USER GUIDE

Version 1.31

DOCUMENT CONTROL

Document

Alpha Tracker User Guide

Current Version

Version	Date	Issued Pages	Reason For Issue
1.31	Dec 2025	All	Wallboard recalculations (in 6.6), Master Project List figures (in 4.4), Automatic emailing of asbestos survey reports (10.5.2), Managing Asbestos Appointments (6.12), Identifying projects not scheduled (6.11), Invoicing (12.2), CRM, No Quality Contact (within 90 days) (13.5.3), Multiple survey reports (10.2), Auto-chasing quotes (3.4), Sample tracking (8.12)

Previous Versions

Version	Date	Issued Pages	Reason For Issue
1.30	Mar 2024	All	All screens. Searching, Sales menu, hotspot text labels, new document flag, document folder backups, appointments, contact details, new screen captures, Sharing Data on the Client Portal
1.29	Dec 2021	All	Entering fibre analysis, Checking analysis results, Staff calendar, Map scheduling, Project pipeline, Defaults on project type, Projects ready to invoice, Appointment status, Auto-numbering, Duplicating projects
1.28	Sept 2021	All	Additional contacts, hotspotting drawings, emailing from Documents folder, quick searches, account management, milestone templates, bulk sample screens, projects dashboard, projects ready to invoice.

Version	Date	Issued Pages	Reason For Issue
1.27	Nov 2020	All	New Fibre Analysis screen, including audit trail. Calendar changes, Quotations and follow-ups, Validator.
1.26	Jan 2020	All	Notification emails. Receiving bulk samples via the Client Portal.
1.25	Apr 2019	All	Staff Training screens & equipment, suggesting appointments, Calls/Tasks screens, Find & Replace, minor amendments
1.24	July 2018	All	GDPR, QR codes, AlphaValidator, Survey Data screen, Clients, Sites, Setup screens, Quotations, Staff Training Matrix, Uploading files, Client logging of enquiries, Copying survey data
1.23	April 2017	All	Searching, phone number
1.22	Dec 2016	All	QR codes, Projects Dashboard, Client View Site Register, Projects Ready To Invoice, Closing projects
1.21	Nov 2016	All	Changed plan images
1.20	Sept 2016	All	General updates.
1.19	June 2016	All	Excluding PDFs from transfers. Client Portal. Hotspots.
1.18	May 2016	All	Removals/remediation.
1.17	March 2016	All	Alpha keyboard shortcuts.
1.16	December 2015	All	December 2014 and Jan 2015 release items. (See release notes on website for details.) Survey sharing between systems. Updated Lab checking.
1.15	December 2014	All	November 2014 release items. (See release notes on website for details.)
1.14	November 2014	All	September 2014 and October 2014 release items
1.13	August 2014	All	August 2014 release items, QBF searching
1.12	July 2014	All	Extra status in job allocation, exporting to Sage, receiving cash payments. July 2014 release items.

Version	Date	Issued Pages	Reason For Issue
1.11	July 2014	All	Updates to Re-inspections, re-using survey data, job allocation and acceptance, data validation
1.10	July 2014	All	Updates to Re-inspections, CRM added, auto-numbering of survey items, updated quotation screens, contracts
1.9	July 2014	All	Re-inspections, actions from Sites, new site/quote/project from client, generating a quotation document, export to excel, multi type and multi site quotes, updated screens and fields
1.8	May 2014	All	Report parameters, duplicating multiple projects, draft reports, uploading files, removing group from not current staff
1.7	May 2014	All	Fixed/variable priced jobs, updated fibre analysis screens
1.6	Mar 2014	All	Reports & Timesheets, Master & sub-projects, Key Milestones added
1.5	Mar 2014	All	Lab Checking, Duplicating, Choose Task options, Site Address and Milestones on new projects added
1.4	Jan 2014	All	Updated screens and extra features in Setup and Invoicing
1.3	Nov 2013	All	Office setup and Synchronising Calendars added
1.2	May 2013	All	Logo changed
1.1	May 2013	All	Scheduling added
1.0	April 2013	All	First draft

Trademark Acknowledgement

Microsoft Word, Microsoft Excel and Microsoft Access are registered trademarks of Microsoft Corporation.
Google Calendar and Google Maps are registered trademarks of Google Inc..
™Alpha Anywhere is a trademark of Alpha Software Corporation
All other trademarks are the property of their respective owners.

CONTENTS

1. MAINTAINING CLIENTS 10

1.1 Adding a new client 10
1.1.1 Entering client details 10
1.1.2 Adding additional contact details 12
1.1.3 Recording sites for a client 12
1.2 Editing client details 15
1.3 Maintaining client data protection details 17
1.4 Searching in Alpha Tracker 19
1.5 Using keyboard shortcuts 21

2. MAINTAINING SYSTEM DATA 22

2.1 Maintaining General Setup data 23
2.1.1 Maintaining project status 23
2.1.2 Maintaining project types 24
2.1.3 Maintaining roles 27
2.1.4 Maintaining staff 27
2.1.5 Maintaining extra fields 29
2.1.6 Maintaining extra fields dropdowns 31
2.1.7 Maintaining offices 32
2.1.8 Maintaining key milestones 33
2.1.9 Maintaining rates 34
2.1.10 Maintaining CRM action types 35
2.1.11 Maintaining contract lengths 36
2.1.12 Maintaining cost centres 37
2.1.13 Maintaining departments 38
2.1.14 Maintaining payment terms 38
2.1.15 Maintaining report issue reasons 39
2.1.16 Maintaining turnaround values 39
2.1.17 Maintaining VAT codes 40
2.1.18 Maintaining aborted reasons 41
2.1.19 Maintaining equipment types 42
2.1.20 Maintaining teams 42
2.2 Maintaining Lab and Survey data 43
2.2.1 Maintaining approaches 43
2.2.2 Maintaining asbestos types 44
2.2.3 Maintaining condition values 45
2.2.4 Maintaing lab backfill details 46
2.2.5 Maintaining lab lookup data 46
2.2.6 Maintaining the materials list 47
2.2.7 Maintaining the priority assessment values 48
2.2.8 Maintaining default priority assessment scores 48
2.2.9 Maintaining recommendations 49
2.2.10 Maintaining standard comments 49
2.2.11 Maintaining surface treatment values 50
2.2.12 Maintaining survey types 51
2.2.13 Validation for fibre analysis 52

3. QUOTING FOR WORK 53
3.1 Creating a new quotation 53
3.2 Displaying and editing an existing quotation 56
3.3 Generating and printing a quotation 58
3.4 Following up open quotations 59
3.5 Converting a quotation to a project 63
3.6 Monitoring enquiries from the Client Portal 66

4. WORKING WITH PROJECTS 67
4.1 Creating a new project 67
4.2 Duplicating a project 75
4.3 Displaying and editing an existing project 77
4.4 Grouping projects together 80
4.5 Monitoring projects on the Projects Dashboard 82
4.6 Displaying progress in the project pipeline 83

5. WORKING WITH SURVEYS 85
5.1 Setting up a survey 85

6. SCHEDULING PROJECTS 88
6.1 Scheduling a new project 88
6.2 Editing and moving a project 92
6.3 Showing photos on the calendar 94
6.4 Suggesting available appointment times 95
6.5 Checking the calendar change log 96
6.6 Using the wallboard 98
6.7 Mapping projects 99
6.8 Job allocation and scheduling 100
6.8.1 Allocating jobs 100
6.8.2 Monitoring jobs you have allocated 101
6.8.3 Viewing and scheduling jobs allocated to you 102
6.8.4 Accepting projects on another's behalf 103
6.8.5 Viewing your unscheduled projects 103
6.8.6 Checking the scheduled status of your accepted jobs 104
6.9 Scheduling weekend teams 105
6.10 Map scheduling 107
6.10.1 Creating the sub-projects 107
6.10.2 Displaying the sub-projects in a list and on a map 108
6.10.3 Schedule appointments 109
6.10.4 Routing the appointments 111
6.10.5 Send SMS messages to the site contacts 112
6.11 Identifying projects not scheduled 113
6.12 Managing asbestos appointments 115

7. CARRYING OUT THE SURVEY 117
7.1 Recording survey results 117
7.2 Reviewing survey data 119
7.3 Re-using survey data 124

7.4 Moving data from one project to another 128
7.5 Copying survey data to a new project 129

8. ENTERING LAB RESULTS 130

8.1 Entering external lab results manually 130
8.2 Entering fibre analysis 131
8.3 Setting default fibre analysis settings 135
8.4 Updating the survey with results 137
8.5 Entering analysis results by a remote lab 138
8.6 Checking analysis results 139
8.7 Resolving disputed analysis 142
8.8 Searching for lab analysis records 143
8.9 Displaying a summary of the lab analysis 144
8.10 Displaying Lab warnings 144
8.11 Checking the audit log 145
8.11.1 Inspecting the audit log for individual records 145
8.11.2 Querying the full audit log 146
8.12 Sample tracking 148
8.12.1 Using manual sample tracking 148
8.12.2 Using barcode sample tracking 150

9. USING BULK SAMPLE PROJECTS 157

9.1 Creating a Bulk Sample project 157
9.2 Recording Bulk Sample analysis results 159
9.3 Loading the Bulk Sample analysis results 160
9.4 Receiving bulk samples via the Client Portal 161

10. PRODUCING THE SURVEY REPORT 162

10.1 Checking the survey is complete 162
10.1.1 Validating from Survey Details 163
10.1.2 Validating from Survey Data 165
10.2 Generating the survey report 167
10.3 Viewing and editing the report 169
10.4 Uploading reports and other files 171
10.5 Emailing files to your clients 173
10.5.1 Emailing files from the Document folder 173
10.5.2 Automatic emailing of asbestos survey reports 174
10.6 Hotspotting drawings 176
10.7 Sharing survey data 179
10.7.1 Sending a report and its survey data to a linked system 179
10.7.2 Receiving a report and survey data from a linked system 180
10.7.3 Linking Alpha Tracker systems 183
10.7.4 Displaying transfer details 183
10.8 Using QR codes 184

11. REGISTERS AND RE-INSPECTIONS 187

11.1 Displaying the Asbestos Register 187
11.2 Updating the Asbestos Register 188

11.3 Re-inspecting a site 189
11.3.1 Performing a site re-inspection 190
11.4 Re-inspecting a project 195
11.4.1 Performing a project re-inspection 195
11.5 Creating Refurb projects from a register 197
11.6 Re-inspecting using the app 197

12. TIMESHEETS, INVOICING & CONTRACTS 199

12.1 Recording time and costs 199
12.1.1 Recording time spent on projects 199
12.1.2 Enquiring on time spent on projects 200
12.1.3 Recording associated costs 201
12.2 Recording and raising invoices 203
12.2.1 Using the integrated invoicing process 203
12.2.2 Recording an external invoice 208
12.2.3 Raising an invoice 208
12.2.4 Raising an ad hoc invoice 212
12.2.5 Identifying projects ready to invoice 213
12.2.6 Exporting invoices 215
12.2.7 Receiving payments 215
12.3 Closing projects 216
12.4 Managing contracts 218
12.4.1 Recording contract details 218
12.4.2 Adding an invoice schedule to a contract 220
12.4.3 Adding review notes to a contract 221

13. LOGGING CALLS AND TASKS 222

13.1 Logging a call or task 222
13.1.1 Using quick links to log a call or task 224
13.2 Checking your To Do list 226
13.3 Completing a call or task 228
13.4 Checking all calls/tasks logged 229
13.5 Tracking client contact 229
13.5.1 Identifying key contacts 229
13.5.2 Recording contact with clients 230
13.5.3 Displaying and monitoring client contact 231
13.5.4 Sending and recording bulk emails 232

14. REPORTING ON YOUR DATA 234

14.1 Running a report 234

15. SHARING DATA ON THE CLIENT PORTAL 236

15.1 Introduction to the Client Portal 236
15.2 Setting up Client Portal users 237
15.3 Making projects visible on the Portal 238
15.4 What can be seen on the Client Portal? 239
15.5 Customising the Portal view 242
15.6 Uploading files to the Portal 243

15.7 Viewing hotspot drawings on the Portal 244
15.8 Viewing CAD drawings on the Portal 246
15.9 Recording removal and remediation details 247
15.10 Logging enquiries, accepting/rejecting quotations 249

16. STAFF TRAINING 252

16.1 Listing training courses 252
16.2 Recording training courses attended 252
16.3 Who has attended training courses 253
16.4 Displaying the training calendar 254
16.5 Scheduling using qualifications as restraints 254
16.6 Displaying the Training Matrix 255
16.7 Reports 256
16.8 Managing equipment 257

1. MAINTAINING CLIENTS

This chapter describes how to maintain your client information in Alpha Tracker by adding new client records and by finding and updating existing client details.

1.1 Adding a new client

This section contains a summary of the steps necessary to create a new client in Alpha Tracker. Optional steps to enter details of additional contacts and sites are also included.

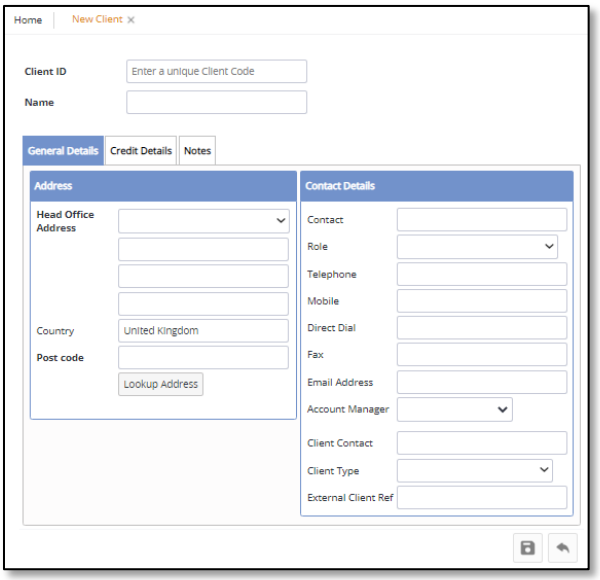
There is a setting that allows you to control who can add new clients in Alpha Tracker ("UserListNewClients"). If this setting is left blank then all users can create new clients. To restrict client creation to specific users then list their user IDs.

1.1.1 Entering client details

Before you can create a project for a new client in Alpha Tracker, you must set up the new client by entering their details on the New Client tab.

To add a new client:

1. Click the "New Client" menu option to display the New Client screen.



2. Type the ID which you want to apply to this client in the **Client ID** field or use the **Get Next Number** button to generate the next available client number.

   Typically the ID is a short alphabetic code that helps you identify the client, eg "START" for Start Software.

3. Type the client's name in the **Name** field.

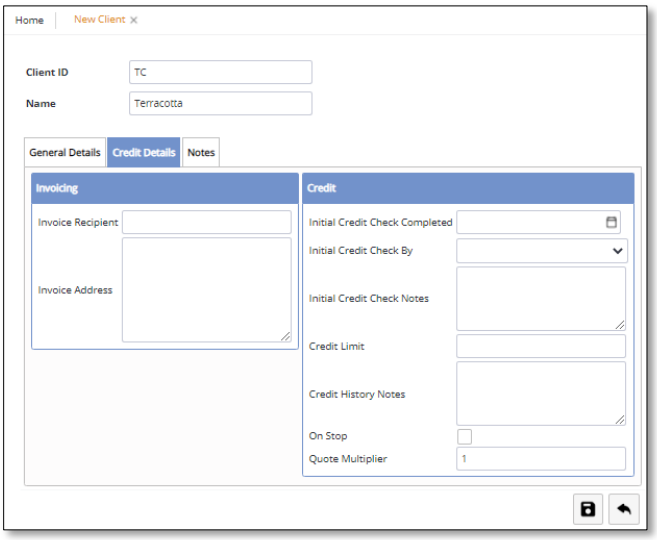
   To help prevent the duplication of clients in the database a warning message will pop up if you attempt to create a client that already exists.

4. Use the five **Address** fields to enter the client's full postal address.

5. Use the **Contact Details** fields to enter name, role, telephone, fax and email details for your main contact at the client.

   There are also additional fields which may be present and that you can complete if they are appropriate: eg **Account Manager, Account Support** and **Sales Support** fields in which you can select the appropriate member of staff; **Client Contact** to identify a contact person; a **Client Type** field in which you can type in or select an entry to categorise the client.

6. Click on the **Credit Details** section heading to expand it and show fields relating to invoicing and credit checking.



7. Complete as many of the **Credit Details** fields as required.

8. Click the **Notes** section and record any notes in the **Notes** field.

   You can also use the **Allowed Office Letter** field to restrict who can see the client details by specifying the Office letter to which this client belongs. Each logged in user has allowed office letters set in their User record. If a user has the matching office letter set in their allowed office letters, then they will be able to see the client in lists and dropdowns. If no letter is specified on the Client record then all users can see the client.

9. Click **Save** to save the new client.

You can find more fields to define the client and how the system behaves when the client is selected by opening the client details from the Client List.

Refer to 1.2, Editing client details, for instructions on how to use the Client List and edit client details. When editing a client record there are more fields that you can complete.

1.1.2 Adding additional contact details

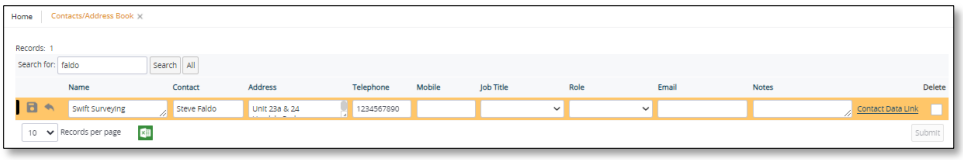
If you have multiple contacts at a client you can record their details in Alpha Tracker as part of an address book. This is an optional step and best done as part of editing the client details.

> ☞ Refer to Section 1.2, Editing client details, for instructions on searching for a client record and adding further contacts on the Client Address Book tab.

You can also see all your client contacts in one place:

1. Click the "Contacts/Address Book" menu option on the Clients menu to display the Contacts/Address Book tab.
2. The **Search for** box at the top searches for matching text in the Name, Contact, Address and other contact details fields. Type your search text and then click **Search**.

   Any matching contacts are displayed.



> *Contacts can be deleted by ticking the **Delete** tickbox at the end of the row and then clicking **Submit**.*

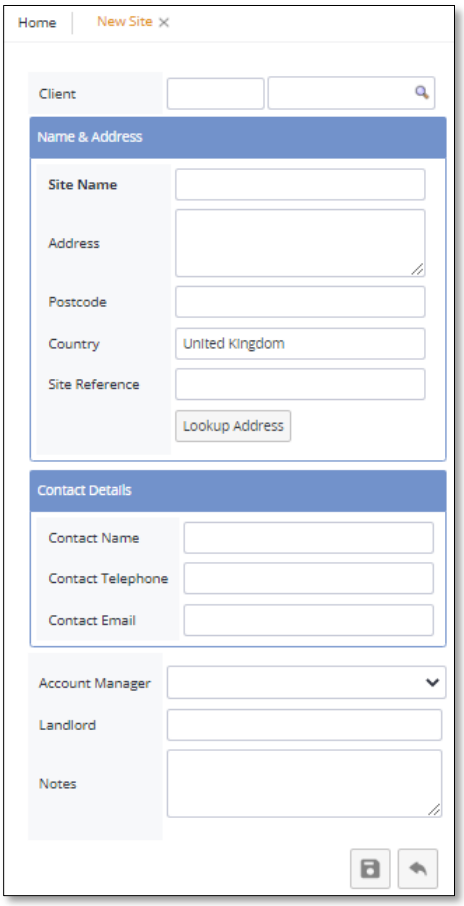
1.1.3 Recording sites for a client

A client may have a number of different sites at which you are to carry out project work. You can set up these sites for your clients in Alpha Tracker so that they are available for selection from a drop-down list when creating a project. This is an optional step as you can create new sites at the same time as you create a new project. You can also import a list of sites via spreadsheet by using the Import/Export menu under Setup.

> *If you do not use the term "site" it is possible to change the term to one of your choice throughout Alpha Tracker by using a setting in the system (Name: Site).*

To record site details:

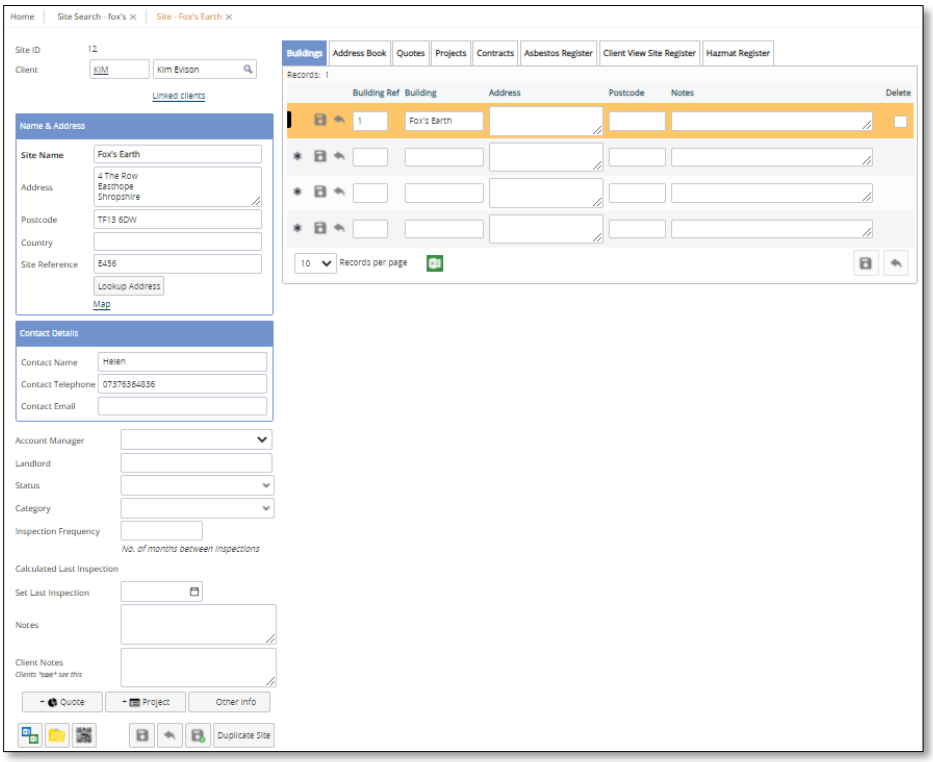
1. Click on the "New Site" option from the Sites menu to display the fields in which you can record site details.



2. If you know the client's ID, type this into the first **Client** field. If not, click the magnifying glass in the second **Client** field and search for and select the client for whom you are creating the site.
3. Complete the following details for the site:
   - **Site Name**
   - **Address**
   - **Postcode**
   - **Country** (if not pre-populated).
4. Type the reference for the site, if you have one, in the **Site Reference** field. This might, for example, be a UPRN number.
5. Complete any contact details you may have for the site:
   - **Contact Name**
   - **Contact Telephone**
   - **Contact Email**.
6. Complete any other details if required:
   - **Account Manager** (one of your staff)
   - **Landlord** (if applicable)
   - **Notes**.
7. Click the **Save** button to save the new site details.

You can also search for sites and display their details by using the “Site List” menu option, completing the search criteria fields as required and clicking the underlined Site Name. From the Site screen on which the details are displayed, you can:

- define the buildings for the selected site by using the Buildings tab. Then when you come to set up the project, you can select the site and also select the buildings from a list that shows only those buildings defined for the site. (Buildings can also be defined when setting up the project and, if necessary, when carrying out the survey on Tracker Mobile)
- create a new project for the displayed site by clicking the **Project** button (the site details are carried forwards to the project)
- create a new quotation for the displayed site by clicking the **Quote** button (the site details are carried forwards to the quotation)
- enter additional site-related details by clicking the **Other Info** button
- display a list of projects linked to the site and access the project details
- display a list of quotations linked to the site and access the quotation details
- display a list of contacts linked to the site and add further contacts to the list as required
- see any contracts linked to the site
- see the Asbestos Register for the site, and from there create Re-inspection projects or Removal/Remediation projects, and print photos and QR codes
- see the Client View Site Register which is the register as the client sees it from the Client Portal
- display the location of the site on a map if the address is geocoded from a postcode
- generate site-specific documents
- display the contents of the site folder
- duplicate a site.

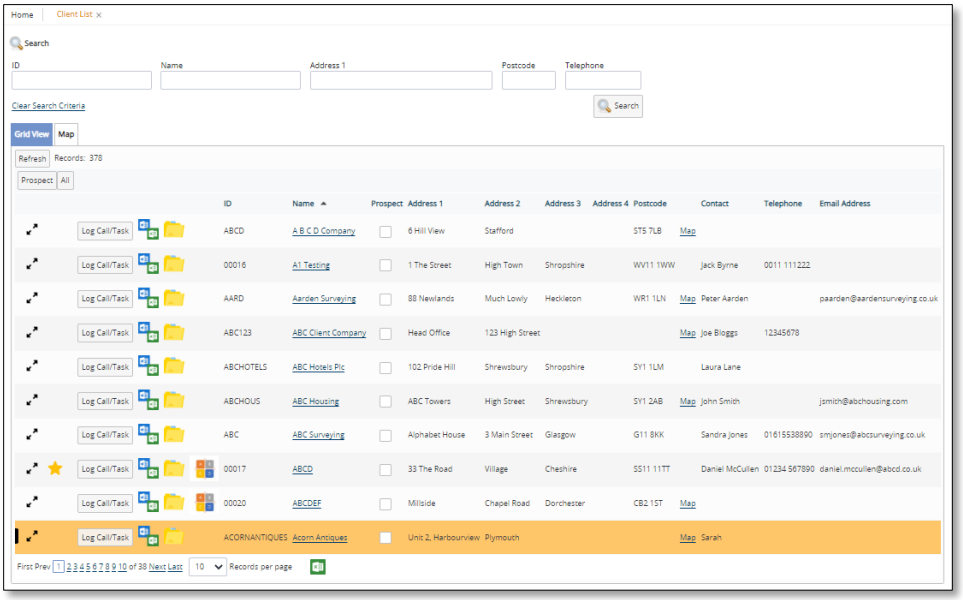


1.2 Editing client details

You can edit existing client details by finding the client on the Client List and then simply changing their details. You can also add further details to a client such as their quote multiplier, date they became an inactive client and any extra information you want to capture relating to clients.

To display and edit existing client details:

1. Click on the "Client List" option on the Clients menu to display a list of existing clients and some search fields to help you locate the required client.



   You can show more clients in the list by paging through the clients or by selecting to show more records per page (eg 50, 75 or 100). The controls to do this are at the bottom of the client list.

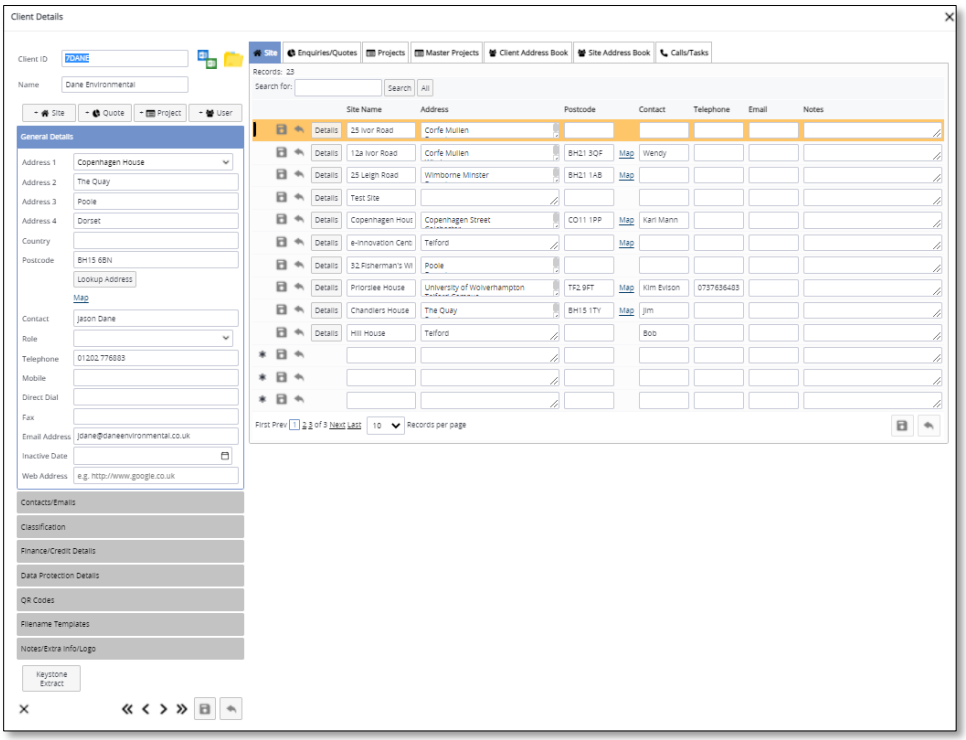
2. Type any details that may help you locate the required client in the search fields – for example you might enter part of their name or their postcode – then press **Enter** or click **Search**.

   The list is filtered to show only those clients matching your search criteria.

> ☞ Refer to 1.4, Searching in Alpha Tracker, for further details on search criteria that you can use in Alpha Tracker search fields.

3. Select the required client from the list by clicking on the underlined client name.

   The Client Details screen is displayed, showing client name and address details on the left and separate tabs on the right for site, quote, project, master project and address book details related to the client.



You can use the Site, Client Address Book and Site Address Book tabs on the right as quick ways to add details of extra sites and contacts for a client. There are also buttons available below the **Client ID** and **Name** fields on the left to add a new site, add a new quote and add a new project. Use the links and buttons on the tabs to open the sites, quotes or projects.

The **Classification** section lets you assign a type and a sector/industry to clients.

The **Finance/Credit Details** section groups together the financial details, including payment terms which can be inserted when invoices are raised from projects. Fields at the bottom of this section help you control the requirement for purchase orders for certain clients on projects and on invoices. These are: **Requires PO For New Project** tickbox, **Requires PO For Invoice** tickbox and **Default PO Template** field. If you try to save a project or raise an invoice on a project for a client where the tickboxes are set and nothing is present in the **Client Order Number** field on the project, then a warning message displays and you cannot complete the action.

The **Default PO Template** field lets you set a default entry for new projects for the **Client Order Number** field for the client, eg “TBC”. You can use two tags in the default to pull through the following:

- today’s date - {Date}
- the logged in user’s name - {LoggedInName}

For example, “TBC - {Date} - {LoggedInName}” might produce a default entry of “TBC - 21/12/2018 - Administrator”.

