



**WATER HYGIENE MODULE
USER GUIDE**

Version 2.0



DOCUMENT CONTROL

Document

Alpha Tracker Water Hygiene Module User Guide

Current Version

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Previous Versions

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CONTENTS

1.	INTRODUCTION	4
1.1	Introduction.....	4
2.	DATA SETUP	5
2.1	Setting up asset types	5
2.2	Setting up outlet types	7
2.3	Setting up sub project types.....	8
2.4	Setting up risk categories	9
2.5	Setting up frequency categories.....	10
2.6	Setting up risk ratings.....	11
2.7	Setting up risks and actions.....	12
2.8	Setting up questions.....	14
2.9	Setting up risk trigger conditions	15
2.10	Setting up outlet risk trigger conditions.....	16
3.	SETTING UP THE PROJECT	18
3.1	Creating the project	18
3.2	Scheduling the project.....	20
3.2.1	Scheduling projects as one-offs	20
3.2.2	Creating a repeating schedule for a single project.....	21
3.2.3	Creating projects and appointments in a schedule.....	24
3.3	Managing water appointments.....	27
4.	CAPTURING THE DATA.....	28
4.1	Working with the Offline app.....	28
4.1.1	Getting started with the app.....	30
4.1.2	Entering project details	32
4.1.3	Adding details for a Risk Assessment-type project	33
4.2	Adding details for a Monitoring-type project.....	39
5.	SENDING IN THE DATA.....	40
5.1	Synchronising in the Offline Water App.....	40
5.1.1	Synchronising	40
5.1.2	Backing up	41
5.2	Saving data in the Online Water App	41
6.	WORKING WITH THE DATA.....	42
6.1	Displaying the data sent into Alpha Tracker.....	42
6.2	Producing the report	43
6.3	Viewing the data on the Client Portal	43
6.3.1	Displaying the Project Pipeline.....	44
6.3.2	Displaying the Risk Summary Dashboard	44
6.3.3	Displaying the Water Dashboard	45

1. INTRODUCTION

1.1 Introduction

The Alpha Tracker Water Hygiene module allows you to collect data for two main types of water hygiene project:

- risk assessment-type projects, in which assets/outlets are recorded
- monitoring-type projects such as temperature monitoring, which typically apply to a type of asset.

You send the data collected into an Alpha Tracker project from where you can generate reports and further analyse the data as required.

Data collection for Water Hygiene uses the Alpha Tracker Mobile app. Alpha Tracker Mobile is the companion app for use with the Alpha Tracker asbestos software. It allows users to perform many of the functions of asbestos and environmental software Alpha Tracker from a smartphone or tablet. The app is free to download from the App Store / Play Store but requires server setup.



Alpha Tracker Mobile

Log into the Alpha Tracker Mobile app using your usual Alpha Tracker username and password.



Please contact Support at Start Software (0333 301 1010 or support@start-software.com) if you need help or advice with the Alpha Tracker Mobile App.



Note that the Water Hygiene Module is subject to a licence key.

Currently, there is both an offline version of the Alpha Tracker Mobile app, which you can use anywhere, and also an online version. There are benefits to both:

- The offline version lets you work when a connection isn't available and is super quick. You need a connection only to synchronise, ie for the data to send and be processed into Alpha Tracker.
- The online version saves your data immediately into Alpha Tracker. A stable WiFi, 4G or 5G connection is required.

2. DATA SETUP

This section describes how you can set up the categories, questions and general structure of your Water Hygiene module. This setup must be done in Alpha Tracker in advance of carrying out data collection as it defines the options available. It includes information on setting up:

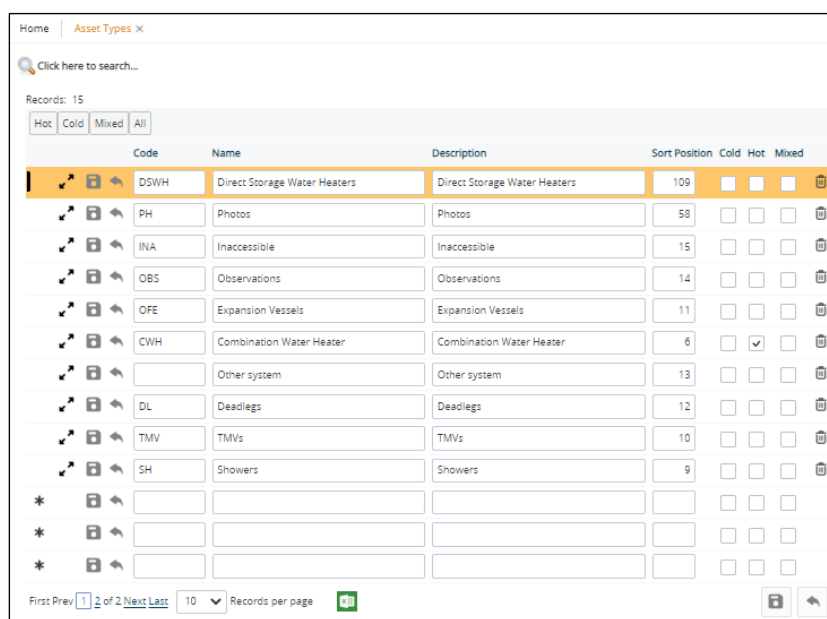
- asset types
- outlet types
- sub project types
- risk categories
- frequency categories
- risk ratings
- risk and actions
- questions
- risk trigger conditions
- outlet risk trigger conditions.

2.1 Setting up asset types

Asset types are the main types of objects that you can record information for in the Water Hygiene module, such as Direct Storage Water Heaters, Expansion Vessels, Calorifiers etc.

To set up asset types:

1. Click the “Asset Types” option from the Water Hygiene section on the Setup menu to display a list of existing asset types and some search fields to help you locate the required asset.



2. Search for existing asset types by typing into any of the search fields at the top of the screen and clicking **Search**. (You may need to click “Click here to search...” to display the search fields.)

You can also use the pre-set filter buttons to display asset types defined as Hot, Cold or Mixed. Use the **All** pre-set filter button to remove a filter.

3. Add a new asset type by typing into a blank row marked with an asterisk at the bottom of the list. Enter the following:
 - **Code** – a short code for the asset type
 - **Name** – the full name of the asset type
 - **Description** – a description of the asset type
 - **Sort Position** – a number to define the position of the asset type in a selection list
 - **Cold, Hot, Mixed** and/or **Mains** – tickboxes indicating which system(s) the asset type belongs to.
4. Save your changes – either individual row changes or all changes together.

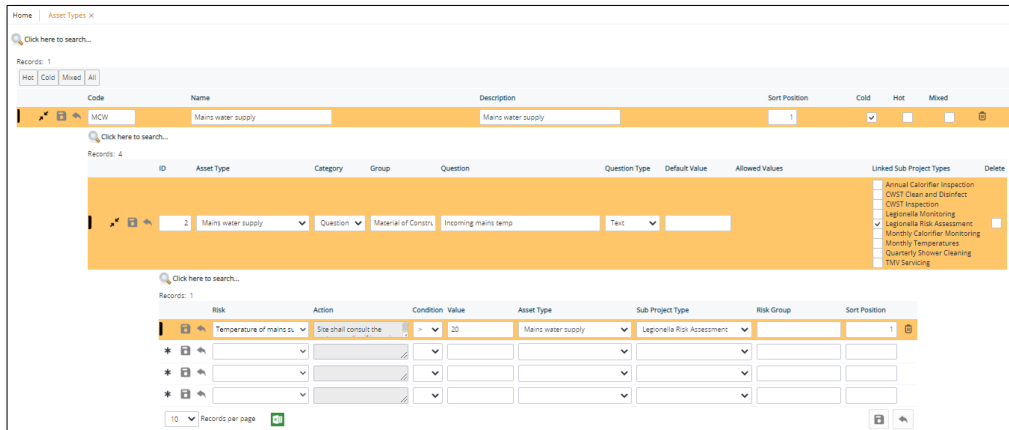
Once you have set up all your data, you will be able to see the questions associated with each asset type by clicking on its row expander:



For example:

The screenshot shows the 'Asset Types' configuration page. At the top, there are search fields for 'Type', 'Name', and 'Description', along with filter buttons for 'Cold', 'Hot', and 'Mixed'. Below this is a table of asset types. The first row is highlighted in orange and has an asterisk in the 'Code' column, indicating it is a new or unconfirmed entry. The table columns are: Code, Name, Description, Sort Position, Cold, Hot, and Mixed. Below the table, there is a 'Click here to search...' link and a table of questions associated with the asset types. The question table has columns: ID, Asset Type, Category, Group, Question, Question Type, Default Value, Allowed Values, and Linked Sub-Project Types. The first question is ID 2, Asset Type 'Mains water supply', Category 'Question', Group 'Material of Constr.', Question 'Incoming mains temp', Question Type 'Text', and Default Value is empty. The second question is ID 3, Asset Type 'Mains water supply', Category 'Question', Group 'Material of Constr.', Question 'Insulation', Question Type 'Dropdown', and Allowed Values 'Yes/No/N/A'. The third question is ID 4, Asset Type 'Mains water supply', Category 'Question', Group 'Material of Constr.', Question 'Water meter', Question Type 'Dropdown', and Allowed Values 'Yes/No'. To the right of the question table is a list of 'Linked Sub-Project Types' with checkboxes, including 'Annual Calorifier Inspection', 'CWST Clean and Disinfect', 'CWST Inspection', 'Legionella Monitoring', 'Legionella Risk Assessment', 'Monthly Calorifier Monitoring', 'Monthly Temperatures', 'Quarterly Shower Cleaning', and 'TMV Servicing'.

And expanding these will show you how the answer to the question might trigger a risk and associated action. For example:

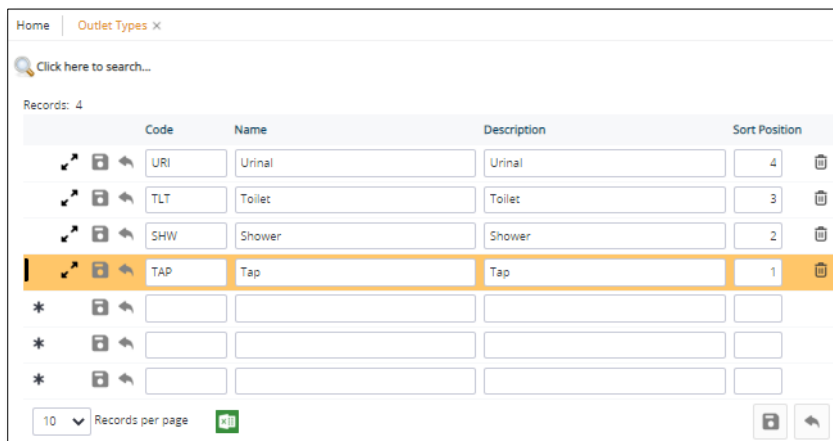


2.2 Setting up outlet types

Outlets are also objects that you can record information for in the Water Hygiene module, they also share a characteristic: water comes out of them.

