Release 41.5 - Alpha Tracker Release Notes

New Features / Changes (from SVN9265 to SVN9857)

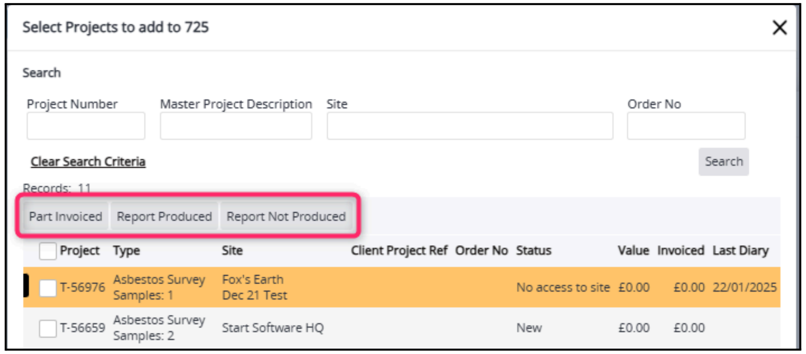
1. The Invoice screen has had a variety of improvements to make a smoother experience when sending invoices. These include:

    - The sample count is now displayed on the Projects Ready To Invoice list. You can see it below the **Type**, when asbestos samples may be expected.

    - The **Value** and **Invoiced** amounts are now positioned after **Status** on the Projects Ready To Invoice list to match the order of fields on the Project List.Other fields on Projects Ready To Invoice have been tidied and reorganised.

    - You can now set a default invoice date when raising invoices from Projects Ready To Invoice. When you click the **Invoice Selected** button, a window is displayed for you to set the parameters of the invoices to be raised. These include the **Type**, eg Single or Consolidated, the **Office Letter** for the issuing office and the default **Invoice Date**.

    - When using the **Add More Projects** button on a draft invoice to add further lines to an invoice, you have pre-set filter buttons to give better searches and more information displayed, including the master project description, client project reference, status, value, invoiced and last diary date.



- You can use the row expander on Draft Invoices to edit and delete invoice lines. There is also a quick search box to help you find specific invoice lines and an Excel download button to export to spreadsheet.

- A setting allows you to control whether manually entered text in the Invoice Message field is displayed on the invoice or not. If it is not displayed, you can use this field for notes (“AlwaysUseInvoiceMessage”).

- **Accounts Email** has been added to the Locked, Exported and Issued lists. **Accounts Email** is populated from the **Accounts Email** on the client record and, if entered, also from the **Accounts Email** on the project.

- You can specify an email address to automatically CC when emailing invoices by using the new setting “Email address to CC when emailing invoices”.

- When invoicing, you can produce a breakdown of the invoice as a spreadsheet. This can be done from the Invoice Detail screen (click **View Details** to see this screen), and the PDF can also be generated from the same screen. Both are saved into the invoice’s document folder. The breakdown has the filename pattern “Invoice [invoice number] Breakdown”.

- Once the invoice is locked, you can email it to the Accounts email address by using the **Email PDF** button, which automatically attaches both the invoice and the breakdown if one is present in the folder and your settings allow (“Include Invoice Breakdown on Email”). The text and subject line of the email can be specified in settings (“Email body for invoice files sent to client” and “Email subject for invoice files sent to client”).

- A confirmation message is displayed before emails are sent and checks ensure the accounts email on screen matches what is being sent. Success or failure in sending the email is clearly displayed. An email is sent for each invoice and emails can be sent across multiple clients by using the tick box to select the invoices and the button at the bottom of the screen.

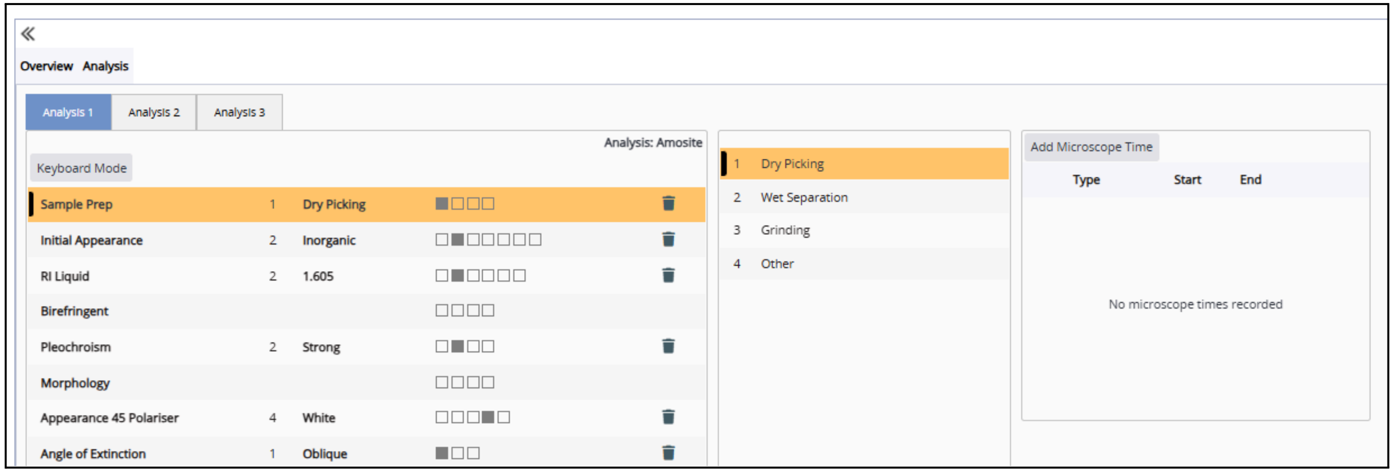
- If you are sending invoice emails by using the Send PDF button in the Invoice folder, you will find the dropdown of email addresses is now consistent with the Accounts Email address displayed on the Invoicing screen.

