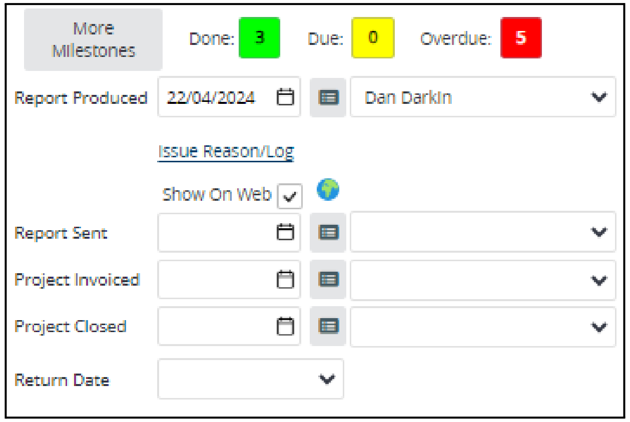
Release 41 - Alpha Tracker Release Notes

New Features / Changes (from SVN8603 to SVN9264)

1. A keenly awaited feature in this release is that your asbestos survey reports can now be automatically emailed directly to your clients from Alpha Tracker. If you choose to use this new function, you will need to have the Alpha Tracker Work Queue installed; it is the Work Queue that automatically sends the reports. There are also settings to complete to define the criteria that will identify which survey reports are ready to send.

   The following settings are available:

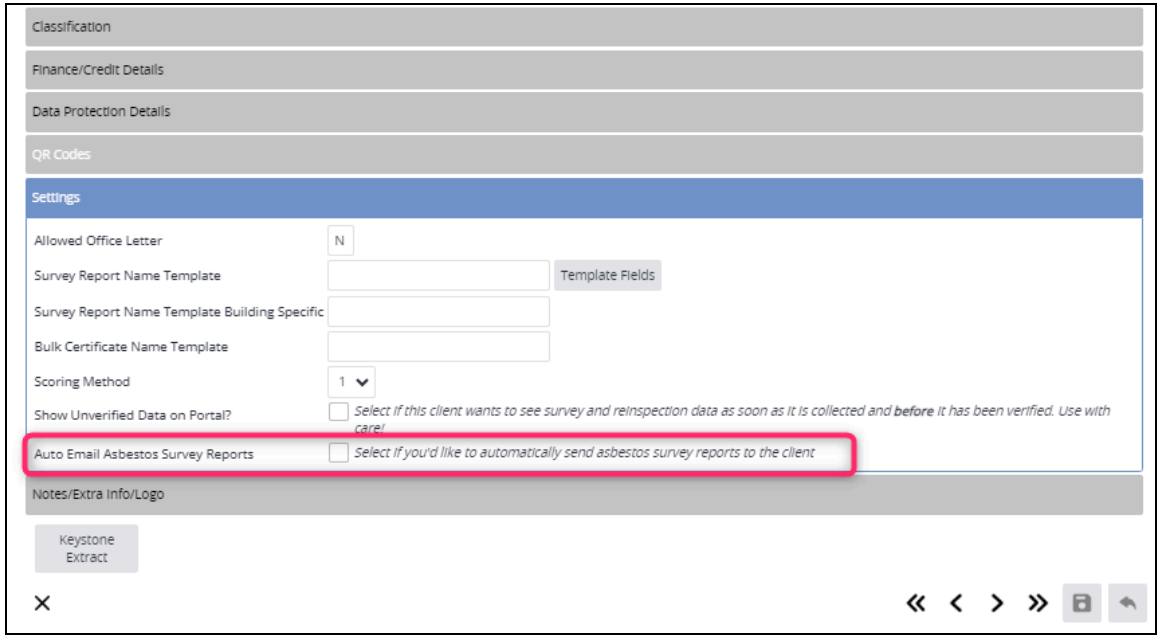
   - “Show Report Sent” should be set to yes. This adds a new milestone to the Projects screen for “Report Sent”, which is automatically completed if the report is automatically sent.



   - “Auto Email Asbestos Survey Reports” should be set to a letter code to set the criteria for identifying reports that are ready to send. Initially the valid values are “A” - when the Survey Approved Date is completed, and “B” - when the QC Date is completed.
     In addition to these criteria, the Report Produced date must be completed for a report to send.
   - “Auto Email Asbestos Survey Reports CC” allows you to specify an email address to which all automatically sent reports will be CC’d.
   - “Auto Email Asbestos Survey Reports Email Body” allows you to specify the text to include in the body of the emails. Contact Start Software for help with using tags in the text.
   - “Auto Email Asbestos Survey Reports Email Subject” allows you to specify the subject line of the emails.

- "Auto Email Asbestos Survey Reports From Address" allows you to specify the from address visible on the emails, eg alphatracker@start-software.com.

In addition, each client whose projects are to be included in the automatic sending of reports process must have a flag set on their Client record. You can find this tickbox here:



The Alpha Tracker Work Queue identifies the projects matching the criteria for codes A, B etc, where the Report Produced milestone is completed and the Report Sent milestone is not completed, and then emails the reports. By default the Alpha Tracker Work Queue runs every minute, but this is configurable.

The Work Queue sends the emails to all the Report Recipients listed on the projects. The report PDF to send is identified as follows:

- it is a PDF in the Document folder
- its name matches the survey filename template (including client-specific filename templates)
- it is not marked as a DRAFT.

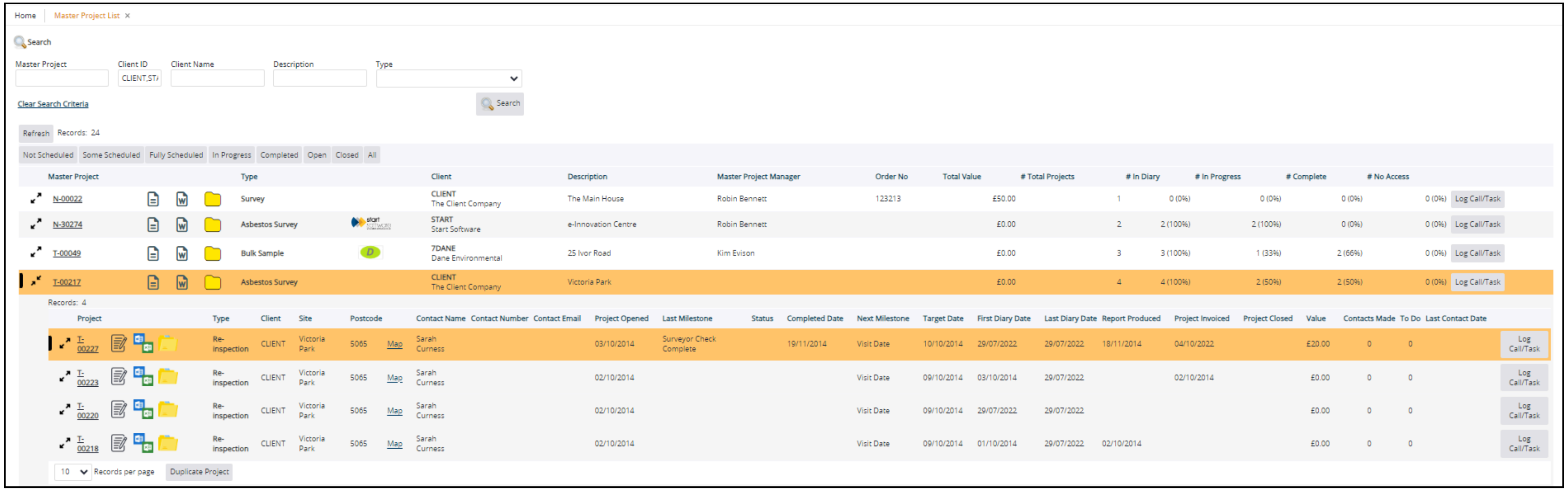
If more than one report PDF is identified for a project, then no email is sent as manual intervention will be needed to clarify which PDF is to be sent. If a report is sent, then a note is added to the project's Jotter.

2. Alpha Tracker has had some cosmetic changes in this release. The changes are most obvious when looking at buttons, tabs and icons. These changes are to introduce more consistency in the display, and to make it easier and more appealing. We hope you like them!

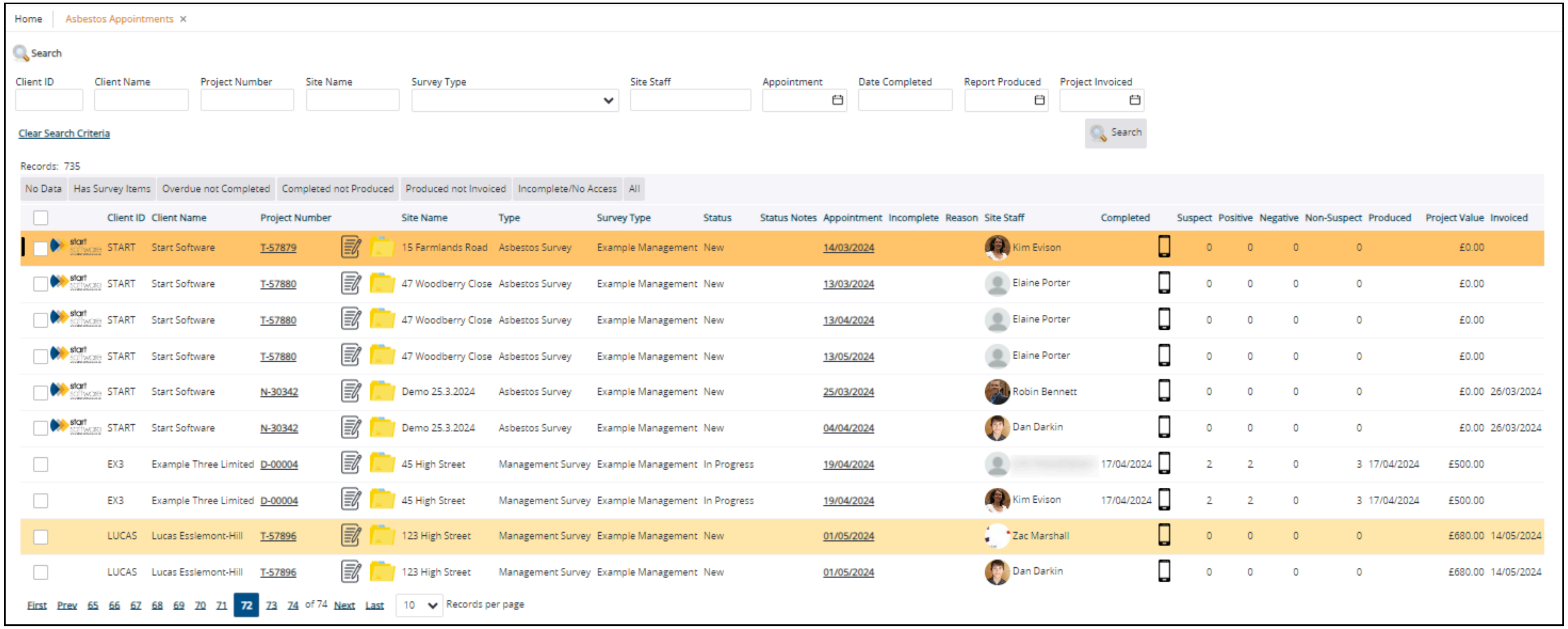
3. This release sees performance improvements with changes to the platform running Alpha Tracker, which are aimed in particular at larger, busier consultancies. "Free threading" is the key feature now in use to improve performance on busy servers.