☞ See Section 1.3, Maintaining client data protection details, for information on the Data Protection Details tab.

The **Notes/Extra Info/Logo** section lets you enter free text notes and contains an **Extra Info** button from which you can display any extra fields that have been defined to capture additional information relating to clients. It also lets you:

- specify an office letter if the client is to belong to one office only
- upload a logo for your client which will be displayed on list screens in Alpha Tracker
- record the client's QR code password for private QR codes.

☞ Refer to 2.1.5, Maintaining extra fields, for further information on setting up the extra fields.

4. Amend the client details as required.
5. Save any changes you make by clicking the **Save** buttons.

Tip: *To display details of all clients in the filtered list one after the other on the Client Details screen without returning to the Client List, use the Next Record button below the client name and address details.*

1.3 Maintaining client data protection details

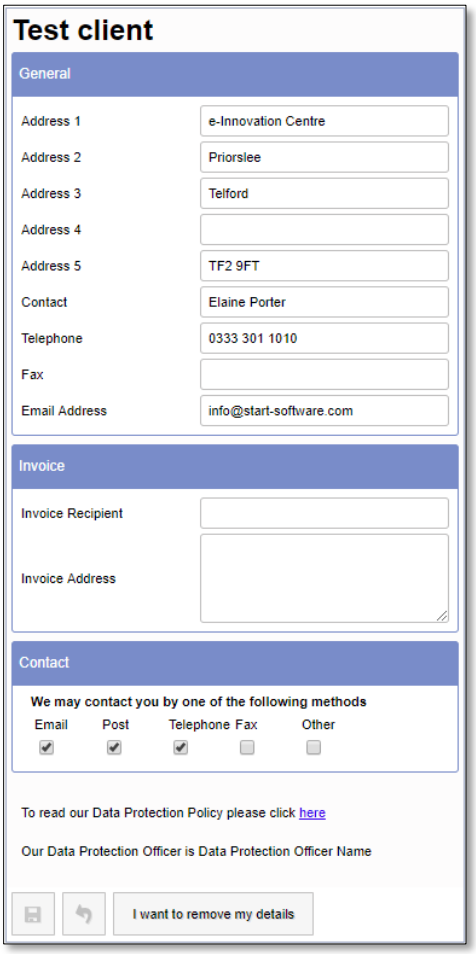
With the introduction of GDPR, there are some important additional features available in Alpha Tracker where you can record a client's data protection details.

To maintain the data protection details:

1. Display the Client Details screen for a client and click on the "Data Protection Details" tab to display the GDPR-related information.

This gives you a “Client Data Link” that you can copy and provide to the client so they can see what information you hold in Alpha Tracker about them

2. Click the “Client Data Link” link to see the information set out like this:



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

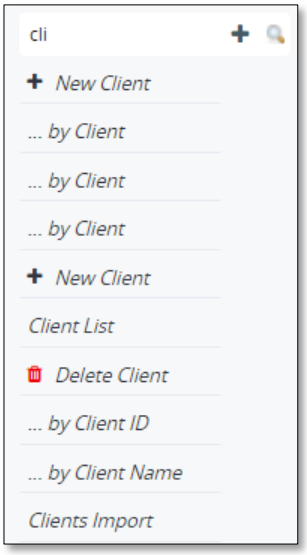
The “Data Protection Details” tab also provides a link to your Data Protection Policy, states who your Data Protection Officer is and how the client has confirmed they may be contacted.

All the settings that control this information are held in one location on your Alpha Tracker, on the Setup menu, in the Data Protection section. Here you can specify:

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

1.4 Searching in Alpha Tracker

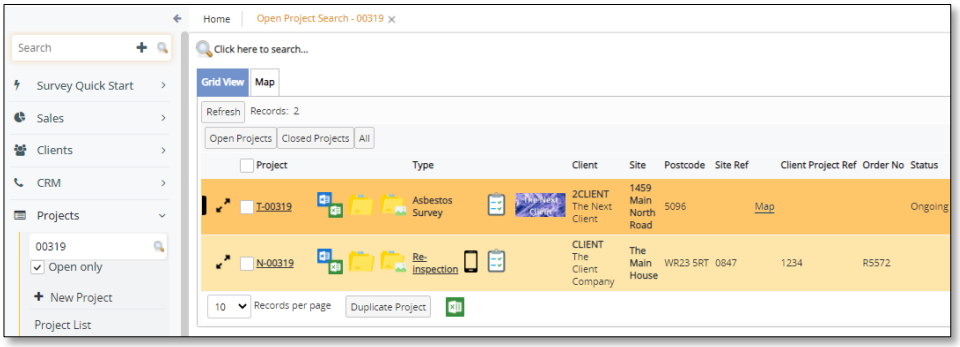
There is a menu search that can be displayed at the top of the menu bar in Alpha Tracker. This Search Menu is designed to help you navigate the menu structure. If you don't know where in the menu structure to find the option you need, simply start typing in a keyword and matching menu options will be displayed:



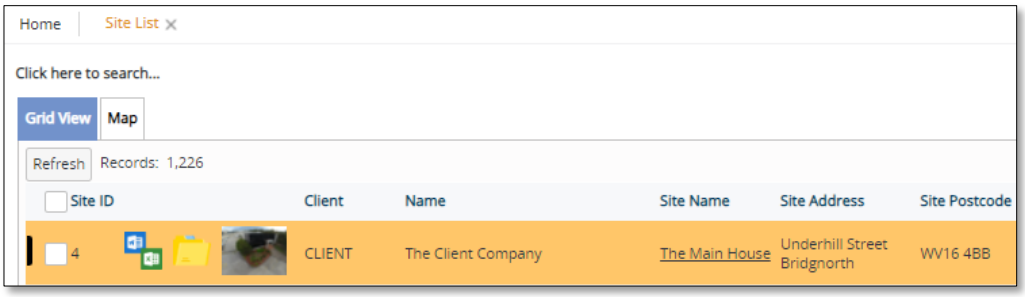
If there is only one matching menu option, you can press **Enter** or click the magnifying glass to open it. Otherwise, pressing **Enter** or clicking the magnifying glass performs an intelligent search, which can display matching clients, projects, sites, quotations etc. If there is only one matching entry it opens automatically.

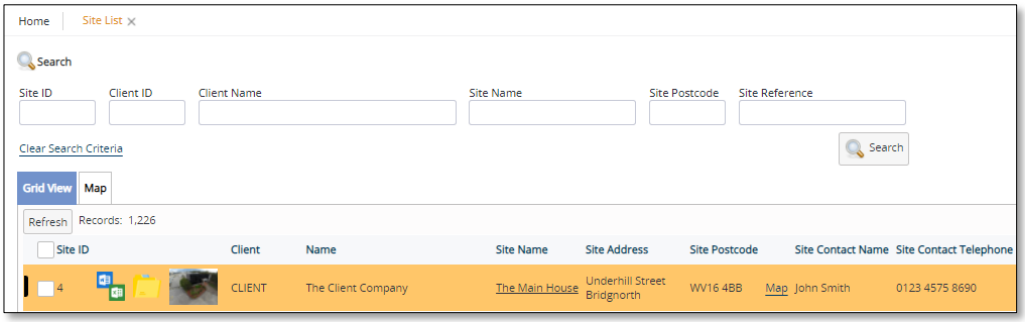
If you are looking for the "New…" menu options so that you can create a new record in the system, click the plus button in the Search box – it automatically enters the word "New" so that all the "New…" menu options are displayed.

Other menus have quick search boxes at the top. These let you type in a name, number or date (or part of one) to find matching entries quickly. For example, you could type "00319" in the quick search on the Projects menu, begin the search by tapping **Enter** or clicking the magnifying glass, and all matching projects are listed on the Project List screen. Note that the search will include open projects only if the tickbox is ticked. If the quick search results in only one matching project, client, site or quotation, then it is automatically opened.



List screens in Alpha Tracker allow you to search by entering criteria in fields at the top of the screen. If the search fields are not displayed, click on “Click here to search…” to display them.





You can use Query By Form (QBF) syntax in search fields in Alpha Tracker which means that you can search on ranges of values, greater than x, less than y etc, by typing specific characters into the search fields. The following table describes how to enter these search operators.

Operator	Example	Meaning
=	=asbestos	Equals ‘asbestos’
>	>10	Greater than 10
>=	>=12	Greater than or equal to 12
<	<10	Less than 10
<=	<=02/11/2004	Less than or equal to 02/11/2004
!=	!=asbestos	Not equal to ‘asbestos’
value1..value2	alpha..delta	Values that are greater than or equal to ‘alpha’ and less than or equal to ‘delta’
..value3	..16/04/2009	Values that are less than or equal to 16/04/2009
value4..	17..	Values that are greater than or equal to 17
Is blank	Is blank	Values that are blank or null. To omit null values, use = ‘’
Is not blank	Is not blank	Values that are not blank or null
Is null	Is null	Values that are null
Is not null	Is not null	Values that are not null
value1,value2,value3	alpha,beta,gamma	Values that are ‘alpha’ or ‘beta’ or ‘gamma’

1.5 Using keyboard shortcuts

There is a range of keyboard shortcuts that you can use in Alpha Tracker. You may at times prefer to use key presses to perform certain actions rather than using mouse clicks. The keyboard shortcuts work in particular areas of the system as described in the table below.

Key	Action
Up	Move focus to the previous row in the Grid part
Down	Move focus to the next row in the Grid part
F9	Save the current record
Shift+F9	Save all the records (in a Grid that allows multiple records to be edited at once)
Ctrl+F9	In the Detail View, save the current record and start entering a new record
Enter	Put the field with focus into edit mode
Page Up	Move to the previous page of records
Page Down	Move to the next page of records
Ctrl+D	Delete current record
F2	Open the lookup window for the current field
Esc	Abandon edits made to the current field

2. MAINTAINING SYSTEM DATA

This section describes how you can maintain the data that provides settings, data and drop-down lists for Alpha Tracker. The System Data in Alpha Tracker may include the following (only some options may be applicable to your installation) or you may see additional options:

- General Setup:
  - project status
  - project types
  - roles
  - staff
  - extra fields
  - extra field dropdowns
  - offices
  - CRM action types, and many more
- Lab and Survey Data:
  - asbestos types
  - lab lookup data
  - materials
  - recommendations
  - standard comments
  - survey types
  - validation for fibre analysis
- Document Production:
  - these options control the production of your reports and are for technical use only. They are not documented here
- Import/Export
  - these options enable the import and export of data into and out of Alpha Tracker and are for specific users only. They are not documented here
- Dashboard Emails
  - these options control the alerts and dashboard emails sent from Alpha Tracker and are for technical use only. They are not documented here
- Help
  - these options control the help text displayed on the Home tab. They are not documented here
- System
  - these options control system functions and are for technical use only. They are not documented here.

2.1 Maintaining General Setup data

This section explains how to maintain the following general setup data items:

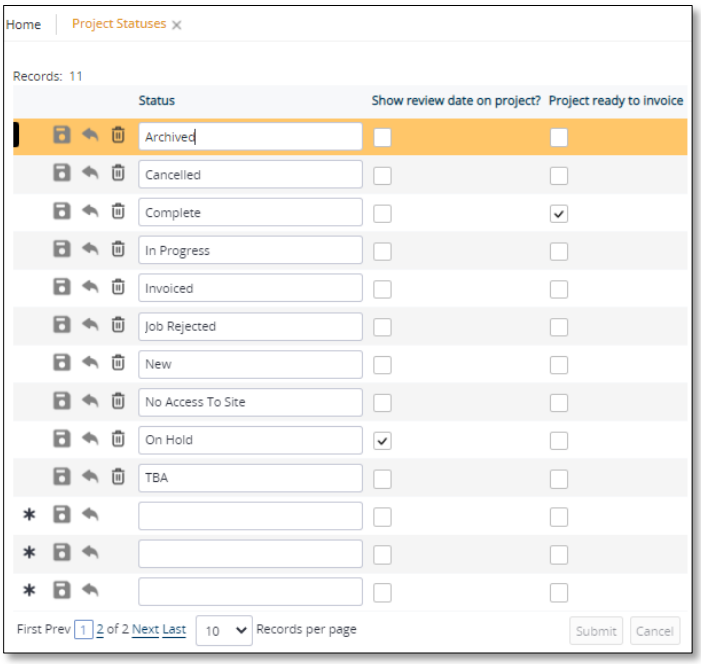
- project status
- project types
- roles
- staff
- extra fields
- extra field dropdowns
- offices
- key milestones
- rates
- CRM action types
- contract lengths
- cost centres
- departments
- payment terms
- report issue reasons
- turnaround times
- VAT codes
- aborted reasons
- equipment types
- teams.

2.1.1 Maintaining project status

Alpha Tracker has a list of descriptions that are used to indicate project status. You apply these project status descriptions to projects as they progress.

To maintain the project status descriptions:

1. Open the General submenu from the Setup menu and select “Project Statuses” to display the Project Statuses screen.



Any project statuses already defined are displayed.

2. To add a new status, in a blank row marked with an asterisk, type the required new project status description.

3. Tick the **Show review date on project?** tickbox if you want an additional date field to be displayed on the Project screen when the status is selected and saved on a project. This is useful when you place a project on hold and want to specify when the status should be reviewed.

4. Tick the **Project ready to invoice** tickbox if you want projects with this status to be added to the Projects Ready To Invoice screen.

> ☞ Refer to Section 12.2.4, Identifying projects ready to invoice, for further details on how this works.

5. To delete a status, click on the red cross on the appropriate row.

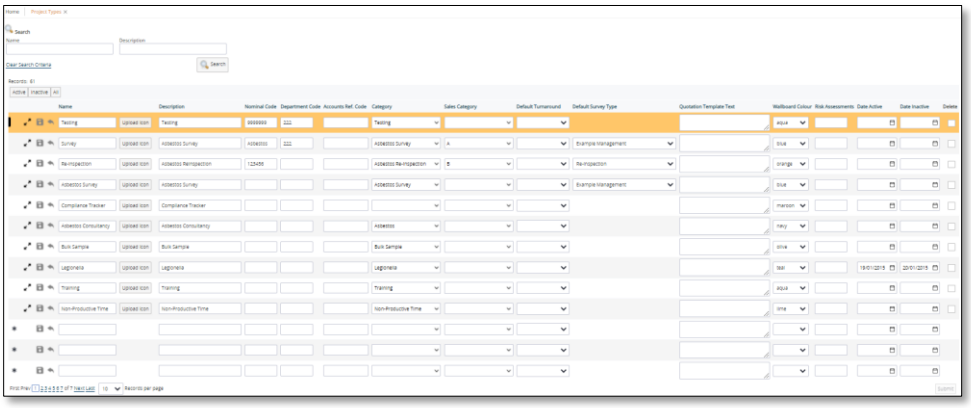
6. Click the **Save** button on the record or at the bottom of the list to save the status changes.

2.1.2 Maintaining project types

Each project or job in Alpha Tracker must have a type assigned to it. As part of the project type, you can define the significant events that are usually associated with such projects or jobs. These significant events form a milestone template for the project type.

To maintain project types:

1. Open the General submenu from the Setup menu and select “Project Types” to display the Project Types screen.



A list of project types is displayed. You can enter search criteria in the top of the screen to filter the list as required.

> ☞ Refer to 1.4, Searching in Alpha Tracker, for further details on search criteria that you can use in Alpha Tracker search fields.

2. To add a new project type, in a blank row marked with an asterisk, type the **Name** to use for the project type, the **Description** to help you identify how this type is used, and select the **Category** to define the additional buttons and screens available to this project type.

   You can also define the following for each project type:

   - a **Nominal, Department** and **Accounts Ref Code** that you want to link to the project type for exporting to Sage
   - a **Sales Category** to link project types to sales categories for reporting purposes
   - a **Default Turnaround** and **Default Survey Type** for this project type
   - **Quotation Template Text** to specify text to be inserted into quotations for projects of this type – your quotation templates will need to be set to pull in this text
   - the **Wallboard Colour** in which projects of this type are to be displayed on the Wallboard.

3. Use the row expander button on a project type record to set up the milestone template, cost breakdown template, associated cost items template and subtypes for projects of this type.

   Milestones:
   The milestone template defines the milestones that are to be displayed under the **More Milestones** button on projects which have the current Project Type.

   - Type a number to indicate the position of the milestone in the sequence in the **Position** field. It is often useful to number the milestones 10, 20, 30 etc so that you can easily insert additional milestones in the sequence if you need to do so later.
   - Type a description of the event in the **Milestone** field.
   - Specify how to calculate the target date for this milestone by entering a number of days in the **Target** field. The target date may calculated as the specified number of weekdays after the Project Opened date or the number of days from the last completed milestone (depending on your system settings). If you do not want a target date to be calculated, click the **Disable Target Date Calc** tickbox.

- If the milestone is linked to a key milestone then its name is displayed in the **Key Milestone** field. Key milestones are used to auto-complete milestone dates or display data elsewhere in the system.

> ☞ For the key milestone selections to take effect certain system settings need to be switched on. These are the "Automate…" settings. Refer to Start Software if you would like key milestones to be set up. See also Section 2.1.8, Maintaining key milestones, for further details.

- There are further fields on the Milestone Templates that can be used to send emails on the completion of milestones and also to generate documents.

> ☞ Speak to Start Software if you want emails or documents to generate from milestones.

- Save the milestone template changes and click the minus button to close the templates.

Cost breakdowns:
The cost breakdown template is displayed for projects of the selected Project Type when the … button next to the value is clicked on Quotations and Projects. It lets you pre-set descriptions and rates for the breakdown.

- Specify the item to include in the cost breakdown in **Field, e**g "Daily rate" or "Number of samples".
- Enter the unit price for the item in **Default Unit Price**, eg "125" for £125.00 or "0.30" for 30p. This price can be amended when the cost breakdown for a project is entered, as can all the other details.
- Select the type of record, eg "Calculations" or "Data Entry".
- Save the cost breakdown template changes and click the minus button to close the templates.

Cost breakdowns may be set to specify the frequency of costs. This feature is designed to allow you to separate out into separate columns one-off, monthly and annual costs. Separate totals are displayed for each column and the **Unit Price** field may be re-named, for example to "One-off".

Associated cost items:
The associated cost items template is displayed for projects of the selected Project Type when the … button next to the **Total Current Costs** field is clicked on Projects (Financials/Planning tab). It lets you pre-set categories, descriptions, quantities and rates for project costs.

- Select the **Cost Category** and **Item Description** from the dropdowns.
- Set the **Item Code**, **Quantity** and **Cost**.
- Save the associated cost items template changes and click the minus button to close the templates.

Sub Types:
Sub types are used in Quotations so that if you select a Project Type of, say, "Survey", you can be more specific and select a sub type such as "Management".

- Type in the name of the sub type in the **Sub Type** field. The system automatically enters the ID.

4. To delete a project type, click on the **Delete** tickbox on the appropriate row(s).

Alpha Tracker checks to see if there are any projects of the selected type and only allows you to delete a project type if none exist.

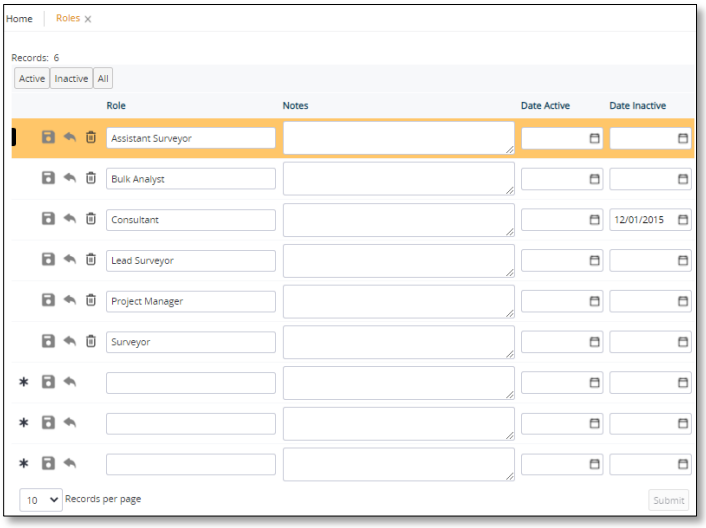
5. Click the **Save** button on the record or at the bottom of the list to save the details.

2.1.3 Maintaining roles

When you record projects in Alpha Tracker you can build up a list of the members of staff involved in the project. To each member of staff you assign a role. You can specify the list of roles that are available.

To maintain roles:

1. Open the General submenu from the Setup menu and select “Roles” to display the Roles screen.



2. To add a new role, in a blank row marked with an asterisk, type the **Role** and any **Notes** that help you to define the role.
3. To delete a role, click on the red cross on the appropriate row.
4. Click the **Save** button on the record or at the bottom of the list to save the details.

2.1.4 Maintaining staff

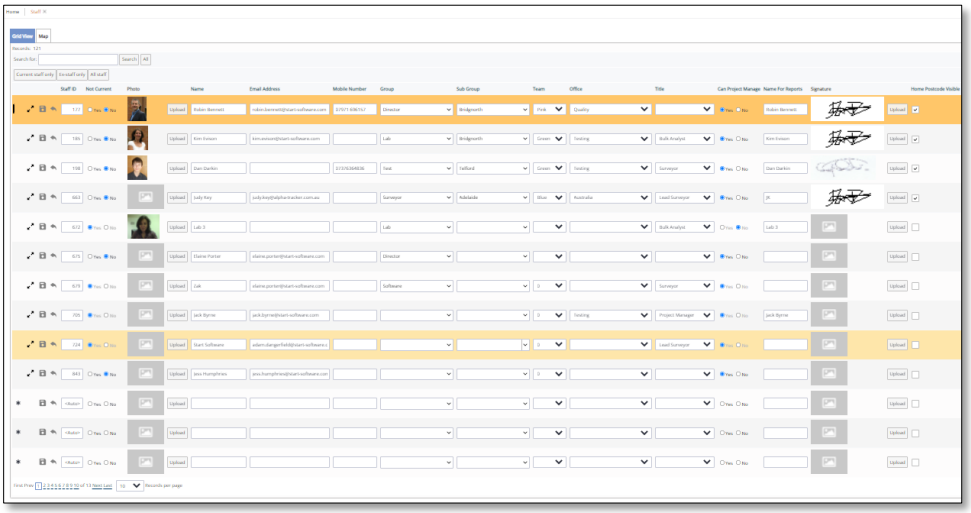
You must set up staff details before you can record the involvement of members of staff in projects. Staff must also be recorded on the Staff tab before they can be assigned a user ID and password to log in.

Tip: When a member of staff leaves, keep their details recorded on the system as this enables the regeneration of reports in which they appear. Simply mark them as inactive (Not Current) on the Staff screen and remove or change their log in details by using the Users menu option.

Editing of the Staff screen is limited to users in the Superuser and Administration groups. Other users can only view the Staff list.

To maintain staff details:

1. Open the General submenu from the Setup menu and select “Staff” to display the Staff screen.



Scroll to the right to see all the fields on this screen. You can enter search criteria against the name of the member of staff in the top of the screen to filter the list as required. There are also ready-made filter buttons to display current or former members of staff only.

2. To add a new member of staff, in a blank row marked with an asterisk, enter the full name and contact details of the member of staff in the **Name, Email Address** and **Mobile Number** fields. The **Staff ID** is automatically generated.

3. Make the member of staff active on Alpha Tracker by clicking the No button for **Not Current**. If you ever want to disable the member of staff’s access you can click the **Yes** button to mark them as not current – you should also amend their User record to prevent them from being able to log in.

4. If required, upload a photo for each member of staff by using the **Upload** button next to the **Photo** field. You can display these photos on the calendar and also on generated documents.

5. In the **Group** field set the group to which the member of staff belongs. If appropriate, you can also set a **Sub Group** and a **Team**.

   The Group field determines which Calendar Group the person appears in.

Note that if you mark a member of staff as “Not Current”, then you must also remove their Group entry so that they no longer appear on the Calendar when that group is selected.

6. Select the office to which the member of staff belongs in the **Office** field and their title for reports in the **Title** field.

7. Specify whether the member of staff is to appear in the drop down list of Project Managers by clicking on the appropriate **Can Project Manage** radio button.

8. Type the staff member’s name as it is to appear on reports in the **Name For Reports** field.

9. If required, upload a signature for each member of staff by using the **Upload** button next to the **Signature** field. You can display these signatures in reports and on generated documents.

10. Enter postcode and contact details in the **Home Postcode**, **Office Postcode**, **Notes** and fields.

    There is a tickbox that determines whether or not the **Home Postcode** is visible. When it is not visible it is hidden from the Staff screen and from the Edit Event dialog (on the Calendar).

11. If you are using the Calendar Sync tool, enter the member of staff's Calendar ID in the **Google Calendar ID** field to link their Google Calendar™ and Alpha Tracker. Alternatively, if you are linking your Microsoft Outlook™ Calendar and Alpha Tracker, complete the **Exchange Email** field.

If you are using the Calendar Sync tool, refer to Section 4, SYNCHRONISING CALENDARS, in the Technical Guide to set up the user's Google Calendar™. Contact Start Software if you want to synchronise with Microsoft Outlook™ Calendars.

12. Use the **Dept Code** and **Cost Centre Code** fields to allocate each member of staff to a department and cost centre so that invoices exported to Sage (or other accounts packages) can be tagged with the correct department and cost centre.

13. If the staff member uses a mobile device for capturing survey details, enter the ID of their handheld device in the **Unit ID** field. This enables data to be sent back to the user's handheld device. The Unit ID must be an exact match to that recorded in the Settings in MDS on the device.

14. If the member of staff is a Lab analyst, you can use the **Default Microscope**, **Default RI Liquid** and **Default Lab** fields to set default values to be displayed on the Fibre Analysis screen when they record analysis.

15. Use the **Payroll Number** field to record a staff member's payroll number.

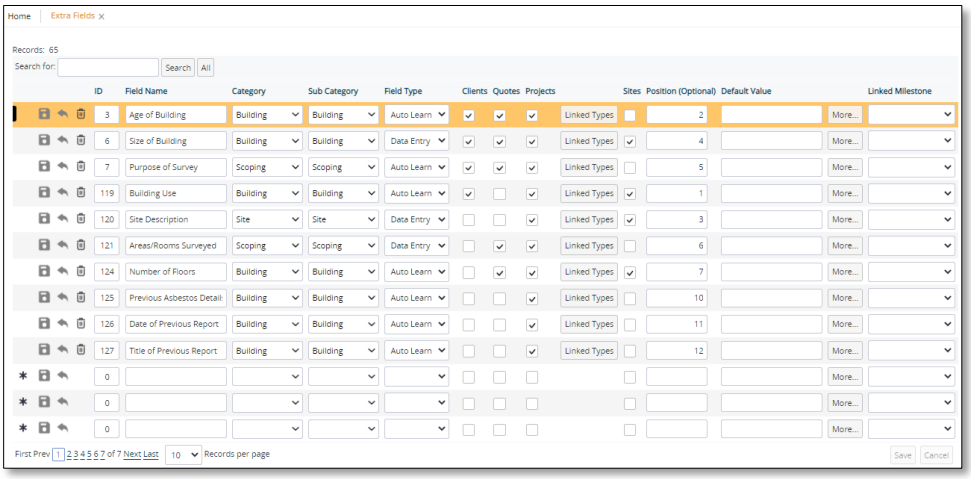
16. Save any changes you have made and close the screen.

2.1.5 Maintaining extra fields

Extra fields are used in Alpha Tracker where additional information needs to be captured (under the **Other Info** button). This additional information can be used in reports or generated documents. The extra fields are first defined and assigned to particular screens. They are then available as a list from a button on the assigned screen. Categories and Sub Categories can be used to separate the list into sections – Categories create headings in the list of Extra Fields and Sub Categories create the radio buttons which enable you to filter the list of Extra Fields.

To define the extra fields:

1. Open the General submenu from the Setup menu and select "Extra Fields" to display the Extra Fields screen.



Any existing extra fields are listed.

2. To add a new extra field, in a blank row marked with an asterisk, type the name of the extra field in the **Field Name** field.

   The ID is automatically generated so you do not need to enter anything in the **ID** field.

3. To group the extra fields into sections specify the **Category**, and optionally the **Sub Category**, to which the field is to belong.

   Categories create headings in the list of Extra Fields and Sub Categories create the radio buttons which enable you to filter the list of Extra Fields. Each item must have a Category or it will not be displayed.

> *Any extra fields to which you assign the category "Scoping" are displayed in a separate list which is available from the **Scoping** button on the Projects screen. These do not require a Sub Category.*

4. Select the type of field, for example one that requires a Yes or No answer, an auto-learning field or a data entry field, from the drop-down list on the **Field Type** field.

   If you select the type "Dropdown", you can specify the values for the dropdown list by clicking on the **Edit Values** button that appears next to the **Field Type**.

5. Tick the appropriate tickbox(es) to indicate on which screen(s) this question should be available.

   If the extra field is to be on the Projects screen, then you must also specify which project types it is to be linked to. Click the **Linked Types** button and specify the project types for which this field is to be created.

6. If required, specify a position in the list of extra fields for this field in the **Position (optional)** field. It is useful to number the items 10, 20, 30… so that you can easily insert additional items.

7. If you want a default to be displayed in the field, type it into the **Default Value** field.

   If a default is only to be displayed for certain sub types (sub types of project types – as selected on quotations), use the **More…** button to specify the required sub types and set the individual defaults.

8. If you want the user to be prompted to complete an extra field when a milestone is updated, select the milestone in the **Linked Milestone** field.