To set up outlet types:

1. Click the “Outlet Types” option from the Water Hygiene section on the Setup menu to display a list of existing outlet types and some search fields to help you locate the required outlet.



2. Search for existing outlet types by typing into any of the search fields at the top of the screen and clicking **Search**.
3. Add a new outlet type by typing into a blank row marked with an asterisk at the bottom of the list. Enter the following:
 - **Code** – a short code for the outlet type
 - **Name** – the full name of the outlet type
 - **Description** – a description of the outlet type
 - **Sort Position** – a number to define the position of the outlet type in a selection list.

4. Save your changes – either individual row changes or all changes together.

Once you have set up all your data, you will be able to see the questions associated with each outlet type (if there are any) by clicking on its row expander.

2.3 Setting up sub project types

Sub project types define the type of Water Hygiene project you are working on. When you create a Water Hygiene project, you will set the sub project type to indicate the type of work involved in the project.

To set sub project types:

1. Click the “Project Types” option from the Water Hygiene section on the Setup menu to display a list of existing sub project types and some search fields to help you locate the required sub project type.

ID	Name	Description	Asset Type	Frequency	Active	Type
13	6 Month Cooling Towers	6 Month Cooling Towers			<input type="checkbox"/>	
4	Annual Calorifier Inspection	Annual Calorifier Inspection	Calorifiers		<input checked="" type="checkbox"/>	
22	Calorifier Internal Inspection	Calorifier Internal Inspection	Calorifiers		<input type="checkbox"/>	
15	CWST Clean and Disinfect	CWST Clean and Disinfect	Cold Water Storage Tank		<input checked="" type="checkbox"/>	
5	CWST Inspection	CWST Inspection	Cold Water Storage Tank		<input checked="" type="checkbox"/>	
18	Dip Sampling	Dip Sampling			<input type="checkbox"/>	
3	Domestic Legionella Risk Assessment	Domestic Legionella Risk Assessment			<input type="checkbox"/>	LRA
9	Domestic Legionella Risk Assessment	Domestic Legionella Risk Assessment			<input type="checkbox"/>	LRA
26	Expansion Vessel Flushing	Expansion Vessel Flushing	Expansion Vessels		<input checked="" type="checkbox"/>	
21	Expansion Vessel Servicing	Expansion Vessel Servicing	Expansion Vessels		<input type="checkbox"/>	
*	<AUTO>				<input checked="" type="checkbox"/>	
*	<AUTO>				<input checked="" type="checkbox"/>	
*	<AUTO>				<input checked="" type="checkbox"/>	

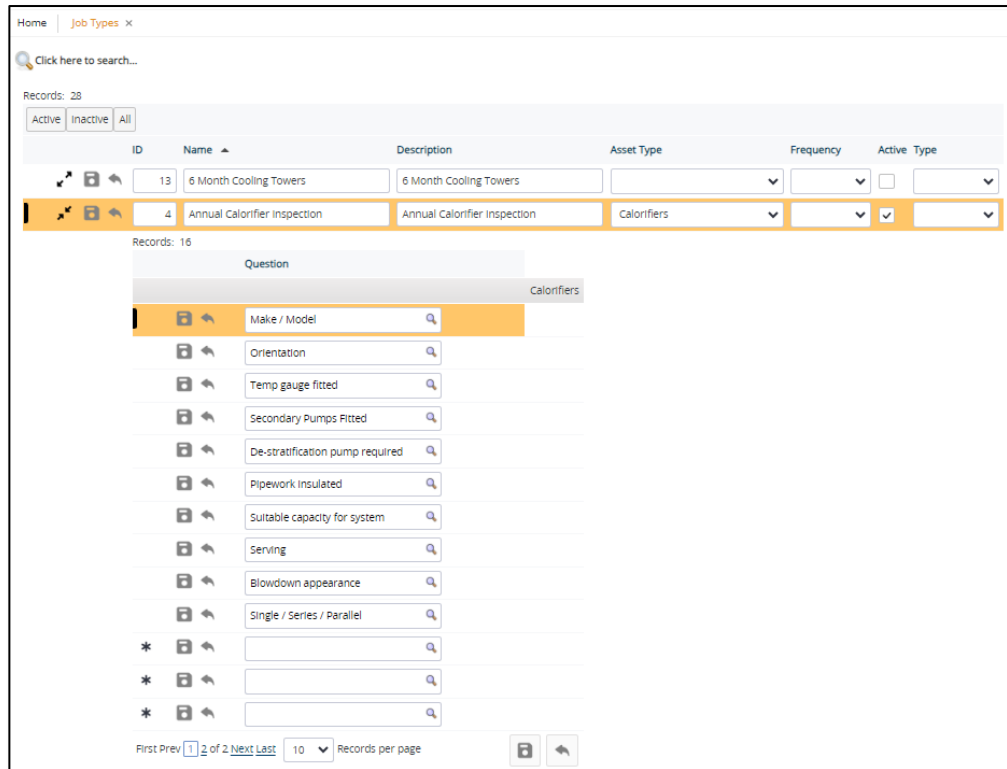
2. Search for existing sub project types by typing into the search fields at the top of the screen and clicking **Search**.

You can also use the pre-set filter buttons to display sub project types which are Active or Inactive. Use the **All** pre-set filter button to remove a filter.

3. Add a new sub project type by typing into a blank row marked with an asterisk at the bottom of the list. Enter the following:
 - **Name** – the name of the sub project type
 - **Description** – a description of the sub project type
 - **Asset Type** – the asset type applicable to the sub project type, if only one asset type applies
 - **Frequency** – the frequency at which this project type is to be scheduled (when multiple sub project types are in use)
 - **Active** – tick the box to make the sub project type active and available for use

- **Type** – place the sub project type in one of the available categories, LRA or Monitoring, if appropriate. These are used on the Client Portal.
4. Save your changes – either individual row changes or all changes together.

Once you have set up all your data, you will be able to see questions specific to the sub project type by clicking its row expander. For example:

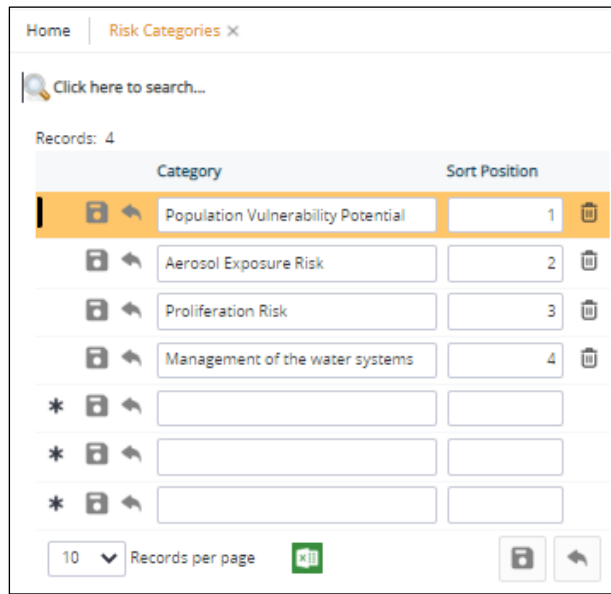


2.4 Setting up risk categories

Risks can be grouped together into categories to facilitate grouping of risks in your reports.

To set risk categories:

1. Click the “Risk Categories” option from the Water Hygiene section on the Setup menu to display a list of existing risk categories.



2. Add a new risk category by typing into a blank row marked with an asterisk at the bottom of the list. Enter the following:
 - **Category** – the name of the risk category
 - **Sort Position** – a number to define the position of the risk category in a selection list.
3. Save your changes – either individual row changes or all changes together.

2.5 Setting up frequency categories

You can define frequencies to set the time intervals intended by frequencies, eg Quarterly is every three months, Fortnightly is every two weeks. These are used, for example, when specifying how frequently appointments should be scheduled.

To define frequencies:

1. Click the “Scheduling Frequencies” option from the General section on the Setup menu to display a list of existing frequencies.

	Description	Date Add Modifier	Date Add Value	Sort Position	
	One off			1	
	Weekly	Week	1	2	
	Monthly	Month	1	4	
	Quarterly	Month	3	5	
	Annually	Year	1	7	
	Fortnightly	Week	2	3	
	6 Monthly	Month	6	6	
*					
*					
*					

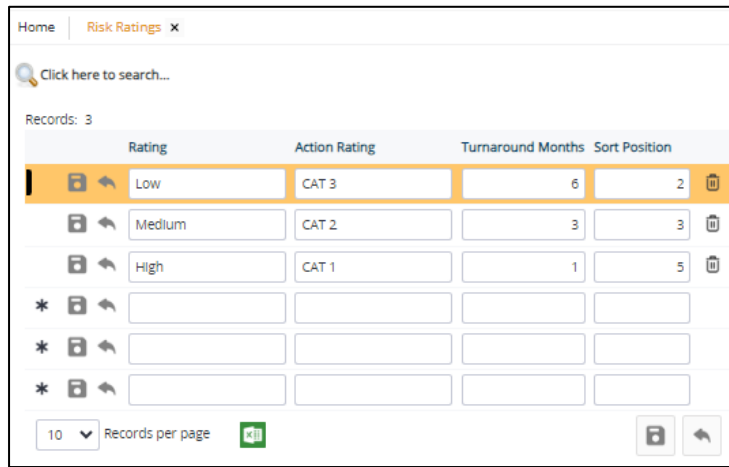
2. Add a new frequency by typing into a blank row marked with an asterisk at the bottom of the list. Enter the following:
 - **Description** – the name of the frequency
 - **Date Add Modifier** – the unit of time, eg week, month, year
 - **Date Add Value** – the number of units of time
 - **Sort Position** – a number to define the position of the frequency in a selection list.
3. Save your changes – either individual row changes or all changes together.

2.6 Setting up risk ratings

You can apply different ratings to risks. These risk ratings appear on dropdown lists.

To set up the risk ratings:

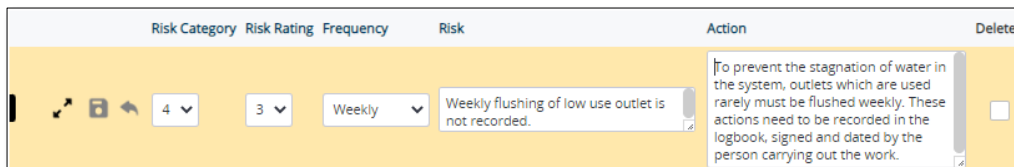
1. Click the “Risk Ratings” option from the Water Hygiene section on the Setup menu to display a list of existing risk ratings.