- The Draft Invoices and Locked Invoices lists open with 50 records displayed by default.

- To prevent unnecessary invoice duplication, a new setting checks whether an invoice has already been raised for a project within x seconds ("RepeatInvoiceCheckSeconds").

2. If you have your own lab then you might want to use the new, improved Fibre Analysis Microscope times. This feature is controlled by a setting "Fibre Analysis Microscope Time Method". The setting is set to "Basic" by default but, if you would like to use the new screens, it can be changed to "Detailed". The new Fibre Analysis Microscope Time method automatically calculates the time you have spent using a microscope, based on you starting and stopping a clock. You no longer have to type figures in on the Overview tab, instead you start and stop the clock as you complete the Analysis details.

   When an option is highlighted on the Analysis tab, the Microscope Times section is displayed to the right of the possible values. For example:



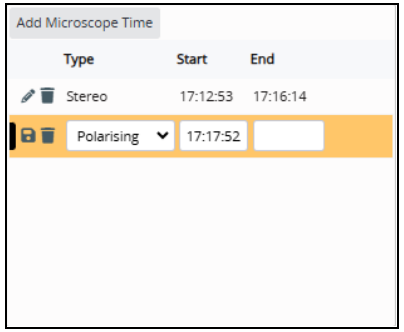
   To start the clock:

   - Click "Add Microscope Time" and select the type of microscope. The start time is automatically set as the current time.

   To stop the clock:

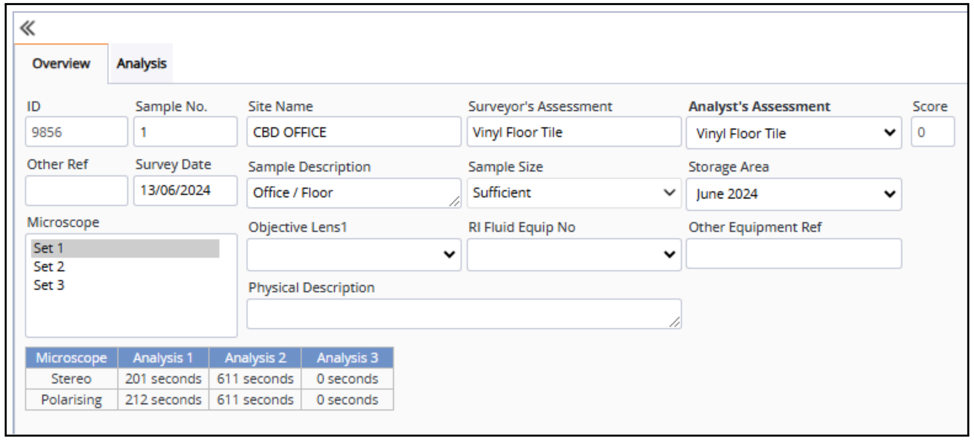
   - Click in the End field to insert the current time.
   - Save the Microscope Time record.

   If you have finished using the Stereo microscope on this analysis and have just started using the Polarising microscope, the microscope times might look like this:

