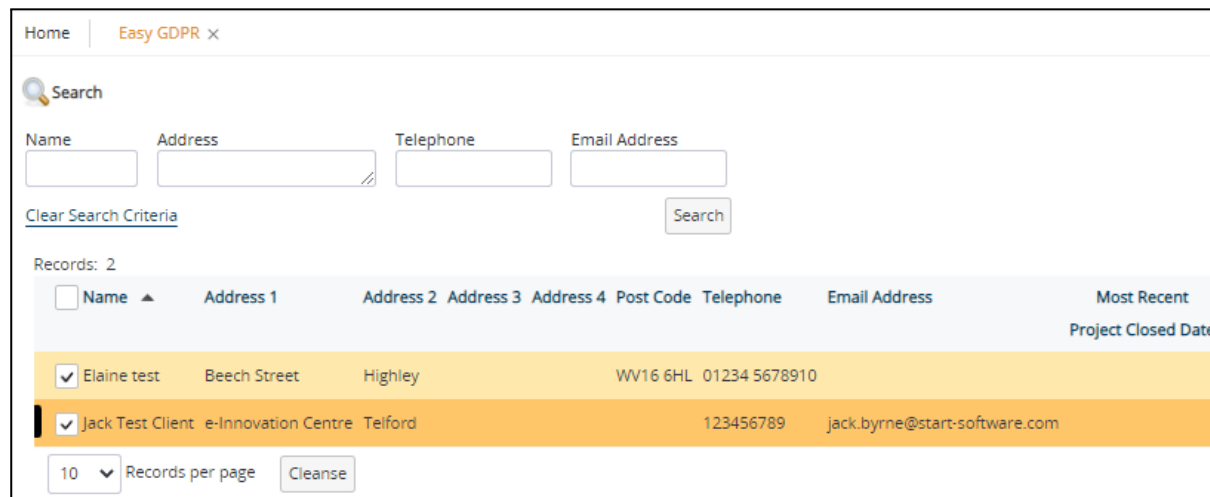
47. The totals on the CRM Account Management screen can be read from the project value or the invoice total so that you can now also get figures if you do not use Alpha Tracker for your invoicing. The setting “CRM Value” controls this behaviour. Valid values are “Project” or “Invoiced”. The default is “Invoiced”.

On the Account Management screen:

- If CRM Value is set to “Invoiced”, then:
 Year Value = Total of all invoices with invoice date in this year
 Total Value = Total of all invoices for that client

- If CRM Value is set to “Project”, then:
 Year Value = Total of all projects with project opened date in this year
 Total Value = Total of all project values for that client.

- The Lab Project List now displays the Status Notes from the project in a new column called “Notes”. It also displays the Count to Due Date which turns red if overdue.
- If required, it is now possible to display the previous project number in Tracker Mobile on re-inspection data sent to a handset.
- It is also now possible to include the data from Extra Info records that were captured on Location 000 in Tracker Mobile on re-inspection data sent to a handset. A new repository setting named "Reinspection includes location 000 Extra Info" controls this behaviour. The default is "no". When the setting is enabled then Extra Info records that were captured on the Location 000 session are sent back within the XML. This is often building description or scope details. Data is looked up from the Extra Info table to ensure that the latest information is being sent back.
- This release includes a new Easy GDPR menu option on the Clients menu to help you remove Clients’ personal details from the Client database. You can mark individual Client records as “private clients” by ticking a box in the Classification section of the Client Details screen. These Clients are displayed on the EasyGDPR screen. Multiple Clients can be selected using a tickbox, and then by clicking the “Cleanse” button all name, address, telephone (including mobile number, direct dial, and Fax) and email details are removed from the Client record.