2. Add a new risk rating by typing into a blank row marked with an asterisk at the bottom of the list. Enter the following:
 - **Rating** – the name or value of the risk rating
 - **Action Rating** – an alternative form of the risk rating
 - **Sort Position** – a number to define the position of the risk rating in a selection list.
3. Save your changes – either individual row changes or all changes together.

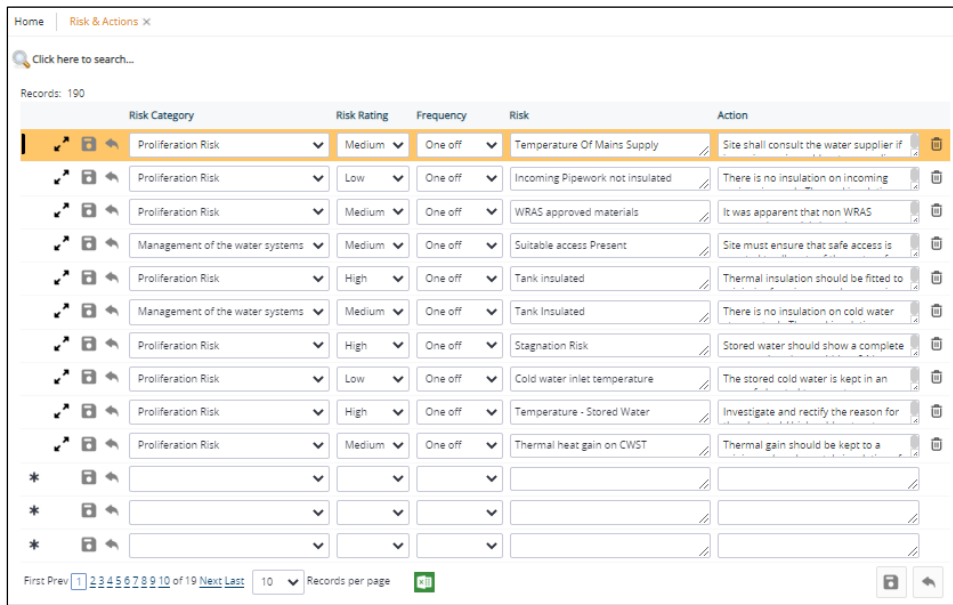
2.7 Setting up risks and actions

You must create a list of the risks to be available in the system, and assign values to the risks, such as giving them a rating, specifying what action should be taken if the risk is present and how frequently. For example:



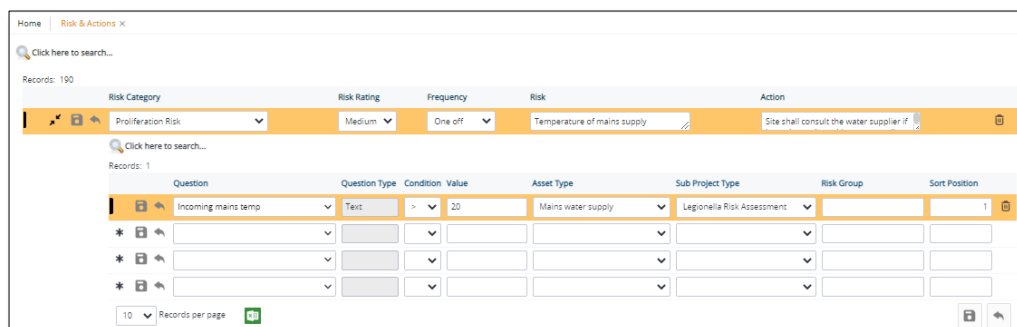
To set up the risks and their actions:

1. Click the “Risk & Actions” option from the Water Hygiene section on the Setup menu to display a list of existing risks and their actions and some search fields to help you locate specific risks.



2. Search for existing risks or actions by using the search fields at the top of the screen and clicking **Search**.
3. Add a new risk by typing into a blank row marked with an asterisk at the bottom of the list. Enter the following:
 - **Risk Category** – select the risk category applicable to this risk
 - **Risk Rating** – select the risk rating applicable to this risk
 - **Frequency** – select the frequency applicable to the action
 - **Risk** –text defining the risk
 - **Action** – text defining the action(s) that apply to the risk.
4. Save your changes – either individual row changes or all changes together.

Once you have set up all your data, you can see the questions associated with each risk/action combination by clicking on its row expander. This also shows you what answer triggers the risk/action. For example:



2.8 Setting up questions

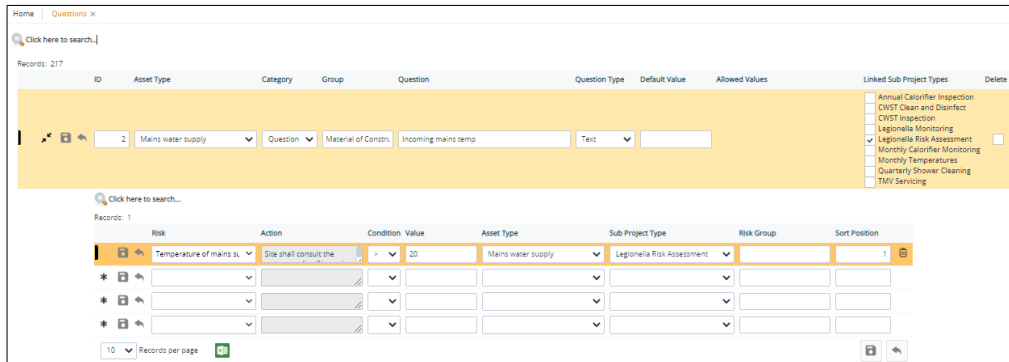
The questions that are asked in the app must be set up in advance on the Questions screen. Among other things, you can define the text of the question, where it should be displayed and what type of answer is allowed. You can also link it to specific sub project types.

To define the questions:

1. Click the “Questions” option from the Water Hygiene section on the Setup menu to display a list of existing questions and some search fields to help you locate specific questions.

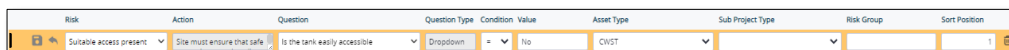
2. Search for existing questions by making selections or typing into the search fields at the top of the screen and clicking **Search**.
3. Add a new question by typing into a blank row marked with an asterisk at the bottom of the list. Enter the following:
 - **Asset Type** – select the asset type to which the question applies, or leave blank if the question is general and doesn’t apply to a specific asset type, eg for system management questions
 - **Category** – the category to which the question belongs (this is usually “Question”)
 - **Group** – the group to which the question belongs which determines where it is displayed
 - **Question** – the text of the question
 - **Question Type** – the type of question, eg dropdown or text entry
 - **Default Value** – a default answer to the question, if required
 - **Allowed Values** – a comma-separated list of the acceptable values for dropdown questions
 - **Linked Sub Project Types** – tick the boxes to indicate the sub project types for which this question should appear.
4. Save your changes – either individual row changes or all changes together.

Once you have set up all your data, you can see the risks, actions and trigger conditions associated with each question by clicking on its row expander. For example:



2.9 Setting up risk trigger conditions

The risk trigger conditions specify when the risk is triggered and the associated action(s) become recommended. For example, if the answer to a specific Yes/No question is “No” then the specified risk applies and the associated action should be carried out:

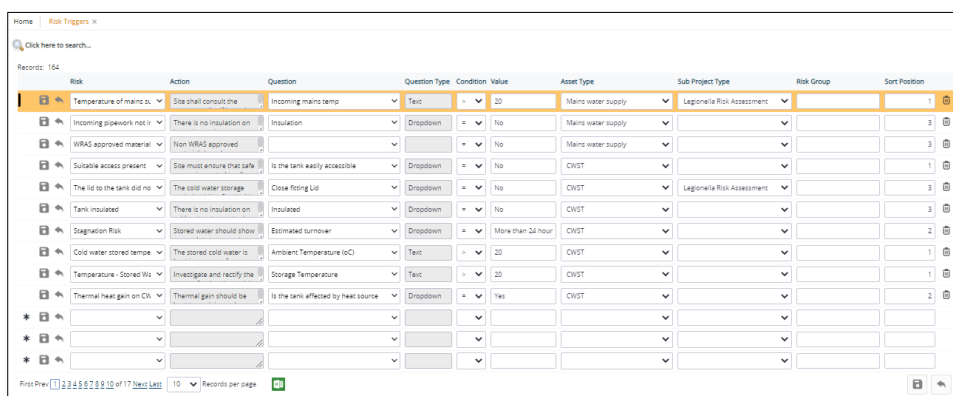


You must have already set up the risks & actions and also the questions.

Refer to Section 2.7, Setting up risks and actions, for information on setting up the risks and their actions and Section 2.8, Setting up questions, for details on how to define the questions.

To define the risk trigger conditions:

1. Click the “Risk Triggers” option from the Water Hygiene section on the Setup menu to display a list of existing risks and the conditions that trigger the linked actions.



2. Search for existing risks or actions by typing into the search fields at the top of the screen and clicking **Search**.
3. Add a new risk by typing into a blank row marked with an asterisk at the bottom of the list. Enter the following:

- **Risk**– select the risk for which you want to define the trigger conditions from the dropdown list. You can begin typing a key word in this field to reduce the number of risks in the list. The action associated with the selected risk is automatically displayed.
 - **Question** – select the question that triggers the risk from the dropdown list. You can begin typing a key word from the question in this field to reduce the number of questions in the list. The type of the selected question is automatically displayed.
 - **Condition** – select the condition for the trigger, eg <, >, =, <=, >= or <>
 - **Value** –enter the value to work with the condition, eg Yes or 20
 - **Asset Type** – select the asset type applicable to the risk trigger, or leave blank if the risk/question is general and doesn't apply to a specific asset type, eg for system management questions
 - **Sub Project Type** – select the sub project type applicable to the risk trigger
 - **Risk Group** - enter the risk group applicable to the risk trigger
 - **Sort Position** – a number to define the position of the risk condition in a selection list.
4. Save your changes – either individual row changes or all changes together.

2.10 Setting up outlet risk trigger conditions

The outlet risk trigger conditions specify when a risk specific to an outlet is triggered. For example, if the hot temperature is recorded as being below 50°C then the specified risk applies.

You must have already set up the risks & actions.



Refer to Section 2.7, Setting up risks and actions, for information on setting up the risks and their actions.

To define the outlet risk trigger conditions:

1. Click the “Outlet Risk Triggers” option from the Water Hygiene section on the Setup menu to display a list of existing risks and the conditions that trigger them.