4. Improvements have been made to the Master Project List to help you manage larger projects better. In particular, the counts that are now displayed at the master project level give you an indication of the status of the whole master project. The Master Project List now includes the following:

   - a count of the number of sub projects in the master project
   - counts to show the number and percentage of sub projects in the diary, in progress, completed and not accessed
   - pre-set filter buttons to search for master projects based on the counts, eg Not Scheduled, Some Scheduled, Fully Scheduled, In Progress and Completed
   - Open and Closed pre-set filter buttons so that you can easily exclude closed projects from the list
   - the Project Manager on the Master Project List
   - site contact-related information on the sub-project list
   - contacts made information on the sub-project list, including Contacts Made, To Do and Last Contact Date
   - the Status on the sub-project list
   - an Excel download button
   - a Jotter button
   - Client logos, where added.



5. There is a new Asbestos Appointments screen to help you manage your asbestos projects better. It has been designed to work in a similar way to the Water Appointments screen.



This screen shows you all appointments for asbestos-type projects (Project Category = Asbestos Survey) and gives you information on the status of the project linked to the appointment. You can use this screen in many ways. For example, you might want to filter the display to show all the appointments for yesterday, then:

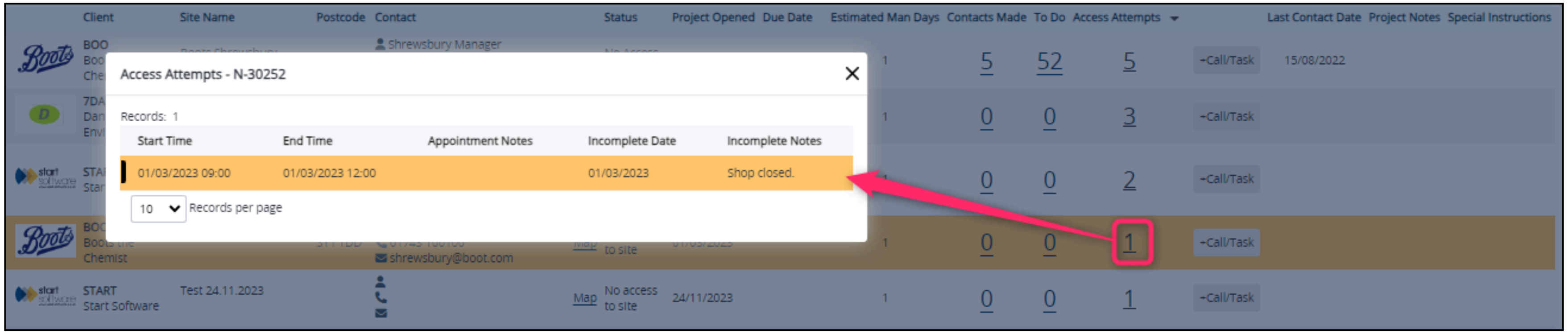
- Site Staff tells you which member of staff the appointment was for
- Incomplete Reason indicates whether there was No Access To Site
- Completed indicates whether data has been sent into the project, the date(s) that data was sent into the project are displayed - if there are more than three dates then “Various” is displayed
- the number columns give a breakdown of the suspect, positive, negative and non-suspect items (and you can access that data from the mobile icon).

You have pre-set filter buttons to help you filter the appointments further. These include No Data, Has Survey Items, Overdue not Completed, Completed not Produced, Produced not Invoiced, Incomplete/No Access. For example, if you filtered the display to show all the appointments for yesterday and then used the No Data button, you would get a list showing which surveyors had not sent in their survey data for yesterday. You could do a similar search to find all appointments that were marked as incomplete or not accessed.

You can find the Asbestos Appointments option on the Resources menu, under Asbestos.

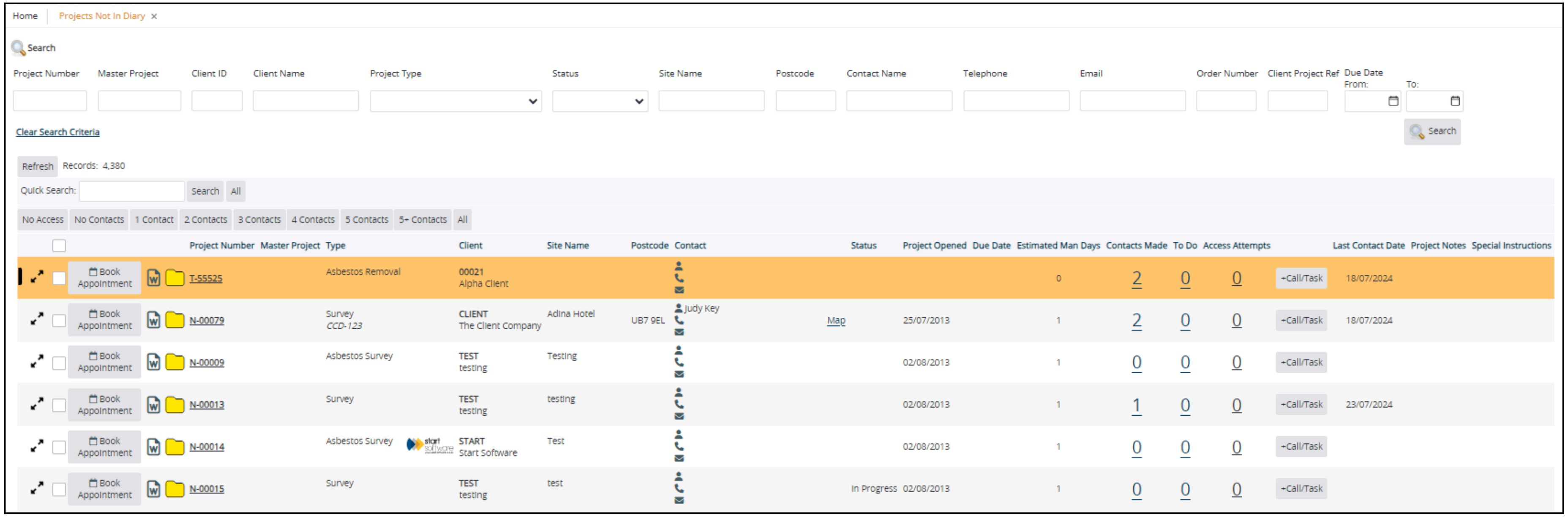
6. The Projects Not In Diary screen is very popular with consultancies who are booking and re-booking large numbers of appointments. This screen has had a number of additions to make it even more useful to a wide range of users:

   - The screen now includes the Project Notes and Special Instructions on the far right-hand side.
   - The Status has been added to the search fields.
   - The Contacts Made and To Do now open in a window in the middle of the screen so that they are always visible no matter what size monitor you are using.
   - There is a new "Access Attempts" column after To Do. This displays a count of the number of aborted appointments for the project. Clicking on the number lists the aborted appointments and their details.



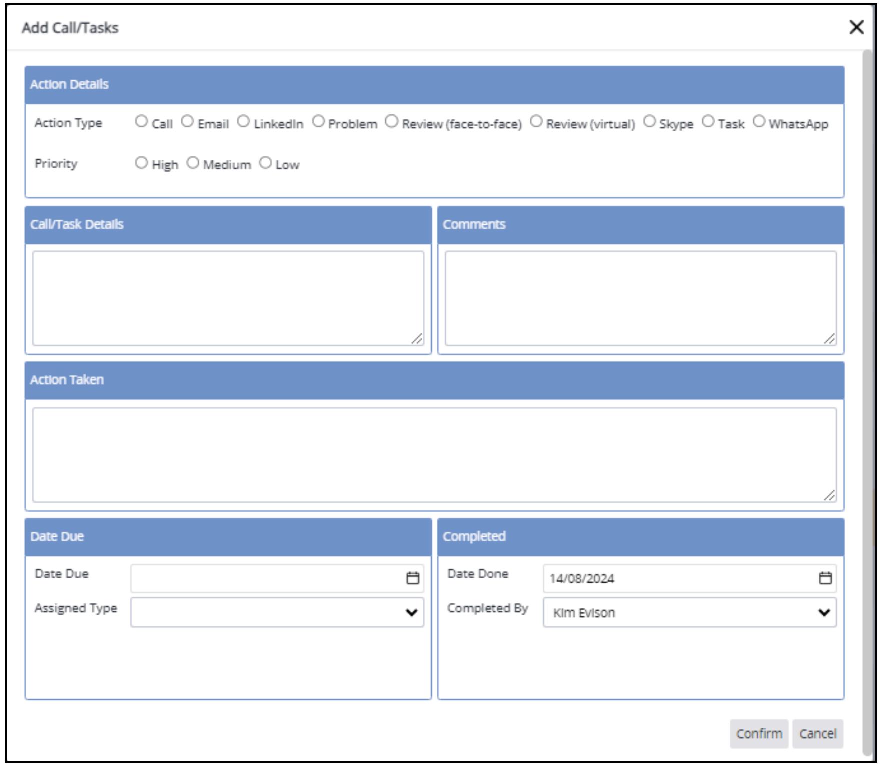
   - A new quick filter button on the Projects Not In Diary screen helps you find all open "No Access" projects with one click.
   - The Add Call/Task window has been updated and optimised.