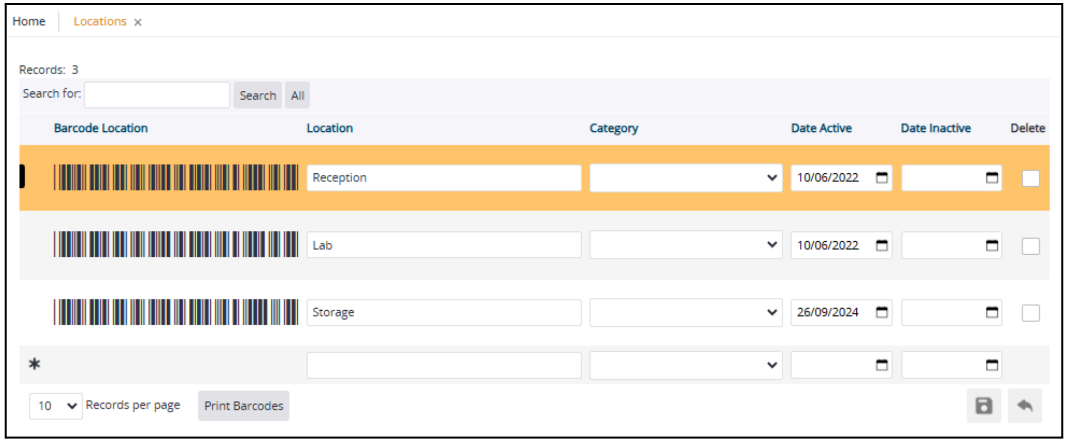


If you have ended a clock and start a new one, the open clock is automatically saved. If you leave a clock without an end time and start a new one, a warning message is displayed.

Separate times are recorded for each Analysis tab. All timings are added together and displayed on the Overview tab, for example:



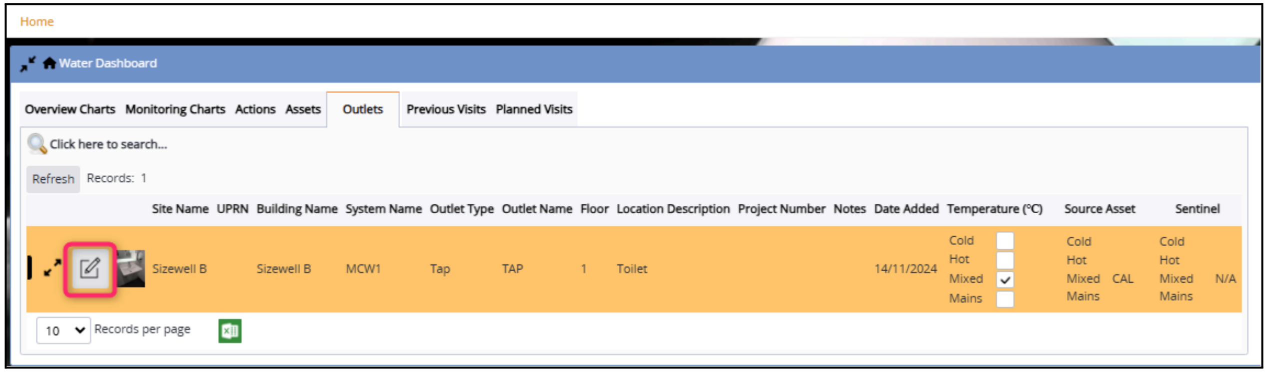
3. Improvements have been made to the Sample Check-in process. You can now identify which of your locations is/are to count as a lab. To do this, you set the new Category field on Locations to “Lab”.



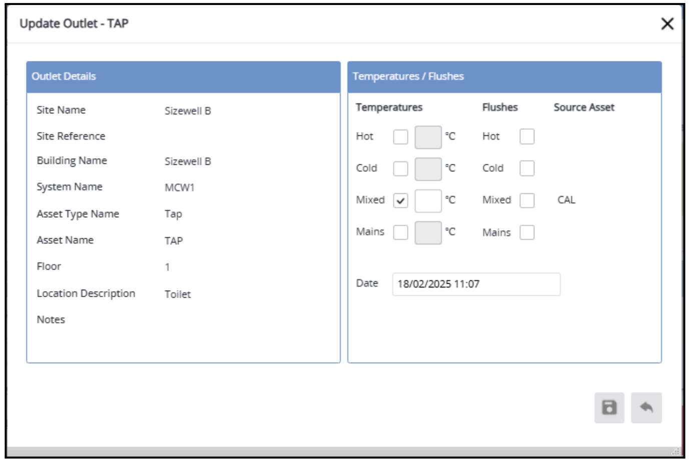
Then, when you check samples into one of these locations, if there is a milestone in the project that is linked to the key milestone “Samples received in lab”, that milestone is updated. In addition, a prompt is displayed so that you can open Fibre Analysis immediately if you wish.

4. Included in this release is the new Lab Sample Exchange feature. This feature works through Open Asbestos to enable the sharing of sample data electronically from other Alpha Trackers and also from some other external systems (Flow Mobile). Look out for further information and documentation on this feature.