Home | Outlet Risk Triggers x

Search

Outlet Sentinel Risk Entry Type Condition Value

Clear Search Criteria Search

Records: 10

Outlet	Sentinel	Risk	Entry Type	Condition	Value
Tap	N/A	Take temperature from outlets.			
Tap	Nearest	Take temperature from sentinel outlets.			
Tap	Furthest	Take temperature from sentinel outlets.			
Tap		Hot water temperature is too low	Hot	<	50
Tap		Scald hazard Hot water greater than 65°C	Hot	>	65
Tap		Scald hazard for susceptible users greater than	Mixed	>	43
Tap		The blended water too cool below 39°C	Mixed	<	39
Tap		Cold water temperature is too high	Cold	>	20
Tap		Mains water temperature is too high	Mains	>	20
Tap		Hot water temperature is too low	Hot	<	55
*					
*					
*					

10 Records per page

2. Search for existing outlet risks by making selections or typing into the search fields at the top of the screen and clicking **Search**.
3. Add a new risk by typing into a blank row marked with an asterisk at the bottom of the list. Enter the following:
 - **Outlet** – select the outlet type
 - **Sentinel** – if the outlet is a sentinel, select its type
 - **Risk**– select the risk for which you want to define the trigger conditions from the dropdown list. You can begin typing a key word in this field to reduce the number of risks in the list.
 - **Entry Type** – select whether the outlet has hot, cold, mixed or mains water
 - **Condition** – select the condition for the trigger, eg <, >, =, <=, >= or <>
 - **Value** –enter the value to work with the condition, eg Yes or 20.
4. Save your changes – either individual row changes or all changes together.

3. SETTING UP THE PROJECT

Before you can capture any information for a Water Hygiene project on your handheld device you need to set up the project on Alpha Tracker and schedule it in the diary. Once the project is created and scheduled, it will be available for selection on your smartphone or tablet in the Alpha Tracker Mobile app.

3.1 Creating the project

To set up a Water Hygiene project:

1. Click the “New Project” menu option to display the New Project screen.
2. Complete all the required details to set up your Water Hygiene project.

As a minimum, you are advised to complete the bold fields:

- **Project Number**
- **Client**
- **Project Manager**
- **Site Name/Ref**
- **Project Type**
- **Estimated Total Project Value.**



Ensure that the **Project Type** is set to “Water Hygiene” (or your equivalent) so that the **Water Details** button is displayed. Note that the **Water Details** button is only visible for projects where the project type has a category of “Water Hygiene”.

3. Click the **Water Details** button and in the Tasks section set the type of work that will be carried out in this Water project, for example Legionella Risk Assessment or Monthly Temperatures. This is the sub project type. Use the plus button below the Tasks section to select the **Type**.

In the Setup tab the **Type** field is set according to your selection in the Task section.



It is important that you set the **Type** on the Water Details screen. If you don't, then the site staff will not be able to see the project. Note that a **Default Water Type** can be set on the Project Type to help.

4. Enter the price of this sub project in the **Price** field on the Water Details screen. The **Estimated Total Project Value** field on the project is updated automatically.



*If you have created this project by using a Master Project Import or the Map Scheduler, then the **Price** is automatically completed from the master project*

5. Enter other details on the Setup tab as required, which may include Site Type, Approver, Start Date and Hours Required.
6. Click on the Notes tab and enter text for the **General Description**, **Scope Of Work** and **Method Statement**. The other three sections on the Notes tab will be completed from data sent in from the app.



*If you have created this project by using a Master Project Import or the Map Scheduler, then the **General Description**, **Scope Of Work** and **Method Statement** are automatically completed from the master project.*

The other tabs (Overall Risk Assessment, No Access and Sign Off) will also be completed from data sent in from the app.

7. Save the Water Details and the new project.

You must book an appointment for the project in the diary to make it available to select and send data into on the Offline app.

If you are using the app offline, you will need to Refresh to see the new project.

If you are using the Online app then the project is available immediately, assuming you have an internet or data connection. However, scheduling it in the diary makes it even easier to find in the app, in the My Projects or My Projects Today tabs.

3.2 Scheduling the project

You can schedule projects:

- as one-offs
- to create a repeating schedule of appointments for a selected project
- to set the selected project as a master project and create sub projects and appointments.

3.2.1 Scheduling projects as one-offs

Scheduling the project in the diary makes the project very easy to find in the app. The method of scheduling a project described below is the standard method, where you are simply adding an appointment into the diary for a project.

To schedule the project:

1. Select “Staff Calendar” from the Resources menu option and select whose diary you want to display, then click **Calendar**.
2. On the day and time that you want to schedule the appointment, click and drag (from start time to end time). The Add/Edit Event screen is displayed.

3. Enter the appointment details, setting at least:
 - **Project Number**
 - **Resource** (who you are scheduling this for)
 - **Start Time** and **End Time** (if these aren't set correctly from your clicking and dragging)
 - **Notes** about the appointment.

4. Save the appointment.

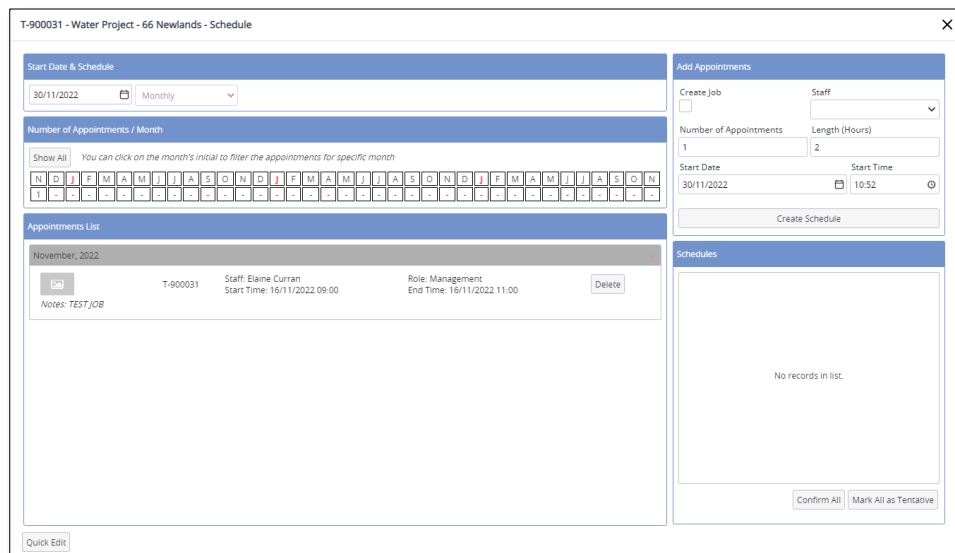
Once booked in the diary, it is easy to find the booked appointment in the app, in the My Projects or My Projects Today tabs.

3.2.2 Creating a repeating schedule for a single project

This method for scheduling a project creates multiple appointments for the selected project, which you can use to create a repeating schedule of appointments. A typical scenario might be scheduling appointments for a return to site for a review with the client every quarter. All the appointments generated will be under the same project number.

To schedule the repeating appointments:

1. Open the project for which you want to create the repeating appointments so that it is displayed on the Project Details screen.
 You could be using a specific project number here or perhaps the “U-” project for Meetings if you are scheduling a repeating programme of general meetings.
2. On the Financials/Planning tab, go to the Diary section and set the **Default Appt. Length (hours)** and the **Schedule**.
 These fields define the parameters for the appointments you are going to create. So if you want to create an appointment every month that is 2 hours long, set the fields to “2” and “Monthly”.
3. Save the changes to the Financials/Planning tab and then click **Diary Appointments** to open the Schedule screen for the project.



On the left-hand side, this screen gives you (from top to bottom):

- a filter for the appointments displayed, plus a reminder of the schedule frequency
- a quick-view of the number of appointments in each month for the next 36 months – clicking on a month’s initial filters the list to just show that month’s appointments; clicking **All** returns the display to all appointments

- an Appointment List which displays appointments for the project depending on how the filters above it are set.


On the right-hand side, the screen contains:

- a section for specifying the parameters of the repeating schedule of appointments that you want to create
- a section to display the proposed appointments.

4. In the Add Appointments section, define the parameters of the repeating schedule of appointments that you want to create:
 - **Staff** – select the member of staff who will be assigned to each appointment
 - **Number of Appointments** – enter the number of appointments that you want to be in this schedule
 - **Length (Hours)** – enter the duration of each appointment (this value is defaulted in from the Project Details screen)
 - **Start Date and Start Time** – set the earliest date and time for the start of the schedule.

5. Click **Create Schedule** to generate 'proposed' appointments and display them in the Schedules section. Each of the appointments is for the same project number.

6. Tick the **Create appointments** tickbox but ensure that you leave the **Also create a project for each** tickbox unticked.

 *This means the appointments you are creating will all be for the same project.*

7. Accept each of the ‘proposed’ appointments – either individually or all together – by clicking either **Confirm** or **Tentative**, or **Confirm All** or **Mark All as Tentative**.

This changes the ‘proposed’ appointments into ‘real’ appointments and moves them to the Appointment List, marked as either Confirmed or Tentative. They are now in the diary.

8. If you need to amend an appointment from this screen, double click on it to open the Appointment Details and make your changes. Alternatively, click **Quick Edit** at the bottom of the screen to open the old-style Diary Appointments screen which displays the appointments in an editable format.

3.2.3 Creating projects and appointments in a schedule

This method for creating a schedule of appointments starts from a master project and creates both the sub-projects and their appointments. A typical scenario might be a monthly temperature monitoring programme. Each appointment generated will be under a separate project number.

To create the schedule of projects and appointments:

1. Create or open the *master project* for which you want to create the schedule of projects and appointments so that it is displayed on the Project Details screen.

Ensure the master project includes all the details required for the sub-projects, including the **Price**, **General Description**, **Scope Of Work** and **Method Statement**.

2. On the Financials/Planning tab, go to the Diary section and set the **Default Appt. Length (hours)** and the **Schedule**.

These fields define the parameters for the appointments you are going to create. So if you want to create an appointment every fortnight that is 3 hours long, set the fields to “3” and “Fortnightly”.

3. Save the changes to the Financials/Planning tab and then click **Diary Appointments** to open the Schedule screen for the project.

On the left-hand side, this screen gives you (from top to bottom):

- a filter for the appointments displayed, plus a reminder of the schedule frequency
- a quick-view of the number of appointments in each month for the next 36 months – clicking on a month’s initial filters the list to just show that month’s appointments; clicking **All** returns the display to all appointments
- an Appointment List which displays appointments for the project depending on how the filters above it are set.

On the right-hand side, the screen contains:

- a section for specifying the parameters of the repeating schedule of appointments that you want to create
- a section to display the proposed appointments.

4. In the Add Appointments section, define the parameters of the repeating schedule of appointments that you want to create:
 - **Staff** – select the member of staff who will be assigned to each appointment
 - **Number of Appointments** – enter the number of appointments that you want to be in this schedule
 - **Length (Hours)** – enter the duration of each appointment (this value is defaulted in from the Project Details screen)
 - **Start Date and Start Time** – set the earliest date and time for the start of the schedule.