9. Save your changes and close the Extra Fields window.

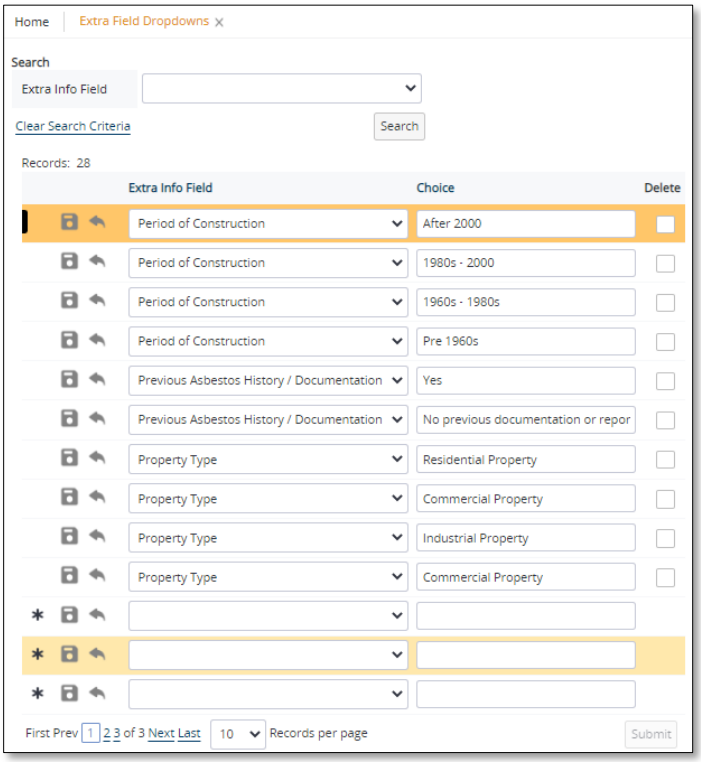
2.1.6 Maintaining extra fields dropdowns

The Extra Field Dropdowns screen lets you search for and maintain the values that you have set for any Extra Fields of the type “Dropdown”. These are user-defined fields that you have created by using the Extra Fields screen.

> ☞ Refer to 2.1.5, Maintaining extra fields, for further details on how to set up these user-defined fields.

To maintain extra field dropdowns:

1. Open the General submenu from the Setup menu and select “Extra Field Dropdowns” to display the Extra Field Dropdowns screen.



2. Select the Extra Info Field for which you want to display dropdown values from the list on **Extra Info Field**, then click **Search**.

   The list of fields is filtered to show only the requested field.

3. To add a new dropdown value for the field, in a blank row marked with an asterisk, select the field to which the value belongs in the **Extra Info Field** field, then type the new value in the **Choice** field.

4. To delete a project type, click on the **Delete** tickbox on the appropriate row(s).

5. Click the **Save** button on the record or at the bottom of the list to save the details.

2.1.7 Maintaining offices

You can define the offices in use on your Alpha Tracker and assign them an office ID or letter that identifies them. You can also set up other information for the offices, such as address details and VAT and UKAS numbers that may be required for your reports.

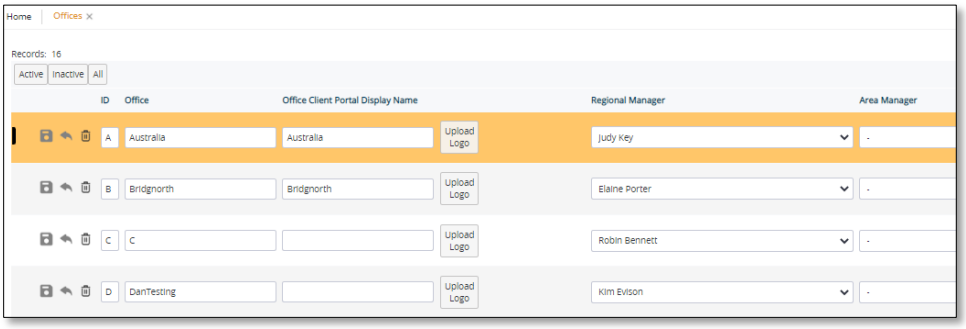
Alpha Tracker lets you define offices and assign an office letter to each one set up, for example the letter “B” might be assigned to the Bridgnorth office, “A” to the Adelaide office. The office letter is used at the beginning of project numbers, for example B-00123. Office letters can also be linked to users to provide default office letters and to control which office letters can be used by which users.

Your office setup may be one of the following three types:

- single-site – if you use only one office then you need not set up offices and there is a default office letter set for all users which displays when projects or quotations are created.
- multi-site – if you have more than one office then set up an office letter for each office. Each individual is assigned a default office letter to display when projects or quotations are created but this can be overwritten to create projects for other offices.
- multi-site, restricted view – if individuals are only to see and create project data for their own office(s) then set an office letter for each office and assign a default office to each individual. If you also define a list of office letters that the user is permitted to use, they will not be able to see or create projects for any offices not in the list.

To define offices:

1. Open the General submenu from the Setup menu and select “Offices” to display the Offices screen.



2. To add a new office, in a blank row marked with an asterisk, enter the identifying letter and name of the office in the **ID** and **Office** fields.
3. If you want to use different logos for each office in your reports, you can upload them here by clicking the **Upload Logo** button next to the **Office** field. Your templates will need to be set to pull the logos from here.
4. If appropriate, select the member of staff who acts in the specified role in the **Regional Manager**, **Area Manager** and **Office Manager** fields.
5. Type the contact details for the office in the **Address, Email, Phone** and **Fax** fields.

   There is also an **Issuing Office** field that lets you record an additional address. So, for example, if you have a number of small satellite offices that raise projects but use a

centralised issuing office address, you can record both their actual addresses and also their issuing office addresses and chose which to pull into your reports.

If the office issuing a report is different to the office that created the project, then you can record details of the issuing office on the Survey screen. A setting ("Show Survey Issuing Office") controls whether you can see this field or not. The field defaults to the project's office address but can be changed.

6. Enter the VAT and UKAS numbers for the office in the **VAT Number** and **UKAS Number** fields.

   There are also fields to record a **VAT Message** and **Account Number** if required.

7. Enter the Department Number and Nominal Code for the office if you need these for the Sage 50 Detailed Export in the **Dept Number** and **Nominal Code** fields.

8. If all projects and reports linked to this office are to be hidden from the Client Portal tick the **Exclude from Portal** tickbox. You might tick this if you use, say, Q for quality checking projects or T for test projects.

9. Do not delete offices, instead set the Date Inactive if an office is no longer to be used.

10. Click the **Save** button on the record or at the bottom of the list to save the details.

2.1.8 Maintaining key milestones

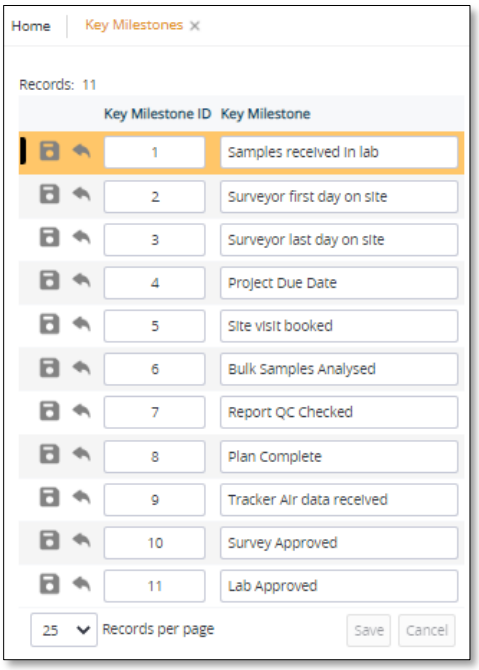
Key milestones are used to auto-complete milestone dates or display data elsewhere in the system. The set of key milestones that can be used is displayed on the Key Milestones screen. This list is fixed due to the coding that defines the actions performed by the key milestones, although you can amend the name of the key milestone, so if the key milestone refers to say "project" and you use the term "job" then you can amend the text in the name to refer to "job".

The key milestones can be linked to project type milestones when you use the row expander button on a project type record to set up the milestone template.

☞ Refer to 2.1.2, Maintaining project types, for details on setting up the milestone templates.

To rename a key milestone:

1. Open the General submenu from the Setup menu and select "Key Milestones" to display the Key Milestones screen.



2. Amend the text in the **Key Milestone** field as required.
3. Save your changes.

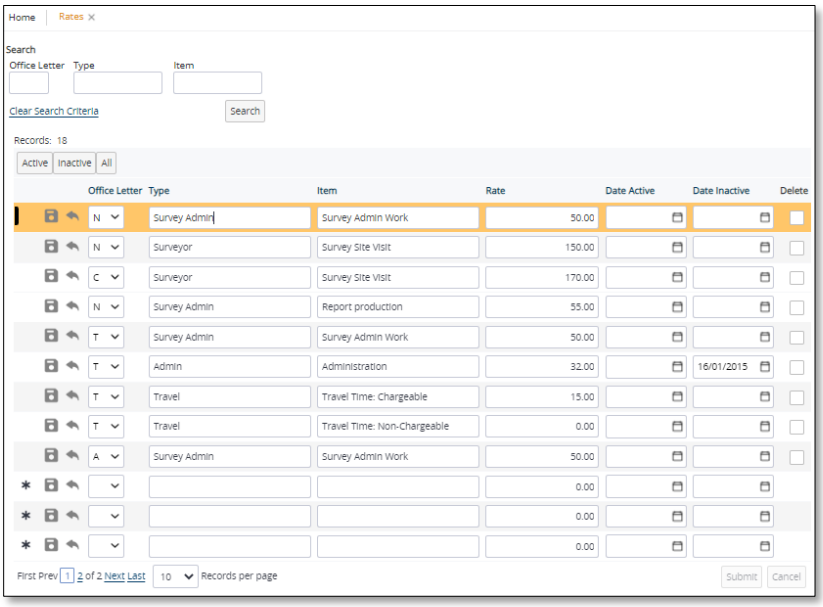
2.1.9 Maintaining rates

The rates that you can maintain under the Setup menu, General submenu are those that are applied to time recorded in the Timesheets facility.

If you use the Timesheets menu options or app, then you need to identify the task (or role) that you are recording time for, for example “Survey Admin Work” or “Onsite Surveying”. For each task you can define a charge rate. Different charge rates can be set for the same task for different offices if applicable. So you might, for example, charge admin work at £50.00 per hour from Office A and at £55.00 per hour from Office B.

To set the roles and rates to be used on Timesheets:

1. Open the General submenu from the Setup menu and select “Rates” to display the Rates screen.



2. To add a new rate, in a blank row marked with an asterisk, enter the office letter the rate is to apply to, the type of work in the **Type** field (so that you can group tasks together), the actual task in the **Item** field and the rate for the task in the **Rate** field.
3. To delete a rate, tick the **Delete** tickbox on the appropriate row.
4. Click the **Save** button on the record or **Submit** at the bottom of the list to save the details.

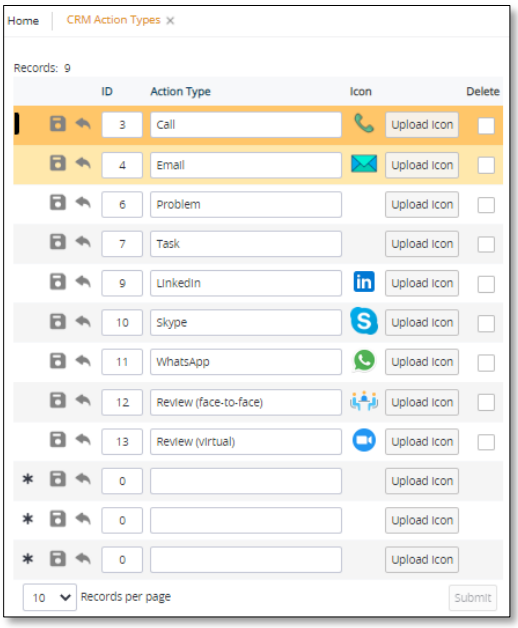
The tasks will now be available for selection on the New Timesheet screen and will display the rates you have set.

2.1.10 Maintaining CRM action types

CRM action types define the types of action that can be recorded when logging a call or task, such as an email, a phone call or a problem. These action types show as radio buttons when you log a call or task.

To define the CRM action types:

1. Open the General submenu from the Setup menu and select “CRM Action Types” from the Setup menu to display the CRM Action Types screen.



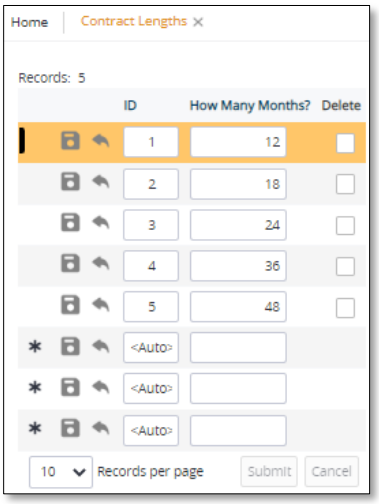
2. To add a new action type, in a blank row marked with an asterisk, enter the name of the action type in the **Action Type** field. The **ID** field will be completed automatically.
3. If required, upload an image file as the icon for this action type.
4. To delete an action type, tick the Delete tickbox on the appropriate row.
5. Click the **Save** button on the record or **Submit** at the bottom of the list to save the details.

2.1.11 Maintaining contract lengths

Contract lengths define the values that appear for selection against contracts. You might, for example, have 12, 18 and 24 months set up as possible contract lengths and these options will be displayed on the Contract Details screen when you create, edit or display a contract.

To define the contract lengths:

1. Open the General submenu from the Setup menu and select “Contract Lengths” from the Setup menu to display the Contract Length screen.



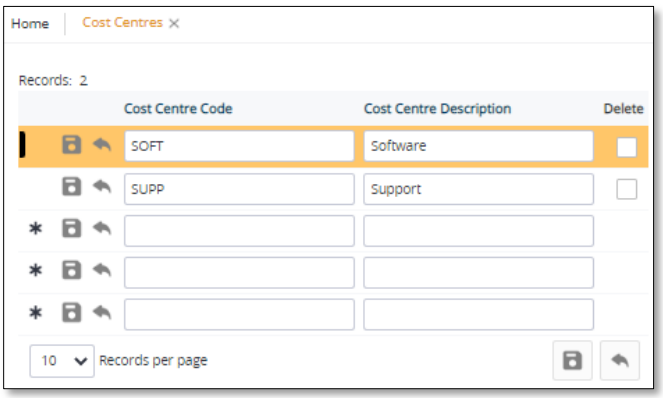
2. To add a new contract length, in a blank row marked with an asterisk, enter the number of months you want to set in the **How Many Months?** field. The **ID** field will be completed automatically.
3. To delete a contract length, tick the Delete tickbox on the appropriate row.
4. Click the **Save** button on the record or **Submit** at the bottom of the list to save the details.

2.1.12 Maintaining cost centres

You can set up and maintain cost centres in Alpha Tracker. Fields on the Staff screen allow each member of staff to be allocated to a cost centre so that invoices exported to Sage (or other accounts packages) can be tagged with the correct cost centre.

To set up a cost centre:

1. Open the General submenu from the Setup menu and select “Cost Centres” from the Setup menu to display the Cost Centres screen.



2. To add a new cost centre, in a blank row marked with an asterisk, enter the code and description of the cost centre.
3. To delete a cost centre, tick the Delete tickbox on the appropriate row.

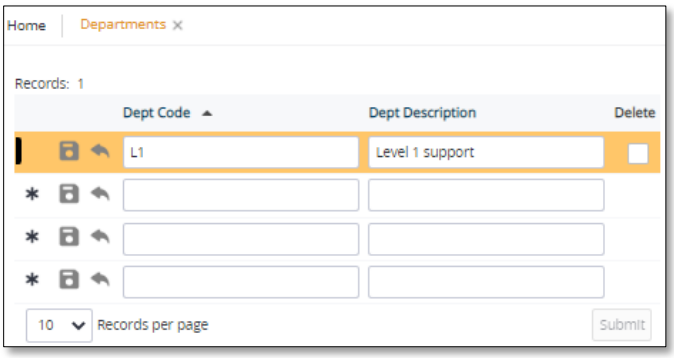
4. Click the **Save** button on the record or **Submit** at the bottom of the list to save the details.

2.1.13 Maintaining departments

You can set up and maintain departments in Alpha Tracker. Fields on the Staff screen allow each member of staff to be allocated to a department so that invoices exported to Sage (or other accounts packages) can be tagged with the correct department.

To set up a department:

1. Open the General submenu from the Setup menu and select “Departments” from the Setup menu to display the Departments screen.

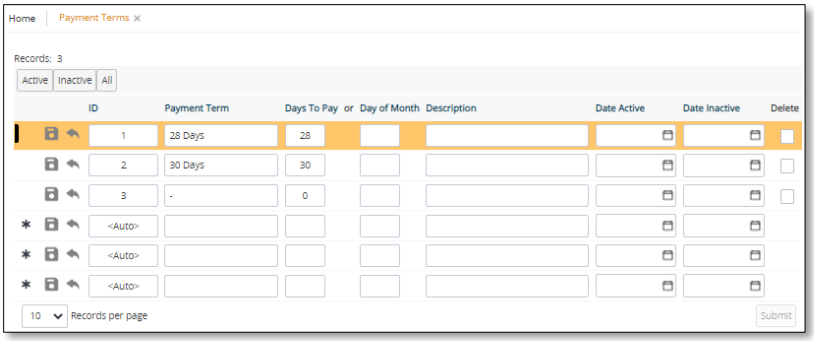


2. To add a new department, in a blank row marked with an asterisk, enter the code and description of the department.
3. To delete a department, tick the Delete tickbox on the appropriate row.
4. Click the **Save** button on the record or **Submit** at the bottom of the list to save the details.

2.1.14 Maintaining payment terms

Payment terms can be recorded against clients and then displayed on invoices when these are raised from projects. To maintain the values for the Payment Terms dropdown on the Client screen:

1. Open the General submenu from the Setup menu and select “Payment Terms” from the Setup menu to display the Payment Terms screen.

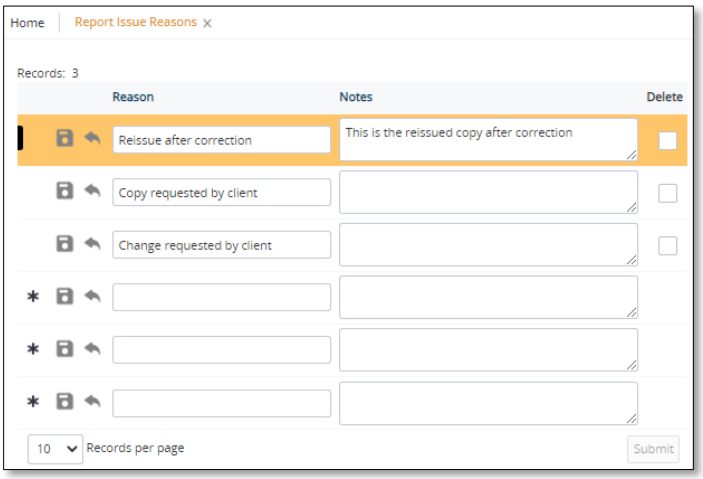


2. To add a new term, in a blank row marked with an asterisk, enter the text for the term in the **Payment Term** field, the number of days used in the calculation of the due date in the **Days To Pay** field and, if required, a description of the term in the **Description** field.
3. To delete a term, tick the Delete tickbox on the appropriate row.
4. Click the **Save** button on the record or **Submit** at the bottom of the list to save the details.

2.1.15 Maintaining report issue reasons

You can specify reasons for issuing/re-issuing reports for your projects under the Report Produced milestone. To set the possible reasons:

1. Open the General submenu from the Setup menu and select “Report Issue Reasons” from the Setup menu to display the Report Issue Reasons screen.

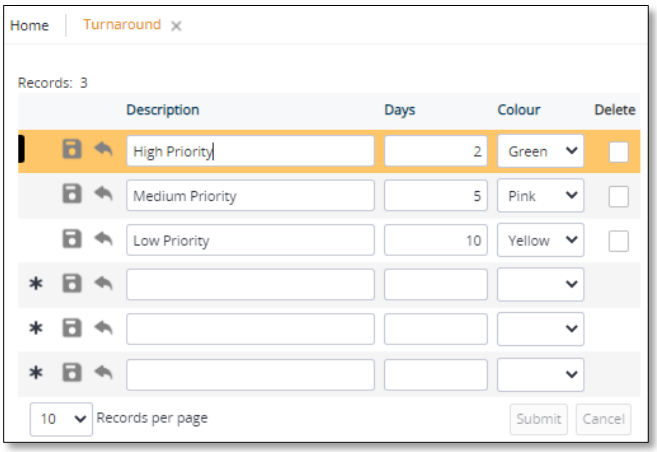


2. To add a new reason, in a blank row marked with an asterisk, enter the reason you want to set in the **Reason** field. You can also record notes against the reason.
3. To delete a reason, tick the Delete tickbox on the appropriate row.
4. Click the **Save** button on the record or **Submit** at the bottom of the list to save the report issue reason details.

2.1.16 Maintaining turnaround values

You can specify a turnaround value on projects to indicate a project’s priority. To set the available turnaround values:

1. Open the General submenu from the Setup menu and select “Turnaround” from the Setup menu to display the Turnaround screen.



2. To add a new turnaround value, in a blank row marked with an asterisk, enter the value you want to set in the **Description** field. The **ID** field will be completed automatically.
3. Select the colour in which projects with this Turnaround value are to be displayed on the Projects Dashboard and Lab Project List from the list on the **Colour** field.
4. To delete a turnaround value, tick the **Delete** tickbox on the appropriate row.
5. Click the **Save** button on the record or **Submit** at the bottom of the list to save the details.

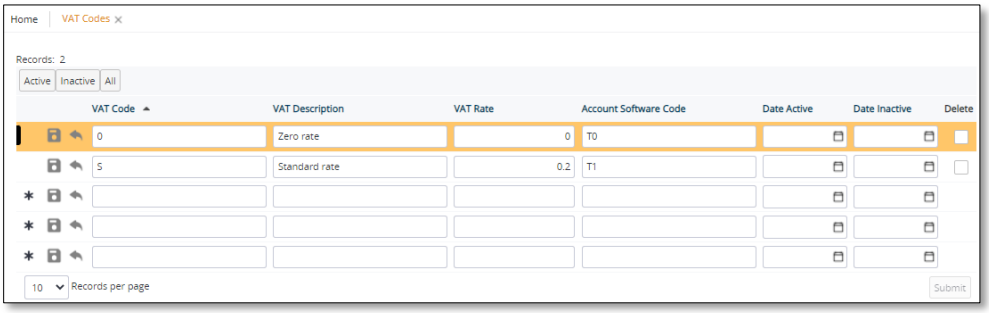
There is also a Days field on the Turnaround field that lets you link the Turnaround to the Project Due Date key milestone. The “Turnaround updates project due date” setting must be enabled for this feature. If it is, then the Project Due Date is set from the Project Opened Date plus the number of days specified on the Turnaround. This feature works with dynamic milestones. To make it even easier to set the Project Due Date, there is also a Default Turnaround field on Project Types. If you use the Project Types to categorise turnaround, this will let the system set both the Turnaround and the Project Due Date for you, eg “Bulk Sample - 24hrs” could have a default Turnaround of 1 day which would set the Project Due Date to the Project Opened Date plus 1 day.

2.1.17 Maintaining VAT codes

VAT codes are used on invoices in Alpha Tracker. If rates change you can maintain them here.

To set the VAT rates:

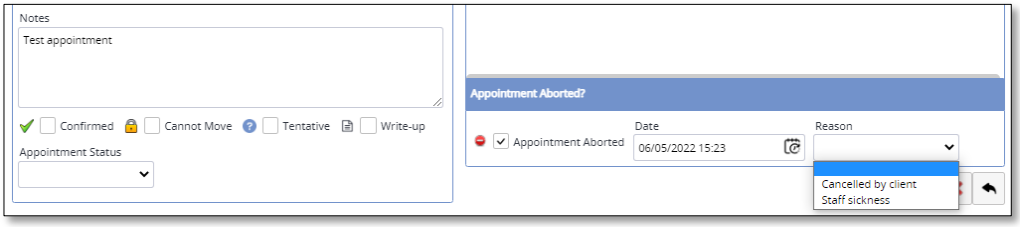
1. Open the General submenu from the Setup menu and select “VAT Codes” from the Setup menu to display the VAT Codes screen.



2. Set the value in the **VAT Rate** column to the required VAT rate, expressed as a decimal, eg 20% = 0.2.
3. To delete a VAT code, tick the **Delete** tickbox on the appropriate row.
4. Click the **Save** button on the record or **Submit** at the bottom of the list to save the details.

2.1.18 Maintaining aborted reasons

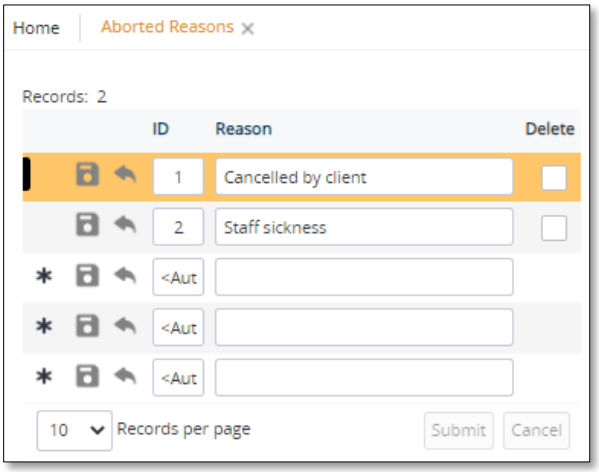
Aborted reasons are recorded on diary appointments that have been aborted and remain in the diary.



☞ See Section 6.2, Editing and moving a project, for instruction on how to abort an appointment.

To set the aborted reasons:

1. Open the General submenu from the Setup menu and select “Aborted Reasons” from the Setup menu to display the Aborted Reasons screen.



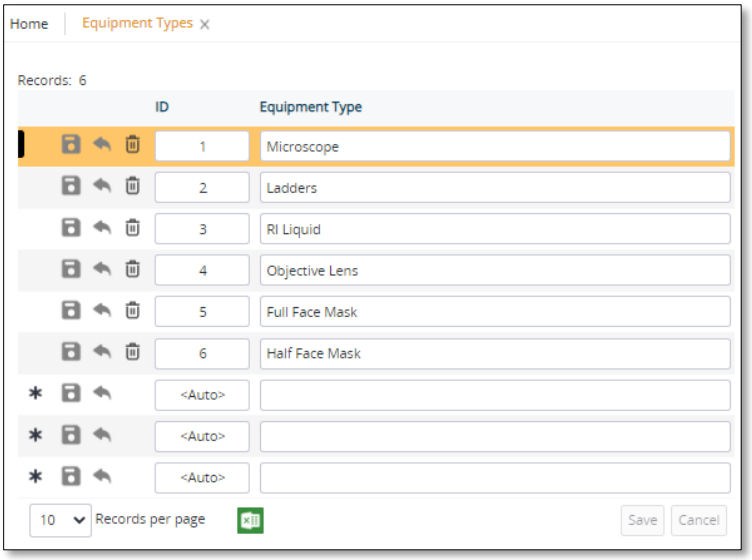
2. Type the description of the reason in the **Reason** field, eg Refused entry to site.
3. To delete a reason, tick the **Delete** tickbox on the appropriate row.
4. Click the **Save** button on the record or **Submit** at the bottom of the list to save the details.

2.1.19 Maintaining equipment types

Equipment types are displayed on the dropdowns on the Survey, Lab and Other Equipment screens where you can maintain a database of your equipment (available from the Equipment submenu on the Resources menu).

To maintain the equipment types:

1. Open the General submenu from the Setup menu and select “Equipment Types” from the Setup menu to display the Equipment Types screen.



2. Type the description of the equipment type in the **Equipment Type** field, eg Microscope or Full Face Mask.
3. To delete a type, tick the **Delete** tickbox on the appropriate row.
4. Click the **Save** button on the record or **Submit** at the bottom of the list to save the details.

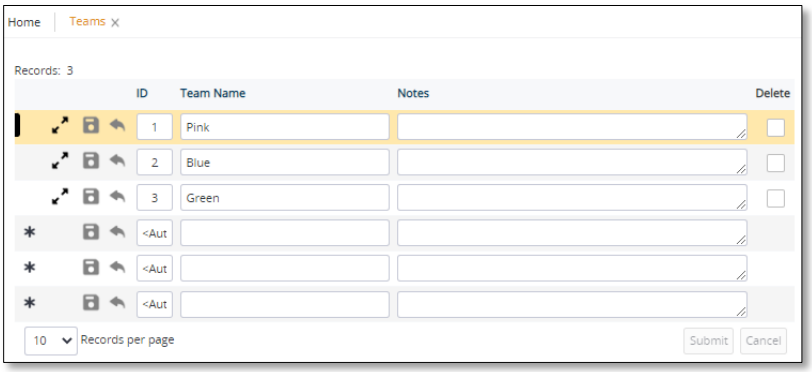
2.1.20 Maintaining teams

Alpha Tracker facilitates the organization of staff into teams and the scheduling of weekend rotas for these teams. The first step in defining the schedules is to create the teams.

> ☞ Refer to 6.9, Scheduling weekend teams, for further details on setting the schedules for these teams.

To maintain the teams:

1. Open the General submenu from the Setup menu and select “Teams” from the Setup menu to display the Teams screen.



2. Type the name of the team in the **Team Name** field and any notes to describe or define the team in the **Notes** field.
3. To delete a type, tick the **Delete** tickbox on the appropriate row.
4. Click the **Save** button on the record or **Submit** at the bottom of the list to save the details.

2.2 Maintaining Lab and Survey data

This section explains how to maintain the following aspects of system data that support the functioning of the lab and survey report production:

- approaches
- asbestos types
- condition
- lab backfill
- lab lookup data
- materials
- priority assessment
- default PA scoring
- recommendations
- standard comments
- surface treatments
- survey types
- validation for fibre analysis.

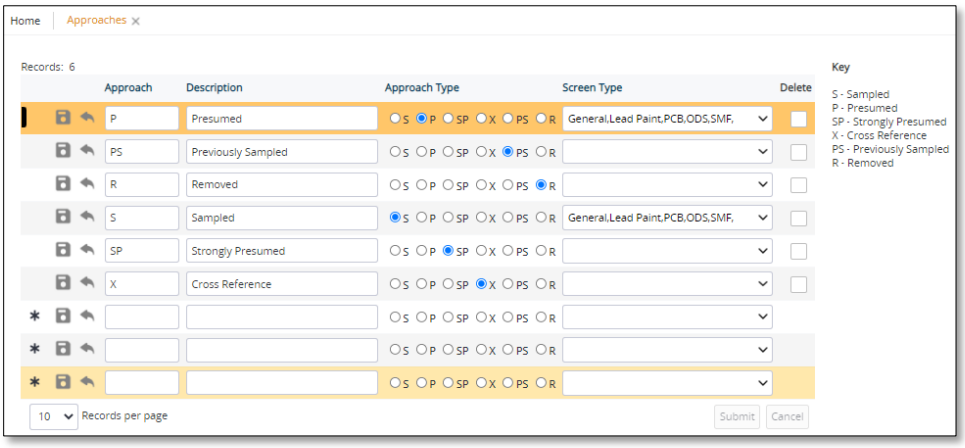
Only appropriately qualified users should have access to and be able to maintain the lab and survey data.