7. To help with multiple contacts with clients/tenants, you can now log contacts made on multiple projects at once. This is also done on the Projects Not In Diary screen.



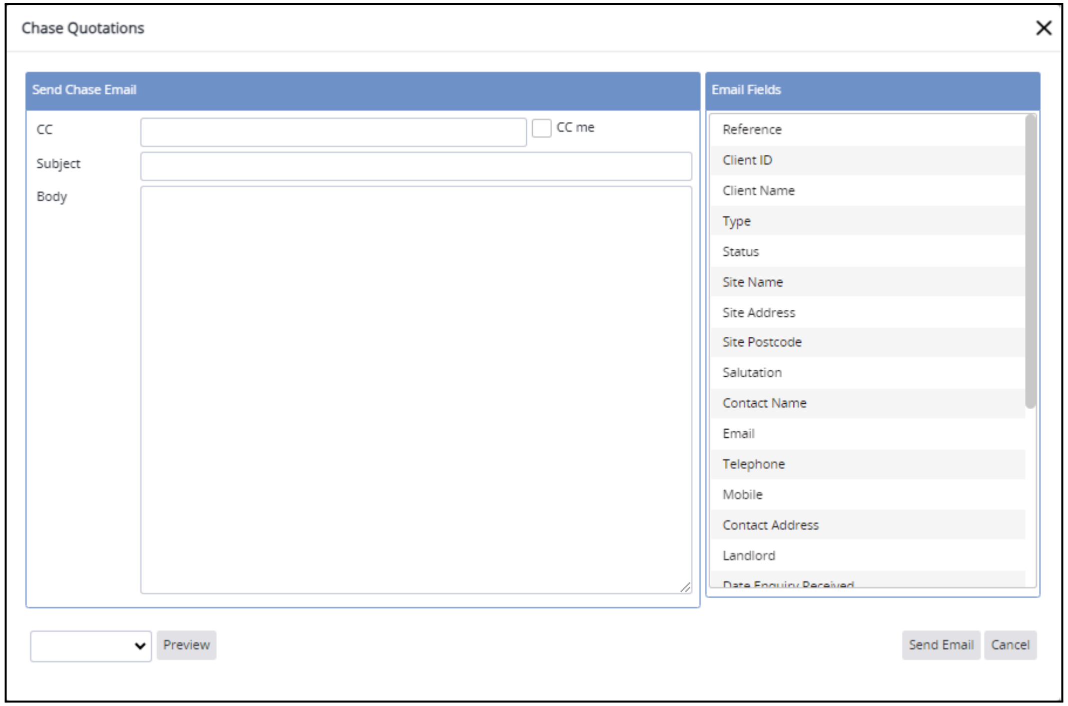
Simply use the checkboxes on the right of the screen to select the projects to which you want to record the same contact information, then click the new Add Call/Tasks button that is displayed at the bottom of the screen.

Complete at least the Action Type and Action Taken fields (though you could also enter the Priority, Task Details, Comments and Date Due), then Confirm to save the call/task to each of the selected projects.



8. There is a new feature in this release to auto-chase open quotations. This feature sends an email with pre-set text to the contact email address specified in the Contact Details section of the enquiry or quotation (displayed on the far right-hand side of the Enquiry List or Quotation List). This will be a huge time-saver for sales teams wanting to follow up on open quotes without manually writing individual emails to each prospect.

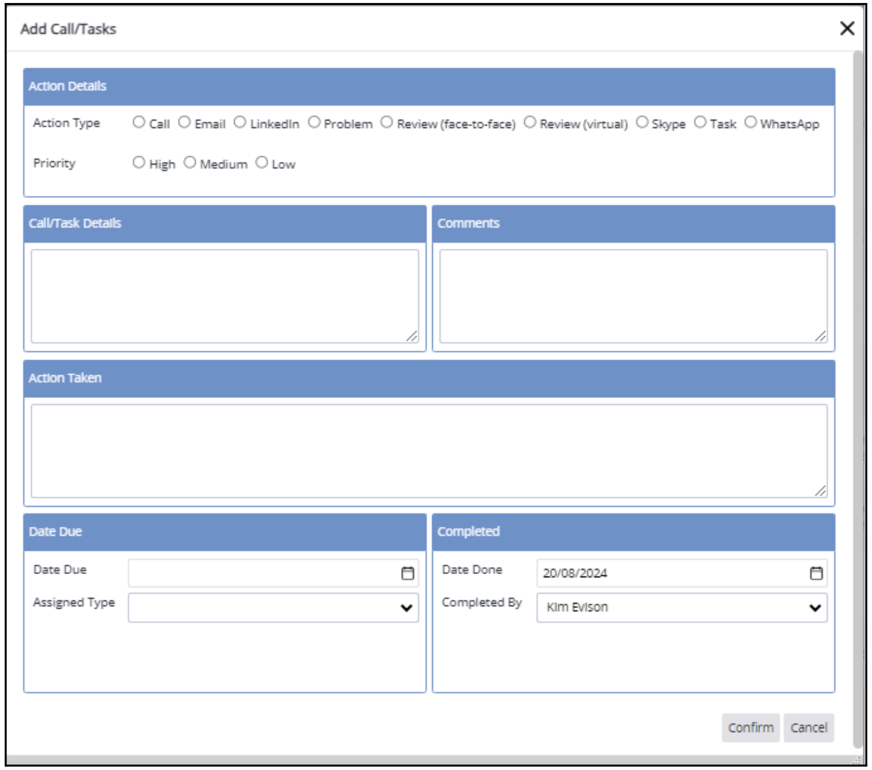
   You can work from either the Enquiry List or the Quotation List to send the emails. You filter the list of open quotes to select the ones you want to follow up and then simply select the applicable enquiries/quotations by ticking the checkboxes on the left-hand side or select all. A **Chase Selected** button is displayed at the bottom of the screen. Click the **Chase Selected** button to display the Chase Quotations screen where you can define or refine the text for the email. Default text can be specified by using the settings: “Email body for quote chase”, “Email subject for quote chase”. The list of tags available to use within the text is displayed on the right - simply enclose the tag name within angled brackets (< >)to pull the contents of that field into the email.



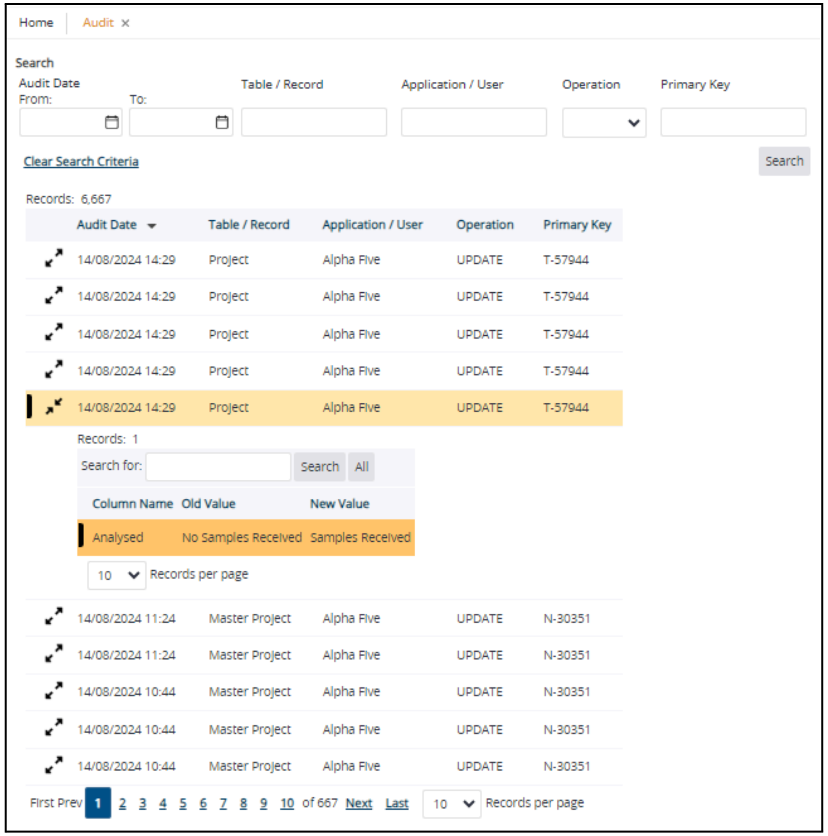
If Tracker Filer is not included in the email recipients, a CRM record will be written which also logs a quote follow-up.

There is a preview function that lets you see what the email would look like before sending it. You can select the quotation number of the email to preview and then click Preview. The email preview is displayed on the screen - this is particularly useful if you have used tags and want to check the results.

9. Also for quotations, in this release there is a new feature to add CRM calls/tasks to multiple quotations at a time. Simply select the required quotations on the Quotation List by ticking their checkboxes, then click the Add Call/Tasks button that is displayed at the bottom of the screen. A window is displayed for you to enter the details of the call/task. Complete the fields and save so that the call/task is logged against all the selected quotations.



10. The database audit has been extended to include changes to Projects. This means that all Project changes are logged and can be displayed on the Audit screen:



This feature will be extended further in future updates.