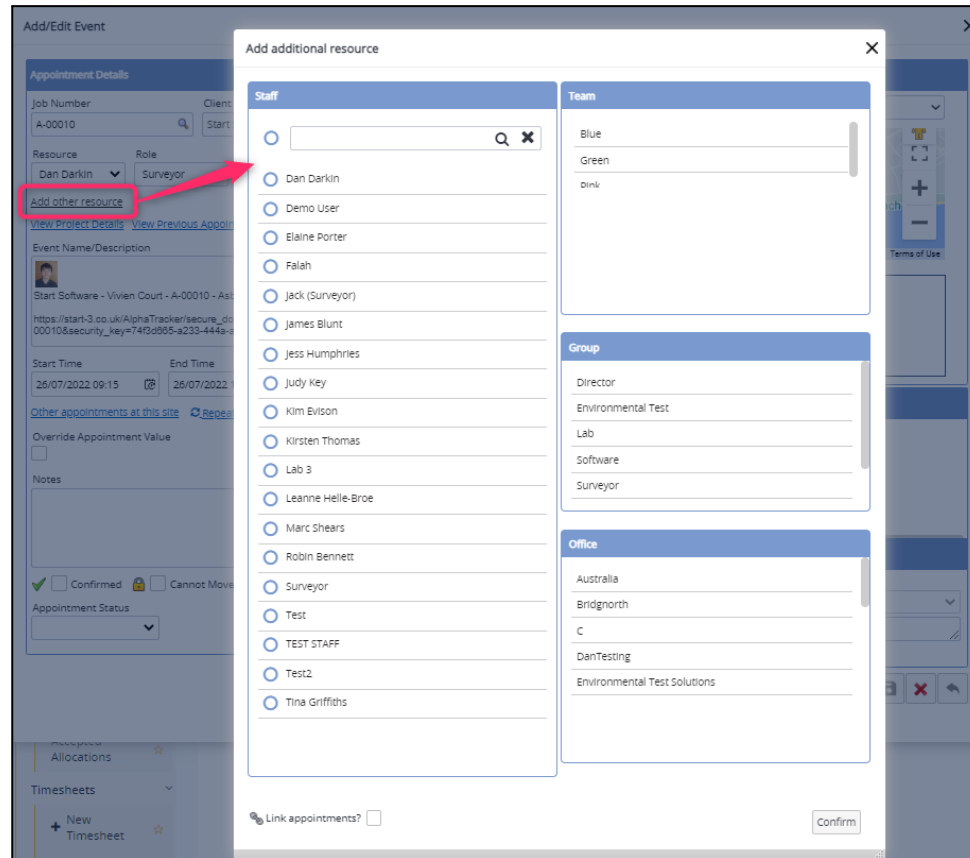


52. Another tickbox on the Client, this time on a contact record, lets you mark contacts as DNS - Do Not Solicit. The effect of ticking this box is to hide the contact's email address on the Account Management screen, even if they are marked as a key contact, so that they cannot be included in any bulk emails.
53. A new field has been added for a client's Accounts email address. You can find it on the Client Details, Project Detail, Client Lookup and Invoicing screens.
54. Excel download buttons can now be hidden on specific list screens to prevent the download of the data. Settings control this. The screens where the button can be hidden are: Client List, Invoice List, Project List, Quotation List.
55. It is now possible to hide more columns on the Bulk Sample Setup screen. New settings allow you to hide the Item Description and also the Material columns. Both are defaulted to no so that the columns will display unless switched off.
56. Clients using Australian Air Monitoring now have the ability to check in Air samples online using the Client Portal.
57. For Aus/NZ Air Monitoring users, there are a number of small changes plus some new settings:
 - "Air Monitoring and Clearances Work Location Required". If it is set to yes and the Work Location is blank, then a prompt message is displayed - the user must confirm the message if they want to leave the field blank.
 - "Automate Air Monitoring and Clearances Counted By" is another new setting, which also defaults to no. If it is set to yes, the Counted By auto-updates after the fibre values are updated.
 - "Microscopes - Show 2nd Factor Column", default=no, if yes, show the numeric 4 column on the Microscopes screen, on Clearances show 13mm and 25mm records, otherwise just show 13mm (the existing factor)
 - "Microscopes - Name: Numeric 1"
 - "Microscopes - Name: Numeric 2"
 - "Microscopes - Name: Numeric 3"
 - "Microscopes - Name: Numeric 4"
 - "Fibre Counts View (Grid/List)", default=Grid
 - "Calculation: Volume Decimal Places", default=blank.

Superusers now have the ability to delete air monitoring/clearance records.

58. A new setting lets you choose the terms you want to use for Master Project. The setting is "Name: Master Project". In addition, the application of the language tag for the term "Project" has been extended to capture more instances.
59. A new setting "Hide reports menu other than for Superusers/Management" lets you hide the Reports menu from all users not in the Superusers or Management permission groups.

60. For clients with more than 100 active staff, the Company Calendar can now be hidden by using the setting "ShowCompanyCalendar (yes/no)".
61. The screen to add additional people to a calendar appointment has been changed to make the selection of staff consistent across multiple screens. Click the circle next to staff names to select/deselect staff.



Fixes/Minor Changes

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

- PDFs in the Client Uploads folder will now be visible via Site QR codes..
- Any white space in Alpha Draw drawing filenames will now be trimmed. And there is additional logging in the Alpha Draw data process code.
- A problem with the display of Status Notes after saving has been fixed.
- Further variations to the term for NAD are now allowed for in points calculation, including “Asbestos Not Detected”.
- Some minor changes have been made to help Client Portal users reset their passwords easily.
- Issues with using multiple email addresses in the “Send to client” option in Document folders have been resolved.
- The display of the Sample Status on the Project List has been improved to work better with the new colours.
- Curly braces ({}) in survey data no longer stop re-inspection XML generation.
- If you are using the Project Pipeline (from the Surveying side or the Client Portal), then the Report Produced milestone will now be relabelled as in the rest of your system.
- All Hazmat screens now only show active staff on Surveyor dropdowns. Inactive staff names are displayed in brackets. Reinspection Notes have been added to all Hazmat screens.
- Logging in is now faster.
- Creating a project from a quote now copies the longitude and latitude across. This ensures that the map link shows on the Project List for projects created in this way.
- The Appointments screen checks that projects exist before allowing you to schedule them.
- The Floor field on the Survey Items screen now allows you to type up to 25 characters to match the field length in the database.