2.2.1 Maintaining approaches

It is possible for you to choose the terminology you use and display for approaches when surveying. For example, you may want to use VS for Visually Similar rather than our standard

X for Cross Reference. The “Approaches” menu option lets you set your terms and map them to our standard approach types:

1. Open the Lab and Surveys submenu from the Setup menu and select “Approaches” to display the Approaches screen.



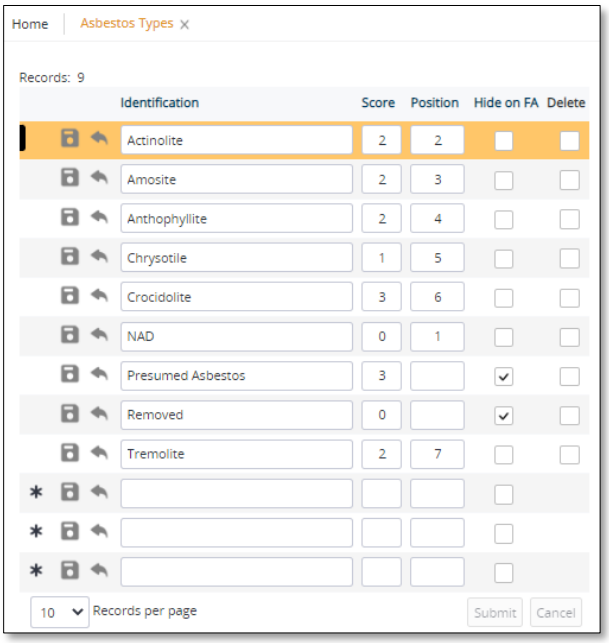
2. To add a new approach, in a blank row marked with an asterisk, type the short form of the approach, eg VS, in the **Approach** field and type its long form, eg Visually Similar, in the **Description** field. Then select the standard approach, eg X, to which it is to be mapped by clicking a radio button. The key on the left of the screen should help you choose the correct approach.
3. To delete an approach, click on the **Delete** tickbox on the appropriate row(s).
4. Save your changes and close the Approaches screen.

2.2.2 Maintaining asbestos types

You can set up the identification of asbestos types on your Alpha Tracker, specifying the identification and the score of each asbestos type.

To set up an asbestos type:

1. Open the Lab and Surveys submenu from the Setup menu and select “Asbestos Types” to display the Asbestos Types screen.



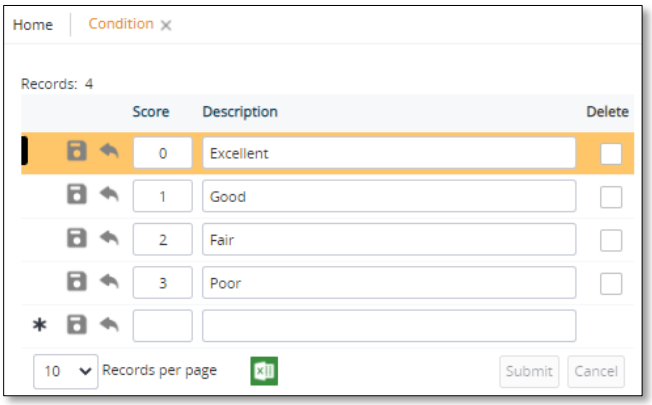
2. To add a new type, in a blank row marked with an asterisk, type the asbestos name in the **Identification** field and type its score in the **Score** field.
3. If an order other than alphabetical is required, type the **Position**, and if the asbestos type is to be hidden on Fibre Analysis screens, tick the **Hide on FA** box.
4. To delete an asbestos type, click on the **Delete** tickbox on the appropriate row(s).
5. Save your changes and close the Asbestos Types screen.

2.2.3 Maintaining condition values

The condition values are used in Tracker Mobile when recording the condition of a suspect item. You can set and maintain the values by using the condition screen – you should only amend the descriptions.

To maintain condition values:

1. Open the Lab and Surveys submenu from the Setup menu and select “Condition” to display the Condition screen.



2. To add a new value, in a blank row marked with an asterisk, enter the required **Score** and **Description**.
3. To delete a condition value, click on the **Delete** tickbox on the appropriate row(s).
4. Save your changes and close the Condition screen.

2.2.4 Maintaing lab backfill details

The lab backfill details are the default settings for the fibre analysis fields when a specific analysis identification is selected.

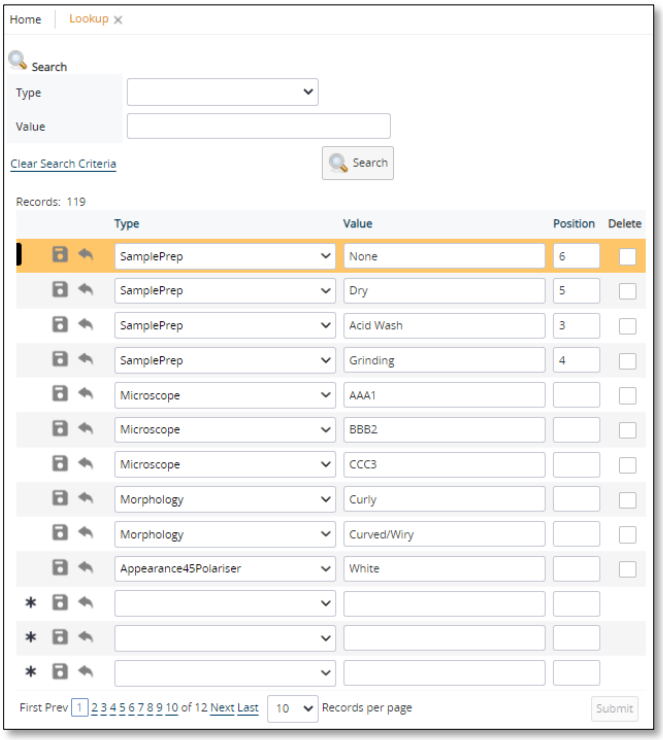
> ☞ Refer to 8.3, Setting default fibre analysis settings, for details on how to set, use and re-set the lab backfill values.

2.2.5 Maintaining lab lookup data

The lab lookup data defines the content of the drop-down lists on the Fibre Analysis screen. Each of the fields available on the Fibre Analysis screen is defined as a Type in the lookup data. Each of the values listed on the drop-down is defined as a Value.

To maintain lab lookup data:

1. Open the Lab and Surveys submenu from the Setup menu and select “Lab Lookup” to display the Lab Lookup screen.



You can enter search criteria in the top of the screen to filter the list as required. For example if you only want to see the values for the “RI Liquid” field, select “RILiquid” in the **Type** field and then click **Search**.

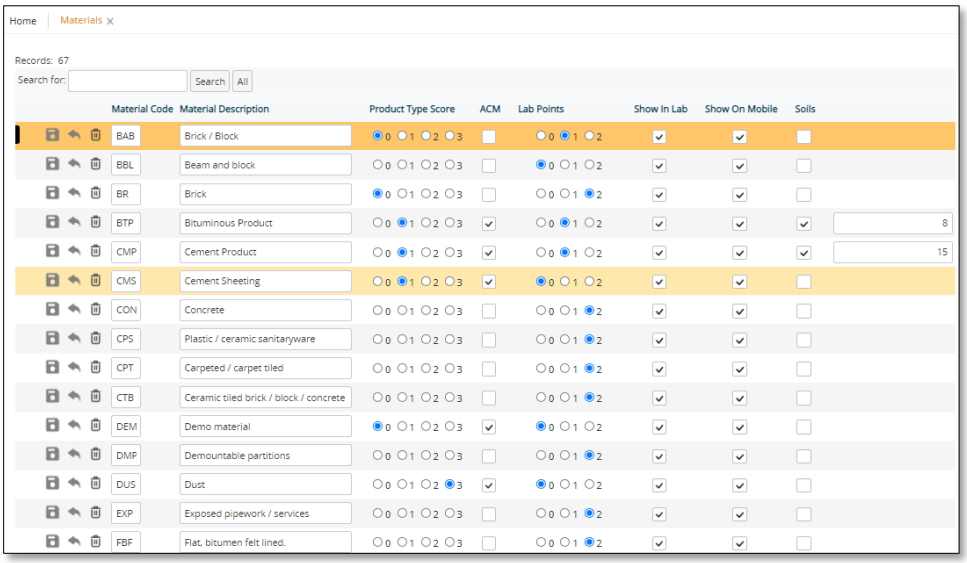
2. To add a new value, in a blank row marked with an asterisk, select the field name in the **Type** field and type the value to appear in the drop-down list in the **Value** field.
3. To delete a lab lookup entry, click on the **Delete** tickbox on the appropriate row(s).
4. Save your changes and close the Lab Lookup screen.

2.2.6 Maintaining the materials list

Material codes are used to identify materials surveyed and consist of a three-letter code and a description. Materials are assigned product type scores and may be defined as Asbestos-Containing Materials (ACMs).

To maintain the materials list:

1. Open the Lab and Surveys submenu from the Setup menu and select “Materials” to display the Materials screen.



2. To add a new value, in a blank row marked with an asterisk, type the three-letter code and description in the **Material Code** and **Material Description** fields.
3. Select a radio button to indicate the **Product Type Score** for this material – 0, 1, 2 or 3 – and tick the **ACM** box if the material contains asbestos.
4. If you have your own lab, set the number of lab points accrued when a sample of this material is analysed in the **Lab Points** field.

> *Note that even if you set the Lab Points to 0, each sample analysed accrues a minimum of 1 point.*

5. If you have your own lab, tick the **Show In Lab** tickbox for this material to be displayed in the list on the **Analyst’s Assessment** field on Fibre Analysis.

6. Tick the **Show On Mobile** tickbox to make the material code and description available to surveyors on Tracker Mobile.
7. To delete a material code, click on the red cross on the appropriate row.
8. Save your changes and close the Materials screen.

2.2.7 Maintaining the priority assessment values

The Priority Assessment submenu gives you access to a range of options for setting up the various descriptions and scores that are used in priority assessments. Once set up, these are rarely changed.

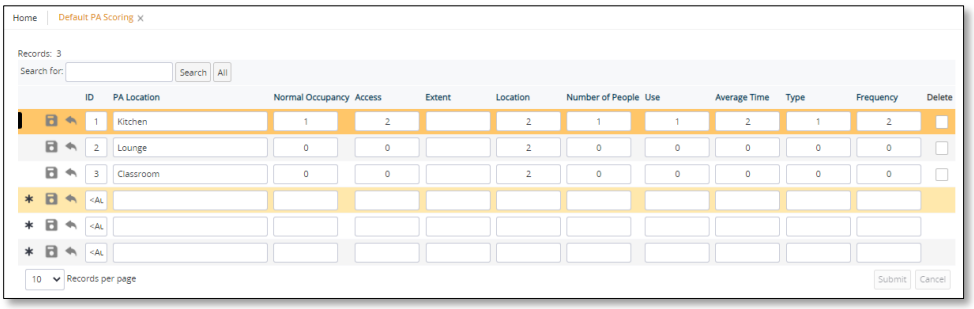
All these options work in the same way. Select the option you require, add or amend the score and description, then save the new or changed entry.

2.2.8 Maintaining default priority assessment scores

The Default PA Scoring menu option lets you set up default values for priority assessment scores based on the location/room type. Your Tracker Mobile can be set to allow you to select a location and default in the appropriate PA scores.

To set the defaults:

1. Open the Lab and Surveys submenu from the Setup menu and select “Default PA Scoring” to display the Default PA Scoring screen.



2. Specify the location/room type for which you are setting up default priority assessment scores in the **PA Location** field.
3. Set the required default values in each of the remaining fields.

> *Note that Extent of Material is a special case in that it is never logical to set a default for the extent of the material based on room type. It is therefore recommended that Extent is set manually.*

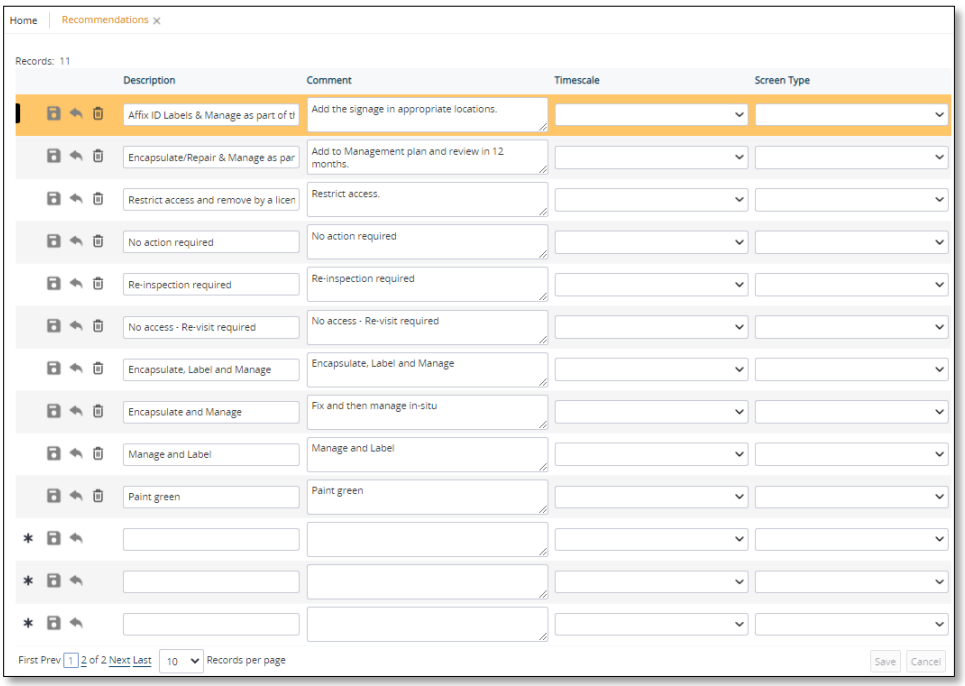
4. Save your changes and close the Default PA Scoring screen.

2.2.9 Maintaining recommendations

You can set up short forms of recommendations for surveyors to select and link these to longer paragraphs for insertion in reports. If required you can also set a timescale for action.

To maintain the recommendations:

1. Open the Lab and Surveys submenu from the Setup menu and select "Recommendations" to display the Recommendations screen.



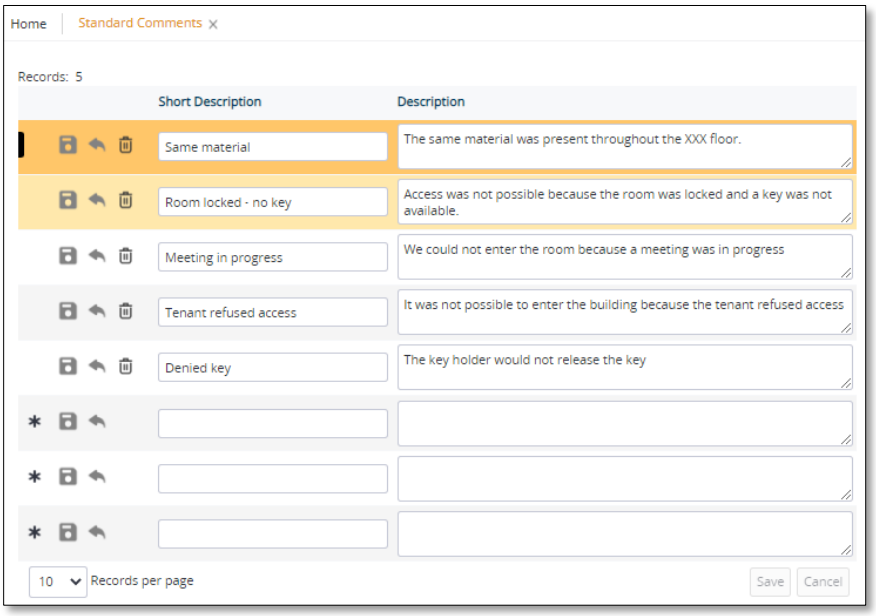
2. To add a new value, in a blank row marked with an asterisk, type the short description of the recommendation in the **Description** field.
3. If you want to link the recommendation to a longer piece of text, type this text in the **Comment** field.
4. If you want to associate a timescale for action with the recommendation, type this in the **Timescale** field.
5. Save your changes and close the Recommendations screen.

2.2.10 Maintaining standard comments

If standard comments are used in Tracker Mobile, then you can set up the short form for use in Tracker Mobile and the longer version for use in your reports.

To maintain standard comments:

1. Open the Lab and Surveys submenu from the Setup menu and select "Standard Comments" to display the Standard Comments screen.



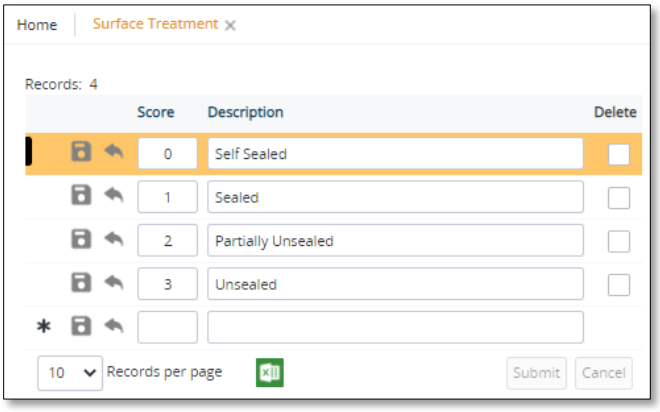
2. To add a new value, in a blank row marked with an asterisk, type the short description of the standard comment in the **Short Description** field.
3. If you want to link the comment to a longer piece of text for your reports, type this text in the **Description** field.
4. Save your changes and close the Standard Comments screen.

2.2.11 Maintaining surface treatment values

The surface treatment values are used in Tracker Mobile when recording the surface treatment of a suspect item. You can set and maintain the values by using the Surface Treatment screen – you should only amend the descriptions.

To maintain surface treatment values:

1. Open the Lab and Surveys submenu from the Setup menu and select “Surface Treatment” to display the Surface Treatment screen.



2. To add a new value, in a blank row marked with an asterisk, enter the required **Score** and **Description**.

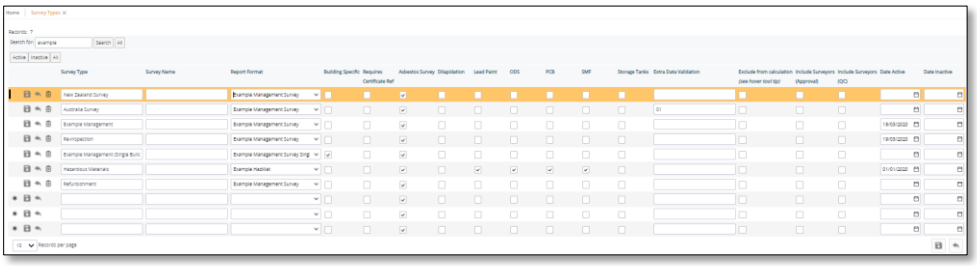
3. To delete a surface treatment value, click on the **Delete** tickbox on the appropriate row(s).
4. Save your changes and close the Surface Treatment screen.

2.2.12 Maintaining survey types

The survey types define the type of report that you produce from your survey data, for example Management or Refurbishment or Demolition. The Survey Types screen links survey types to report formats which contain the instructions for producing your reports. These are usually maintained by Start Software.

To maintain survey types:

1. Open the Lab and Surveys submenu from the Setup menu and select “Survey Types” to display the Survey Types screen.



2. To add a new value, in a blank row marked with an asterisk, type the name of the survey type as it is to be displayed on the Survey Details dropdown in the **Survey Type** field. You can also define a separate **Survey Name** if required.
3. Specify the name of the Reports Format linked to the survey type in the **Report Format** field. This defines how your report is produced.
4. If the survey type is to produce building-specific reports, tick the **Building Specific** tickbox.
5. If the survey type requires the entry of a certificate reference, tick the **Requires Certificate Ref** tickbox.
6. Tick the Asbestos Survey tickbox if the survey type requires the standard asbestos survey Survey Details and Survey Data screens to be displayed. Otherwise, tick the specific elements required.
7. If any extra data validation checks are to be made during data validation for surveys of this type, list the checks in the **Extra Data Validation** field, eg 01.

   The tests are labelled A, B, C etc or 0, 1, 2 etc. The numbered ones (0, 1, 2…) are not automatically run when “*all*” is specified in the system setting that controls this feature.
8. If you want to exclude projects with the survey type from the last inspection date calculation on the Client Portal, then tick the **Exclude from calculation** tickbox. For example, you might not want Refurbishment surveys to affect the calculation of the last inspection date.
9. Save your changes and close the Survey Types screen.

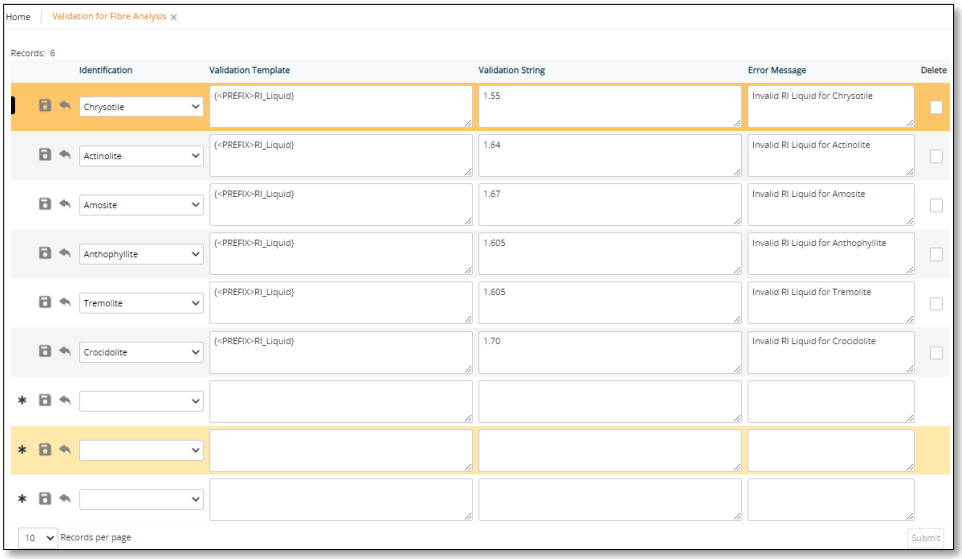
If you require further information on survey types, report formats and templates please contact Start Software on 0333 301 1010.

2.2.13 Validation for fibre analysis

If you use the lab functions in Alpha Tracker to enter fibre analysis results, it is possible to set up validation of the results entered against standard results for an identification. For example, you might specify that if "Chrysotile" is selected as the **Identification** then **Morphology** must be set to "Curly", **RI Liquid** to "1.55", **First Order Red Tint Plate** to "Length slow", **Birefringent** to "Low" etc.

To set validation for fibre analysis:

1. Open the Lab and Surveys submenu from the Setup menu and select "Validation for Fibre Analysis" to display the Validation for Fibre Analysis screen.



2. To add a new value, in a blank row marked with an asterisk, specify the identification for which you are defining the validation in the **Identification** field.
3. List the fields contained in the validation in the **Validation Template** field.

The fields must be listed in a certain format. If you are in any doubt how to specify the fields please contact Start Software on 0333 301 1010.

4. Specify the values that must be present in the listed fields, in the same order as the fields are listed, in the **Validation String** field.
5. Type the text of the message that is to be displayed if fibre analysis fails the validation in the **Error Message** field. For example, you might enter "You selected an invalid configuration for Chrysotile."
6. Save your changes and close the Validation for Fibre Analysis screen.

3. QUOTING FOR WORK

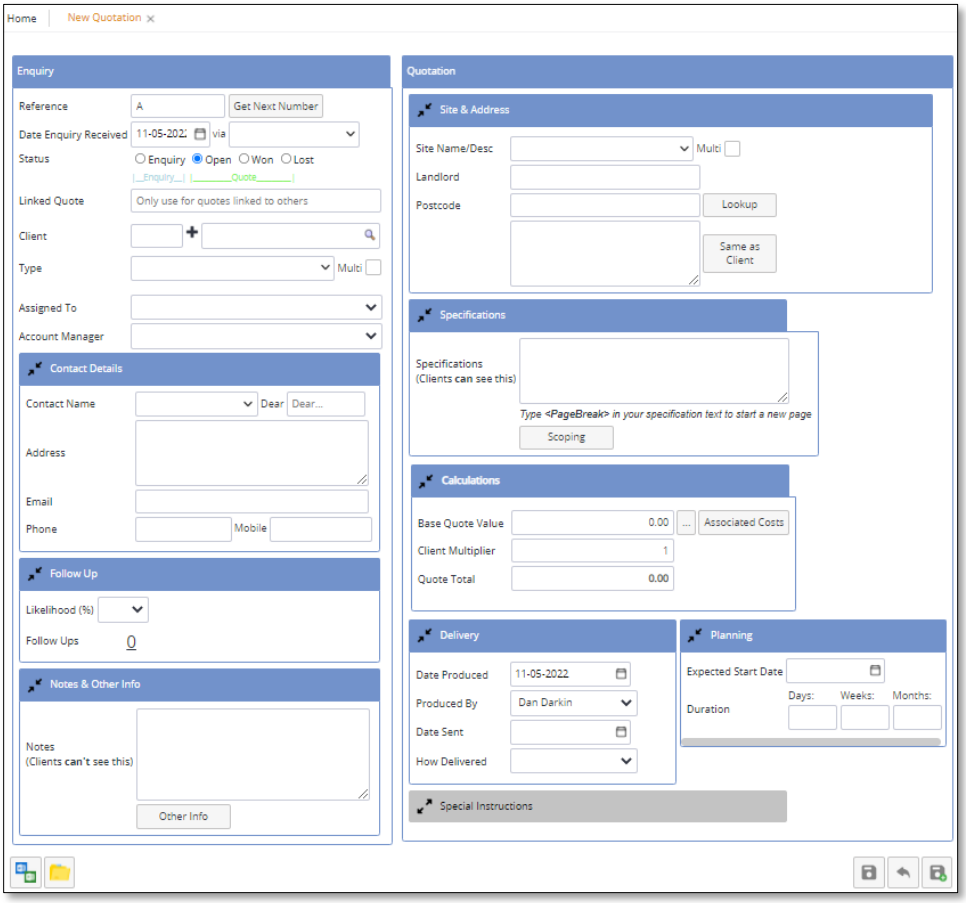
Alpha Tracker lets you create new quotations quickly and easily. Quotations can be set up so that clients can view and accept or decline them online, with email notifications when such events occur. You can also return to existing quotations and update the details, such as status, as required.

3.1 Creating a new quotation

This section describes the steps necessary to create a new quotation in Alpha Tracker. In addition to the method described here, you can also create a new quotation from the client, by using a Create Quotation button, in which case many of the client details are automatically pulled across.

To create a new quotation for an existing client:

1. Click the "New Quotation" option from the Sales menu to display the New Quotation screen.



2. Complete the **Reference** by either accepting the default letter and clicking the **Get Next Number** button to assign the next available reference number to this quotation, or by typing in an office letter/reference number of your choice. It is possible to set the system to generate the next number automatically when the screen is opened.

3. Indicate the status of the quotation by clicking the "Enquiry", "Open", "Won" or "Lost" radio buttons. The default status for a new quotation is "Open".

> *Selecting the "Enquiry" button is the same as entering a new enquiry. The only difference between enquiries and quotations is the status and the level of detail that can be added. You can progress an enquiry through to a quotation by changing the status and adding details of the work and price.*

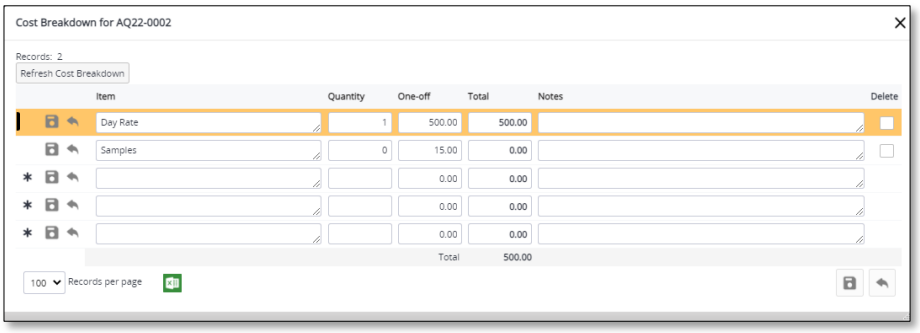
4. Complete the Enquiry details by selecting or entering details in the following fields, if they are displayed:
   - **Date Enquiry Received** – type in or use the date picker. Today's date is displayed by default
   - **Via** – a self-learning dropdown field to record the source of the enquiry
   - **Linked Quote** – only specify a quotation number here if this quote is linked to others. This makes it possible to exclude certain quotes from reports so as not to exaggerate quote values where quotes have been logged for the same opportunity.
   - **Client** – search for and select the client's name from the list by using the magnifying glass, or type their Client ID directly into the first, short field. The + button lets you add a new client "on the fly" – you then need to select that client as normal
   - **Type –** select from the dropdown unless the quote is for more than one type of project, in which case leave blank and tick the **Multi** box. Click the **Multiple Types** button displayed and create a line for each project type that you require. If you enter values here they are totalled and entered into the **Base Quote Total** field.
   - **Sub Type –** to further define the type of work, if applicable
   - **Assigned To** – select the person who is to follow up the quote. This can be configured to send notification emails to the individual to whom the enquiry/quotation is assigned. There are several settings that control how this works. Please contact Start Software for help in setting this up.

5. Complete the Contact Details for the quotation by selecting or entering details in the following fields if they are displayed:
   - **Contact Name** – your contact at the client. Select from the dropdown or type in a new one
   - **Dear** – how the contact is to be addressed, this prefills with the first name
   - **Address** – the contact's address
   - **Email** – your contact's email address
   - **Phone** – your contact's telephone number
   - **Mobile** - your contact's mobile number.