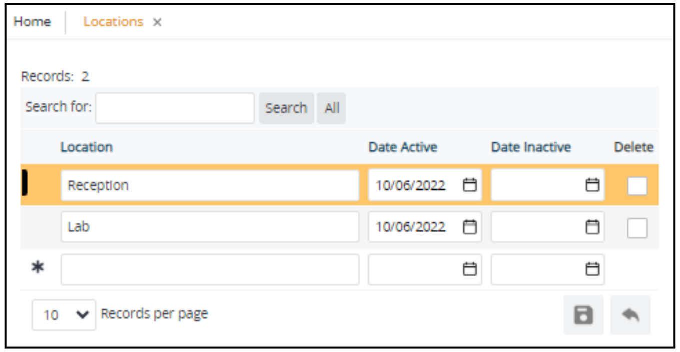
11. The barcode sample tracking feature in Alpha Tracker has been extended to allow the same sample tracking features to be available with or without the use of barcodes.

    You can set whether barcodes are to be used in the setting “Sample Tracking Process”, which can have a value of barcodes or manual. The Barcode Tracking menu has been renamed to accommodate both processes and is now “Sample Tracking”, located under the Resources menu. Similarly, “Barcode Locations” has been renamed as “Locations”, and “Scan Barcodes” has been renamed as “Sample Check-in”.

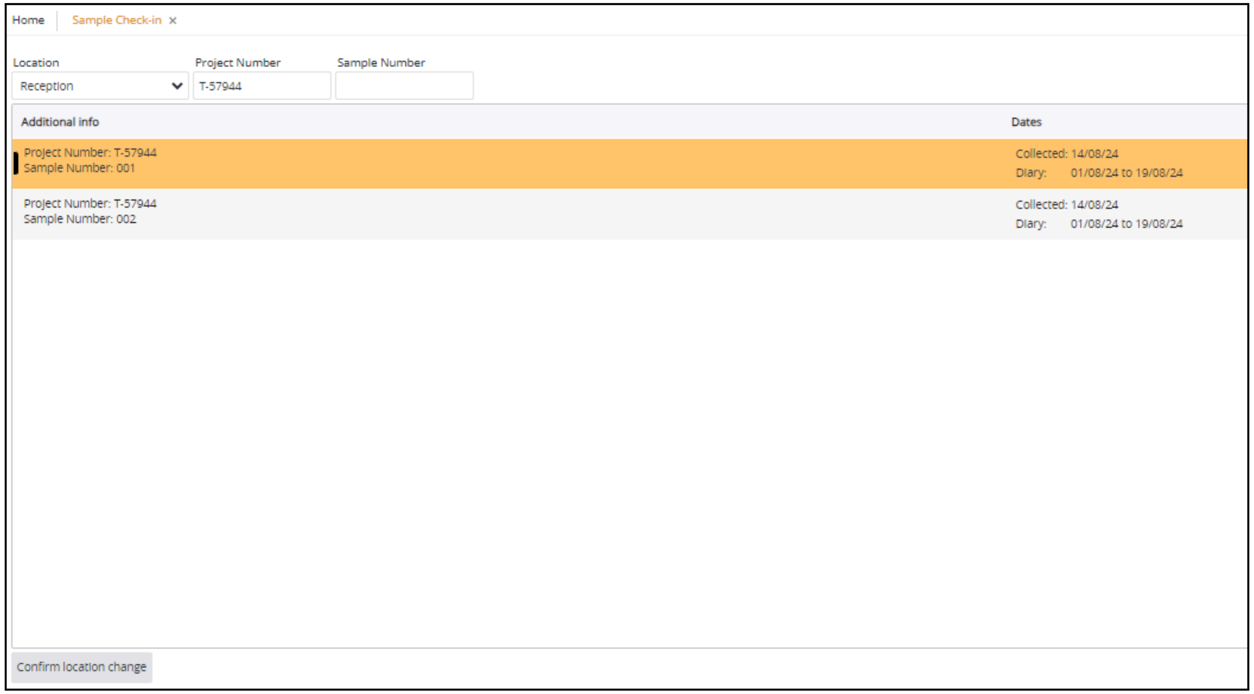
    When manual sample tracking is in use, you will see only two options on the Sample Tracking menu: “Locations” and “Sample Check-ins”.

To book samples in when using manual sample tracking:

a. Ensure that all the locations where you might be booking in the samples are set up on the "Locations" screen.



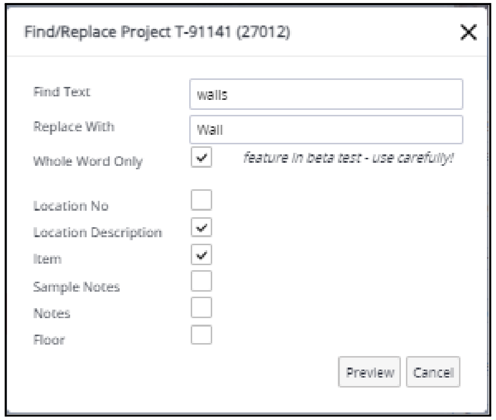
b. On the Sample Check-in screen, set the Location where you are receiving/booking in samples and the Project Number of the samples. Click Enter or click out of the field to display the expected samples (ie those in the survey data).



c. Register the samples' new location by clicking the Confirm Location Change button.

12. The Find & Replace feature on the Survey Data screen now includes a preview screen. This allows you to see exactly what changes will be made if you proceed with the action. It also lets you select/deselect individual changes in case there are some places where you do not want the change to be made.

    Click the Find & Replace button on the Survey Data screen and specify the parameters, eg:



    Then click Preview to see the changes that will be made. Use the radio buttons on the left to select the items where the change is to be applied - you can easily select them all by clicking the radio button in the header row - then click Save to action the change or Change Parameters to go back and alter the parameters.

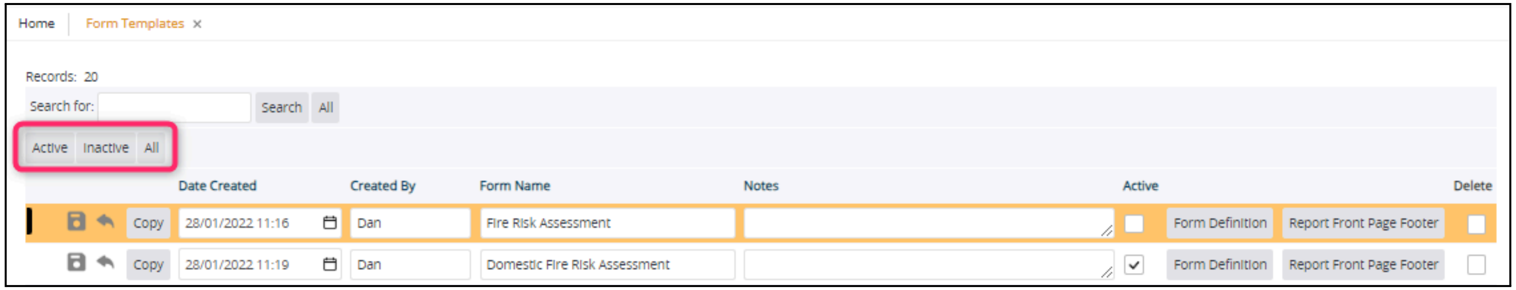
    Note that the preview can show you either the original text or the replacement text. The replacement text is displayed by default but you can change to the original text by using the buttons at the top of the screen.

13. The Forms module, that allows you to define your own standard question sets as form templates, and for these forms to be available for completion from a project, has been extended so that the forms can now also be completed via the Alpha Tracker Mobile app. This means you can easily complete a form while out on site.

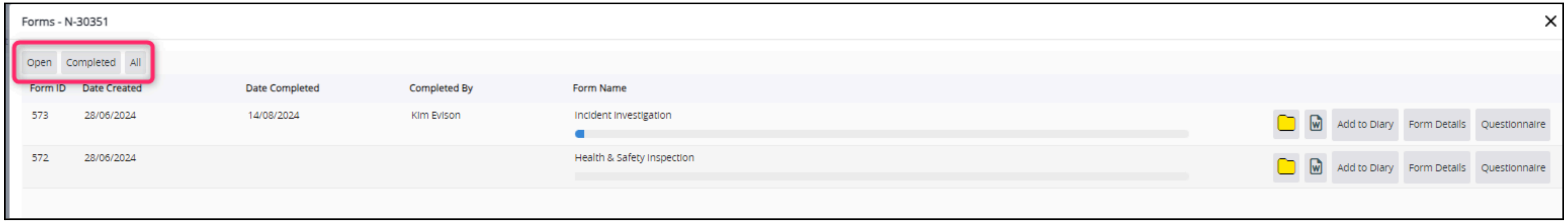
    You can use Forms for any purpose as you define the questions and possible answers. For example, you might want to set up form templates for Risk Assessments, for Equipment Inspections, for Audits, for Investigations, for Disability Audits… for anything.

    It's easy to complete a form – either online or by using the Alpha Tracker Mobile app. Online you simply click the Forms button from the project, choose the form and answer the questions. From the Alpha Tracker Mobile app, you first need to have an appointment booked in your calendar for the project, and can then tap Forms to select and fill in the available forms. Synchronise your data to send it into the project. You can even generate a report of the answers if you have a template setup.