- The Intellisearch now also searches on the Linked Quote column. And, when a quote number is entered, it searches all quotes, not just open quotes. It also now searches site address and postcode.
- A fix has been applied to the Refresh Cost Breakdown button.
- Performance improvements have been made to AppointmentValue triggers. Only future appointments are now updated.
- The Site List screen has an additional search field for Site Address. Results are displayed in Site ID descending order. The Site Address search field on the Site List respects language tabs and is a text area.
- There have been some minor changes to the Staff screen. The “Not Current” field has been relabelled as “Inactive (Yes/No)” to make it clearer, and the Delete tickbox is now a button with an amended message.
- The software update facility has had some minor improvements.
- Some fixes have been applied to sort order in site register reports, including the site register 'Print/PDF' on the Client Portal.
- The tab no longer closes when adding a Call/Task from the Quotation List.
- An issue with the Analyst Assessment score not populating on the Fibre Analysis screen has been fixed.
- An issue with adding more projects from the Invoice screen has been fixed.
- Forward slashes in survey data are now allowed in re-inspection XML generation.
- A fix now ensures the latest front page photo is displayed on the Client Portal Site List & Compliance Summary.
- Some minor fixes have been applied to Fibre Analysis to ensure locked records remain uneditable and tabs are always labelled “Re-check” appropriately. Also an issue with loading and saving trace analysis has been fixed.
- A problem with the display of contacts made in Account Management has been fixed.
- The sort on the Total Value column in Account Management has been fixed.
- There have been some minor field changes for Aus/NZ Air clients.

- The Print/PDF reports from the Site Register on the Client Portal and Client View Site Register.
- The Map Scheduler has had a refresh affecting the staff searcher, project selector, search buttons and Route/Optimise Route buttons. In addition, the site importer has been tidied and the logic of the import and its messages improved.
- It is also now possible to set a default appointment length for use on the Map Scheduler - enter this on the Master Project (if importing, or on each sub if setting up separately), in the Financials/Planning section.

The screenshot shows a 'Diary' configuration window. It has a blue header with the title 'Diary'. Below the header are two input fields: 'Estimated Man Days' with a value of '1' and 'Estimated Man Days (Write Up)' with a value of '1'. Below these is a field for 'Default Appt. Length (hours)' with a value of '0', which is highlighted with a red rectangular box. To the right of this field is a blue link labeled 'Change Log'. Below the 'Default Appt. Length' field is a button labeled 'Diary Appointments'. At the bottom of the main form area are two buttons: 'Add Timesheet' and 'Timesheets'. Below the main form area is a grey section titled 'Notes/Other Info' with three icons: a save icon, a back icon, and a refresh icon.

- Home and Office Postcode can now be shown on the map for routing purposes on the Map Scheduler.
- A variety of fixes have been applied to the system to prevent errors when using IIS, eg when uploading staff photos and signatures.
- A fix has been applied to the download to Excel from Site Register for the Recommended Action.
- If there are extra info fields linked to the "Project Opened" milestone, then the Extra Info will now be created, and then opened with a filter for Project Opened Extra Info fields.
- A fix has been applied to the random password generation on IIS when creating a new user, and the random password generator now uses the regular expression in the repository setting to ensure that the password generated satisfies the password rules.
- A problem with loading QR codes via the Site List & Compliance Summary has been fixed.
- Monthly and Yearly totals from the cost breakdown now carry through to the project when created from a quote.

- A problem with the loading of the Quick Edit Survey Details screen has been fixed.
- Optimisation has been applied to the Intellisearch feature, the Project List and Projects Ready to Invoice to speed up loading.
- SM2 Survey Item Import now only shows if scoring method is shown / setting enabled.
- The general search box at the top of the Projects menu now also searches on Client Project Ref.
- The Quotation List search should now be much quicker as changes have been made to how it works.
- The selection of staff on the Staff Calendar has been changed so that you can search for a name, select them and continue to search for other names to add to the selection. You can also select/deselect all staff. The staff selector outputs first names to the tab, restricted to 15 characters.
- A problem with the population of the key milestone 'Report QC Checked' has been fixed.
- The drag and drop zone on document folders is now even smaller if the “compact” option is selected.
- The Master Project List now shows additional columns, such as client and project type.
- The map view on the Project List, Client List and Site List has been increased in size by approx 40% to make it much more useful.
- An issue with the creation of duplicate buildings on project import has been fixed.
- The operation of the Contracts screens has been standardised.
- The search on the user site restrictions lookup has been improved.
- The Lab Project List now only shows open projects.
- The Initial Findings email now uses the SendEmail function for sending with the latest email settings/function.
- Improvements have been made to background video/image serving.
- If a lowercase prefix is passed to the GetNextNumber stored procedure, it will now always output with the uppercase prefix.

- Project Import and Site Import are now available to the "Management" security group. Previously only Superusers and Administrators could use these two imports.
- There have been some performance fixes to the Project dropdown on Re-use Survey Data and Re-inspection project number selection. Re-use Survey Data will now only bring through projects without a Report Produced Date. Both respect allowed office letters.
- The Master Project Import now downloads the template as .xlsx and accepts an upload of .xlsx and .xls.
- The Cost Category field on the Associated Cost Items screen can now be up to 50 characters.