6. In the Notes & Other Info section:
   - **Notes** – type any notes , eg for background or follow-up advice. These *are not* visible to clients
   - Other Info – click the button if you have additional fields set up for your quotations.

The extra fields that are created for a quotation are based upon the project type that you have selected so that it is possible to display different fields depending on the type of work the quotation is for.

7. Give details of where the work is to take place in the Site & Address section:
   - **Site Name/Desc** – use the dropdown to select a site name already on your system for the selected client, or start typing to display matching sites. If you enter a new site name then it is added to Alpha Tracker as a new site. If the quote is for multiple sites tick the **Multi** box and use the button displayed to specify the sites.
   - **Landlord** – type in if applicable
   - **Postcode** – type in then click the Lookup button to find and insert the address. Alternatively, click the Same as Client button to insert the client's address.
8. In the Specifications section:
   - **Specifications** – type in the details for the quote. These *are* visible to clients, if your templates are set up to display them
   - **Scoping** - click the button if you have additional fields set up for scoping.
9. Complete the Calculation section to set the value of the quote:
   - **Base Value** – either type a value directly into the Base Value field or, after saving the quotation, calculate the base value of the quotation by clicking the "…" button next to this field and entering the price breakdown for the project.



The total is displayed in the **Base Value** once the Price Breakdown screen is saved and closed.

> ☞ Note that template entries for the Price Breakdown screen can be set up for each project type. Refer to 2.1.2, Maintaining project types, for further details. Note also that cost breakdowns may specify the frequency of costs, separating out one-off, monthly and annual costs.

If you have entered values for multi type or multi site projects the totals are carried forward and entered in the **Base Value** field automatically.

- **Client Multiplier** – enter the multiplier to be applied to this quotation in the field. To keep the same value as the base quotation, simply enter "1"
- **Quote Total** – calculated and displayed
- **Associated Costs** – use this to record any costs to you.

It is also possible to set your system to build quotations from costs plus a margin. This form of quote building can be switched on by using the setting "QuotesFromCosts" - acceptable values are "yes", "no" and "mixed". If "mixed" is specified then you can switch it on for certain project types only by ticking a box on the project type(s). If you are building quotations from costs plus margin, then you see a Costs button instead of the usual … button. Use this button to specify the costs. There are additional fields on the screen for specifying cost groups, whether the margin should apply to an item, be copied to the project etc. The Client Multiplier is then applied (as the margin) to arrive at the total. Anything marked as "External" comes through as a direct cost onto the project (ie you can see it in the Associated Cost window on the project).

10. In the Delivery section:
    - **Date Produced** – type in or use the date picker. Defaults to today
    - **Produced By** – select the member of staff's name from the drop-down list. Defaults to the logged in user's name
    - **Date Sent** – type in or use the date picker
    - **How Delivered?** – select how the quotation was sent to the client.
11. In the Planning section (click on the heading to open this section):
    - **Expected Start Date** – to indicate when the work is expected to start
    - **Duration** – to indicate in days, weeks and months how long the work is expected to take
12. In the Special Instructions section (click on the heading to open this section), type any **Special Instructions** for the work.
13. In the Follow Up section:
    - **Likelihood (%)** –indicate how confident of success you are
    - **Follow Ups –** use this later when following up open quotations.
14. Save the quotation details and close the New Quotation screen.

3.2 Displaying and editing an existing quotation

As a quotation progresses, you can keep the details up to date by editing the quotation in Alpha Tracker. In particular, this will involve changing the status of the quotation if it is won or lost.

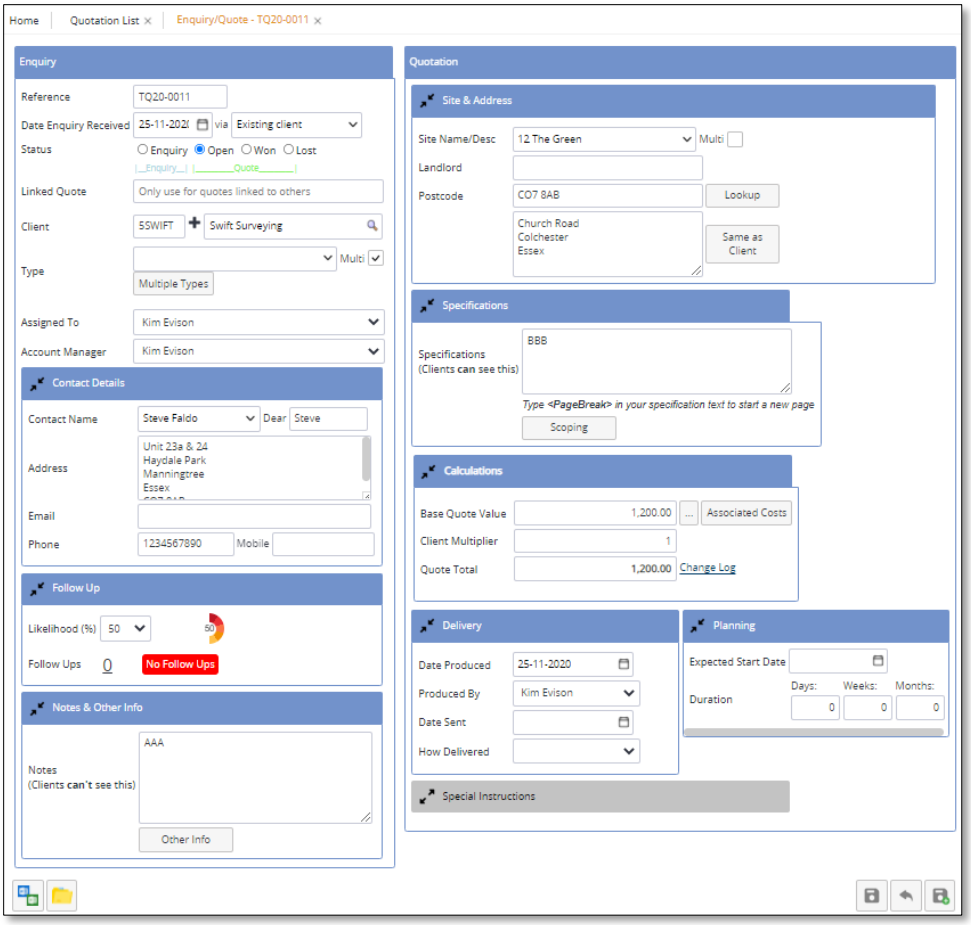
To search for an existing quotation:

1. Select the "Quotation List" menu option, enter search criteria and click **Search** to list matching quotations.

Refer to Section 1.4, Searching in Alpha Tracker, for further details on search criteria that you can use in Alpha Tracker search fields.

The Quotation List displays a total figure. Search and filter the list as you wish to show the required quotations then go to the last page to see the total value of the quotations on the list.

2. Select the quotation to display by clicking on the underlined quote reference number. The Enquiry/Quote screen is displayed.



3. Update the quotation details as required, including the details available from the **Other Info** button.

   You can link one quote to another by using the new **Linked Quote** field. This makes it possible to exclude certain quotes from reports so as not to exaggerate quote values where quotes have been logged for the same opportunity.

   Visibility can be gained on variations to the totals on quotations by using the Change Log. Click the **Change Log** link below the Quote Total to display details of changes.

4. Save the changes and close the screen.

3.3 Generating and printing a quotation

If you need to print a copy of a quotation, perhaps to send a hardcopy to your client, then you must have your quotation template(s) set up in Alpha Tracker so that you can generate and print the document.

> ☞ Refer to the Alpha Tracker Technical Guide for details on how to set up Document Templates or call Support on 0333 301 1010 if you would like Start Software to set them up for you.

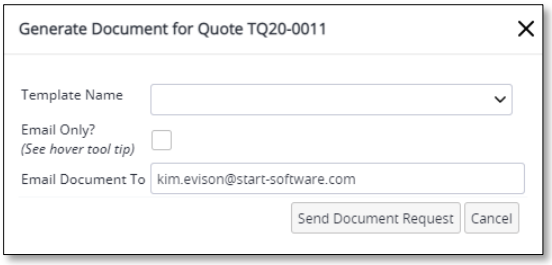
You can print a quotation from the Quotation List screen or direct from the Enquiry/Quote screen. In either case, you use the Word/Excel button to request the document generation.

> *This method of document generation is used wherever you see the Word/Excel button.*

To generate a document:

1. Locate the quotation for which you want to generate a document.
2. From either the Quotation List screen or the Enquiry/Quote screen click on the Word/Excel button:

A pop-up shows you the type of document you are creating, the linked project type and quotation ID and the email address to which the generated document will be sent – this is the email address associated with your login. You can overtype the email address to change or correct it if required.



3. Use the drop-down list on the **Template Name** field to select the quotation template that you want to use from the available templates. The list is filtered so that only relevant templates are displayed.
4. Ensure your email address is displayed and click **Send Document Request** to begin generating the document. Click anywhere off the pop-up to close it.

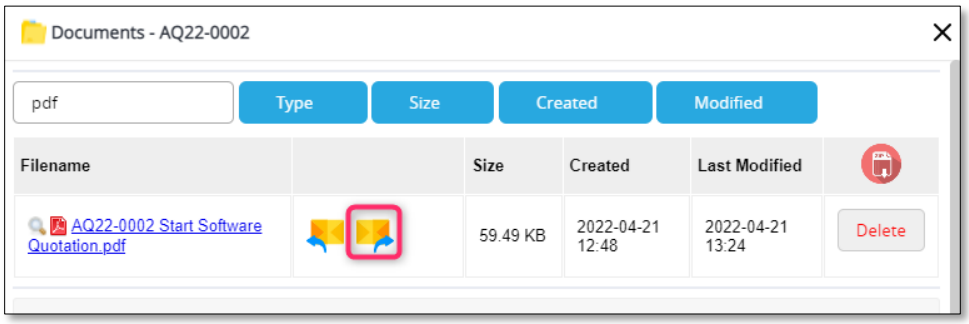
When the quotation has been generated, you will receive an email notification with the quotation document and PDF attached. The files will also be visible from the Open Document Folder icon for the quotation for you (or anyone else) to download if required:

☞ Refer to 10.3, Viewing and editing the report, and 10.4, Uploading reports and other files, for information on how to download and upload documents to Alpha Tracker.

To send the quotation you can simply forward the emailed PDF. Alternatively, email files from Document folders directly to clients or to yourself.

- To email any of the files to yourself (to the email address associated with your login), find the file in the document folder and click the **Send to Me** button. The email is sent immediately.

- To email your quotation out to the client, simply find the PDF in the document folder and click the **Send to Client** button. (This is only available for PDFs.)



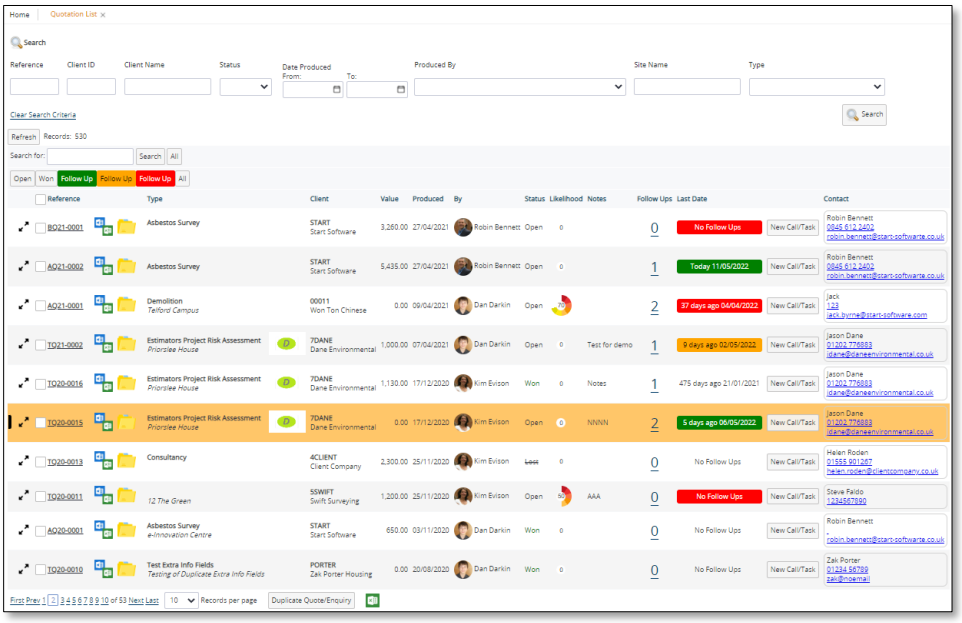
☞ See Section 10.5, Emailing files from the Document folder, for further details.

3.4 Following up open quotations

All your quotations are listed on the Quotation List, which you can search and filter to find the ones you want to follow up. For example, you could search for all “Open” quotations that were produced by you between a range of dates, or perhaps for all “Open” quotes for the project type “Survey”.

There is also a Follow-Up feature on the Quotation List which helps you keep track of your open quotations, how many times and when you followed them up. Colour coding highlights quotations that have been waiting longest without a follow-up. Automatic chasing of open quotations is also available in Alpha Tracker, to send an email with standard text to selected open quotations.

1. Select “Quotation List” from the Sales menu. A list of all quotations is displayed.



2. Display the search fields by clicking “Click here to search...” at the top of the screen, enter your search criteria and click Search.

3. For example, to follow up your own quotations only, select a **Status** of “Open” and your name in the **Produced By** or the **Assigned To** search field, then click Search.

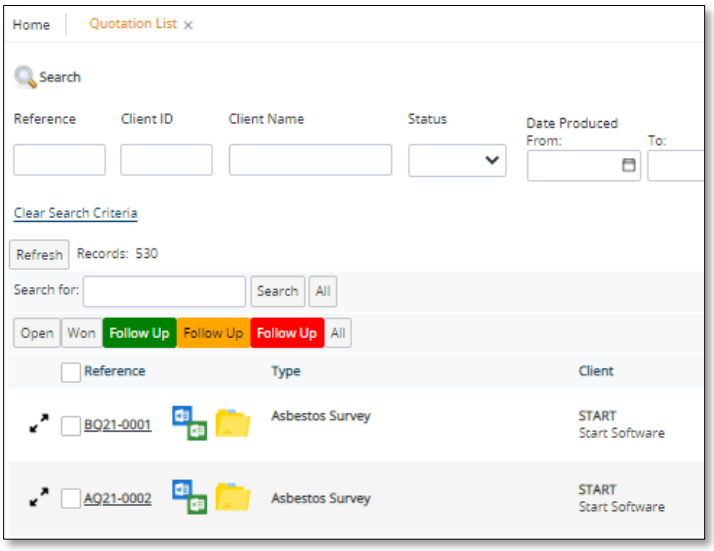
   The number of times you have followed up a quotation is displayed in the **Follow-Ups** column.

   When you last followed up a quotation is displayed in the **Last Date** column. This will display “No Follow Ups” if you have not recorded any follow-ups, or the date of the last follow-up, eg “Today 15/10/2020”, “Yesterday 14/10/2020” or “28 days ago 17/09/2020”.

   The **Last Date** is colour coded if the quotation is an Open quotation. Settings determine when the colours change, by default the colours are set as follows:

   - Green – indicates that the quotation has been followed up within the last two weeks
   - Amber – indicates that the quotation has not been followed for two-four weeks
   - Red – indicates that the quotation has not been followed up for more than four weeks.

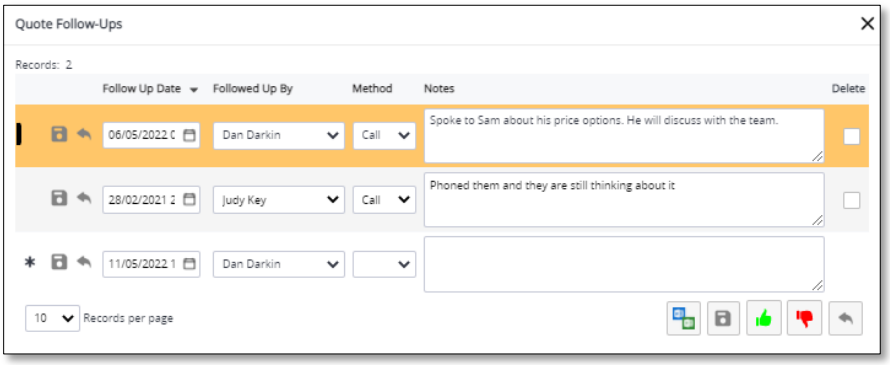
   You can filter the Quotation List by the follow-up details, by using the pre-set filter buttons at the top of the list.



For example, to display all open quotations that have not been followed up for four weeks or more, click the red Follow Up button, or to display all open quotations that you have not followed up for between two and four weeks, click the amber Follow Up button.

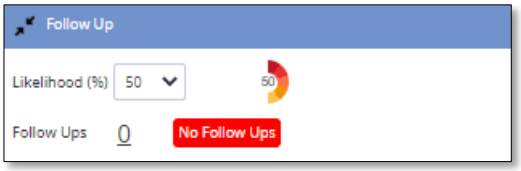
4. Follow up the quotation and record details by clicking the underlined number in the **Follow Ups** column.

   A window opens displaying the date, person, method and notes entered for each previous follow-up. For example:



   Enter the new details in the blank bottom row (marked with an asterisk), then save and close the window.

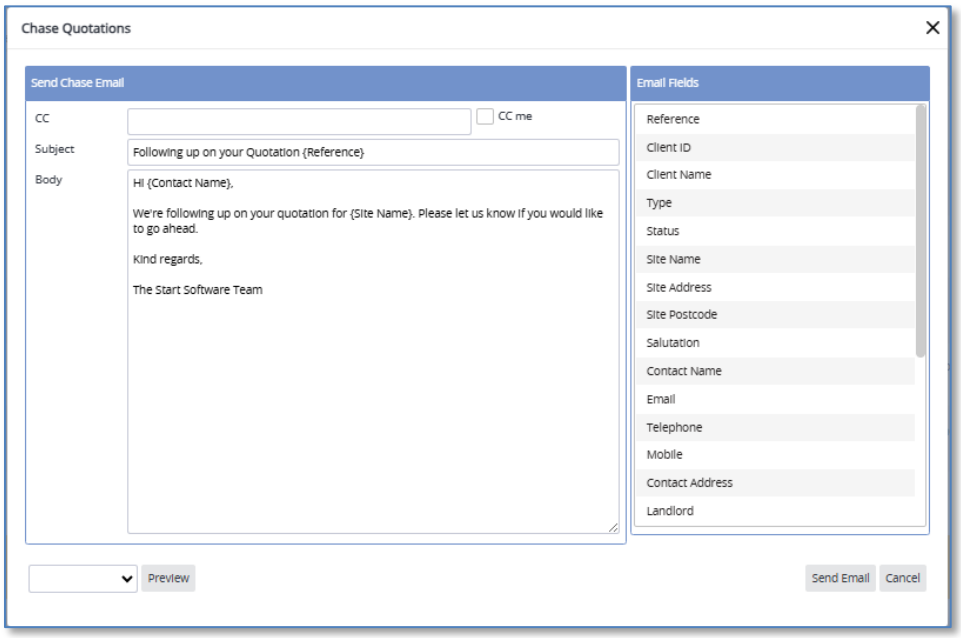
The main quotation screen, Quotation Details, also includes details on follow-ups. These are in the bottom right-hand corner in the Follow Up section and work in the same way as on the Quotation List. You can also find the **Likelihood** field in this section, which sets the coloured wheel on the Quotation List.



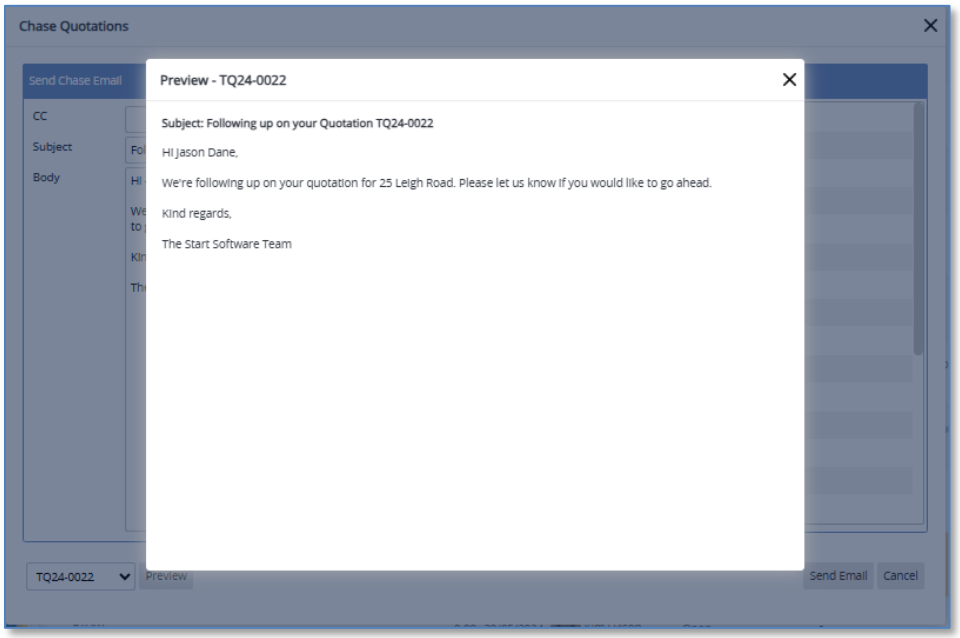
Automated chasing of open quotations is also possible. This time-saving feature allows you to follow up open quotations without manually writing individual emails to each prospect. It sends an email with pre-set text to the contact email address specified in the Contact Details section of the enquiry or quotation (displayed on the far right-hand side of the Enquiry List or Quotation List).

1. Open either the Enquiry List or the Quotation List, automated chasing works from both.
2. Filter the list of enquiries/open quotes to select the ones you want to follow up.
3. Select the applicable enquiries/quotations by ticking the checkboxes on the left-hand side or select all. A **Chase Selected** button is displayed at the bottom of the screen.
4. Click the **Chase Selected** button to display the Chase Quotations screen where you can define or refine the text for the email.

   Default text can be specified by using the settings: “Email body for quote chase”, “Email subject for quote chase”. The list of tags available to use within the text is displayed on the right - simply enclose the tag name within curly brackets ({})to pull the contents of that field into the email.



5. Check what the email would look like before you send. Simply select the quotation for which you want to preview the email from the dropdown list next to the **Preview** button, then click the button. This is particularly useful if you have used tags and want to check the results.



6. If you are happy with the content of the emails, click **Send Email** to send them out.

3.5 Converting a quotation to a project

If a quotation is won, when you change the status of the quotation to "Won" a new button is displayed on the screen – the **Create Project** button. Click the **Create Project** button to open the Project Details screen with as many fields as possible pre-populated with data from the quotation. Complete the remaining fields and save the project.

A project type must be selected on the quotation before a project can be created.

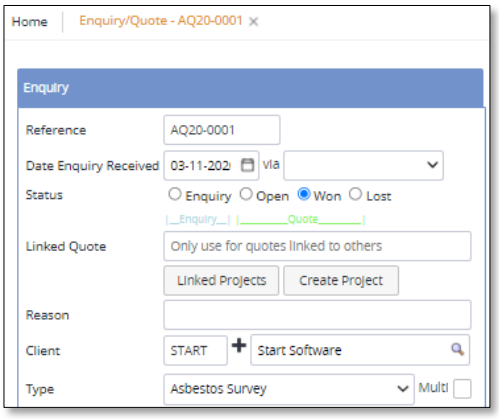
Please note that the **Project Manager/Consultant** field does not get completed from the information on the quotation. This allows projects created in this way to go through the project allocation process.

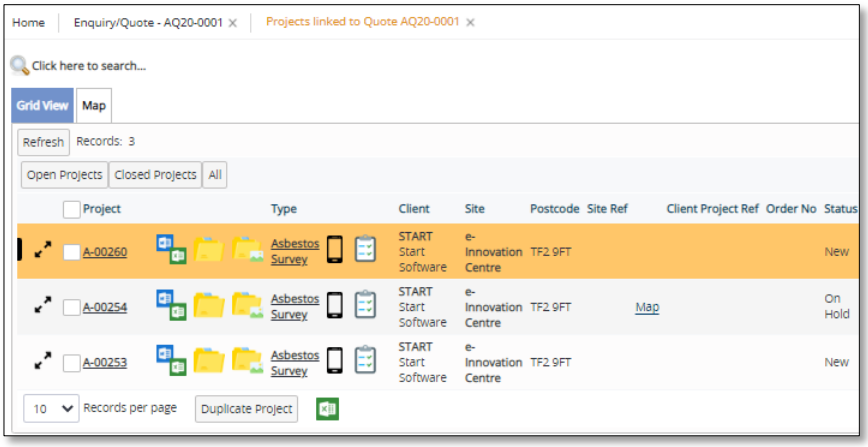
☞ Refer to Section 4, WORKING WITH PROJECTS, for details on entering project related information.

When a quotation is marked as won or lost some additional fields are displayed:

- **Decision Date** – to record the date you received the go-ahead
- **Client Order Number** – to enter an order number supplied by the client
- **Reason** – so that you can record a reason why it was won or lost.

A quick link lets you go from won quotes to their linked projects. Open the quotation and click the **Linked Projects** button on the quote to display a list of projects linked to the quotation. You can then open or work with these projects as you wish.

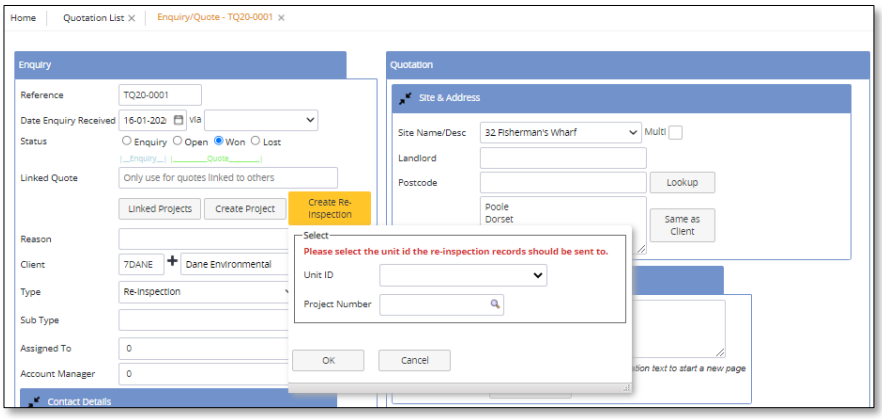




A setting ("Quotation documents available in project folder") lets you copy or move files from quotation folders to project folders when creating new projects from quotes. This means that if you want to have all the quotation folder files present in the projects folder when you open the project, then you can have this without having to download and upload the files. If set to copy, then the files are copied into the project folder within a sub-folder which is named the same as the quote number. If set to move, then the files are moved into the project folder within a sub-folder which is named the same as the quote number.

If this feature is not switched on, you can still see and access the linked quotation folder from a project by clicking on the folder icon next to the **Quotation Ref** field.

Also, if you are raising a re-inspection project from a quotation, you can select the previous project that you want to re-inspect. Simply click the **Create Re-Inspection** button that appears when the status is changed to "Won", select the handset to which the re-inspection records (XMLs) are to be sent and the project number that they are to be created from. Click **OK** to create the new Re-inspection project.


Home
Quotation List
Enquiry/Quote - TQ20-0001
Enquiry
Reference
TQ20-0001
Date Enquiry Received
16-01-2020
via
Status
Enquiry
Open
Won
Lost
Linked Quote
Only use for quotes linked to others
Linked Projects
Create Project
Create Re-Inspection
Reason
Client
7DANE
Dane Environmental
Type
Re-Inspection
Sub Type
Assigned To
0
Account Manager
0
Contact Details
Quotation
Site & Address
Site Name/Desc
32 Fisherman's Wharf
Multi
Landlord
Postcode
Lookup
Poole
Dorset
Same as Client
Select
Please select the unit id the re-inspection records should be sent to.
Unit ID
Project Number
OK
Cancel

3.6 Monitoring enquiries from the Client Portal

If you allow your clients to access the Client Portal to view their data and reports, it is possible to allow them to log new enquiries themselves and also to view the status of their enquiries and quotes. This feature is controlled by a number of settings.

When the client logs an enquiry, an email notification is sent to the address in the “Client Portal Enquiry Notification Email Address” setting. In addition, the enquiry appears on the Enquiry List with “Client Portal” set as the Source.

Date Produced	Produced By	Status	Value	Likelihood(%)	Notes	Contact	Tel #	Email	Source
07/06/2018		Enquiry			Management survey of a domestic property.	Kim Evison	0333 301 1010	kim.evison@start-software.com	Client Portal

If you create quotations for the client, then any open quotations for the client may be listed in the Client Portal, on the My Quotes screen. From here your client can accept or reject a quotation at the click of a button. If a quotation is rejected, your client is prompted to enter some reject notes. The quotation is marked as “Lost” and the client’s reject notes are displayed in the **Reason** field.

Quotes that are accepted from the portal are assigned a new status of “Accepted”. You can search the Quotation List by this status to find them. In addition, the system emails the address specified in the setting “Client Portal Enquiry Notification Email Address” when quotations are accepted or rejected. Accepted quotations need to be marked as “Won” and projects created for them in the usual way.

☞ See Section 15.10, Logging enquiries, accepting/rejecting quotations, for further information.

4. WORKING WITH PROJECTS

Alpha Tracker lets you create new projects quickly and easily. You can also return to existing projects and update the details as required.

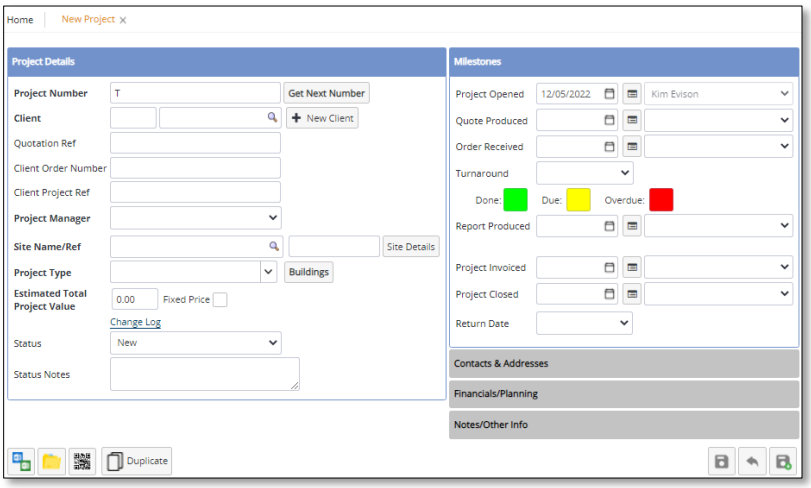
> *If you do not use the term "project" it is possible to change the term to one of your choice, eg job, throughout Alpha Tracker by using a setting in the system (Name: Project).*

4.1 Creating a new project

This section describes the steps necessary to create a new project in Alpha Tracker.