The screenshot shows a software interface with two main sections. The top section, titled 'Add Appointments', contains a 'Staff' dropdown menu, two input fields for 'Number of Appointments' (value: 1) and 'Length (Hours)' (value: 2), and two input fields for 'Start Date' (value: 02/08/2023) and 'Start Time' (value: 16:52). A 'Create Schedule' button is located below these fields. The bottom section, titled 'Schedules', has two checkboxes: 'Create appointments' and 'Also create a job for each'. Below these is a large empty rectangular area with the text 'No records in list.' at the bottom center. At the very bottom of the 'Schedules' section are two buttons: 'Confirm All' and 'Mark All as Tentative'.

5. Click **Create Schedule** to generate 'proposed' appointments and display them in the Schedules section. Each of the appointments will be for a different project number.

6. Tick both the **Create appointments** tickbox and the **Also create a project for each** tickbox.

This means that you want each appointment to be linked to a separate project number.

7. Accept each of the ‘proposed’ appointments – either individually or all together – by clicking either **Confirm** or **Tentative**.

This changes the ‘proposed’ appointments into ‘real’ appointments and moves them to the Appointment List, marked as either Confirmed or Tentative. They are now in the diary. It also creates the sub-projects, which are all linked to the same master project (which was the one you opened initially).

8. If you need to amend an appointment from this screen, double click on it to open the Appointment Details and make your changes. Alternatively, click **Quick Edit** to open the old-style Diary Appointments screen which displays the appointments in an editable format.

3.3 Managing water appointments

Appointments for Water Hygiene projects can be monitored and managed by using the Water Appointments screen. This screen helps you keep track of site work. You can, for example, search for appointments scheduled for a particular date, see whether data has been synchronised and received in the project, how many assets/outlets have been recorded and questions answered. You can also see whether the work is complete, report produced and invoiced. There is also a useful set of search fields and filter buttons to help you identify the status of site work.

1. Select “Water Appointments” from the Water Hygiene submenu on the Projects menu. All appointments for open projects are displayed.

Client ID	Client Name	Project Number	Site Name	Type	Water Type	Status	Status Notes	Appointment	Incomplete	Reason	Site Staff	Completed	Assets/Outlets	Q's Answered	Produced	Project Value	Invoiced
<u>BOO</u>	Boots the Chemist	<u>3130753</u>	Boots Shrewsbury	Water Project	Domestic Legionella Risk Assessment	No Access to Site		14/08/2022	Incomplete	No Access	Dan Darlwin	<input type="checkbox"/>	3	0	19	£0.00	
<u>BOO</u>	Boots the Chemist	<u>3130753</u>	Boots Shrewsbury	Water Project	Domestic Legionella Risk Assessment	No Access to Site		26/08/2022	Incomplete	No Access	Dan Darlwin	<input type="checkbox"/>	3	0	19	£0.00	
<u>BOO</u>	Boots the Chemist	<u>3130753</u>	Boots Shrewsbury	Water Project	Domestic Legionella Risk Assessment	No Access to Site		15/08/2022	Incomplete	No Access	Dan Darlwin	<input type="checkbox"/>	3	0	19	£0.00	
<u>BOO</u>	Boots the Chemist	<u>3130753</u>	Boots Shrewsbury	Water Project	Domestic Legionella Risk Assessment	No Access to Site		05/10/2022	Incomplete	No Access	Dan Darlwin	<input type="checkbox"/>	3	0	19	£0.00	
<u>BOO</u>	Boots the Chemist	<u>3130753</u>	Boots Shrewsbury	Water Project	Domestic Legionella Risk Assessment	No Access to Site		20/05/2023	Incomplete	No Access	Dan Darlwin	<input type="checkbox"/>	3	0	19	£0.00	
<u>PSF</u>	Start Software	<u>3130758</u>	INNOVATION Centre	Water Project	Legionella Risk Assessment	New		09/09/2022			Robin Bennett	<input type="checkbox"/>	0	0	9	£0.00	
<u>PSF</u>	Start Software	<u>3130759</u>	Priories House	Water Project	Legionella Risk Assessment	New		12/09/2022			Robin Bennett	<input type="checkbox"/>	0	0	14	£0.00	
<u>PSF</u>	Start Software	<u>3130759</u>	Priories House	Water Project	Legionella Risk Assessment	New		28/10/2022			Catherine Connery	<input type="checkbox"/>	0	0	14	£0.00	
<u>PSF</u>	Start Software	<u>3130720</u>	Van der Valk Hotel	Water Project	Legionella Monitoring	New		05/12/2022			Dan Darlwin	<input type="checkbox"/>	3	2	2	£3,600.00	
<u>PSF</u>	Start Software	<u>3130722</u>	Van der Valk Hotel	Water Project	Legionella Monitoring	New		06/01/2023			Dan Darlwin	<input type="checkbox"/>	3	2	2	£3,600.00	

2. Use the search fields at the top of the screen to filter the appointments as required. For example, you might want to show appointments for a specific day, a specific client or scheduled for a specific member of staff.
3. Use the pre-set filter buttons to apply filters to show appointment at a particular status. For example:
 - **No Data** – to find appointments where no data has yet been synchronised
 - **Site Complete** – to find those where the **Project Is Complete** tickbox has been ticked
 - **Has Assets/Outlets** - to find those where some assets or outlets have been recorded
 - **Questions Answered** – to find those where at least some questions have been answered
 - **Overdue not Completed** – to find those where the Appointment is in the past and the **Project Is Complete** tickbox has not been ticked
 - **Completed not Produced** – to find those where the work has been completed but the report has not been produced
 - **Produced not Invoiced** – to find those where the report has been produced but the invoice has not been raised.
4. If you need to check on further details related to the project or appointment, click the:
 - underlined **Project Number** to open the Projects screen
 - underlined date to open the appointment
 - mobile icon to display the Water Details screen.

4. CAPTURING THE DATA

Data collection for Water Hygiene uses the Alpha Tracker Mobile app. Alpha Tracker Mobile is the companion app for use with the Alpha Tracker asbestos software. It lets you perform many of the functions that you do in the web-based Alpha Tracker from a smartphone or tablet. The app is free to download from the App Store / Play Store but requires server setup and a subscription.



Alpha Tracker Mobile

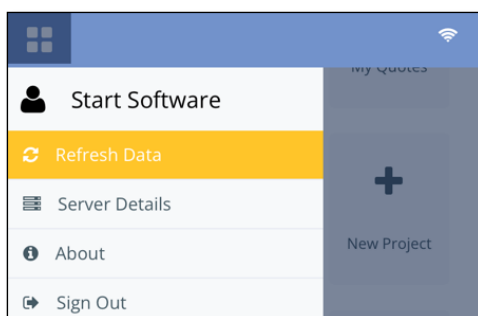
Currently, there is both an offline version of the Alpha Tracker Mobile app, which you can use anywhere, and also an online version. There are benefits to both:

- The offline version lets you work when a connection isn't available and is super quick. You need a connection only to synchronise, for the data to send and be processed into Alpha Tracker. This is the standard, recommended way of working.
- The online version saves your data immediately into Alpha Tracker. A stable WiFi, 4G or 5G connection is required.

4.1 Working with the Offline app

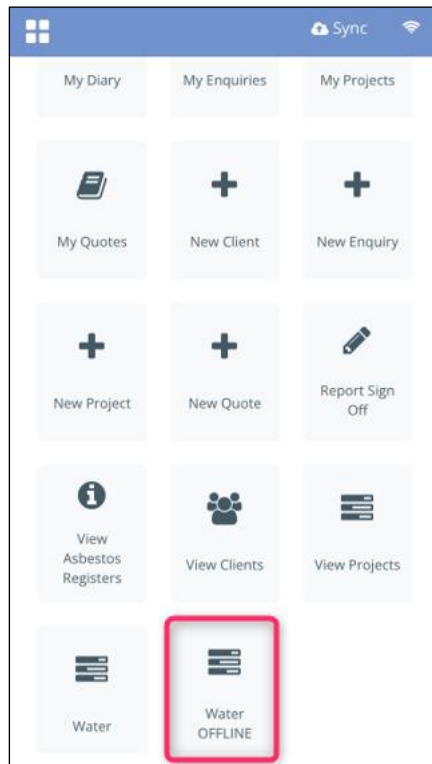
The standard, recommended way of working is to use the Offline app. If you will not have a stable WiFi, 4G or 5G connection on site, then the Offline Water App is ideal and is a super-quick option.

1. **Before you visit site**, when you have a good signal or WiFi connection, you need to refresh your data in the offline Water app. This happens automatically when you start Alpha Tracker Mobile. You can also manually refresh by tapping the Menu button and choosing "Refresh".

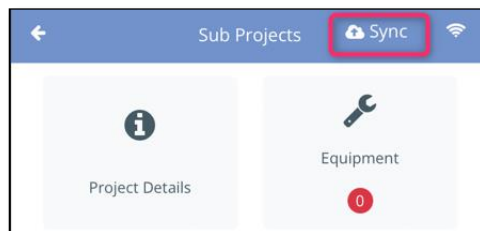


2. Select "Water OFFLINE" from the main menu.

The Offline Water App holds information about open projects for which you have an appointment today and open projects for which you have appointments around today (two days in the past, today and tomorrow).



3. You collect data and photos as described in the following sections.
4. When you have completed the project and have a good signal (WiFi is preferred), tap "Sync" in the toolbar to upload your data and photos.



This can take a few minutes to complete depending on how many assets, outlets and photos you have captured.

When using the Offline Water App please note the following:

- Risks are generated when the data arrives in Alpha Tracker on the server. This means that you cannot see risks until you have synchronised.
- Previously-taken photos of assets and outlets are not available in the offline app. This will be addressed in a later version of the app.
- You cannot access the Equipment, Risks or Tasks buttons in the offline app. This will be addressed in a later version of the app.

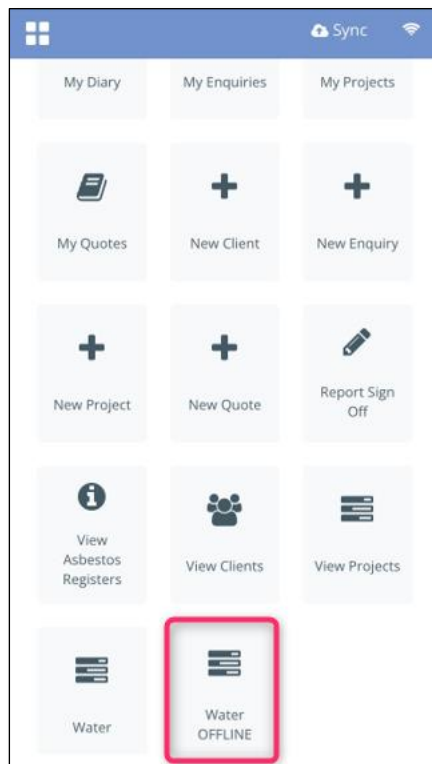
4.1.1 Getting started with the app



Don't forget that you need to refresh your data in the offline Water app, when you have a good signal or WiFi connection, before going onsite.