14. The Form Templates screen now has an Active/Inactive option so that you can easily filter the list.

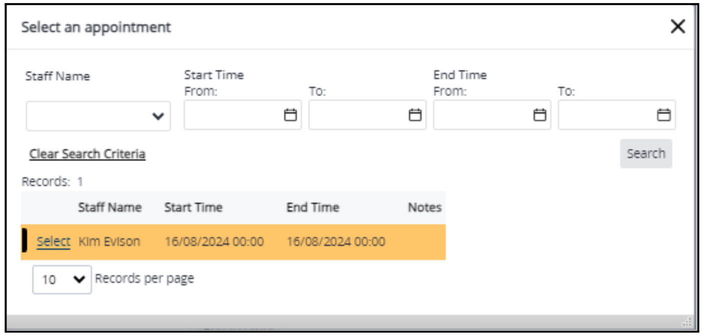


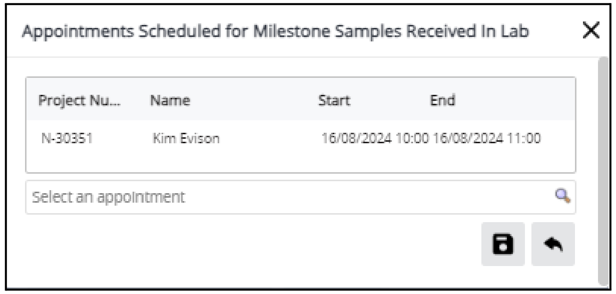
15. When you open Forms from a project and the list of forms is displayed, this list can now be filtered to show Open or Completed Forms only



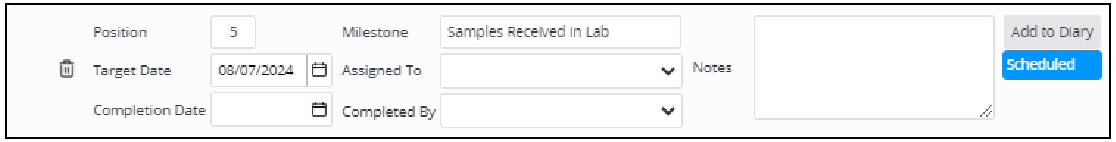
16. It is now possible to link forms and milestones to diary appointments. This is so that staff know that they have forms and/or milestones to complete as part of their appointment.

    Click the displayed "Add to Diary" button next to the form or milestone and select the appointment that you want to link to. The appointment should already exist so that you can select it.

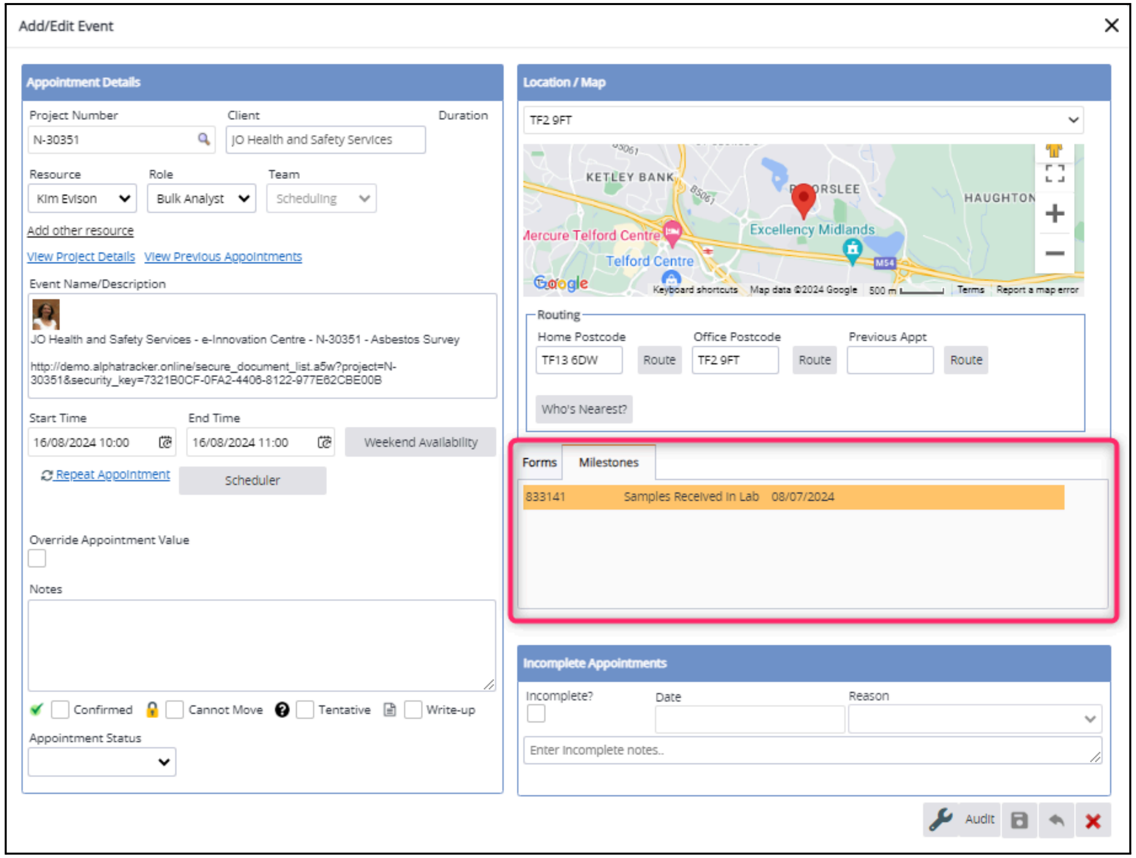




Once linked a “Scheduled” indicator is displayed.



If you open the appointment in the Alpha Tracker Calendar, details of the linked forms and milestones are displayed:



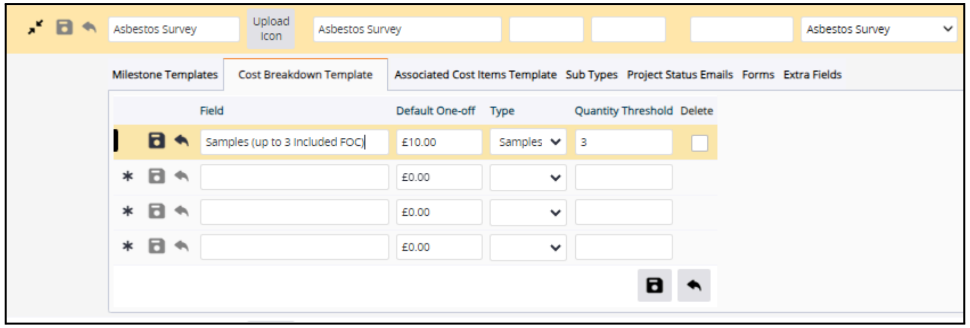
If you are also using Alpha Tracker’s Ticketing system then a third tab is displayed to show any linked Tickets.

17. This release sees the introduction of automatic counting of sample numbers for invoicing purposes. If you include a charge that varies according to the number of samples analysed, then you can set up the system to provide the total number of samples automatically. The count appears in the project's Cost Breakdown if the Cost Breakdown Template includes a row defined as Type "Samples".

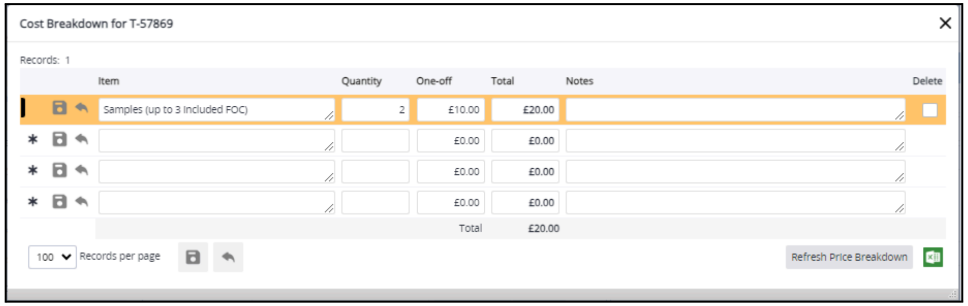
    The count is calculated from the number of survey items with an analysis result, so that it is applicable both to consultancies analysing their own samples and those who outsource the analysis. It can also calculate from the number of fibre analysis records completed for Bulk Sample projects, so that labs analysing third party samples can also use this functionality.

    An additional feature is the ability to include a number of samples free of charge. To do this, you need to specify the Quantity Threshold which is the number of free samples. Only samples over this threshold will be counted.

    To set up an auto-counting Cost Breakdown like this you would enter something similar to the following on the Cost Breakdown Template tab of the Project Type:

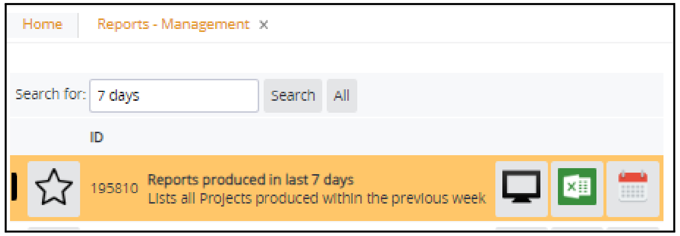


    If the survey had five samples in it, the line would appear in the Cost breakdown on the project like this when all survey data and analysis was complete:

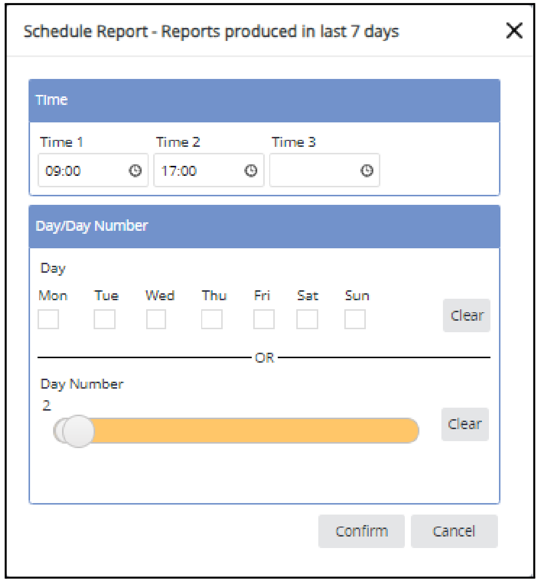


18. This release allows you to build your own dashboard emails from simple reports, ie from those with no parameters. A dashboard email is one that runs a query and automatically sends you the results by email at specified times. For example, you might have a dashboard email that arrives on the first of every month that lists staff qualifications expiring that month.

    To create your own dashboard emails, first find the report that you want to run. The report must not include parameters - you can identify these as they do not have the … button but instead show output options, to screen or to Excel. There is now a third option which is a calendar button for defining the timings of the dashboard email.