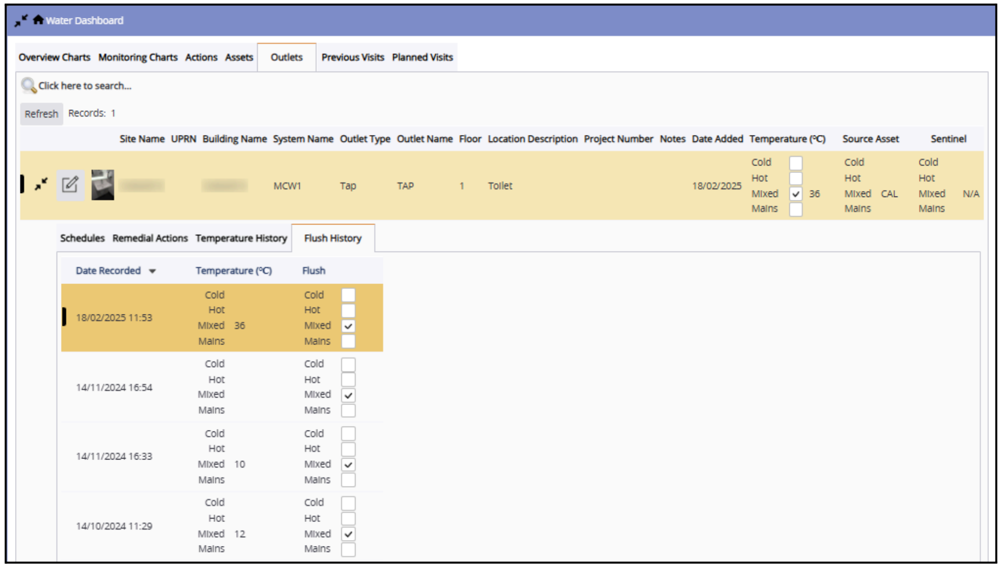
5. Users of Water Hygiene on the Client Portal can now update outlets via a new update button on records on the Outlets tab.



The updated details are added on this screen:



The temperature history is displayed on a chart on the row expander and there is also now a flush history displayed:



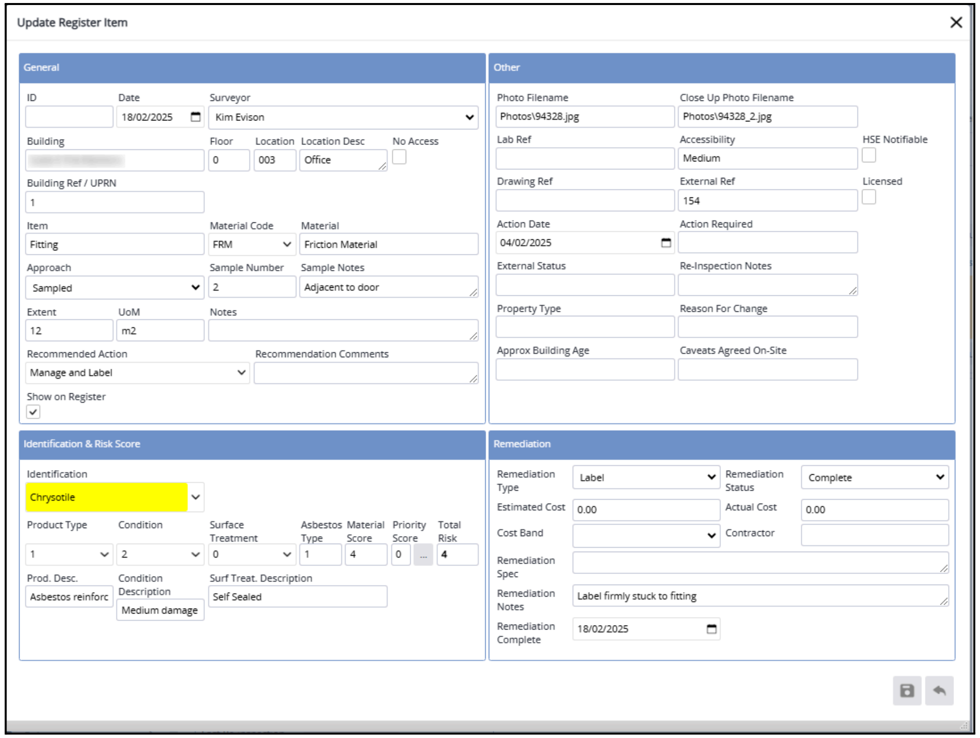
6. There have been a number of additions and improvements made to Alpha Tracker Mobile in this release.

    - SSO is now supported as a sign-in option.
    - The “Water” button now opens Water Offline, and “Water Offline” has been removed as a separate button.
    - The span of appointments in the Water Hygiene app is now -1 and + 1 day, instead of -2 days.
    - There is a new option to display “My Past Jobs” in the Water Hygiene app. This lets water hygiene technicians see their recent past jobs in Alpha Tracker Mobile.
    - The “View Asbestos Registers” button has been renamed as “View Registers”. If you have a valid Hazmat key, then once a site is selected a sub-menu is displayed where you can choose between: asbestos, lead paint, ods, pcb or smf category.
    - The menu options have been restructured.
    - Project Notes and Special Instructions have been added into My Projects, View Projects and New Project.
    - Asset/outlet groups now stay open when swiping in assets, between pages and when switching between sites/projects.
    - The uploading of photos in Water Hygiene and Forms has been improved.
    - When filling out the Water risk summary, it now moves automatically to the next row and also has the next option at the bottom of the screen.
    - There is a new Save All option under the Support menu option on Alpha TrackerMobile. This option is only to be used when instructed to by Support.