Log into the app and select the project you are working on:

1. Log into the Alpha Tracker Mobile app using your usual Alpha Tracker username and password.
2. Select "Water OFFLINE" from the main menu.

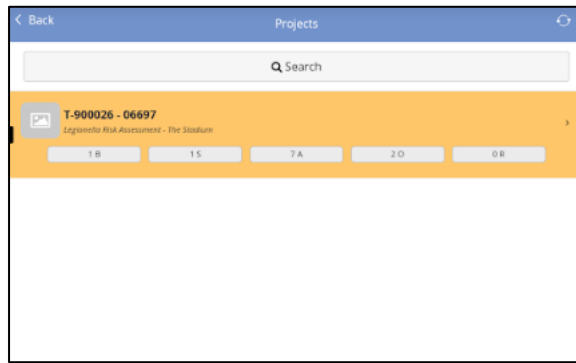


The Projects screen is displayed for you to select which of the projects booked into your diary you want to work on.

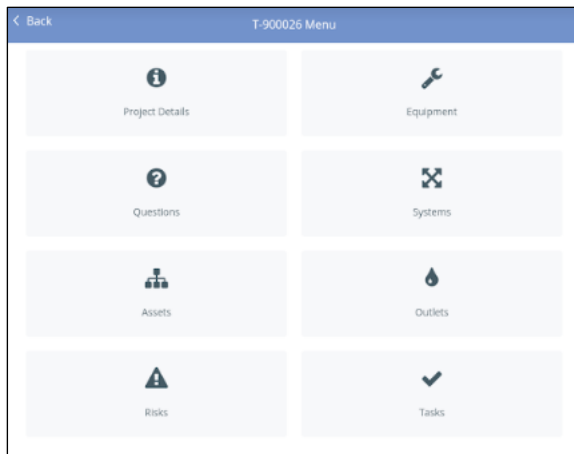
3. Select either **My Projects** or **My Projects Today** which are at the bottom of the screen and then tap on the required project to select it.

Details of the contents of a project are displayed on it. For example, this project has:

- 1 building
- 1 system
- 7 assets
- 2 outlets
- 0 risks.



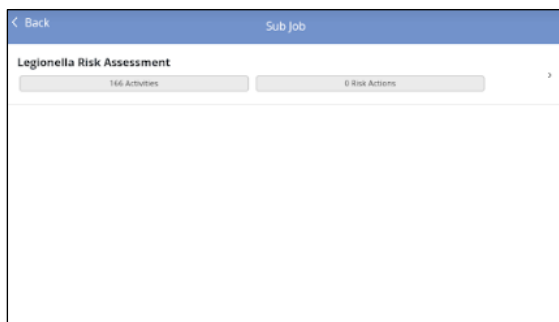
When the project is selected, the Water Hygiene menu is displayed. Work through the menu options in turn.



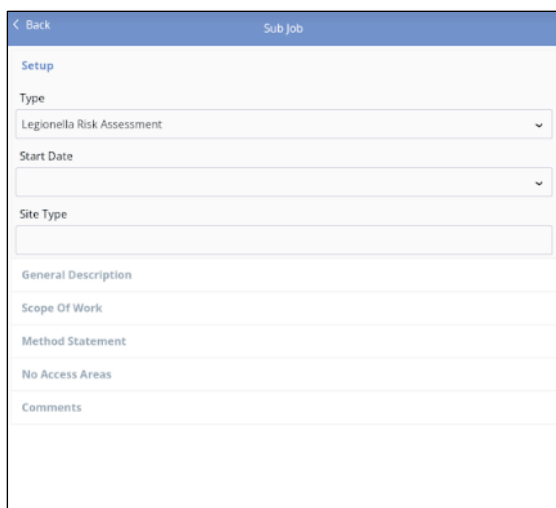
4.1.2 Entering project details

Once you have selected the project you are working on, you can enter the Project Details. To enter the project details:

1. Select Project Details from the menu. Details of the sub project are displayed.



2. Tap on the sub project to display a screen for the sub project setup details.



3. Work through each of the tabs on the left to enter all required setup details:
 - **Front Page Photo** – take a site photo for the front page of the report
 - **General Description** – enter a general site description
 - **Scope of Work** – describe the work
 - **Method Statement** – general method statement
 - **No Access Areas** – indicate whether you gained access to the site at all or whether there were individual no-access areas
 - **Key Findings** – specify any key findings or where these are to be found
 - **Recs** – enter the recommendations
 - **Comments** – enter any comments.
4. Save the project details and tap **Back** until you return to the Water Hygiene menu.



You may want to return to these project details later to update them.

4.1.3 Adding details for a Risk Assessment-type project

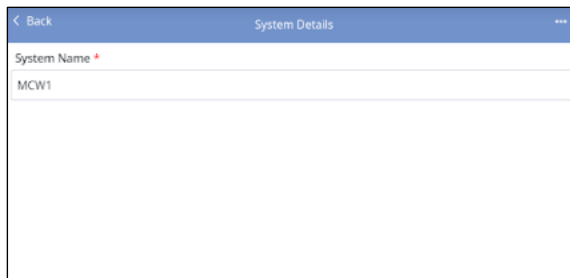
If you are carrying out a Legionella Risk Assessment project, or similar, then you are primarily adding new records for systems, assets and outlets, and answering questions.

First select the project, enter project details as described above, and then follow the instructions below to add systems, assets and outlets, and answer questions.

Defining systems

Systems are the logical setup of pipework with an inlet from the mains water. To define the systems at the site:

1. Select **Systems** from the Water Hygiene menu. Any systems already defined for the site will be displayed.
2. Add any extra systems, by tapping **Add System** and naming the system, eg Domestic Water Services, MCW1 or System 1.



3. Save the added system and tap **Back** to return to the Systems screen. Any added systems are displayed.

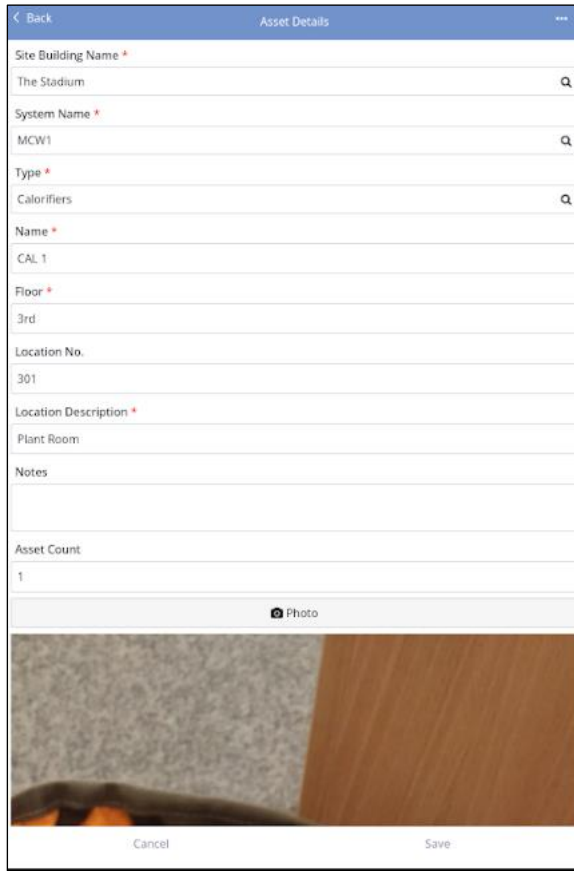
Adding assets

You can define any additional assets required by adding assets to the project. To add assets:

1. Select **Assets** from the menu. Any assets already defined in the project will be displayed on the **Project** tab.

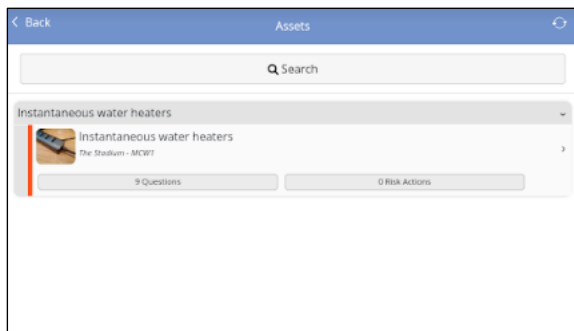
You can sort these assets by location or type by using the dropdown at the top left of the screen. You can also collapse the view of these assets by using the collapse/expand button at the top right of the screen – you can then expand individual assets for an uncluttered display.

2. Tap on the **Site** tab to see the assets defined in other projects for the same site. These assets are read-only. Add individual site assets into your current project by swiping to the right. A flag indicates that the asset record has been created in the project.
3. On the **Project** tab, add any assets by tapping **New Asset** and entering details in the fields.

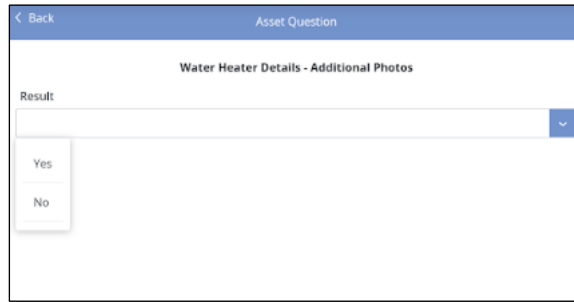


4. Take a photo of the asset by tapping the **Photo** button so that your camera app opens, then taking and confirming the photo.
5. Save the added asset and tap **Back** to return to the Assets screen. Any added assets are displayed.
6. Repeat steps 3-5 to add further assets as necessary.

When you have added an asset and it appears on the list, its details include the number of questions associated with that asset.



7. Answer the questions for each asset by tapping the **Questions** button to display the list and then tapping the first question to open it. Enter your answer in the field provided. For example:



The answer is automatically saved and the next question displayed.

To answer questions out of sequence, return to the question list where you can select which question you want to answer next.

8. When you have finished the questions, tap **Back** to return to the Assets screen.
If your answers to the questions cause risk actions to be created, these will be generated once the data is synchronised and will be visible in Alpha Tracker.