To create a new project for an existing client:

1. Click the "New Project" menu option to display the New Project screen. The fields in bold are the main fields for projects; others are optional.



The first field to complete is the alphanumeric project number in the **Project Number** field. This is usually the office letter followed by a dash and then a five-digit number.

> *Alpha Tracker also supports six-digit project numbers which is useful if you create large numbers of projects.*

2. Get the next project number automatically by checking the displayed default office letter, changing it if necessary, then clicking **Get Next Number**.

   It is possible to set the system to generate the next number automatically when the screen is opened.

3. Enter the Client ID, if you know it, in the first section of the **Client** field, and tab out of the field to pull through the client's name and any other linked details. Or, if you do not know the ID, click on the magnifying glass in the second part of the **Client** field to search for the client. Type a part of the client details (eg part of their name, address or contact)

in the **Search for** field and click **Search** to filter the client list. When you find the required client, click their **Select** link. The client's name and ID are then displayed in the Client field.

*If the client has not yet been recorded on Alpha Tracker, use the **New Client** button as a quick way to enter the client details.*

4. Enter any details you may have for:
   - a related quotation in the **Quotation ID** field (automatically filled in if you create the project from a won quotation)
   - the Salesperson who achieved this project in the **Sales Contact** field (if displayed)
   - the client's order number for the new project in the **Client Order Number** field
   - the client's reference number in the **Client Project Ref** field
   - the contract to which this project belongs in the **Contract** field (if displayed).

*The **Quotation ID** on a project is a link field (the contents are displayed with an underline). Double click on this link to open the specified quotation. Also, if there are any files stored against a quotation, a Quote Documents folder is displayed next to the **Quotation ID** on a project. This means that you can access the quotation documents related to a project without having to open the quotation.*

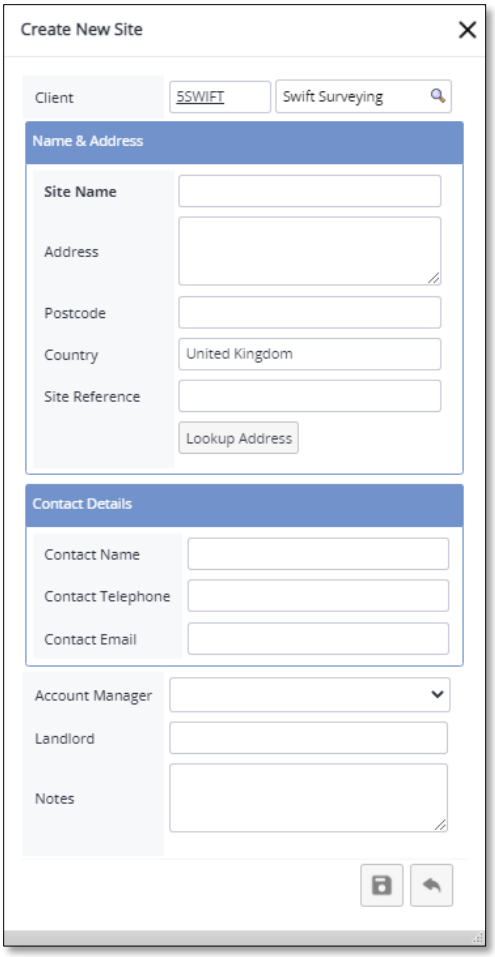
It is also possible to copy or move files from quotation folders to project folders when creating new projects from quotations. This means that if you want to have all the quotation folder files present in the projects folder when you open the project, then you can without having to download and upload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

*The **Contract** field is only displayed if it is switched on for your system. If it is enabled then you can link contracts and projects by selecting the contract in the **Contract** field and using a schedule of rates defined for the contract to set the breakdown for the project value.*

5. Select the Project Manager for the project from the drop-down list on the **Project Manager** field. If there is an Account Manager you can select them too in the **Account Manager** field (if displayed).
6. If you want to specify the staff working on the project, click the **Project Staff** button where you can list them and their roles. A summary of the list is displayed below the **Project Manager** field.
7. Select the site for the project from the drop-down list on the **Site Name** field if you have set up sites for the client already. If the site you need is not on the list, then you can create it by clicking the **New Site** button.

It is important that you select the site from the list if it already exists, rather than create a new site. This is because Alpha Tracker draws together all data entered for a site, across multiple projects, to create an Asbestos Register for the site.

If you click the **New Site** button to create a new site you should fill in the **Site Name**, **Address** and **Post code** fields.



You can also complete the remaining fields if known, eg the site's UPRN in the **Site Reference** field and site contact details in the **Contact Name**, **Contact Telephone** and **Contact Email** fields.

The **Site Details** button on the Projects screen lets you manually re-open the Site Details at any time.

8. Use the drop-down list on the **Project Type** field to select the appropriate type for this project.

The project type must already exist. To set up new project types, use the "Project Types" menu option from the Setup, General menu. As part of the project type, you can define the significant events that are usually associated with such projects or jobs, the milestone template – use the row expander button on a project type record to set up these milestones. You can also define project type-specific cost breakdown templates, sub types and various codes.

Once the **Project Type** has been entered, the **Buildings** button becomes available.

9. Enter the estimated total value of the project in the **Estimated Total Project Value** field and indicate whether the project is fixed price.

   Visibility can be gained on variations to the totals on projects by using the Change Log. Click the **Change Log** link below the **Estimated Total Project Value** to display details of changes.

10. Indicate the current status of the project by selecting from the drop-down list on the **Status** field.

> *The project status must already exist. To set up a new project status, use the "Project Statuses" menu option from the Setup, General menu. You need only supply a description of the project status. In addition, you can set a default status for new projects by entering the required status against the "Default Project Status" repository setting.*

11. Add any notes on the status of the project if required in the **Status Notes** field.

12. Save the project.

    You can now complete the optional project information on the right-hand side of the New Project screen.

13. In the Milestones section, enter dates and names against any milestones that have been completed. For example, you might at this stage complete the **Quote Produced** and **Order Received** milestones. The **Project Opened** milestone is completed for you.

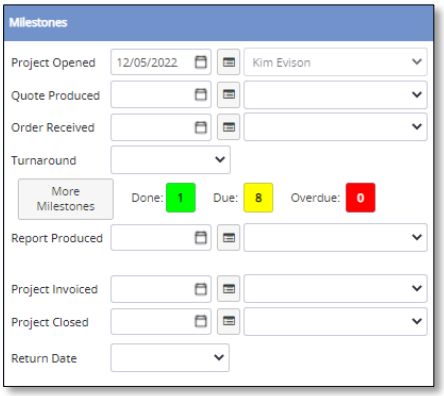
> *Double click in the **Date** field of a milestone to insert today's date there and your logged in user name in the **By** field.*

The **Turnaround** field in the Milestones section lets you set the priority of a project.

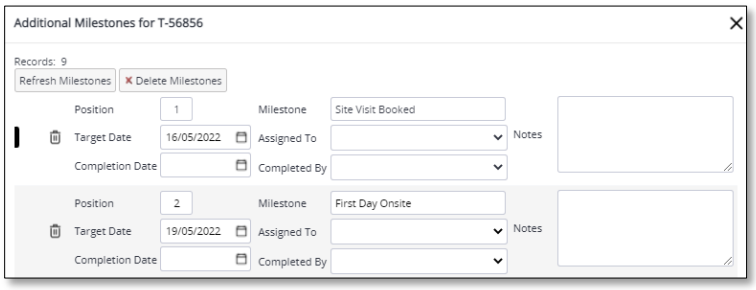
> *You can set the possible values for the field by using the Turnaround option from the Setup, General menu, and you can even change the term "Turnaround" to a term of your choice by using the "Name: Turnaround" system repository setting.*

You can complete additional milestones specific to the project type when you revisit the project by clicking on the **More Milestones** button and completing the details.

The status of milestones under the **More Milestones** button is visible in a traffic light format, showing you the number of milestones Done, Due and Overdue.



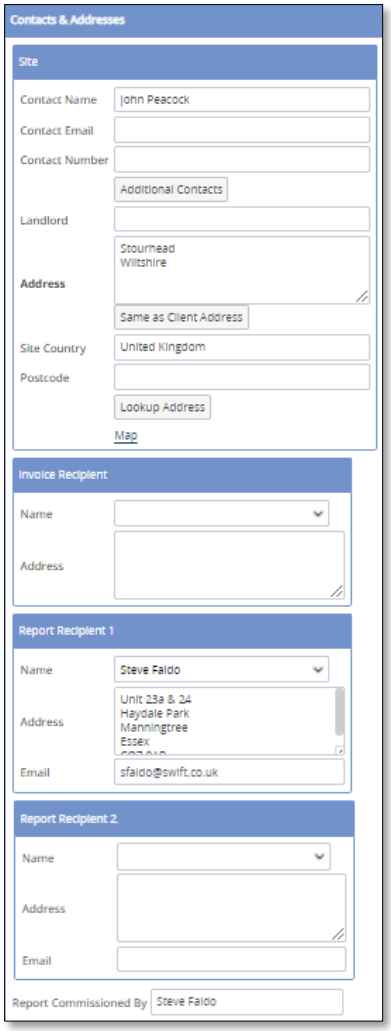
Click the **More Milestones** button to see and update the project-specific milestones.



The buttons at the top of the screen let you:

- update the "More Milestones" so that they will include any that have been defined for the Milestone Template for the Project Type since the project was created (leaving any manually entered ones in place)
- delete all the existing milestones under "More Milestones" in one click.

14. In the Contacts & Addresses section, specify the site, invoice recipient, report recipient and report commissioned by details. Some fields may already be completed from your previous selections.



The **Site Contact Name** field on a Project lets you select from the Contacts listed for the client and the site, simply start typing the name to display a list. The **Site Contact Number** field can either be typed in or will populate when a site is selected and when a project is created from a quotation, if the information has already been recorded.

Clicking in the **Site Address** field will bring through the site address where one has previously been entered and will also insert the postcode and landlord in the separate fields if appropriate.

There is also a **Same as Client Address** button which lets you insert the client address as the site address with one click.

The **Invoice Recipient** field on the Project screen lets you select the person to whom invoices are to be sent. For a name to appear on the dropdown list it must be recorded as an additional contact on the client with either the **Role** or the **Title** field containing the word "account" or "invoice". Alternatively, your system can be set to show all client contacts on this dropdown list. If a name is selected, the associated address will be displayed.

15. In the Financials/Planning section, specify the estimated number of man days that the project will take in the Diary section.

The accuracy of this data, including the **Fixed Price** tickbox, is important for financial statistics extracted from the database, so please take care to enter this information correctly.

When calculating financial data, such as value per day of open projects, variable (ie non-fixed price) jobs use the estimated man days and estimated total value, whereas fixed price jobs use the time actually booked into the diary to work out their daily rate, not the estimate of time required. For example:

<u>Job 1</u>

Estimated to take 3 days and to cost £1500, on a time & materials basis.

Enter:

- Estimated Total Project Value = 1500.00
- Estimated Total Man Days = 3
- Fixed Price = <u>NOT</u> ticked
- Days booked in Calendar = 5

Tracker then calculates the effective daily rate as £500, so each day booked into the Calendar is worth £500.

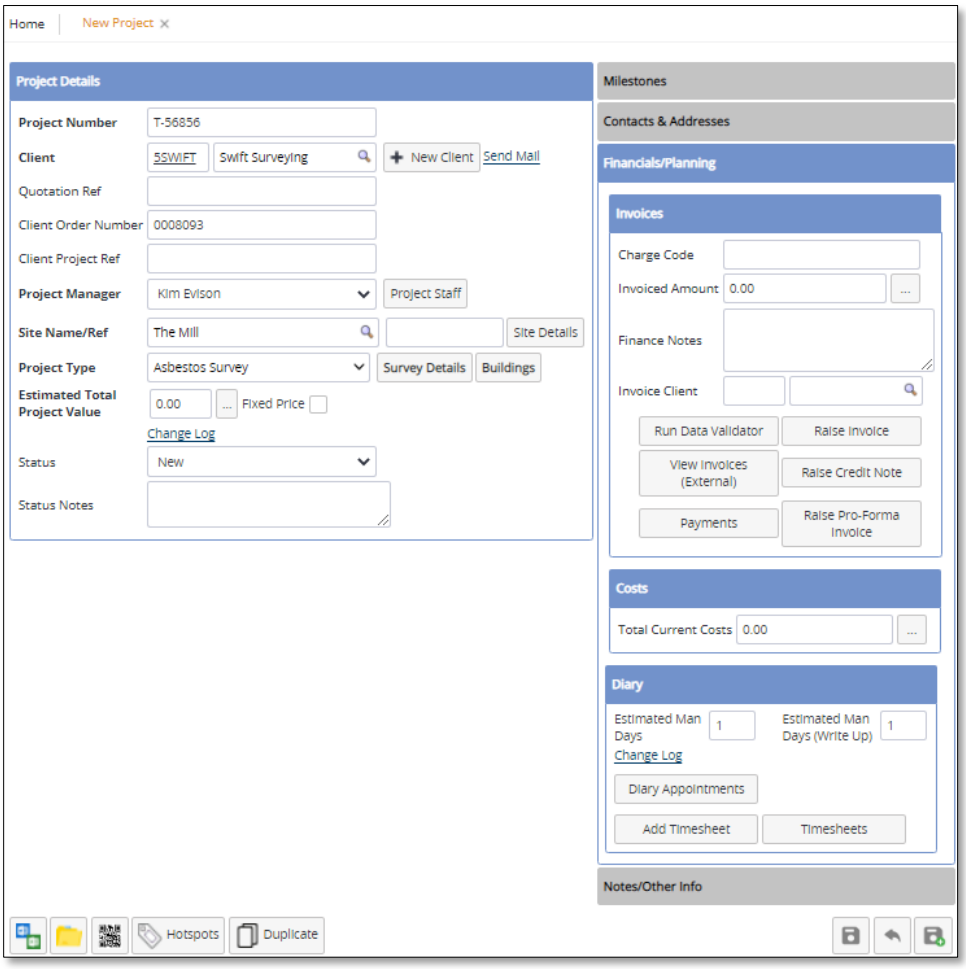
<u>Job2</u>

Estimated to take 3 days, for a fixed price of £1500. However, 5 days are booked in the Calendar.

Enter:

- Estimated Total Project Value = 1500.00
- Estimated Total Man Days = 3
- Fixed Price = Ticked
- Days booked in Calendar = 5

Tracker then calculates the effective daily rate as £300, so each day booked into the Calendar is worth £300.

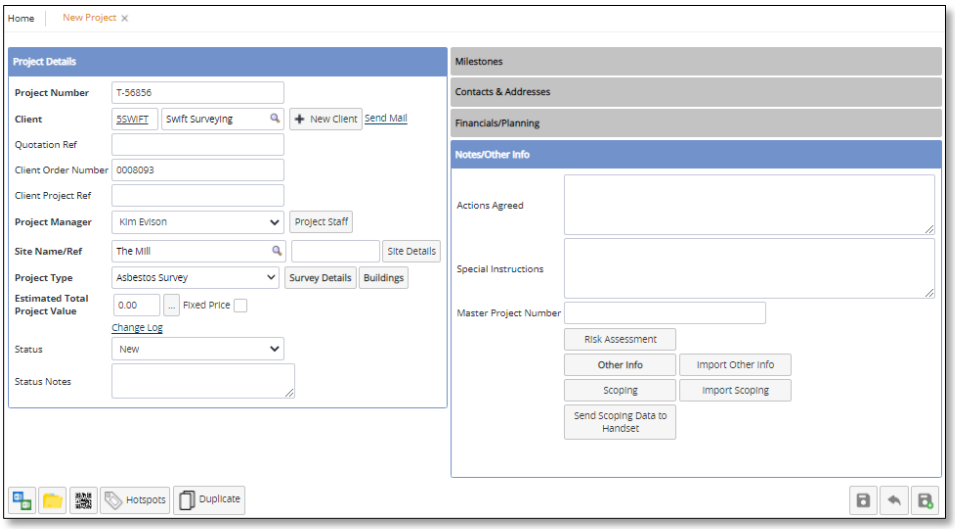


There is a Change Log available on the **Estimated Man Days** field so that you can see if changes have been made to this field, when, who by and what previous values were. There is also an **Estimated Man Days (Write-Up)** field available which is for people who want to record admin time separately on a project without scheduling it in the diary.

16. In the Notes/Other Info section, type any notes that apply to the project. You can also record any special instructions.

    The **Master Project Number** field lets you specify the project number of the master project if this new project is a sub-project.

> ☞ Refer to Section 4.4, Grouping projects together, for further information on master and sub-projects.



The Risk Assessment button lets you view any Risk Assessment details captured on site using the Risk Assessment app.

> ☞ Refer to 4.3, Displaying and editing an existing project, for further details on Risk Assessments.

Once the project has been saved there is an **Other Info** button available in this section that allows you to access any additional fields that you have set up and linked to projects.

Alternatively, you can copy the Other Info details from another project by using the **Import Other Info** button. Specify the number of the project from which you want to copy the fields and then click **Import Data**. This also works to import the Scoping information from another project, if you have this displayed, by using the Import Scoping button.

> ☞ Refer to 2.1.5, Maintaining extra fields, for further information on setting up these extra fields.

17. Save the new project details by clicking the save record icon at the bottom of the screen:

If the project that you are creating is a survey then there are additional steps to be completed to set up the survey.

> ☞ Refer to Section 5, WORKING WITH SURVEYS, for further details.

Your system may be set up so that an email alert is automatically sent to a named person whenever a new project is created. Copies may also be sent to the logged in user. Settings control this functionality and the content of the email can contain template tags to customise it.

> *Please contact Start Software if you would like these email alerts to be sent.*

4.2 Duplicating a project

To save time you can duplicate an existing project in Alpha Tracker. Duplicating enables you to create a copy or a number of copies of a project and then to amend the details as required. The project details copied include:

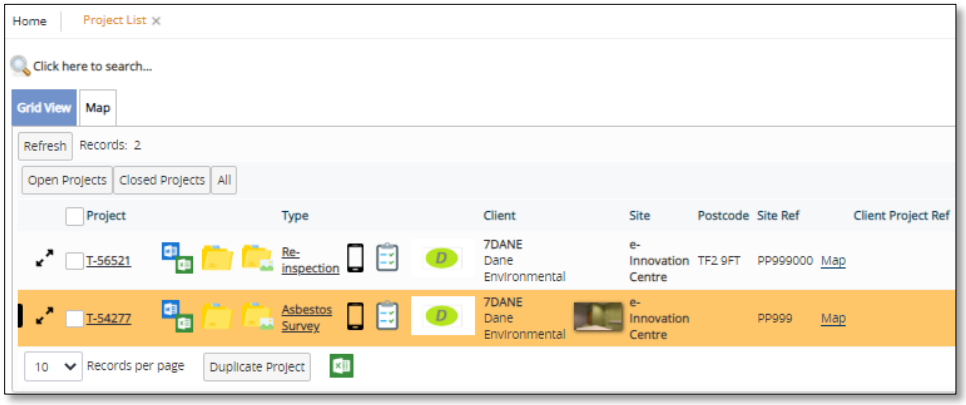
- project letter (a new number is automatically generated)
- client, project and site details
- milestones
- contacts and addresses
- extra information fields
- survey type.

To duplicate a project multiple times:

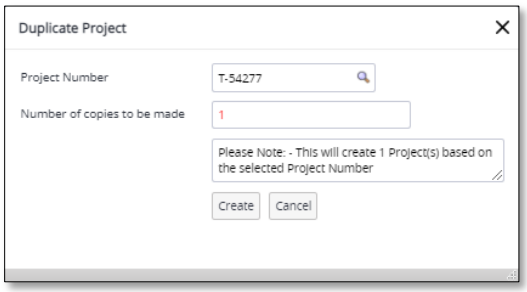
1. Search for the project that you want to duplicate by using the Project List.

> ☞ Refer to 1.4, Searching in Alpha Tracker, for further details on search criteria that you can use in Alpha Tracker search fields.

2. Highlight the project to duplicate by clicking on it.
3. Click the **Duplicate Project** button at the bottom of the Project List screen.



The Duplicate Project screen is displayed.



4. Specify the number of copies of the project you require and click the **Create** button.

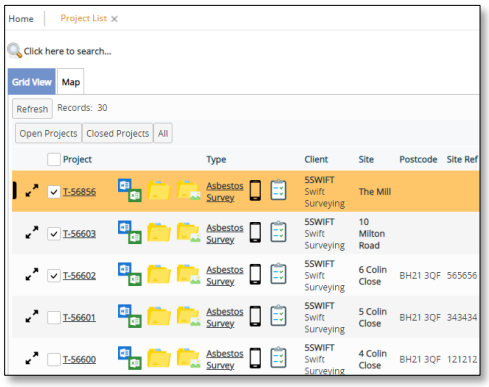
   The duplicate projects are created, using the office letter of the original project and generating the next numbers as appropriate. Refresh the list of projects displayed on the Project List screen to see the newly created projects.

5. Amend the details of the projects as necessary.

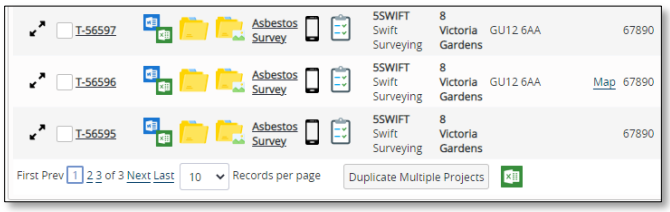
   If you change the site on the projects, take care to amend the Building details too.

To create duplicate copies of multiple projects:

1. Display the projects that you want to duplicate on the Project List.
2. Tick the selector tickbox on each of the projects that you want to duplicate.



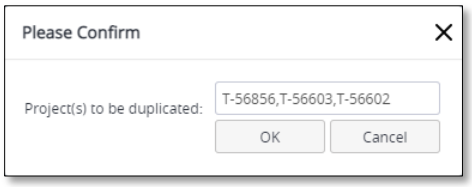
3. Click the **Duplicate Multiple Projects** button at the bottom of the Project List screen.



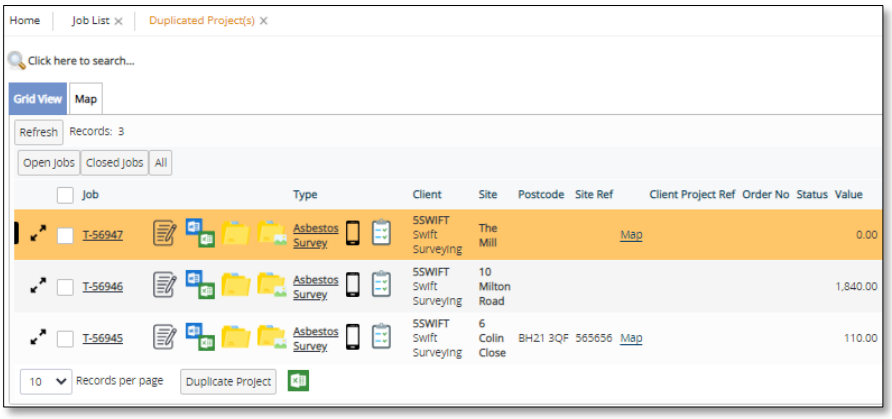
> *Note that if you use the tickboxes to select projects then the duplicate button changes its name and works slightly differently.*

A confirmation screen is displayed.

4. Confirm the projects to be duplicated by clicking **OK**.



A message informs you when the projects have been duplicated and a new tab opens listing the newly-created projects. Each new project is assigned the next available project number.



5. Open the projects and amend them as necessary by using the project number link as normal.

When duplicating a project, it is possible to include the Project Staff list and the Diary appointments in the duplication. Two settings control whether this data is included in the project duplication, both default to “no”.

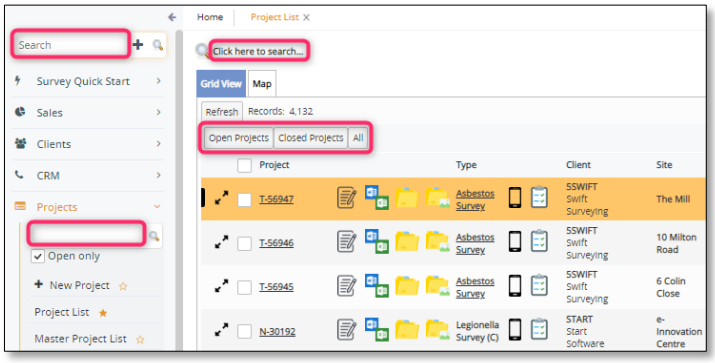
4.3 Displaying and editing an existing project

As a project progresses, you can keep the details up-to-date by editing the project in Alpha Tracker.

1. Search for the required project.

   You can search for the project in a number of ways:

   - entering a key word or project number in the Quick Search field at the top of the Projects menu or in the Intellisearch field at the very top of the menu
   - selecting the “Project List” menu option and:
     - entering search criteria to find the required project – if they are not already displayed, display the search fields by clicking on the “Click here to search” link
     - clicking a filter button (Open Projects, Closed Projects, All) at the top of the Project List

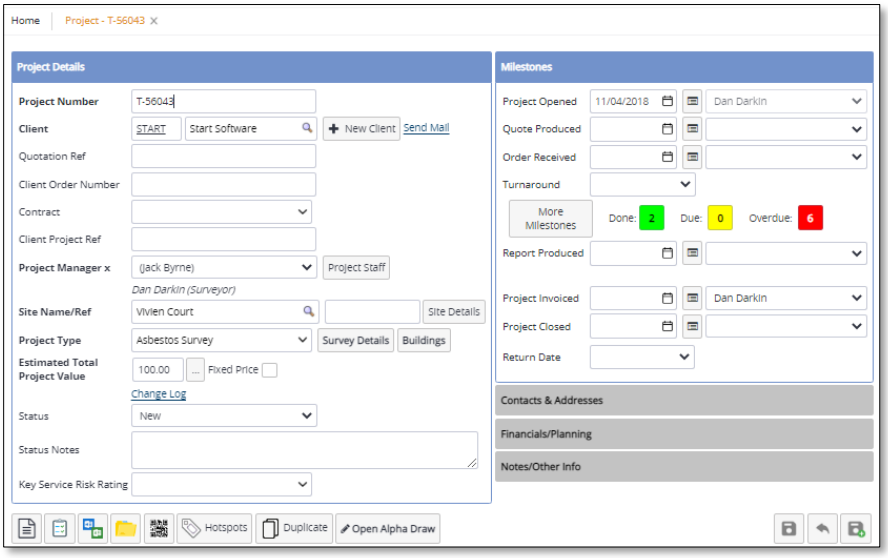


   - selecting one of the “Open Projects” menu options which let you list projects in a number of ways.

All the methods of searching for a project produce a list of projects matching your search criteria.

> ☞ Refer to 1.4, Searching in Alpha Tracker, for further details on search criteria that you can use in Alpha Tracker search fields.

2. Select the project to display by clicking on the underlined project number. The Project Details screen is displayed.



3. Update the project details as required.

This might include:

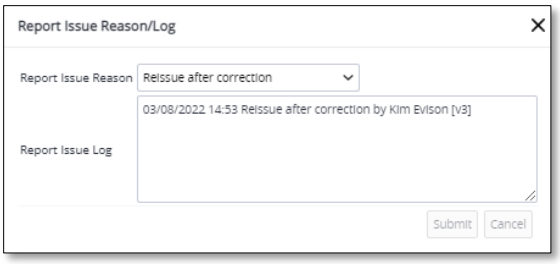
- updating the status of the project
- using the Project Staff button to list members of staff and their roles on the project (this list is also updated automatically if you create an appointment in the Calendar for a project)
- adding to the contact details
- updating project milestones
- recording project notes
- generating project specific documents using your templates which you can find under the Word/Excel icon
- producing a Job Summary Sheet to summarise project details, if this button is switched on for your system
- accessing the survey data items.

> *Note that you can jump straight to the Survey Data screen by clicking the mobile phone icon on the Project List.*

Any documents linked to the project can also be viewed by using the Open Document Folder icon at the bottom of the screen.

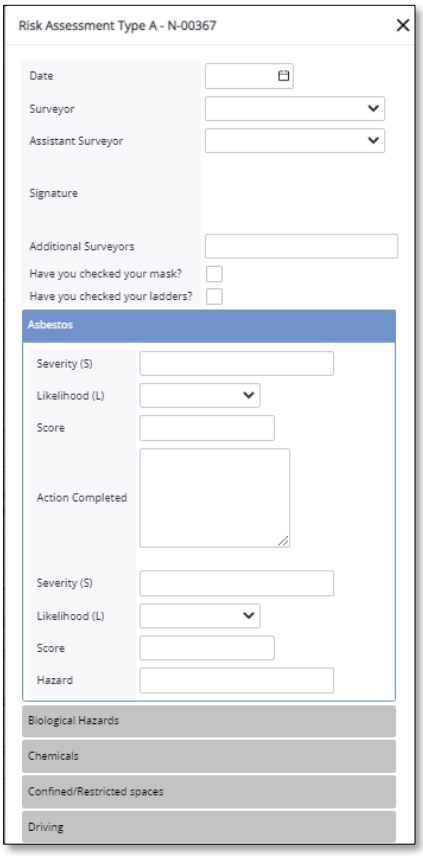
There is a section on the Milestones tab where logs are stored to show when reports have been issued and the reasons for the issuing them. Click the "**Issue Reason/Log**" link

under the **Report Produced** milestone to display the log screen. Note that the link is only visible if the milestone has been completed.



Generating a Final Report logs this event in the Report Issue Log. You can also record reasons for re-issue here by simply selecting an entry from the Report Issue Reason field, another report issue event is then logged in the Report Issue Log. The Report Issue Reasons can be set up by using the “Report Issue Reasons” option under Setup, General.