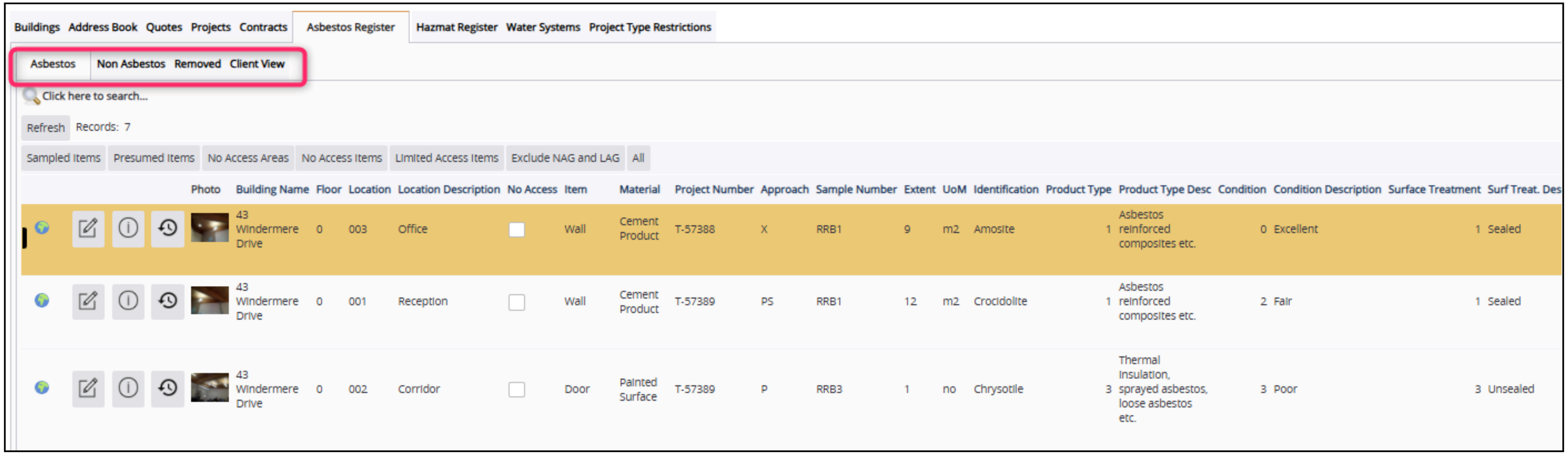
7. There is a new synchronisation method available for Water Hygiene in the Alpha Tracker Mobile app. This method is currently being trialled. The main point of difference in the new method is the separation of the sending and the processing of the data. Data is sent in immediately and then processed separately. A new setting in the app enables the new synchronisation method. This method is expected to be extended to Forms at a later date.

8. When creating a re-inspection, the receiver of the records is now added to the Project Staff as a surveyor. Their name is also added to any items that are copied to the re-inspection project (not sent to the device).

9. There have been improvements to the remediation process on registers, with the Remediation section now included in the main Update screen (bottom right).



10. When viewing asbestos registers from the site, there is a new tabbed view enabling you to quickly and easily switch between the Asbestos, Non-asbestos, Removed and Client View registers. Note that the search fields are hidden by default and can be displayed by clicking the magnifying glass.



11. It is now easier to search for information relating to a master project on the Client Portal.

    The Reports section has been refreshed so that it now includes the master project description, if there is one, immediately below the project number. The columns have been reordered and the search section updated. This change allows you to search for all the reports from a master project simply by searching on the master project number or description.

    The master project description has also been added to the Project Pipeline on the Client Portal and the search section updated accordingly. This also allows you to search for all projects belonging to one master project and check on their progress.

12. Some new fields are available to be displayed on the Client Portal if enabled by their settings:

    - Lead Percent/Concentration (applies to Hazmat only)
    - PCB Capacitane (applies to Hazmat only)
    - Surveyor
    - Recommended Action Comments
    - Identified date - which is the original item date.

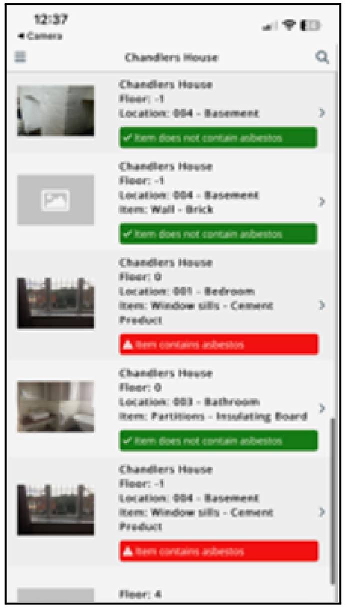
13. Client Portal dashboard charts can now be filtered by Site Classification, making it easier for you to see the figures you want for the sites you want. The display of “Site Classification 1” (which can be re-named as required) is dependent on system settings.