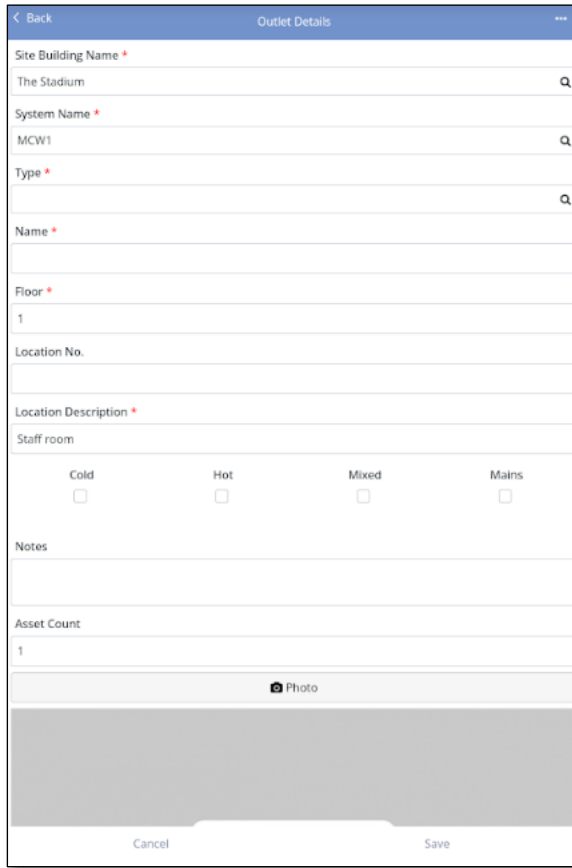
Adding outlets

You can define any additional outlets required in the project by adding them. To add outlets:

1. Select **Outlets** from the menu. Any outlets already defined in the project are displayed.
2. Tap on the **Site** tab to see the outlets defined in other projects for the same site. These outlets are read-only. Add individual site outlets into your current project by swiping to the right. A flag indicates that the outlet record has been created in the project.

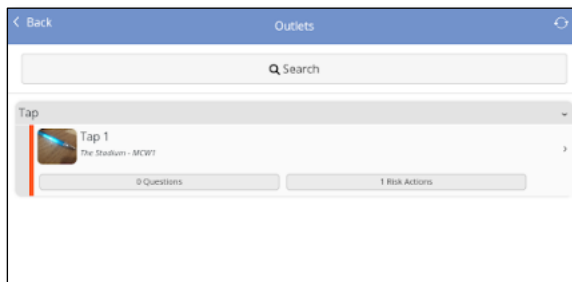
You can sort these outlets by location or type by using the dropdown at the top left of the screen. You can also collapse the view of these outlets by using the collapse/expand button at the top right of the screen – you can then expand individual outlets for an uncluttered display.

3. On the **Project** tab, add any outlets by tapping **New Outlet** and entering details in the fields.



Note that the fields displayed change depending on your selections.

4. Take a photo of the outlet by tapping the **Photo** button so that your camera app opens, then taking and confirming the photo.
5. Save the added outlet and tap **Back** to return to the Outlets screen. Any added outlets are displayed.



6. Repeat steps 3-5 to add further outlets as necessary.
When you have added an outlet and it appears on the list, its details include the number of questions associated with that outlet.
7. Answer the questions by tapping the **Questions** button to display the list and then tapping the first question to open it. Enter your answer in the field provided. The answer is automatically saved and you automatically move onto the next question.

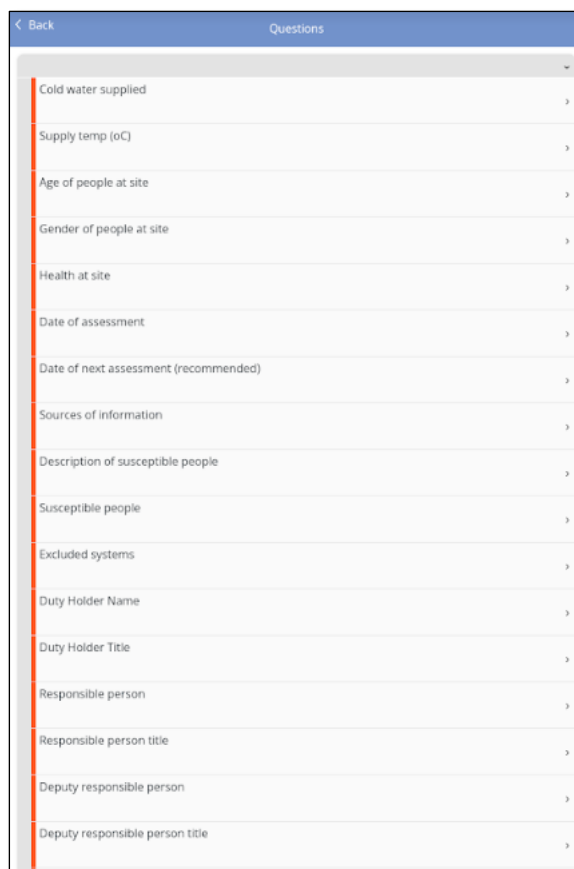
Alternatively, tap **Save** to save your answer and return to the question list where you can select which question you want to answer next.

8. When you have finished the questions, tap **Back** to return to the Outlets screen.
If your answers to the questions cause risk actions to be created, these will be generated once the data is synchronised and will be visible in Alpha Tracker.

Completing general questions

A project may have a general set of questions, not related to assets or outlets, which you need to answer. These are located under the Questions option.

1. Select **Questions** from the Water Hygiene menu to display the list of questions.



2. Tap on each question in turn and record your answer. You are moved on automatically to the next question.
3. When you have completed the questions, tap **Back** to return to the question list, and **Back** again to return to the menu.

Signing off the project

When you have completed the data capture for the project, sign off the work.

To sign off:

1. Select **Sign Off** from the Water Hygiene menu.
2. Select the sub project that you want to sign off.
3. Complete the fields to indicate whether the project is complete, when it was completed and sign it off.
 - Tick the **Project is Complete** box to fill in the **Date Completed**.
 - Tap the **Sign** button, then sign in the box and tap **Accept** if you are happy with your signature. (If not, tap **Clear** and try again.)

The screenshot shows the 'Sign Off' interface. At the top, there is a blue header with a back arrow and the text 'Sign Off'. Below the header, there are two checkboxes: 'Project is Complete' (checked) and 'No Access to Site' (unchecked). Underneath is a 'Date Completed' field showing '01/02/2023 16:19'. A 'Sign Off Signature' section contains a grey box with a handwritten signature. At the bottom, there are three buttons: 'Clear', 'Cancel', and 'Accept'. Below these is a 'Generate Report' button. At the very bottom of the screen are 'Cancel' and 'Save' buttons.

Note that generation of the report is not yet available on the app.

4.2 Adding details for a Monitoring-type project

If you are carrying out a Monitoring project, such as Monthly Temperature Monitoring or Monthly Chlorifier Monitoring, then you are likely to be adding details for systems, assets and outlets that have already been recorded for the site, and then answering questions.

You can use the app in the same way as described above for a Risk Assessment-type project when *adding new* assets and outlets. However, in addition, you can make use of a feature that lets you select previously recorded assets and outlets from the **Site** tab, and then record information for them. You should use this feature whenever the asset or outlet you require already exists so that you are repeatedly recording monitoring information against the same asset or outlet record.

First select the project, enter project details as described above, and then follow the instructions below to select assets previously recorded so that you can add monitoring information:

1. Select **Assets** from the menu. By default, the **Project** tab is selected. This tab lists any assets already selected or defined as part of this project, so initially it is blank.
2. Tap the **Site** tab at the bottom of the screen to display assets defined in other projects for the same site. Only assets relevant to the type of project you have selected will be displayed.
3. Select one of the displayed assets by swiping it right. It becomes greyed out on the **Site** tab and is added to the list on the **Project** tab.

Questions appropriate to the type of project are created for the selected asset.

4. Repeat steps 2 and 3 to select all the relevant assets. You can choose whether you add just some assets and then work on them, or add all relevant assets at once.

If you cannot find the asset you require on the **Site** tab, you can also add a new one for the site by tapping **Add Asset** and completing the details.

5. Work through the questions that have been created for each of the assets that you have added to the **Project** tab.

If any risks are triggered as you answer the questions, these will be created in Alpha Tracker once you have synchronised.

Outlets can be worked on in the same way by selecting Outlets from the menu.

5. SENDING IN THE DATA

5.1 Synchronising in the Offline Water App

In the Offline Water App you must both synchronise and back up your data.

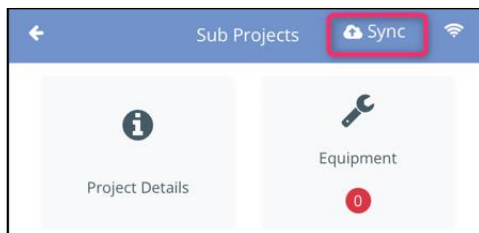
5.1.1 Synchronising

If you are using the Offline Water App, synchronise at the end of the project when you have signal. You can leave data/photos on your device overnight without synchronising (eg on a multi-day project), just make sure that you back up the data at the end of the day.

Synchronising sends your data and photos to Alpha Tracker and also takes an automatic backup beforehand, just in case. The data will be stored against the selected project number.

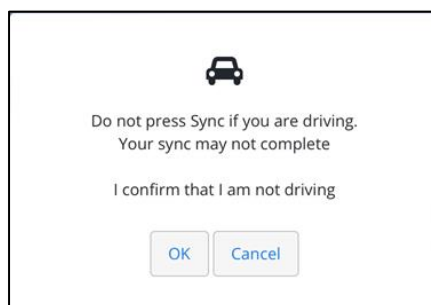
To synchronise:

1. When you have completed the project and have a good signal (WiFi is preferred), tap "Sync" in the toolbar to upload your data and photos.



This can take a few minutes to complete depending on how many assets, outlets and photos you have captured.

If you are driving, do not attempt to synchronise as the connection will not be sufficiently stable.



2. Confirm you are not driving by clicking **OK**.

A connection check happens first, then a data backup. You are then asked whether you want to back up photos

3. Click **Yes** to back up photos. Note that this can take some time.

Data and photos are backed up from the device to the server. The data then synchronises and creates the records in Alpha Tracker.

4. Click **OK** to the message indicating data has been sent successfully.

The “Sync” button is no longer displayed when you have no data left to synchronise.

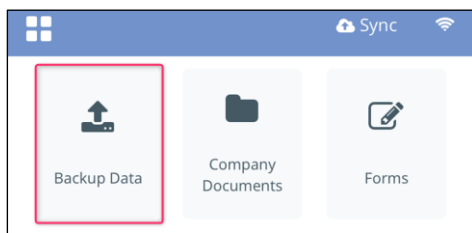
5.1.2 Backing up

Backing up takes a full copy of all unsynchronised data in the Alpha Tracker app on your device and saves it to the cloud.

Back up whenever you want and have a signal. Always back up at the end of the day if you are leaving data/photos on your device overnight (eg on a multi-day project).