If Risk Assessment details have been captured on-site by using the On-Site Risk Assessment Mobile Data Studio app, and sent in, then the details can be viewed by clicking the “Risk Assessment” button on the Notes/Other Info tab of the Project screen. The details may be displayed on a screen similar to this:



4.4 Grouping projects together

Alpha Tracker lets you group projects together under Master projects to show connections between projects and make their administration easier. For example, if you have a major project which involves the surveying of 100 domestic properties for a client, you may want to give the client one project number for the entire project, while also defining each property to be surveyed as a separate project on your system. Alternatively, if you have a lengthy project you may choose to divide it into a number of phases, assigning a sub-project to each phase.

You can define any project as a Master project – even a sub-project can itself have sub-projects.

Note that all linked Master and sub-projects must belong to the same client.

The terms "project" and "master project" are controlled by settings so that you can choose the names you give to these.

To link Master and sub-projects:

1. Create the Master project as a standard project in the normal way, completing all the usual details.

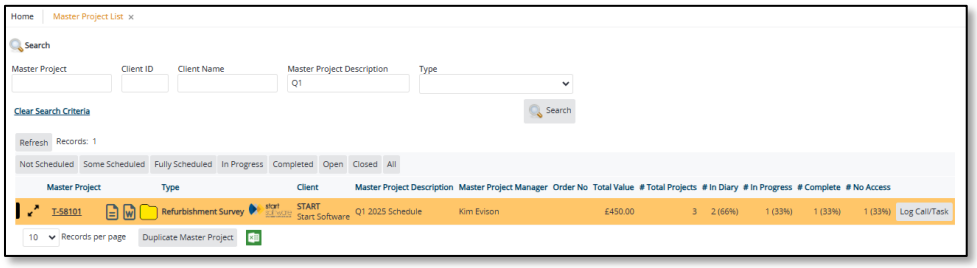
It is important to note that the financial figures must only be put into Tracker once – either enter the total project value into the Master project or enter the value of each sub-project into the sub-projects, not both. To allow the individual invoicing of sub-projects, it is recommended that you enter financial figures in the sub-projects only.

2. Make a note of the project number of the Master project.
3. Create or open the first sub-project as a standard project in the normal way but also specify the project number of the Master project on the Notes/Other Info tab in the **Master Project Number** field.
4. Save and close the sub-project.
5. Repeat steps 3 – 4 as many times as necessary to define all the sub-projects.

To display details of the sub-projects linked together in a Master project you can use the "Master Project List" option:

1. Select the "Master Project List" menu option and enter search criteria to find the required Master project.

Refer to 1.4, Searching in Alpha Tracker, for further details on search criteria that you can use in Alpha Tracker search fields.



The figures displayed for a Master project are made up as follows:

- **Total Value** – The sum of all sub-project values.
- **# Total Projects** – The count of sub-projects.
- **# In Diary** – The count of sub-projects with appointments in the diary that aren't incomplete/aborted and aren't write-ups.
- **# In Progress** – The count of sub-projects with appointments in the diary, that aren't incomplete/aborted and aren't write-ups, that are in the past and where the sub-project does not have a report produced date.
- **# Complete** – The count of sub-projects that have a report produced date.
- **# No Access** – The count of sub-projects that have appointments, where all the appointments are incomplete/aborted with a reason of "No access".

2. Display the list of sub-projects linked to a Master project by clicking on the row expander button on the required Master project. Amongst other information, you can see the last completed milestone for sub-projects displayed in the "Last Milestone" column. The date on which site work was carried out is also displayed (if the appropriate key milestone is in use), in the "Completed Date" column.

On the right of the sub-project information, you can also see details of contacts made for the sub-projects.

3. You can work with the individual sub-projects or the Master project directly from this list:
   - click an underlined link to open the required project
   - read or add a jotter note
   - generate documents for a project by clicking a Word/Excel icon
   - open the document folder for the project by clicking the folder icon.

If you duplicate a sub-project, the new project created retains the master project number and so is also linked to the same master project.

4.5 Monitoring projects on the Projects Dashboard

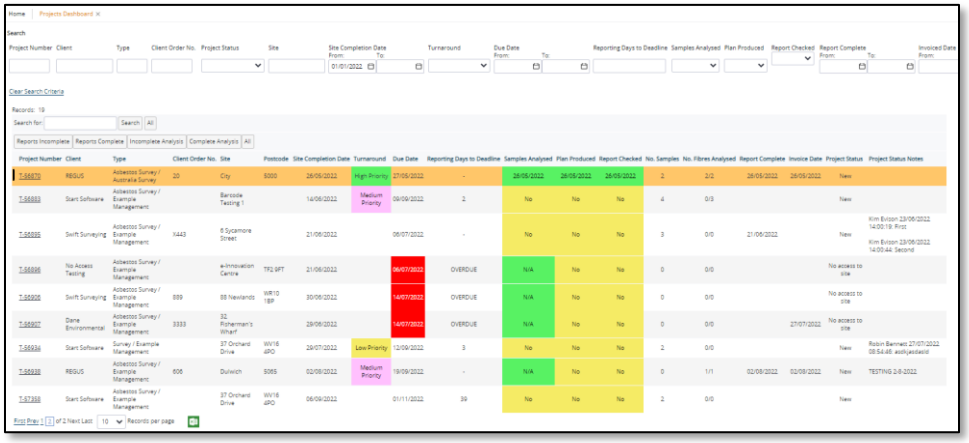
The Projects Dashboard gives a general overview of your projects as well as custom colour-coding for turnaround times and calculations to indicate whether a project is overdue. It provides an at-a-glance view of the status of your projects.

The information for updating the Projects Dashboard comes largely from key milestones. This means that you can only get a full picture on the Projects Dashboard if you are using milestones linked to the system's key milestones. If you are not using the key milestones, then some fields will not be updated on the Projects Dashboard.

> ☞ Refer to Section 2.1.2, Maintaining project types, and Section 2.1.8, Maintaining key milestones, for details on setting up milestones and using key milestones.

To display the Projects Dashboard:

1. Select the "Projects Dashboard" option from the Projects menu.



2. Search or filter to show the projects that you want to see by using the **Search for** field or the full range of search fields at the very top of the screen. You could also sort the data by clicking on a column heading, eg put the projects in due date order to help prioritise your work.

The standard information displayed on the Projects Dashboard is:

- project number
- client
- project and survey type
- client order number
- site name
- postcode

It can also display further status information as follows:

- **Site Completion Date** – The *Completion Date* from the milestone which is linked to the key milestone "Surveyor Last Day On-Site".
- **Turnaround** – The colour-coded value from the Turnaround field on the project.

You can set the colours for the Turnaround by using the "Turnaround" menu option from the General section of the Setup menu and selecting a colour for each Turnaround value.

- **Due Date** – The *Target Date* from the milestone which is linked to the key milestone "Project Due Date".

  If the Due Date is earlier than today but the report has not been completed, then the Due Date is highlighted in red.
- **Reporting Days to Deadline** – A calculated value of the number of week days from today to the Due Date.

  If the Due Date is earlier than today and the report has been produced (ie there is a date in the Report Produced milestone) then a dash "-" is displayed. If the Due Date is earlier than today but the report has not yet been produced then "OVERDUE" is displayed.
- **Samples Analysed** – The *Completion Date* from the milestone which is linked to the key milestone "Bulk Samples Analysed".

  If there is no date, then "No" is displayed.
- **Plan Produced** – The *Completion Date* from the milestone which is linked to the key milestone "Plan Complete".

  If there is no date, then "No" is displayed.
- **Report Checked** – The *Completion Date* from the milestone which is linked to the key milestone "Report QC Checked".

  If there is no date, then "No" is displayed.
- **No. Samples** – The number of survey samples, ie survey data items with an Approach of "S".
- **No. Fibres Analysed** – The number of fibre analysis records and how many of them have an identification recorded.
- **Report Complete** – The date from the Report Produced milestone.
- **Invoice Date** – The date from the Project Invoiced milestone.
- **Project Status** – The Status from the project.
- **Project Status Notes** – The details from the Status Notes field on the project.

4.6 Displaying progress in the project pipeline

Get an alternative view of the progress of your projects through their milestones by using the Project Pipeline. The Project Pipeline is available from the Projects menu for staff and a more limited version can also be displayed on the Client Portal by using the setting "Show Project Pipeline on Client Portal".

☞ See Section 15.4, What can be seen on the Client Portal?, for details on the Client Portal version of the Project Pipeline.

On the Project Pipeline each project's milestones are displayed as a dot.

- If the dot is green, then the milestone has been completed - hover over the dot to see the completed date.
- If the dot is grey, then it has not been completed.

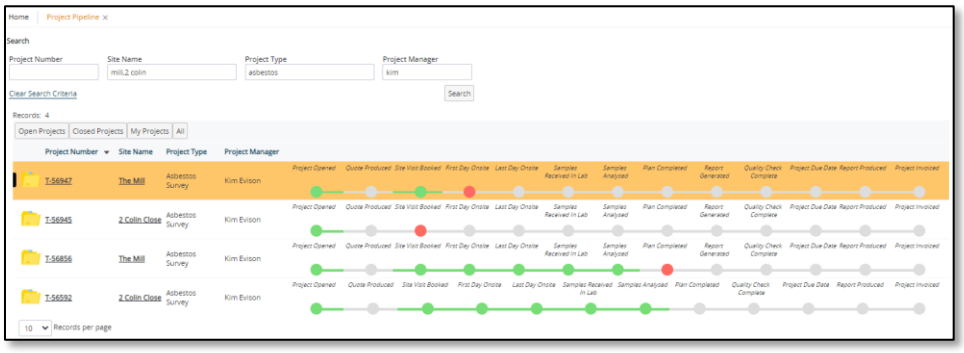
- If the dot is red, then it is overdue (passed its target date) - hover over the dot to see when it was due.

It provides an at-a-glance view of the status of your projects.

The information for the Project Pipeline comes from the project milestones, both the standard milestones and the project type-specific “More” milestones.

To display the Project Pipeline:

1. Select the “Project Pipeline” option from the Projects menu.



   Open projects only are displayed initially, but you can choose to display closed or all projects.

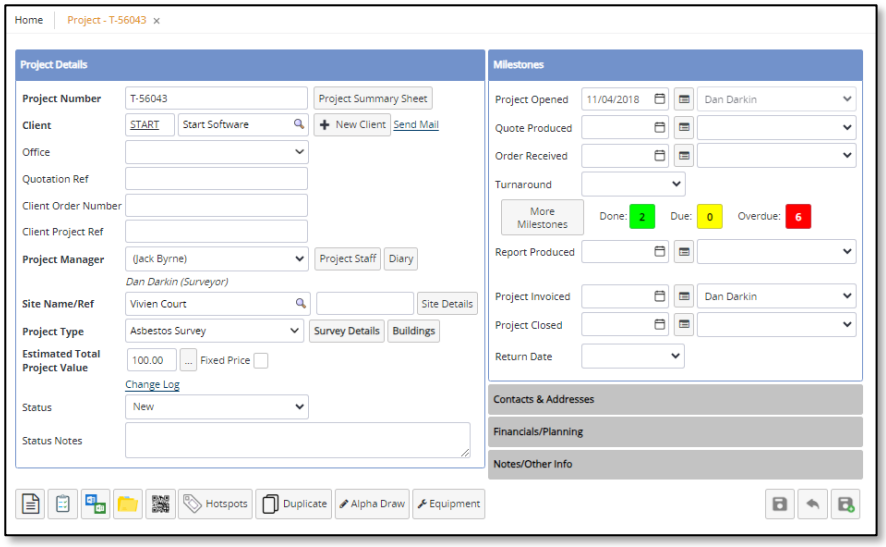
2. Search to find the projects to view.
3. Hover over a dot to see details of the due or completed date.
4. Open project details, if required, by clicking an underlined project number, or site details by clicking an underlined site name.

5. WORKING WITH SURVEYS

This section summarises the additional steps necessary to create a new Survey project in Alpha Tracker.

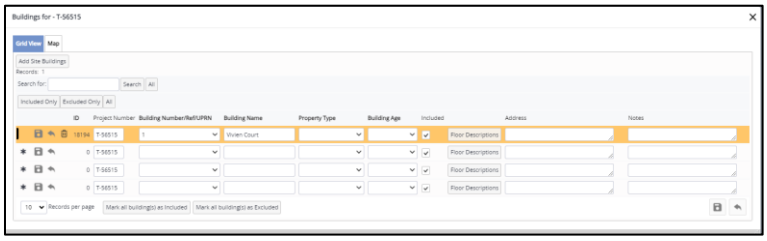
5.1 Setting up a survey

If the project type of the project that you are creating has a category of Asbestos Survey (eg project type "Survey"), then a **Buildings** and a **Survey Details** button are available for you on the New Project tab to specify details specific to the survey.



To set up the additional details for a survey:

1. Click the **Buildings** button to display the Buildings screen for the current project.



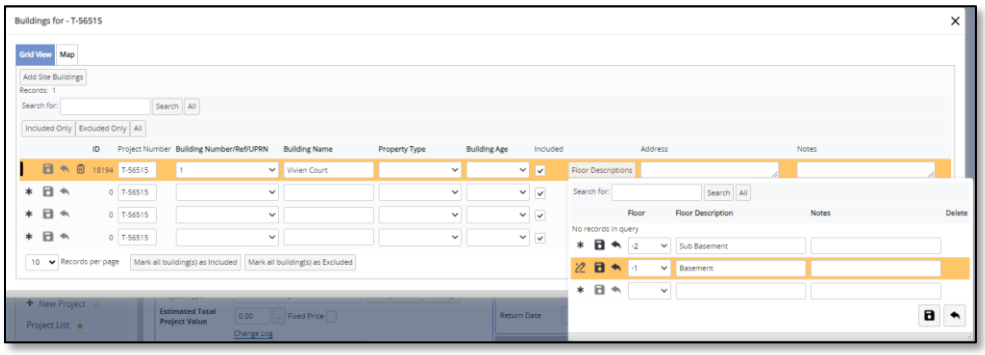
The **Buildings** button is not available on a project until a **Project Type** is specified.

2. Enter the details of the buildings included in the survey into the blank rows marked with an asterisk.

> *Your system may be set to add the Building record automatically when a new project is created. A setting controls this functionality.*

You can also list buildings that are specifically excluded from the survey – making sure that you untick the **Included** tickbox.

3. Use the **Floor Descriptions** button if you want to assign particular names to floor numbers in your reports, eg you might want to call the floor below the Basement the "Sub Basement". You would then need to specify the floor number that equates to the new floor name.

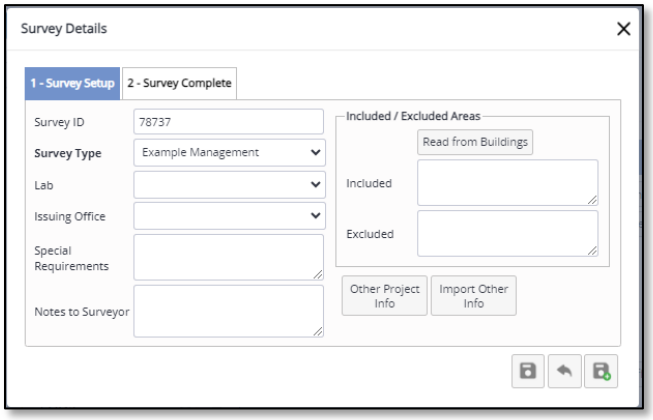


Click the **Submit** button to save any new floor descriptions.

Note that special template/document production coding may be required to use these descriptions in your reports.

4. Click the **Save** button to save the building details and then close the Buildings screen.

5. Click the **Survey Details** button on the New Project screen to display the Survey Details screen.



6. Select the **Survey Type** that you are adding, for example Management, Refurbishment or Demolition.

   If the office issuing a report is different to the office that created the project, then you can record details of the issuing office on the Survey Details screen in the **Issuing Office** field. A setting ("Show Survey Issuing Office") controls whether you can see this field or not. The field defaults to the project's office address but can be changed.

7. Select the lab that will be analysing the samples from this survey in the **Lab** field. By selecting the lab here you are allowing that lab access via their login (if set up) to the fibre analysis screens for this survey's samples. Leave the field blank if you use an internal lab.

8. Enter any special requirements for the survey in the **Special Requirements** field.
9. Enter any notes you want the surveyor to see on their handset when they select the project number in the **Notes to Surveyor** field.
10. Specify the areas included and those excluded from the survey by completing the **Included** and **Excluded** fields.

    You can click the **Read from Buildings** button to take the details directly from the Buildings screen for this project. The **Included** tickbox on the Buildings screen determines which box a building is entered into.
11. Click the **Save** button at the bottom of the Survey Details screen to close the screen and return to the New Project tab. You do not need to enter any further details in the Survey Details screen at this stage.

6. SCHEDULING PROJECTS

This section describes how to use the scheduling tool in Alpha Tracker to book your projects into the diary. It explains how you can:

- schedule a new project
- edit and move a project
- select a user or group of users for the calendar.

If you are using the Calendar Sync tool, all bookings are automatically synchronised with Google Calendars™ so that your staff can see their work diaries at any time from their laptops, home PCs or smartphones. The diary appointments can be customised to show the information that you require.

☞ Refer to Section 4, SYNCHRONISING CALENDARS, in the Technical Guide for details on setting up the Calendar Sync tool.

There are also sections to explain how:

- to display staff photos on appointments
- the system can suggest suitable diary gaps
- to check the audit log of calendar changes
- to display financial or time details on the Wallboard
- to display appointments on a map
- how job allocation can be used with scheduling to allow individuals to control their own diaries.

6.1 Scheduling a new project

The “Staff Calendar” option lets you select individual members of staff, groups, teams or whole offices and display those people on the Calendar. You can select any combination of these, for example, you might select a group called “Surveyors” plus two other individuals – simply click on those required so that they are highlighted in blue and their names appear in the Selected Staff list.

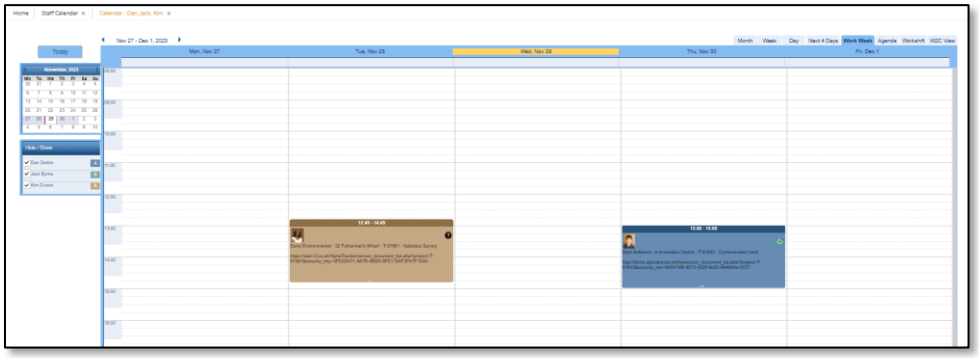
*To put users into group, subgroups, teams or offices you need to populate the **Group, Sub Group, Team** and Office fields on the Staff screen.*

To schedule a project:

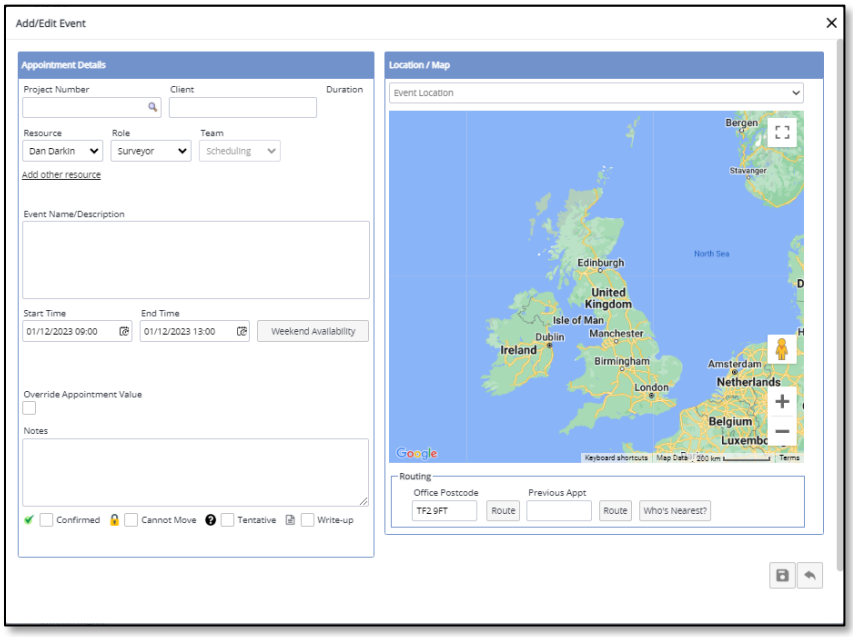
1. Click the “Staff Calendar” menu option on the Resources menu and select the people, groups etc whose diaries you wish to display by clicking on them.
   - select multiple people by clicking on the required members of staff
   - select all staff by clicking the radio button at the top.
2. Click either the **Calendar** or the **Wallboard** button.

The Wallboard shows appointments with either summary time or financial information, depending on system settings (some users can see both). The Wallboard opens as a separate tab in your browser. The Calendar opens as a screen within Alpha Tracker – appointments are normally made by using the Calendar.

Some users may not see the Wallboard at all as it is possible to restrict who can see the Wallboard by using the "UserListSeeWallboard" setting, and some users may see a Wallboard (Financial) option.



3. Adjust the view on the Calendar by:
   - selecting the tab at the top of the Calendar most appropriate to the number of days you want to view, for example Month, Day or Work Week
   - selecting the person/people for whom you want to make bookings by using the Hide/Show toggle and the tick boxes next to the staff names
   - clicking on the date picker to select the date you want to view
   - moving forwards or backwards in time by using the arrows around the date range.
4. Click on the Calendar on the intersection of the day and time when you want to make a booking and then drag the mouse down to define the duration of the booking. The Add/Edit Event window is displayed for you to fill in the details of the appointment.



5. Complete the fields on the Add/Edit Event window as necessary to specify the details of the appointment, including the resource (person), project number, and start and end times.

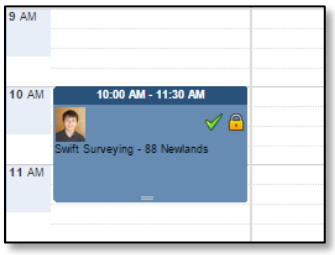
   Many details can be automatically filled in for you, for example:

   - Select a project and the client and the estimated duration of the project are displayed.
     If the site on the project has a postcode entered then the map shows this location. Event details are also populated and may include a photo of the member of staff (if one is uploaded to the Staff screen) and project/site details as defined by a system setting). The photo will also display on the Calendar.
   - Select the resource (person) and their role from the Project Staff is displayed, or you can select a role.
     If a home or an office postcode are defined for the person (in the **Home Postcode** or **Office Postcode** fields on the Staff screen) then the Routing section shows these locations.
     If the person belongs to a team (as defined by the **Team** field on the Staff screen) then this is also displayed and you will get a warning if you attempt to schedule an appointment for them on a day that is not defined as a working day/weekend for the Team.

   Make the appointment for more than one person by clicking the “Add other resource” link below the **Resource**. Alternatively, you can create duplicates of the booking once it is saved by using the “Repeat Appointment” link.

   Tick boxes at the bottom of the Add/Edit Event window let you indicate how fixed the appointment is, eg tentative, fixed or not movable. Tick a box to attach an icon to the appointment which lets you see at a glance the status of the appointment.

   An **Appointment Status** field is also available if required.

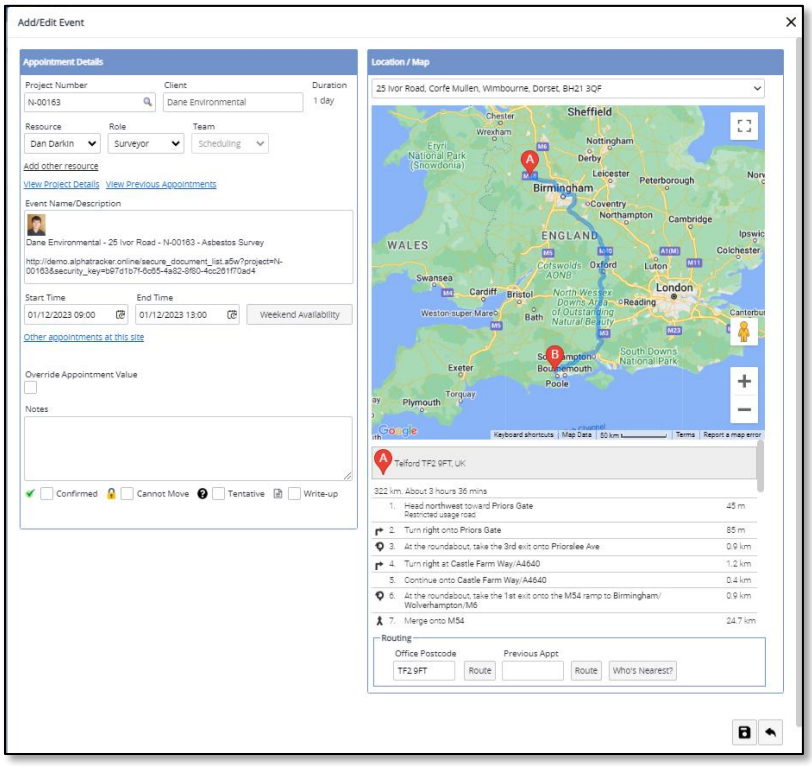


   The map on the right of the Add/Edit Event window can show you the locations relevant to the appointment if you have postcodes recorded in your data. The **Home Postcode** and **Office Postcode** fields are drawn from the Staff record for the selected member of staff. The **Site Postcode** comes from the Site on the Project.

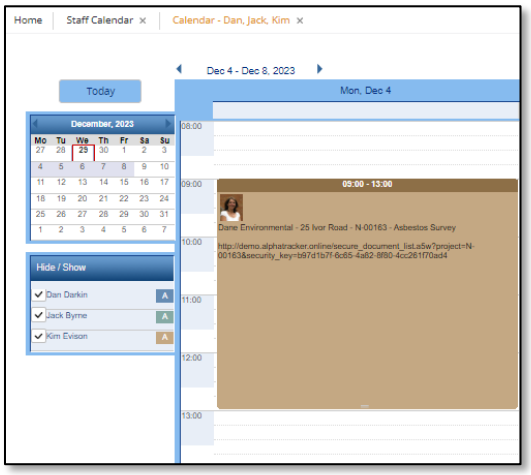
   If postcodes are displayed (or you have typed them in), then you can show routes and directions on the map using Google Maps:

   - Click the **Route** button next to the **Home Postcode** field to show the route from home to site.
   - Click the **Route** button next to the **Office Postcode** field to show the route from office to site.

   For example:



6. Click the **Save** button to save the appointment details and show the appointment on the Calendar.



Adding an appointment for a member of staff in the Calendar adds them to the Staff List for the project if they are not already present on the list.

> *You can also create and edit appointments for projects by using the **Diary Appointments** button on the Financials/Planning tab on the Projects screen. The screen that opens displays the diary appointments that have been entered for the current project only. Similarly, any new appointments you book from here are for the current project only.*

For speed, you can simply click the "New Appointment" option under Diary on the Resources menu, and then complete the appointment details.

If the system prevents you from saving an appointment with a message such as "Sorry, Adam Dangerfield does not have the relevant qualifications on this date", then the optional Staff Training Matrix is in use and is restricting who can be scheduled to specific types of projects. See Chapter 16, STAFF TRAINING, for further details.

6.2 Editing and moving a project

If you wish to make changes to an existing booking, then this is quickly achieved by either dragging and dropping or redisplaying the Add/Edit Event window to specify the required changes. You can also mark a booking as being aborted.

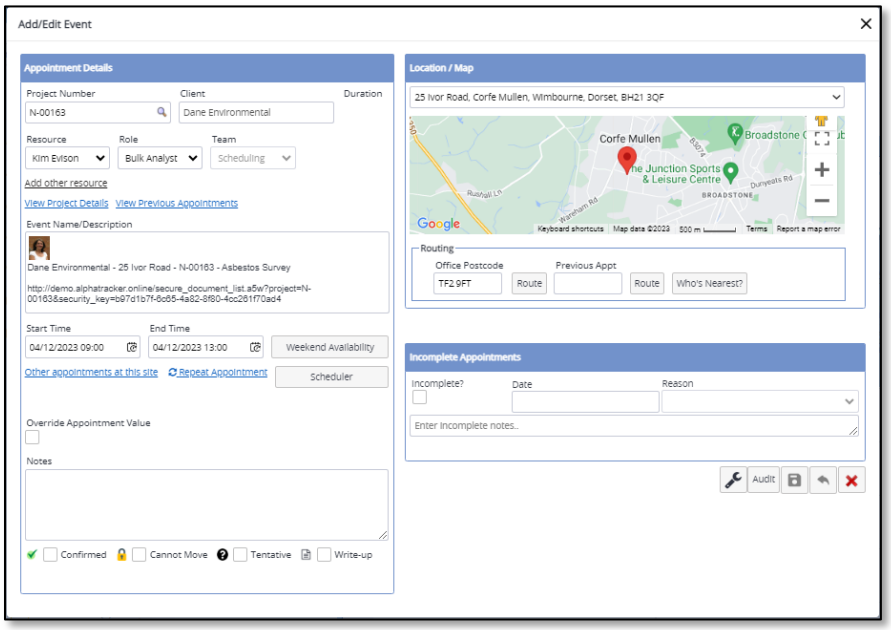
To drag and drop:

1. Move the whole booking by clicking and holding down the mouse button on the coloured block that represents the booking.
2. Drag the coloured block to its new position on the Calendar, either to a different time on the same day or to a different day completely, then release the mouse button to drop the booking in place.

   You can make further adjustments to the booking by using the Add/Edit Event window.

To use the Add/Edit Event window to edit a project:

1. Click on the coloured block that represents the booking. The Add/Edit Event window is displayed.



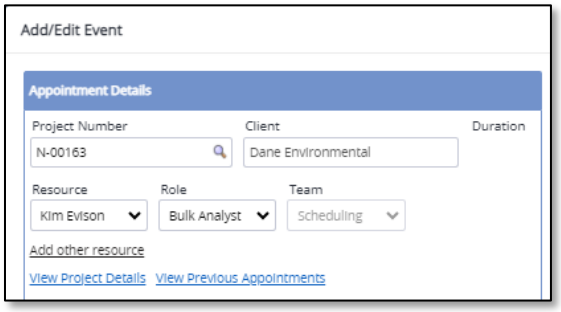
2. Amend any of the displayed details as required.