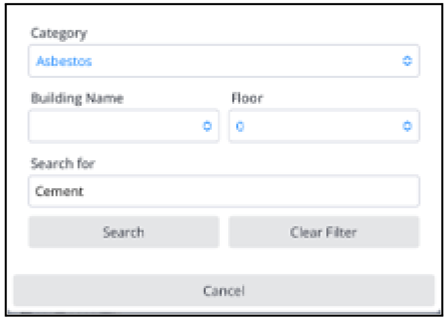
14. The Hazmat Client Portal and Site Hazmat Register have been extended for both individual and combined registers so that they work in the same way. They now have:

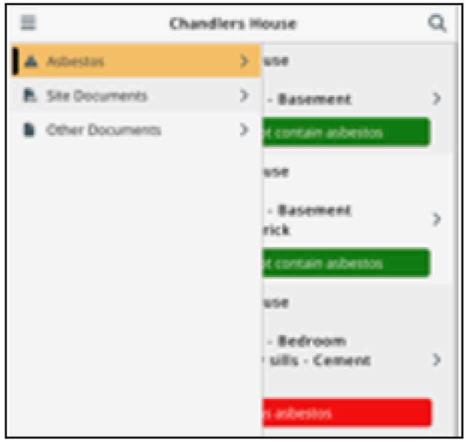
- Update and View features on each Hazmat section (displayed subject to settings) with four sections: Detailed, Other, Result & Score and Remediation
- more fields on the registers
- items removed, including by via remediation, showing the Removed stamp
- a Print/PDF button to generate reports
- a site register report for each Hazmat category.

15. Updates in this release have improved the display of information from QR codes:

- The styling is cleaner and coloured flags on items on registers clearly indicate the status.
- The display of the items is also clearer.
- The search has been improved so that it now includes searching by Category, Building and Floor using dropdowns, as well as a general text search field.
- There is a menu on the left so that you can easily choose the type of register to display (eg Asbestos or one of the Hazmat registers if applicable), access Site Documents and Other Documents. (Site Documents are PDFs in the Site folder, Other Documents are located in the "QR codes" subfolder of the Client folder and were previously called Client Documents.) Other options may also be available on the menu depending on settings.







16. This release sees a new setting and logic for checking whether a site already exists when using the Master Project Import. The setting is “Master Project Site Import key”. The import can use both the Site Name and the UPRN (Site Reference) together to identify sites as unique, or it can use only the UPRN (Site Reference). This means that you can choose whether UPRNs are treated as completely unique in your system, or whether it is the combination of Site Name and UPRN that is unique, ie the same UPRN could be used on more than one site.

    Valid values are “SiteName+UPRN” and “UPRN”.

17. If you use the milestones linked to the key milestones for “Samples Received in Lab” and “Bulk Samples Analysed” in your asbestos survey projects, then you will notice a change in how these work. To help progress projects through the workflow, if there are no samples taken but data collection onsite has been completed, then these milestones automatically complete with a note.

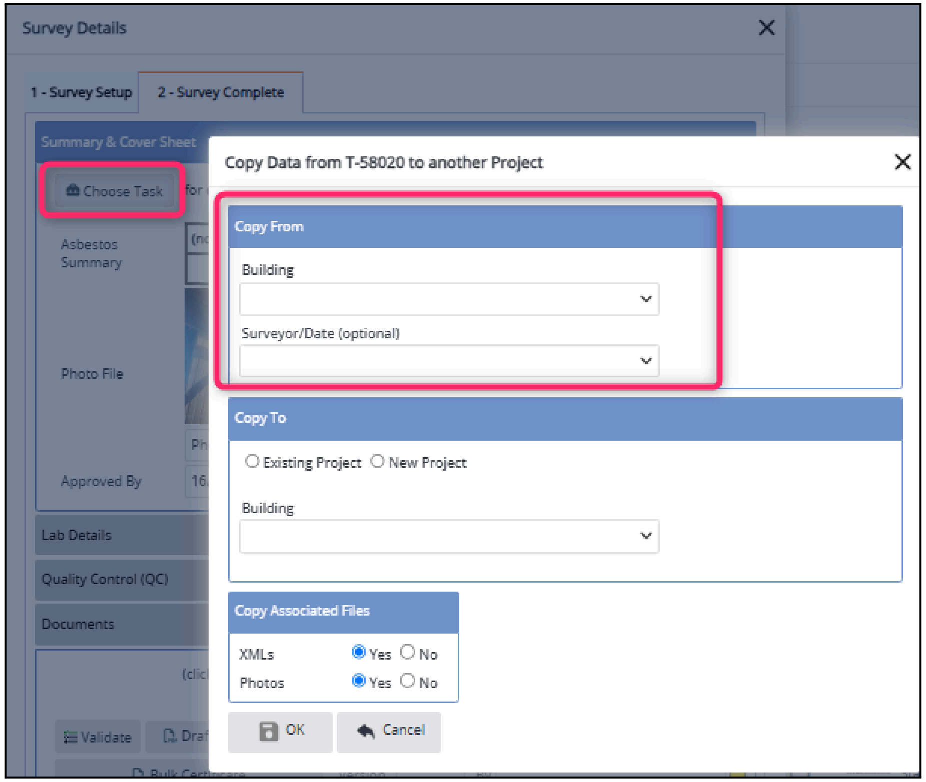
18. There has been a change to what happens when Loc 000 No Access records from Tracker Mobile are processed. They will no longer update the key milestones for “Surveyor First Day On Site” and “Surveyor Last Day On Site”. This means that the milestones/status of the project will not indicate that data has been sent in if only a No Access Loc 000 record has been received, making it easier to see that the work still needs to take place.