    Click the calendar button to display the Schedule Report window on which you can set up the dashboard email. You can set multiple times per day, multiple days of the week and/or a specific date during the month.

The dashboard email will automatically be sent to you (to the email address linked to the user ID you are logged in as) at the scheduled time(s). If you change the details on the Report Schedule window when there is already a dashboard record for the report, then you must confirm that you want the schedule for the dashboard email to be updated.

19. This release sees the introduction of register-based Hazmat re-inspections to Alpha Tracker. There have been some changes to the Hazmat register to ensure the latest records only to be displayed. This means that Hazmat registers will now behave like the Asbestos registers in terms of displaying only the latest records for a site. Hazmat data on QR codes also uses these registers to display the latest data.

    In the same way as with Asbestos, when creating a Hazmat re-inspection, buildings and projects are created and XMLs are generated. A setting lets you specify the default Project Type to be used for the automatically-created projects: "Default Hazmat Re-Inspection Project Type".

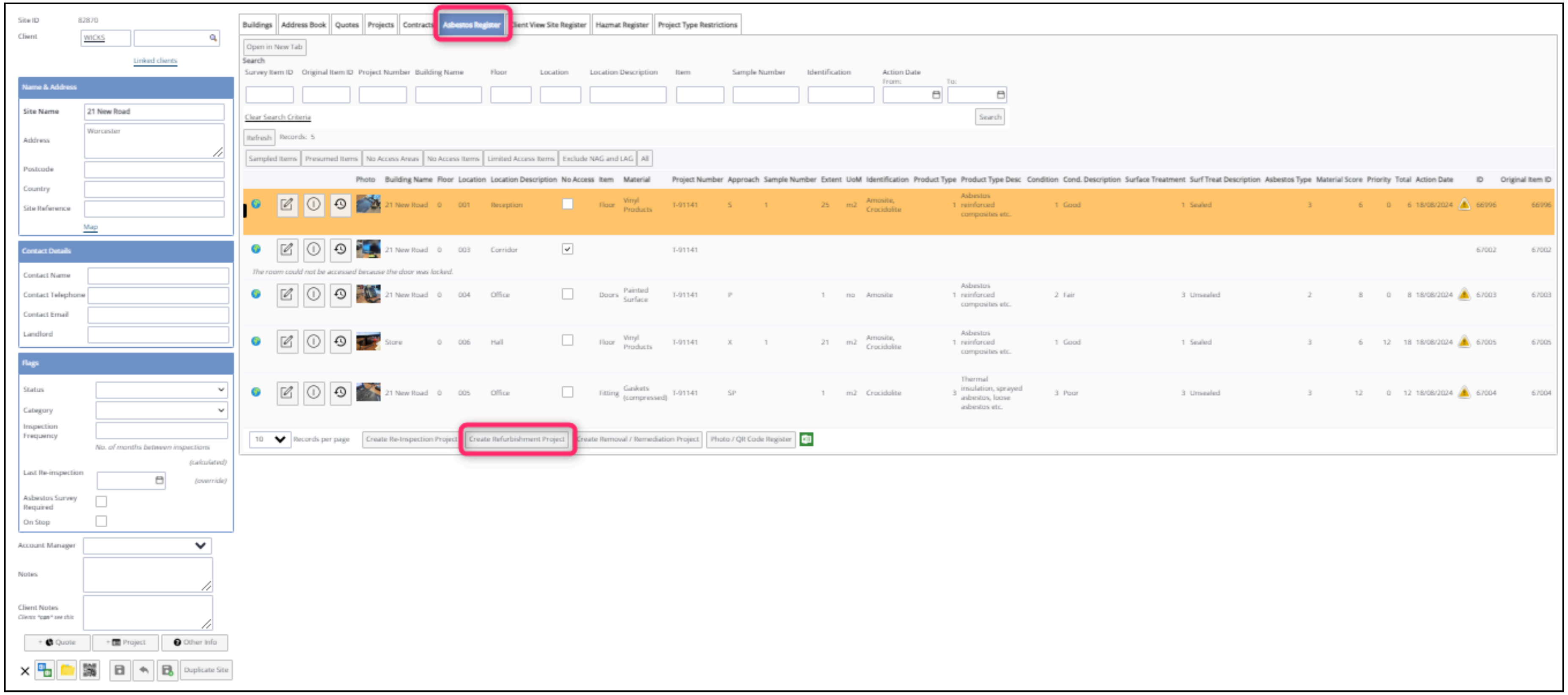
20. “Hide” fields are now available on the Hazmat screens. Any hidden items are displayed in grey. They are also hidden from the Client Portal.

21. There have been improvements to the combined Asbestos & Hazmat register, ensuring consistent data, improved filters for linked and restricted sites, more efficient use of key services and an improved photo register. It also now includes Update, View and History buttons giving you the full range of register functionality.

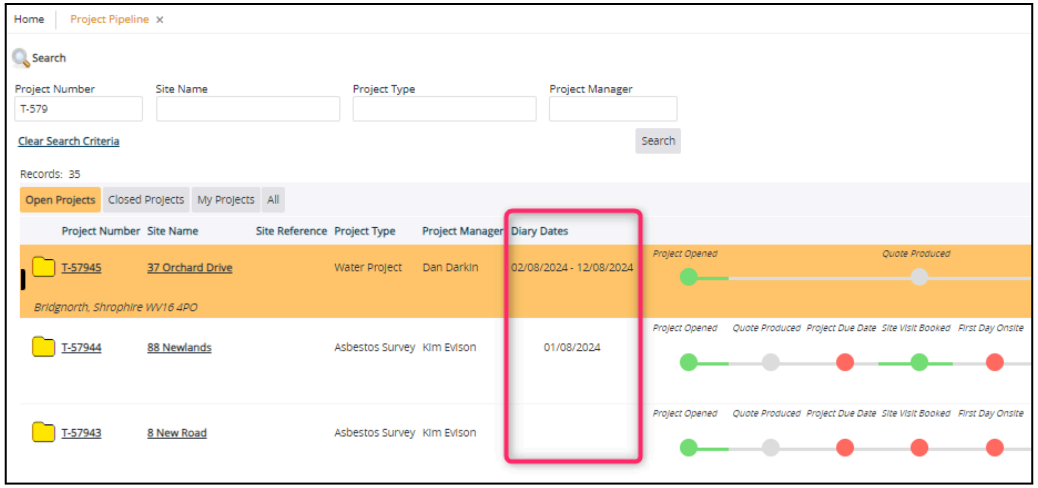
22. Alternative risk algorithms can now be accommodated more easily in Alpha Tracker for clients who do not use the standard UK material assessment. Custom survey item scoring templates are available to define the risk algorithm to be used. It is also possible now to set the custom item scoring template at the Client level.

23. You can now access Tracker Air data straight from the Project List screen by clicking the mobile icon. This means that if you are looking at an asbestos project the mobile icon opens the Survey Items, and if you are looking at an air project the mobile icon opens the Air Monitoring screen (UK or AUS/NZ version as appropriate).

24. Refurbishment projects can now be created from the Asbestos Register, not just from the Client View Site Register. They can include non-suspect items and can contain selected items only if required (by filtering the display). You create the Refurbishment projects in the same way as you do a Re-inspection project, ie by selecting the Unit ID, Project Letter, Pending etc.

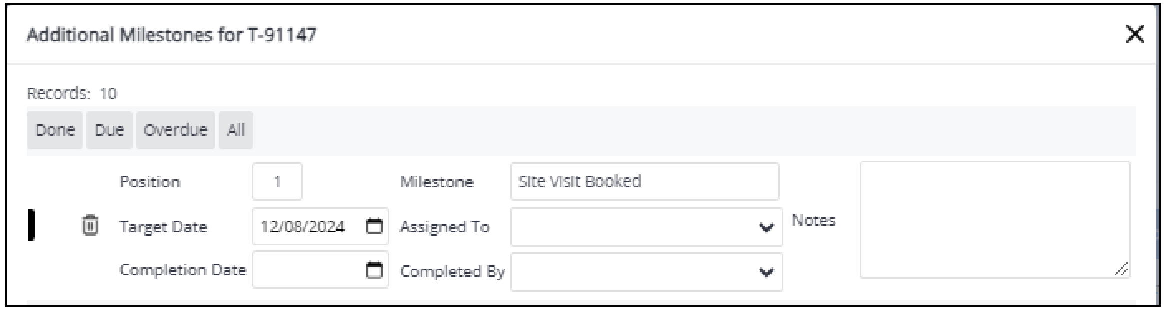


25. A Diary Dates column has been added to the Project Pipeline so that you can see if a project has been scheduled and the date or range of dates. These dates are displayed on the Project Pipeline on both the “surveying” and Client Portal side.



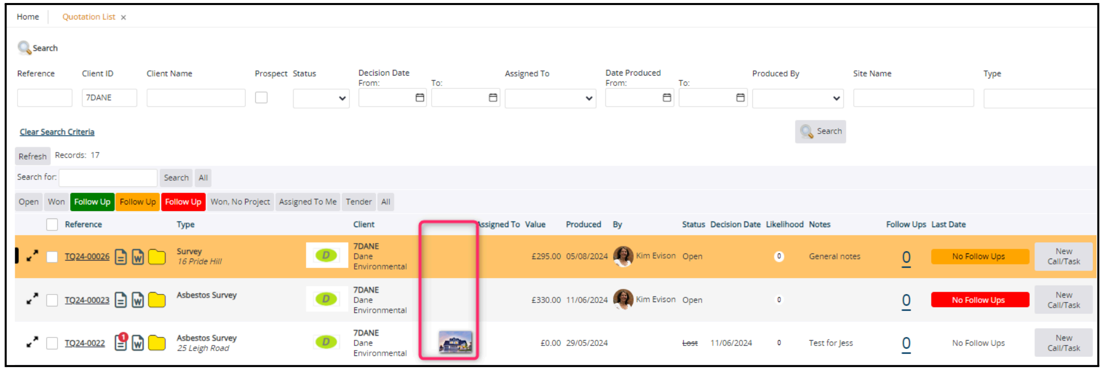
Write-up appointments are not included in the Diary Dates on the Project Pipeline, nor do they complete key milestone 5 (Site visit booked).