To back up:

1. When you have a good signal (WiFi is preferred), select “Backup Data” from the main menu in the Alpha Tracker app.



5.2 Saving data in the Online Water App

If you are using the Online Water App, any data that you save is immediately saved to Alpha Tracker. You do not have to carry out any specific actions to synchronise the collected data or send it into Alpha Tracker as this happens automatically when you save.

The data will be stored against the selected project number.

6. WORKING WITH THE DATA

This section describes how you can display the water hygiene data that has been sent into Alpha Tracker and work with it further, which may include amending the data and generating a report.

Water hygiene data can also be displayed on a separate Water Hygiene Client Portal, which allows your clients to view the data too.

6.1 Displaying the data sent into Alpha Tracker

To access the data sent in from the app, you need to open the project in Alpha Tracker and click the **Water Details** button. You can see the data on screen by opening the different tabs on this Water Details screen.

DateTime	Question	Result	Staff	Delete
15/11/2022 11:59:50	Age of people at site	10-65		
15/11/2022 11:59:51	Executive Summary findings			
15/11/2022 11:59:51	Description			
15/11/2022 11:59:50	Gender of people at site	Mixed	Start Software	
15/11/2022 11:59:51	Comments			
15/11/2022 11:59:50	Health at site	Mixed health		
15/11/2022 11:59:50	Cold water supplied	Yes		
15/11/2022 11:59:50	Date of assessment	15/11/22	Start Software	
15/11/2022 11:59:50	Date of next assessment (recommended)	15/11/2024	Start Software	
15/11/2022 11:59:50	Sources of information			

All data in the Water Hygiene project is amendable on screen in Alpha Tracker.

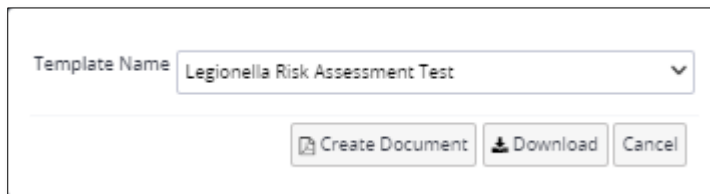
Check the data is correct and complete. For example, check:

- all questions have been answered
- the risks that have been generated
- assets and outlets have all the required details – expand the asset/outlet to see the details.

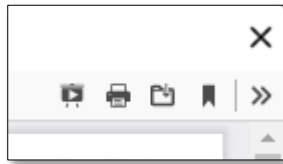
6.2 Producing the report

To generate your Water Hygiene report you need only click the **Produce Report** button on the Water Details screen and select the required template, eg Legionella Risk Assessment or Outlet Temperature Monitoring.

1. On your Water Hygiene project, click the **Water Details** button to display the Water Details screen.
2. Click the **Produce Report** button and select the required template.



3. Click **Create Document** to generate the report and display it on screen. A copy of the report is automatically saved in the project folder (Word and PDF).
4. Use the controls in the top right-hand corner to print and/or download the report as necessary.



6.3 Viewing the data on the Client Portal

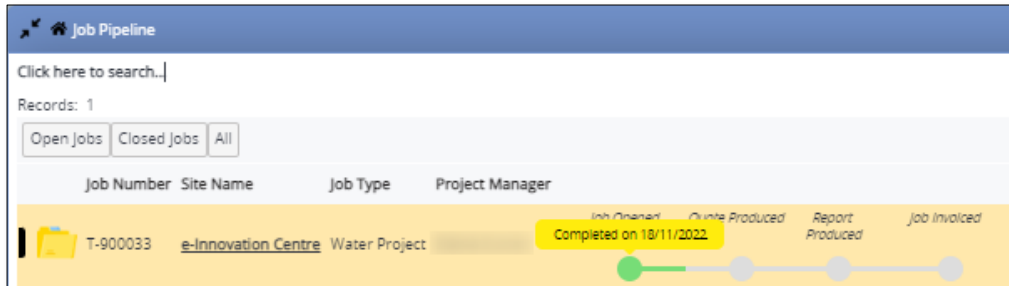
The Water Hygiene Client Portal gives your clients a view of the water hygiene data collected. A separate login is required to open the Water Hygiene Client Portal.

There are three main elements on the Water Hygiene Client Portal:

- Project Pipeline
- Risk Summary Dashboard
- Water Dashboard

6.3.1 Displaying the Project Pipeline

The Project Pipeline gives clients a view of the projects you have in progress for them and gives an indication of status. Hover over a completed milestone to see the date that it was done.



6.3.2 Displaying the Risk Summary Dashboard

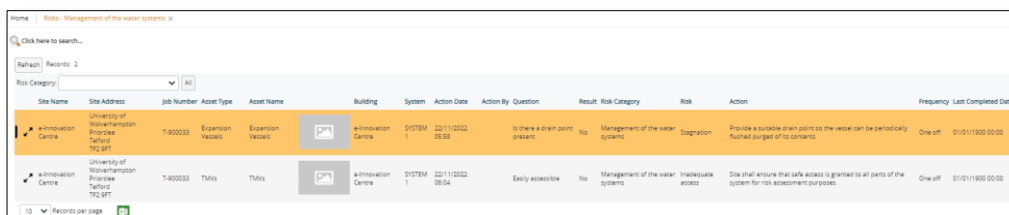
The Risk Summary Dashboard displays headline figures for the risks across the client’s sites, assets and outlets. Four categories of risk are displayed:

- Population Vulnerability Potential
- Aerosol Exposure Risk
- Proliferation Risk
- Management of the Water Systems.




Note that if the login you are using is limited to specific sites, then the figures displayed will reflect these site restrictions.

You can drill down into the details behind the figures by clicking on them. A screen listing the risks is displayed and can be searched as necessary, eg:



6.3.3 Displaying the Water Dashboard

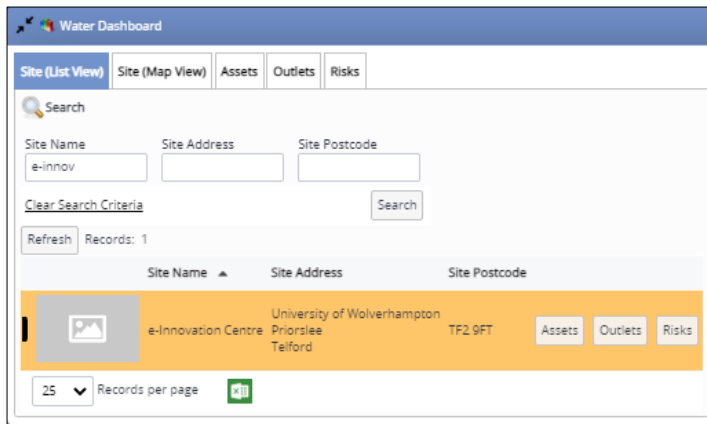
Clients can see the details of the water hygiene data across all their sites, assets and outlets.

 *Note that if the login you are using is limited to specific sites, then the data displayed will reflect these site restrictions.*

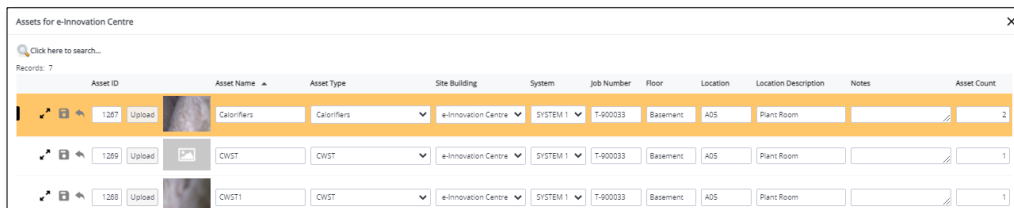
The data is split into five tabs:

- Site (List View)
- Site (Map View)
- Assets
- Outlets
- Risks.

Select the required tab and search it as required using the search fields at the top of the tab to find the required information. You may find it easier to first search for the site and then to use the **Assets**, **Outlets** and **Risks** buttons displayed – these will display data only for the selected site. For example:



Assets:



Outlets:

Outlets for e-Innovation Centre

Records: 2

Outlet ID	Outlet Name	Outlet Type	Site Building	System	Job Number	Floor	Location	Location Description	Notes	Temperature	Source Asset	Setpoint
1271	Tap	Tap	e-Innovation Centre	SYSTEM 1	T-00033	Basement		Ground Floor kitchen		Cold <input type="checkbox"/> 0 Hot <input checked="" type="checkbox"/> 58.0 Mixed <input type="checkbox"/> 0 Mains <input type="checkbox"/> 18.1	Cold <input type="checkbox"/> 0 Hot <input type="checkbox"/> 0 Mixed <input type="checkbox"/> 0 Mains <input type="checkbox"/> 128.6	Cold <input type="checkbox"/> 0 Hot <input type="checkbox"/> 0 Mixed <input type="checkbox"/> 0 Mains <input type="checkbox"/> 0
1272	Tap	Tap	e-Innovation Centre	SYSTEM 1	T-00033	First Floor		Ground Floor kitchen		Cold <input checked="" type="checkbox"/> 14.8 Hot <input type="checkbox"/> 0 Mixed <input type="checkbox"/> 43.5 Mains <input type="checkbox"/> 0	Cold <input type="checkbox"/> 128.6 Hot <input type="checkbox"/> 0 Mixed <input type="checkbox"/> 0 Mains <input type="checkbox"/> 0	Cold <input type="checkbox"/> 0 Hot <input type="checkbox"/> 0 Mixed <input type="checkbox"/> 0 Mains <input type="checkbox"/> 0

Risks:

Risks & Actions for e-Innovation Centre

Records: 13

Site Name	Site Address	Job Number	Asset Type	Asset Name	Building	System	Action Date	Action By	Question	Result	Risk Category	Risk	Action	Frequency	Last Completed Date
e-Innovation Centre	University of Wolverhampton Priories Telford TF3 9ET	T-000033	Calorifiers	Calorifiers	e-Innovation Centre	SYSTEM 1	22/11/2022 05:49		Storage temperature	59.4	Proliferation Risk	Ensure hot water storage temperature is above 60°C for at least one hour per day	Ensure hot water storage temperature to be above 60°C for at least one hour per day	One off	01/01/1900 00:00
e-Innovation Centre	University of Wolverhampton Priories Telford TF3 9ET	T-000033	Calorifiers	Calorifiers	e-Innovation Centre	SYSTEM 1	22/11/2022 05:51		Drain valve fitted	No	Proliferation Risk	Provide a drain point for the vessel	Provide a drain point for the vessel	One off	01/01/1900 00:00
e-Innovation Centre	University of Wolverhampton Priories Telford TF3 9ET	T-000033	CHWT	CHWT1	e-Innovation Centre	SYSTEM 1	22/11/2022 05:50		Is the tank affected by heat source	Yes	Proliferation Risk	Thermal heat gain on CHWT	Thermal gain should be kept to a minimum by adequately insulating of the cold water storage tank	One off	01/01/1900 00:00