19. The Report Recipients dropdown list on projects has been restricted to display only the contacts who are ticked as being Report Recipients on the Client Address Book on the Client Details screen.

20. This release includes FLS integration. If you would like further details on integration to FLS for smart scheduling, contact your Account Manager.

21. A new Tracker Air app is available to separate out the functions of the Site Diary. The purpose of the separate Site Diary app is to allow you to record and send in diary notes even when no certificates are being created.

22. When copying data from one survey to another by using the Choose Task menu option “Copy Data to another Project” , the Copy Data window now allows you to select Building and Surveyor and therefore perform a copy of some of the data only. This feature was previously only available on the move process.



23. This release introduces added flexibility to include PDF documents in your survey reports. PDF documents can now be inserted as PDF files or as text which may be required to produce better quality in documents such as Terms & Conditions.

24. To protect your system from unintended changes, the Client ID on existing clients can now only be edited by Superusers and a message asks for confirmation of the change.

25. There was a tickbox on the Client Details screen that allowed the sending of an email to the client when appointments were made. This option has been removed.

Fixes/Minor Changes

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

- When opening a project from the Client Details, details such as diary appointments are visible.
- If it is displayed on the Site Details screen, then the **Site Classification 1** field is also available on the Site Import.
- A fix has been applied to the Plans button on the Client Portal.
- Significant improvements have been made to register speed on the Client Portal.
- There have been some performance improvements to risk generation in water triggers.
- Temperatures can now be set as blank on water outlets on the desktop.
- Issues with Hazmat QR codes have been fixed.
- The exports of reports from the Reports menu are now much more flexible in terms of their filenames and inclusions.
- The **Monthly Income Target** on the Staff List now allows null values.
- The Custom milestones tab under Milestones has new Active/Inactive pre-set filter buttons.
- There has been a small change to the “Reports Incomplete” pre-set filter button on the Projects Dashboard. This now includes projects where site work has been completed AND there is no Report Produced date.
- Updating a Client ID also updates the linked notes in the Jotter.
- There have been some minor changes to the Associated Cost triggers.
- The System Repository that contains the system settings now uses labels for the setting names and dates to make them clearer. Insertion of new records is prevented.
- When multiple milestones are completed on the same day, and milestones set the **Project Status**, the **Position** as well as the **Date** are taken into account.

- Unticking or ticking ShowOnWeb on a Project now causes the items that have been manually updated to also be marked as ShowOnWeb true/false (if they are directly linked).

- Active and Inactive preset filter buttons and an Excel download button have been added to the Contract List.

- The Client Address Book and Site Address Book on the Client Details now have an Excel download button. The display of these buttons respects the setting to restrict client Excel downloads.

- The “Push to Register” button on Bulk Samples has been rewritten to improve reliability and to ensure Pending, Show On Web and IsLatest flags are handled correctly. The Barcode Serial Number is also now added to the survey item, and a building is associated or created for the survey item.

- The “Raise Invoice” button on projects is temporarily disabled while the raise invoice process is running.

- Deleting an invoice line will now remove the **Invoiced Date** from the associated project if there are no invoices in the system after the deletion. Changing the project number on an invoice line has the same effect for the removed project number. In addition, if the **Project Closed Date** is automatically set when an **Invoice Date** is added, then this is removed to re-open the project.

- Logging and project updates around the raising of invoices have been improved.

- A fix has been applied to the display of water asset data on the Client Portal when site restrictions are in place.

- Water assets that have a project number will now automatically get a site ID.

- A bug in the Survey Items Importer which caused the Asbestos Type score to be set incorrectly has been fixed.

- The order of the toolbar buttons on the Project screen has been changed to match the Project List. In addition, bubble help has been added.

- The Site Address has been added to the Project Pipeline.

- There has been an improvement to the speed of deleting an invoice line.

- The Project screen and Project List have a new **Sales Contact 2** field, hidden by default, which can be renamed as required.

- There have been some performance improvements to the Master Project Import and the Project Import.

- Two additional client contact fields are available on the New Client screen. Two settings control whether these are displayed: “Show Client Contact Additional 1” and “Show Client Additional 2”.