26. New pre-set filter buttons let you filter the additional milestones on a project. You can use the buttons to display only **Done**, **Due** or **Overdue** milestones. To allow for these buttons, the **Refresh Milestones** and **Delete Milestones** buttons have been moved to the bottom of the screen.

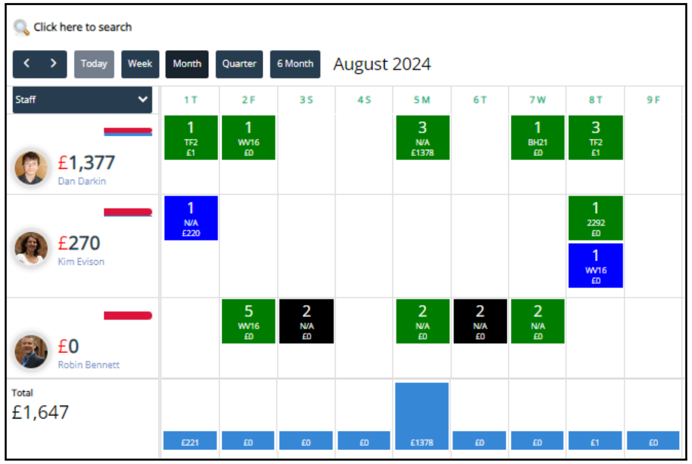


27. There is a new row expander tab under Project Types for Extra Info. This new tab displays the Extra Info that is linked to the selected Project Type.

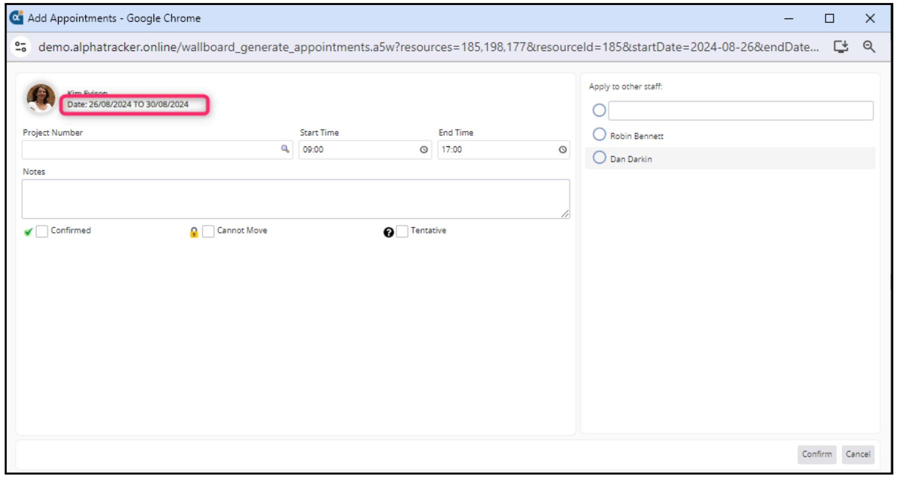
28. It is now possible to upload a front page photo file for quotations which you can include in your quotation documents if required. The uploaded photo is displayed on the Quotation List.



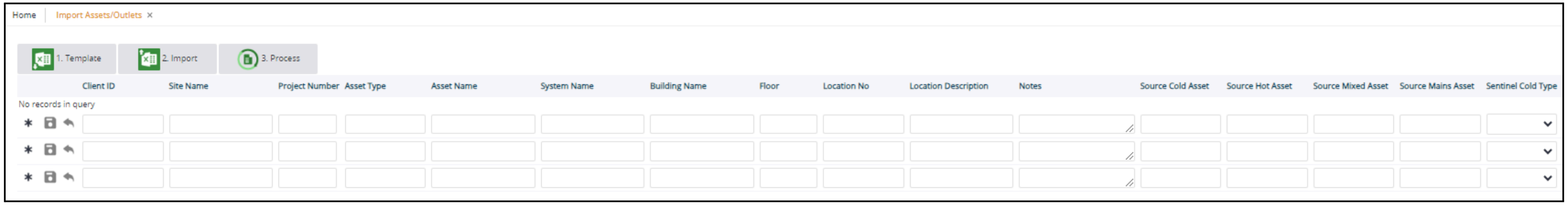
29. The Wallboard now includes staff photos to help you easily identify the person to whom the data relates.



30. The Wallboard now allows you to block-book time. Simply click and drag to select the block of time to book. The Add Appointments screen is displayed, showing the date range, for you to select the project, start and end times and any notes. You can also add the block-booking for other members of staff that you have displayed on the Wallboard by using the radio buttons on the right.



31. The Water Hygiene module now includes an importer for assets/outlets. You can find it under Water Hygiene on the Setup menu. As with other Alpha Tracker imports, there is a three-stage process to download the template, populate it and upload it, and then process the data.

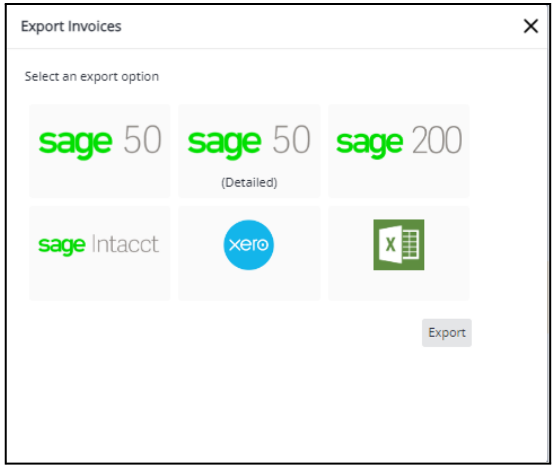


32. A new setting can alter how the Equipment screens work to prevent the Due Date being based on today's date plus the calibration interval. The setting is "Show PAT Test Due Date" and the calculation only takes place if it is set to yes.. If it is no, no calculation occurs, and the PAT Test Due Date column is hidden.

    Another new setting allows the calculation of the Expiry Date based on the Check Date plus the calibration interval. The Expiry Date becomes read-only. The setting is "Calculate Equipment Expiry Date" and the calculation only takes place if it is set to yes. If it is no, no calculation occurs. The default is no.

33. Exports that contain photos (and other types of files such as reports and drawings) can now be more easily created. The exports are part of the Reporting side of Alpha tracker. Previously you could download data into Excel files, and any accompanying files such as photos would have to be attached manually. With this new feature, the reports are still exported as Excel files but are included with the additional files in a .zip folder.

34. The Invoice Export process from the Invoicing screen includes a new option for Sage Intacct. You can make the selection from the Export Invoices window:



35. A brand new feature that starts in this release and will continue to be developed in the next release is the Lab Sample Exchange. This feature will work through Open Asbestos to enable the sharing of sample data electronically from other Alpha Trackers and also from some other external systems. The intention is to create a more open marketplace for sample exchange, including bidding functionality.

    If you are the surveying company sending sample details, this will be achieved simply by clicking a button and selecting a Lab. If you are providing the Lab services, it will provide a quick way to generate a Bulk Sample project listing the samples and also returning the results and certificate.

    There are initial screens in the system already, currently hidden by default until the feature is complete.

36. In this release, automatic Jotter notes are created when you use Tracker Filer. The note includes the main details of the email, enabling you to see a history of actions/communications.

    In addition, the Jotter now includes new quick search filters to help you locate notes more easily and auto-closes after a save so that you can quickly continue with your work.

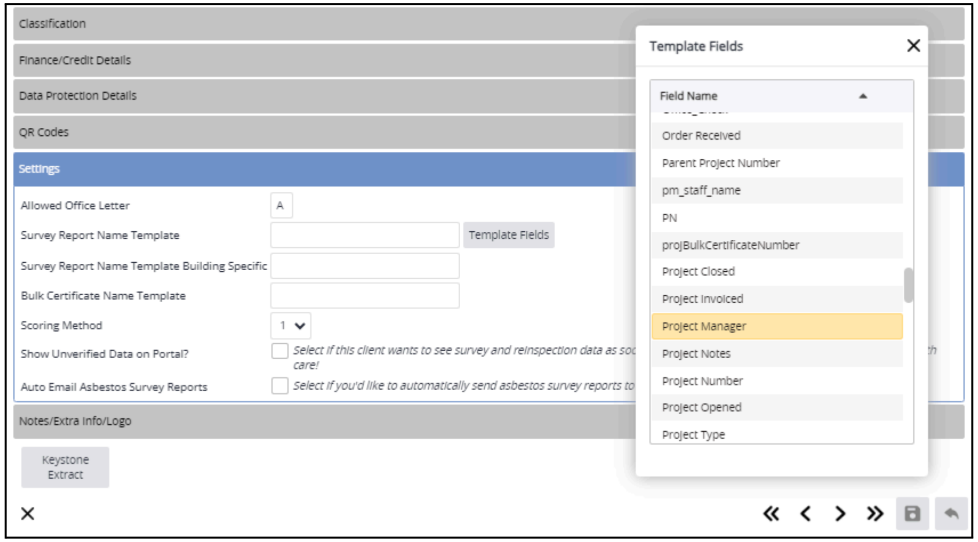
37. Improvements have been made to Single Sign On (SSO) with Alpha Tracker. This enables you to log on to your Microsoft network once, without needing to log in directly to Alpha Tracker. All defaults, permissions etc will be automatically set with the Single Sign On. The login page redirects to the SSO sign-in page if you are using an SSO URL and federated auth is enabled.

38. There are new settings to control the content of Hazmat QR codes. The settings contain a comma-separated list of the fields to be displayed by the QR codes. These are the codes:

    - QR Code Fields Lead Paint
    - QR Code Fields ODS
    - QR Code Fields PCB
    - QR Code Fields SMF.

    Contact Staff Software if you need a list of the fields:

39. The Filename Templates section of the Client Details screen has been extended and renamed - it is now called “Settings”. Next to the Survey Report Name Template field there is a new button “Template fields” which, when clicked, displays a list of the available tags to use in the filename templates. For example, if you want to pull the project manager into your filename template you would search the list and find the closest match, enclosing it in angled brackets. Here it would be <Project Manager>.



Fixes/Minor Changes

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

- The Reason field which displays on a quotation when it is won or lost now displays a dropdown list populated from the Lookups. To set the values you want to see on the dropdown list, go to Setup > General > Lookups and set values for the category “Quotation Result Reason”.
- Problems with the saving of multi-type and multi-site quotations and the display of buttons relating to these on the Quotations screen have been fixed.
- Invoice lines now accept 500 characters to match cost breakdown items.
- Improved logging has been added to the password reset functionality.
- In Alpha Tracker Mobile, the Undo button is now fully functional when using Forms.
- As an addition to the No Access Loc 000 record processing, if a Loc 000 record is received that is not No Access then any previous Loc 000 records in the project are marked as hidden.
- The Quotation List screen now opens with the search section hidden by default so that it matches the Project List.
- When you win or lose a quotation and the Reason field is displayed, you can either select from the dropdown list (which is populated from the Lookups menu option) or type in free text.
- A fix has been applied to building- and room-based QR codes following re-inspections, and to their history.
- Improvements have been made to setting and changing the identification of the latest survey items.
- The performance of the horizontal scroll bar on the Project List has been fixed.
- In Alpha Tracker Mobile, backing up files now only uploads files that are 30 days or less.
- Also in Alpha Tracker Mobile, re-inspections from registers now honour the pending flag and so may be created without a pending status.
- Also in Alpha Tracker Mobile, “My Projects” now shows open projects only.

- Some redundant Client Portal settings have been removed.
- Improvements have been made to the Water Appointments screen to make it faster.
- The SQL Maintenance menu option has been removed from the System sub-menu under Setup. This option is no longer used.
- The email field on Tickets has been increased to 150 characters to allow for longer email addresses.
- The Lab Dashboard will now update every five minutes.
- Improvements have been made to the Project PDF Exporter which gives you an easy way to zip up lots of PDFs across multiple projects. You can find the menu option under *Setup > Import/Export*. It will now:
  - ignore files with the words “purchase order”, “purchase_order”, “order”, “quote”, “remittance, “credit note”, “credit_note”, “training”
  - look at the first word of the filename, and if the first word matches the pattern of a quotation number it will ignore the file
  - ignore filenames containing the word "plan" if the "Drawings" tick box is left unchecked.
- The tabbed screens on Contracts have been tidied up to ensure sites can be viewed and ID columns are no longer visible.
- The Non-Reported Comment on Fibre Analysis now allows unlimited text.
- The Lookup screen now has the Categories hard-coded as these have to be recognised Categories only. The Categories displayed are dynamically set according to the licence keys present in the system. This means that if you do not have a licence key for Hazmat or Mould, for example, then you will not see the associated Categories.
- Updating a training course now marks future appointments as “dirty” so that they are processed by Calendar Sync.
- Some minor changes have been made to the SMS list on the Map Scheduler.
- SMS appointment reminders will now only be sent once, based on the project number and date/time. Even if multiple staff have the same appointment the SMS reminder is only sent once.
- If you update a project with new items after it has been marked as Report Produced and Show On Web, the new items will also have Show On Web and Islatest set to true, so that they are included with the other data in the project.

- The Quotation Ref has been added to the Project Import.
- The default value for Fixed Price is now honoured when creating a project from a quotation.
- The “Edit/View Site Status” option has been removed from the menu on the Client Portal.
- A fix has been applied to the Bulk Sample screens to populate the Overview tab after changing tabs.
- There have been some improvements to the export to Excel on Survey Items and Projects Ready To Invoice.
- The “Options” field on the Forms Templates has been extended for questions and answers.
- The Jotter and Document Folder have been added to the Water Appointments screen. And the Jotter, Word/Excel and the Document Folder have been added to the Projects Dashboard.
- The display of questions in Forms in Alpha Tracker Mobile has been improved.
- Problems displaying active/inactive staff on the lab search have been fixed.
- The intellisearch field that allows you to make wide-ranging searches from the menu, now also searches on client email address (on client records only).
- If a user signs into Alpha Tracker when their user account is incomplete, eg no Staff ID or Client ID, then a message is displayed. This is especially important for Single Sign On and Active Directory users.
- Messages have been improved on the PDF exporter.
- Curly braces are now allowed in re-inspection data.
- If you are using the Ticketing system, then you will be able to record the number of minutes taken to solve a ticket and whether a ticket was solved out of hours.
- If the setting "Multiple Bulk Certificate Types" is enabled, and you are auto-generating documents, you can now select the different bulk certificate types on the milestone templates. When the milestone is completed, the bulk cert type will be set on the project and the document is requested.

- Messages displayed when attempting to delete a client have been improved. For example, if the reason you cannot delete the client is that there are sites linked to that client, then a message informs you of this and the number of sites involved.

- The Xero Contact ID is now automatically updated from the Account Code at the point of exporting the invoice/credit note if the Xero Contact ID is not already set on the client.

- The existing charts on the Client Portal for Water Hygiene users have been renamed to “Overview Charts”. A new tab has been added for “Monitoring Charts” and this feature will be coming soon.

- Soil samples can now be seen in the QC process.

- Some display issues on the Quick Edit Survey Data screen have been fixed.

- An issue where the SMS bubble on the appointment could be lost when a user confirmed or rejected an appointment has been fixed.

- A new control is in place to prevent the possibility of duplicate sample numbers in Bulk Sample projects.

- The Fibre Analysis screen no longer requires you to save/abandon changes if you have not made any changes.

- Selecting an identification now sets the score using client-side only code so is now much faster.

- Improvements have been made to the updating of related records if a project number is changed. This includes records for samples, bulk samples, risk assessments, air monitoring records and related tables, forms and water related tables. The files are also moved into the document folder of the new project number.

- Water Hygiene projects will now display the latest front page photo on the Project List, Site List and on the Site List and Compliance Summary on the Client Portal.

- The Master Project List on Clients has been updated to reflect recent changes to the Master Project List.

- The Equipment Types screen now includes a quick search and the ID field has been hidden.

- Minor improvements have been made to the Clients Importer, including to the error messages.

- If you are using Property Type and Building Age on your Buildings, you will find that this information is copied to buildings on new projects when they are created from the Site Register, eg as for Re-inspection projects.

- The display of the site list dropdown on multi-site quotations after saving has been fixed.
- The latest Alpha Tracker User Guide is displayed on the Help & Support page instead of the Training Guide.
- The settings named "*xxx* can update items via the Client Portal (no/yes)" and "*xxx* can manually add items via the Client Portal (no/yes)" will no longer be created.
- File upload issues on Staff training have been resolved.
- The question setup in Water Hygiene has been re-designed, and the row expander on the sub project setup screen has been removed as it is no longer needed.
- Query Writer fields that are dates are now formatted better so that they can be easily searched.
- Some screens have been improved to make them quicker to open. These include Account Management, Cost Breakdown, Timesheets.
- Some improvements have been made to the file backup error messages in Alpha Tracker Mobile, and also to the file system verification checks.
- The Survey Data screen has seen some minor adjustments, eg to position dates first and better align columns.
- The “Sign Off Report” has been removed. You can now simply double-click in the Date field to enter today’s date and your user name (if permitted). This now works in the same way as milestone date fields.
- On the Client Portal, the Reports Issued is now clickable and opens the filtered Report List.
- The default values of zero on the Priority Assessment breakdown fields have been removed so that if a score is not completed it will have a null value rather than zero.
- The Excel download limit on the Client Address Book has been removed so that you can now download more than ten thousand records.
- The “Active” checkbox on the search for Water Project Types has been removed as a button search does the same.
- SQL reports that create Excel files write files differently now in order to be Alpha Cloud friendly.
- Sub menus under the resource menu are now closed by default, other than Diary.

- Project Notes and Special Instructions have also been added to the Master Project Import. If they are not filled in on the spreadsheet/screen, then they will be copied from the Master project as per previous behaviour.
- The process to create a project from a quotation has been updated and improved, though essentially remains the same for the user.
- The Remediation Details button is available from the Client View Site Register, as well as the Asbestos Register, allowing you to update items from both. This is particularly useful if your updates removed an item from the Asbestos Register but you have further information to add. (Available for both standard scoring and SM2.)
- The icons on the Site Asbestos Register have been updated to match those found on the Client Portal. This applies to Updates, Info and History icons. (Applies to both standard scoring and SM2.)
- The Export to Excel button has been added to the Supplier List allowing you to download the data easily. In addition, the filename of the export on this Supplier List and also on the Project List, Site List, Quotation List and Client List now has a friendly name, eg “Project list”.
- Projects Ready To Invoice can now be searched by Status.
- The currency symbol is now displayed within the Value column on the Project List.
- The source location of staff photos has been updated and the various screens displaying staff photos updated to match.
- The Water Hygiene filters are no longer displayed on the Invoicing screen for systems without the Water Hygiene module.
- Water temperature history records can now be deleted.
- Logging a quotation follow-up has been made faster.
- It is now possible to configure outlet risk triggers per sub project type. This would, for example, allow different risk triggers for healthcare jobs.
- In Water Hygiene, the number of questions sent down to the handset has been reduced to respect any applicable asset type restrictions.
- The CRM list is now displayed as a pop-up when opened from the Quotation via a pop-up window.
- The Fibre Analysis Records list now honours the user’s allowed office letters.
- The Turnaround dropdown on Projects now displays its entries in day order.

- The Excel export on the Project List, Master Project List and Quotation List are now in XLSX format.
- The display of the date and time has been fixed in various screens throughout Alpha Tracker.
- There are a number of new settings to control the display of client additional contacts, sales support and other contacts.
- A new setting allows £0 value invoices to be displayed on the Invoicing screen. This setting defaults to “no”.
- Easy Show On Web no longer requires the project not to have a Report Produced date.