- The SM2 Site Register PDF now outputs in UPRN order.
- A problem with adding buildings from the Survey Data screen has been fixed.
- An issue with the formatting of datetime and date fields in Australian Air Monitoring has been fixed.
- **Report Produced** parameters have been added to the Project PDF Export screen.
- The Project Pipeline for the Client Portal is now separate from the standard Project Pipeline. The Client Portal version respects hidden sites, site restrictions, and linked sites.
- There have been some cosmetic changes, including a reduction of the font size on the Performance, This Month and Lab Dashboards.
- An issue with the **Payment Due Date** when raising invoices for an invoice date other than today has been fixed. As has an issue with **Payment Terms** when using the day of the month option.
- An unlimited number of records can be exported to Excel on the Project List, Lab Project List and Master Project List.
- If you use the job allocation feature for scheduling, then Allocation Status is now set correctly when importing projects without a Project Manager.
- Additional Sign-Offs has a new **Comments** field for you to enter free text notes.
- Tax codes are now being sent to Xero during the export.
- On the Wallboard, to get a clean view of appointments, you can now filter out aborted appointments by using the new **Exclude Aborted Appointments** tickbox in the search criteria.
- When expanding a master project on the Master Project List, the **Site Ref** is now also displayed for each sub-project.
- Also on master projects, if you update information on the master so that relevant open sub-projects are also updated (this was introduced in a previous release), then any appointments linked to those updated sub-projects are now refreshed. This means that surveyors will see any relevant updates in their Exchange or Google calendar.
- Minor changes to Repair Instructions have been implemented to add the **Client Name** and improve quick filters.
- A new setting “Name: Vehicle Assigned Date” allows the renaming of the **Assigned Date** field on the Vehicles screen.
- An issue with the refreshing of data on the Invoicing screen has been fixed.

- In Water projects, you can now record the time of a No Access.
- The jotter notes are now available for reporting when using the Projects table in Query Writer. Also, the Account Manager is available when using Quotations.
- Three of the import screens now include the Estimated Man Days column on the far right hand side. These are the Project Import, the Master Project Import and the Map Scheduler Site Importer.
- The Diary Import now includes some new fields: Confirmed, Cannot Move, Tentative, Write-up, Trainee, Tech Review / QC.
- The Site Category has been added to the Site List, the Site List search fields, the Site Import and Site Information for Query Writer. This means that you can now search the Site List by both the Site Status and the Site Category.
- Hidden items are no longer included in the counts on the Asbestos Summary table which is displayed on the Survey Details screen. Similarly, the Hazmat Summary on this screen now excludes Loc 000 records and hidden items from the counts.
- Survey Data screens for Asbestos and Hazmat have an additional pre-set filter button to filter out hidden items from the screen. The button is “Exclude Hidden”.
- Sending re-inspection data for both Asbestos and Hazmat now excludes hidden items when sending from the project. Hidden items will also not be copied to the new project if the setting that does this is enabled.
- The Water Hygiene menu option for “Project Types” has been renamed to “Water Project Types” to clearly distinguish it from the “Project Types” menu option that already exists under Setup > General.
- The “Send Re-Inspection XMLs to Handset” option under Choose Task on the Survey Details screen allows you to select a mobile app if you have more than one.
- Tracker Air users will see a new standard report: the Four Stage Clearance Failure Report. This new addition is designed to provide Tracker Air users with an insightful and detailed overview of Four Stage Clearance Tests, focusing on failure rates and pinpointing the stages where failures occur. It can help provide information to organisations such as NORAC for the analysis of issues relating to staff members, contractors, types of enclosure etc.
- The character limit of Sample Locations has been extended from 255 to 4000.
- A change has been made to ensure appointment values update from the beginning of the month in the event of appointment deletions.
- The **Schedule of Rates** field has been extended to 500 characters from 50.
- The logs and error output for the invoice lock process have been extended.
- You can now use 0 days in **Payment Terms** on invoices to indicate "today".

- An issue with the Invoice Client ID has been fixed. If an Invoice Client ID is present on a project, then that Client ID will be used by default when raising an invoice. If there is no Invoice Client ID, the normal Client ID is used.

- Nominal codes can now be specified at Cost Breakdown Template level and pull through to invoice lines if input.

- A new QR code setting is available to hide the “Site Documents” option on Site QR Codes. This is useful if reports in Site Documents need to be hidden.

- There have been some minor changes to the Master Project Import to prevent conversion issues.

- The Excel download on the Account Management screen now includes **Industry Type** and **Client Type**.

- Active staff only are now displayed in the dropdown on the **Assigned To** field on the Vehicles List. Also, the **Year of Registration** has been extended to 2040.

- Water assets/outlets are now shown on the Client Portal if they are linked to a site but not to a project.

- When creating a project from a quotation, monthly and yearly cost breakdown totals are now immediately copied to the project.

- A bug has been fixed relating to the project value when cost breakdowns are auto-created.