If you need to check the project details or to see a list of previous appointments made for the project on this appointment then click the links displayed below the **Project Number,** these are:

- View Project Details
- View Previous Appointments.

There is also an “Other appointments at this site” link. This opens as a separate tab in your browser and lists all appointments made for the site, for any project.

If you are looking at an appointment that has been made for more than one person, such as for a meeting, you can see who else has the "same" appointment. The appointments must have the same Project Number, Start Time and End Time.



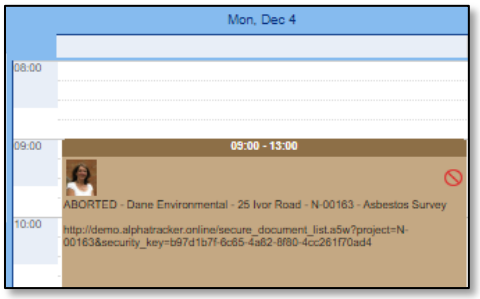
3. Click the **Save** button to save your changes and close the window.

If you have Tracker Dashboard running and email addresses set up for staff, then if you make a late change to an appointment, ie within 24 hours of the appointment’s start time, then an email is sent to the member of staff alerting them to a late change to an appointment for a specified project number.

To abort a project, where the appointment details remain in the diary but it is marked as “ABORTED”, for example if surveyors cannot gain access to a property:

1. Click on the coloured block that represents the booking. The Add/Edit Event window is displayed.
2. Tick the **Incomplete?** Tickbox in the Incomplete Appointments section, enter the date it was aborted, select a reason and enter notes if required, then click **Save**.

The Event Name/Description of the appointment then has a prefix of “ABORTED” and the appointment is displayed with a “No Entry” sign on the calendar so that the appointment is clearly marked as aborted. This is also visible on the appointments on mobile devices.



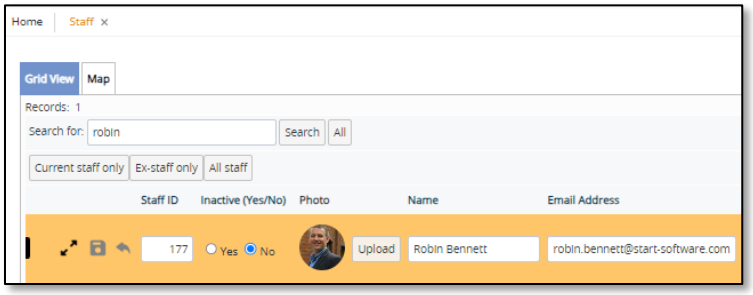
6.3 Showing photos on the calendar

You can display a thumbnail photograph on the Calendar appointments for each person. To include the photo you need only take the photo, save it as a *.jpg file and then upload it.

A setting ("ShowAppointmentPicture") determines whether or not photos are displayed on appointment event details. You can switch it off if you do not wish to see photos.

To upload a photo:

1. Open the General submenu from the Setup menu and select "Staff" to display the Staff screen.
2. Locate the record for the required member of staff by using the **Search for** field at the top of the screen.
3. Click the **Upload** button on the member of staff's record, browse to and select the required photo.



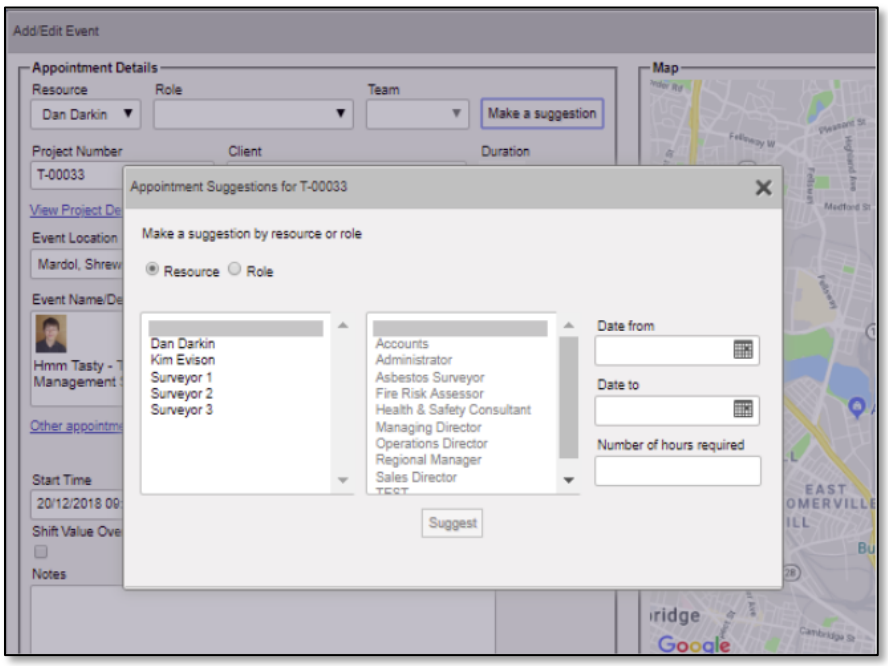
The uploaded photo is displayed on the Staff screen and will be displayed on any subsequent appointments that you make for that person.

6.4 Suggesting available appointment times

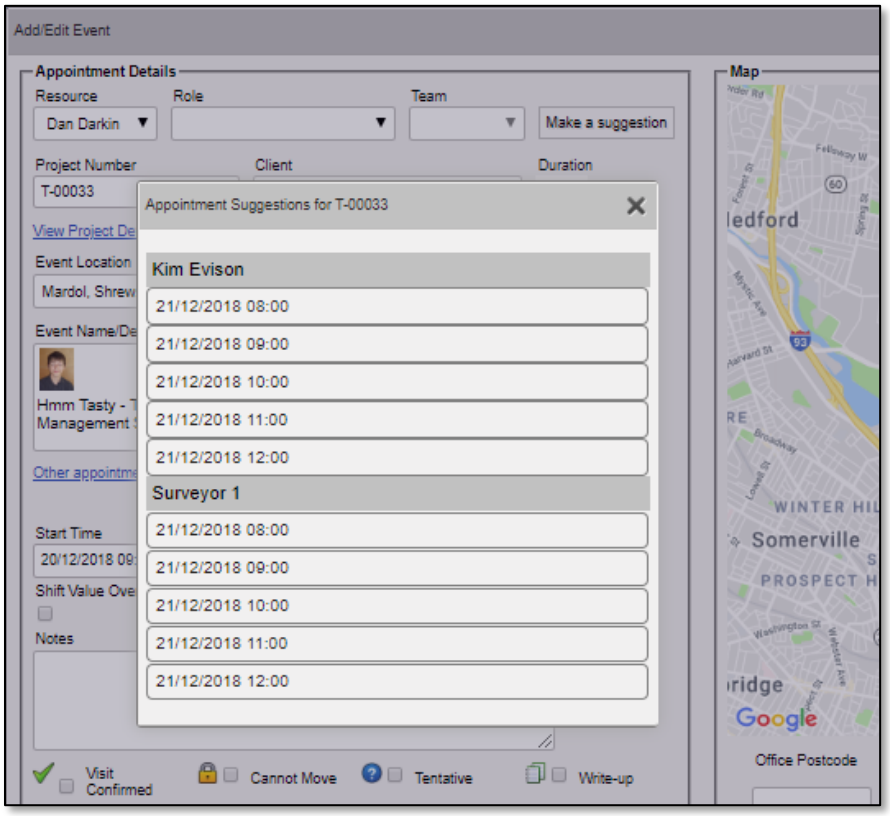
The Diary includes a feature to help you book appointments. The **Make a suggestion** button on the Add/Edit Event screen can suggest who has the appropriate space available in their Diary. This button is also displayed on the Diary Appointments screen from the Project.

To get the Diary to make suggestions:

1. Click and drag on the Calendar to define an appointment and display the Add/Edit Event screen.
2. Select the Project Number for which you want to make an appointment then click the **Make a suggestion** button.



3. Select whether you want to limit who (**Resource**) the suggestions are for or what role (**Role**) they are for. Note that the **Resource** suggestions will be limited to the members of staff currently displayed on the Calendar.
   - If you select **Resource**, the Role list is greyed out and you can click to select the person or people whose calendar is to be searched.
   - If you select **Role**, the Resource list is greyed out and you can click to select the roles you need.
4. Specify the date range you want to search for an appropriate gap, eg if the appointment needs to be booked for tomorrow, select tomorrow's date in both the **Date from** and **Date to** fields.
5. Specify the number of hours needed for the appointment.
6. Click **Suggest**. A list of suggested appointment start times is displayed, grouped by person. Each of the displayed people has a gap in their Diary that can accommodate a booking of the specified number of hours.



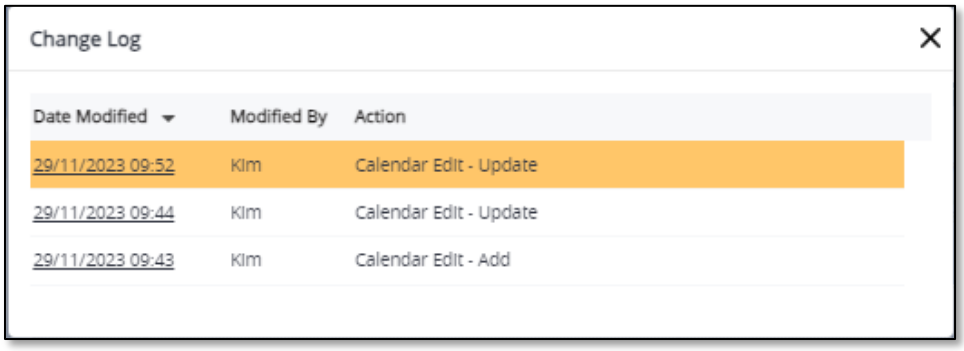
7. Select from the list by clicking on one of the start times. The Add/Edit Event screen is populated with the selected person, date and time details and you can continue to define the appointment by, for example, adding any notes.

Appointment suggestions exclude weekends unless the staff member has had working weekends added on the Staff List. Non-working weekdays are also excluded from the suggestions.

6.5 Checking the calendar change log

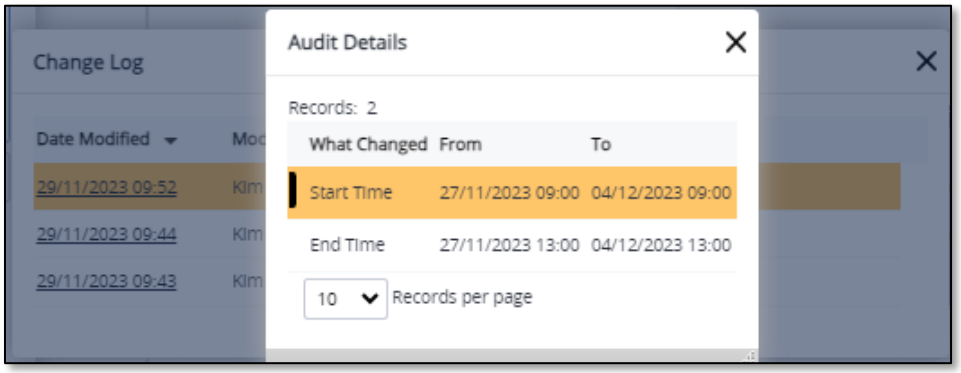
An audit trail has been added to the calendar allowing you to check the history of an appointment – eg who created the appointment, whether it has been edited or moved.

1. Click on the required appointment on the Calendar to open its Add/Edit Event screen.
2. Click the **Audit** button (next to **Save**) to display a list of sessions during which changes were made to the appointment.



This includes the date, time, user and a description of the change.

3. Click the underlined date and time of the session you want to check. The details of the changes made are displayed, showing previous and new values.

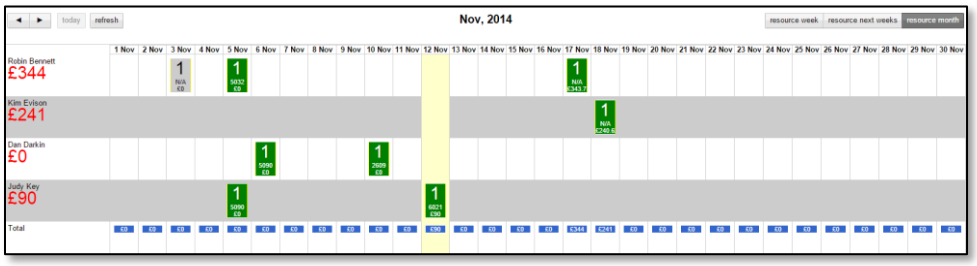


6.6 Using the wallboard

The Wallboard is displayed either from its own menu option or when you click the **Wallboard** button after selecting to display Resources, Groups or Teams. It opens in a separate tab on your browser and shows summary financial information but can also be set to show and total hours rather than values (by using the "WallboardShowAppointmentHours" repository setting).

1. Select the members of staff you want to see on the wallboard by using the “Staff Calendar” menu option, then click the **Wallboard** button.

   The Wallboard opens in a new tab.



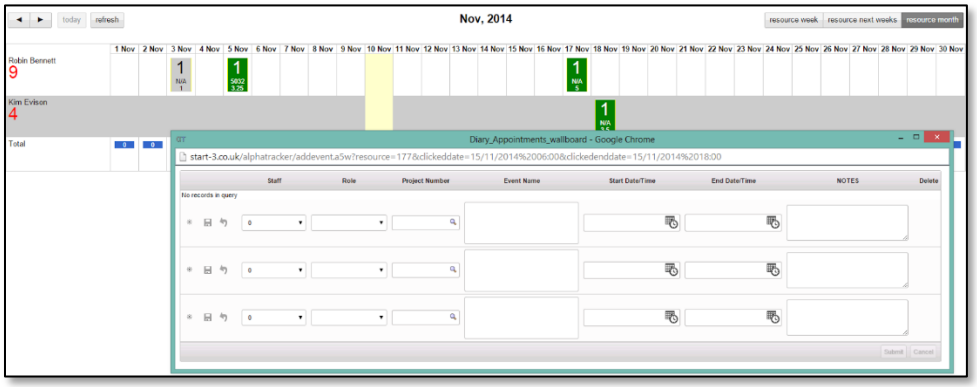
   Summary financial or time details are displayed for the selected resources, with totals at the bottom.

   If you mark an appointment as aborted, and your wallboard is set to display values rather than hours, then the aborted appointment displays with a value of zero on the wallboard.

   You can set different project types to display in different colours so that you can see at a glance what type of project a booking is for. To define the colours set the **Wallboard Colour** field on the Project Types screen.

   If you hover over an appointment on the Wallboard you can see the Project Type, Site and Postcode to help you identify it.

2. Add new appointments directly from the Wallboard by clicking on a cell and completing the appointment details.



If you are using the Financial Wallboard to show the value of appointments, then how fields are set on the project has a bearing on how the value is calculated. In particular, this includes the **Fixed Price** tickbox, the **Estimated Man Days** and the time booked in the calendar.

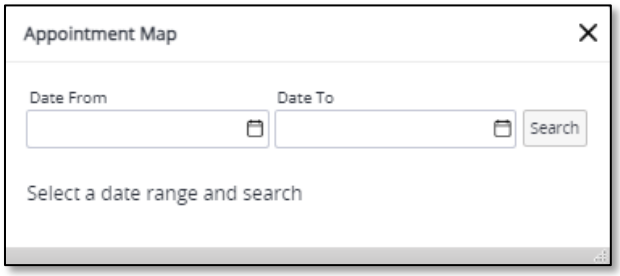
☞ See the discussion on the Financials/Planning information and the Fixed Price tickbox in Section 4.1, Creating a new project, for details on how the value of appointments is calculated.

This means that as you add more appointments for a project, the value of each can change. However, if you are looking back in time at appointment values on the Wallboard, in particular back to the previous month or before, then these values become fixed so as to provide a stable picture. A message on screen indicates when historic information is being displayed that will not change even if projects and appointments are modified.

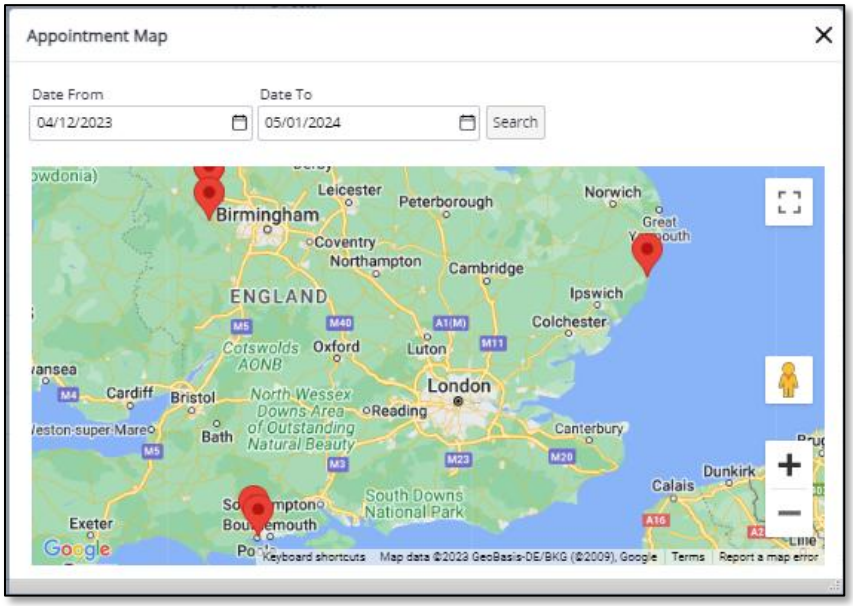
6.7 Mapping projects

You can choose to display appointments on a map when you click the **Map** button after selecting to display Resources, Groups or Teams.

1. Select the members of staff whose appointments you want to map by using the "Staff Calendar" menu option, then click the **Map** button.



2. Enter the date range of the appointments to map and click Search.



6.8 Job allocation and scheduling

Projects may be allocated and scheduled in the diary centrally or they may be allocated to individuals who then organise their own diaries. Alpha Tracker provides a way to track the allocation of projects to individuals. Settings in Alpha Tracker control how allocation works.

> ☞ Refer to Start Software if you would like job allocation settings to be switched on.

6.8.1 Allocating jobs

Projects that are allocated have the name of the person to whom they are allocated in the **Project Manager** or **Consultant** field on the project.

> *To allocate jobs you must be in the Resource User Group which gives you an additional menu option allowing a special view of open projects – the Allocation Dashboard.*

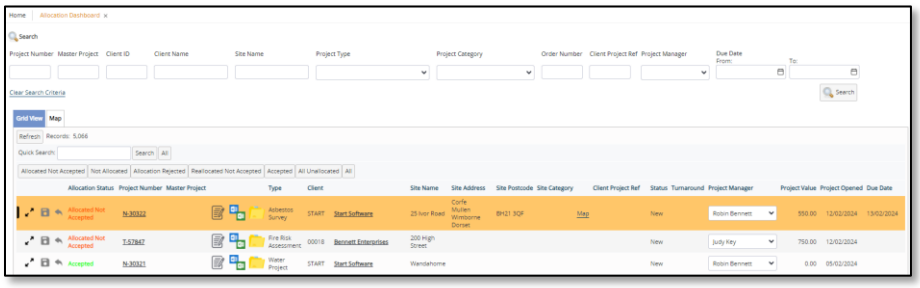
To allocate and monitor the allocation of jobs:

1. Create projects as normal in Alpha Tracker.

   Your system may be set so that an email is sent on creation of new projects. This might, for example, be sent to the resourcing manager(s) and/or to the logged in user.

   When projects are created they are automatically given an allocation status of “Not Allocated” if no Project Manager or Consultant is assigned, or “Allocated Not Accepted” if a Project Manager or Consultant is assigned.

2. Open the Diary submenu from the Resources menu and select “Allocation Dashboard” to display the Allocation Dashboard.



3. Enter any search criteria at the top of the screen and click **Search** to filter the list of open projects. You can also use the status buttons to filter the list quickly by allocation status, as well as sorting the list by clicking on column headings. Enter search criteria in the **Quick Search** box to perform a quick search across multiple fields.

> ☞ Refer to 1.4, Searching in Alpha Tracker, for further details on search criteria that you can use in Alpha Tracker search fields.

In addition to the usual features, this screen allows you to:

- search by **Location** – searching all parts of the Site name, Address and Postcode
- search by Project Category as well as Project Type
- search by Project Manager or Consultant
- search by **Due Date From** and **To**
- search by Allocation Status
- see the **Allocation Status** of each project at a glance:
  - Not Allocated (red)
  - Allocated Not Accepted OR Reallocated Not Accepted (amber)
  - Allocation Rejected (yellow)
  - Accepted (green).

This means that you can sort and filter the list in a number of ways to monitor the allocation status of projects.

4. To allocate projects individually:
   - Locate the row showing the project you want to allocate.
   - Set the **Project Manager** or **Consultant** field to show the person to whom you want to allocate the project.
   - Click **Submit** and confirm the changes to save the allocation.
   - The red "Not Allocated" status changes to amber "Allocated Not Accepted".

   An email is sent to the Project Manager/Consultant with a link to the job summary and the general site details.

6.8.2 Monitoring jobs you have allocated

Two screens let you monitor the status of jobs that you have allocated.

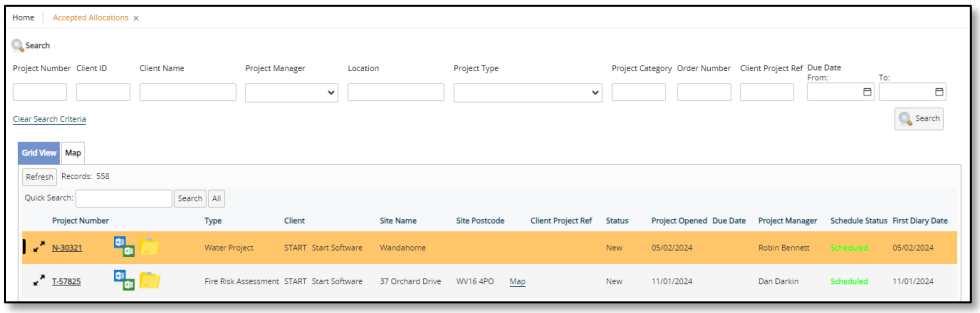
The first is the Allocation Dashboard, see above, that allows you to allocate projects and sort and filter the list in a number of ways to monitor the allocation status of projects.

The second is the Accepted Allocations screen. This screen lets you monitor the status of jobs that you have allocated and that have been accepted. It gives you a view of the Schedule Status of a project, for example whether it has been booked into the diary yet.

To work with these allocation screens you must be in the Resource User Group.

To monitor accepted projects:

1. Open the Diary submenu from the Resources menu and select "Accepted Allocations".



All open, ie not completed and closed, and accepted projects are listed. The schedule status is colour-coded as follows:

- Unscheduled
- Provisionally Scheduled
- Scheduled.

2. Use the search features to filter the list as required.

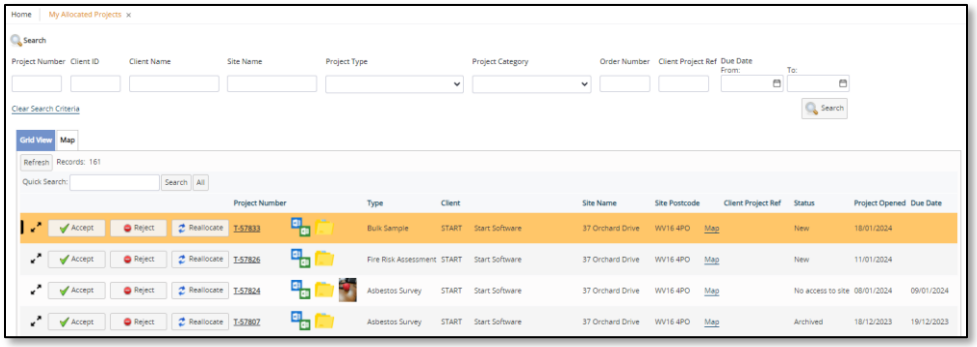
   You can access the project details by clicking the underlined links.

6.8.3 Viewing and scheduling jobs allocated to you

Any jobs allocated to you will appear in your My Allocated Projects screen in Alpha Tracker. You can filter and sort this list to work with the projects allocated to you, and then accept, reject or reallocate these projects (depending on your permissions). Once you have accepted, rejected or reallocated a job it no longer appears on this list; accepted jobs can then be seen on your Projects Not In My Diary list, ready for you to enter into your diary.

You must be in the Project Manager Group to see this functionality.

1. Select "My Allocated Projects" from the Projects menu. All open projects that have been allocated to you are listed.



2. Accept, reject or reallocate projects by clicking the appropriate button on a row.

Please note that some users do not have the permissions necessary to reallocate projects.

If you click:

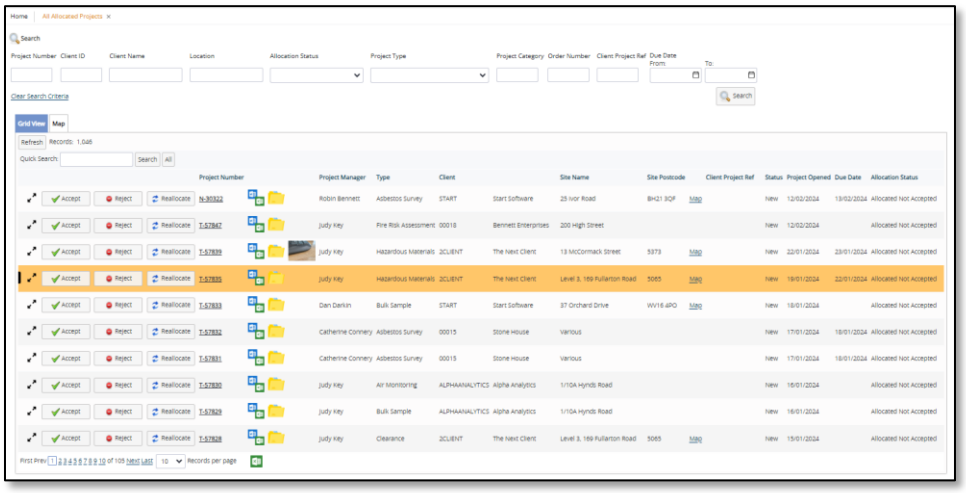
- **Accept** – Once you have confirmed your acceptance the project will be removed from this list and subsequently appear on the list of accepted projects ready for you to book into your diary.
- **Reject** – You must specify a reason for rejecting the project. An email notification is automatically sent to certain members of the Resource Group advising them of rejected project(s). The project will be removed from this list and be available for re-allocation by the Resource Group.
- **Reallocate** – You must specify a reason for rejecting the project and select the name of the Project Manager or Consultant to whom you are reallocating the project. The project will be removed from your list and appear in the same list for the selected Project Manager or Consultant.

6.8.4 Accepting projects on another's behalf

There is one option on the Resource menu that provides an overview of the allocation process and permits a user to accept projects on another's behalf. This is the "All Allocated Projects" menu option. It is only available to users in the Superuser or Administrator user groups.

To accept projects on another's behalf:

1. Select "All Allocated Projects" from the Projects menu.



2. Accept, reject or reallocate projects by clicking the appropriate button on a row.

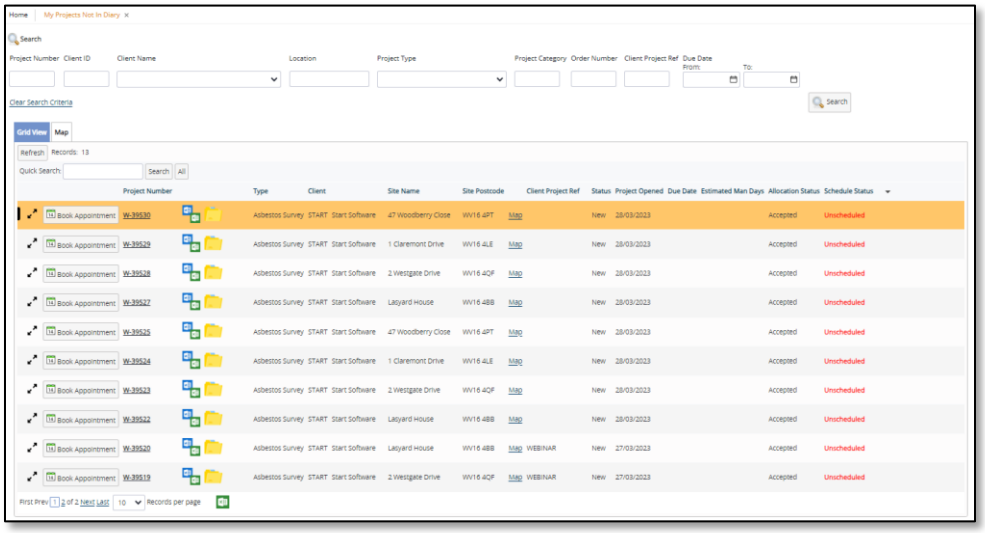
6.8.5 Viewing your unscheduled projects

Any projects that you have accepted but not yet booked into your diary are displayed in a separate grid on your My Projects Not In Diary screen. These projects are all waiting to be scheduled in your diary. By clicking a button you can access the calendar and book the projects in. Projects booked into your diary will no longer appear in this list.

You must be in the Project Manager Group to see this functionality.

To schedule an accepted project.

1. Select “My Projects Not In Diary” from the Projects menu. All open, accepted projects that do not have any entries in your diary are displayed.



2. Review the list and book appointments as required.
3. To book an appointment:
   - Click the **Book Appointment** button on the appropriate row to open your Calendar.
   - Review your existing appointments and then create an appointment for this project by clicking and dragging on the required day and time.
   - Complete the details on the Add/Edit Event window to define the project – for example you may need to:
     - refine the appointment times
     - add any **Notes**
     - tick the Visit Confirmed, Cannot Move or Tentative tickboxes.
   - Click **Update** to save the appointment.

> ☞ Refer to steps in 6.1, Scheduling a new project, for more detailed instructions on how to work with the Calendar.

4. Return to the My Projects Not In Diary screen and review your remaining projects.

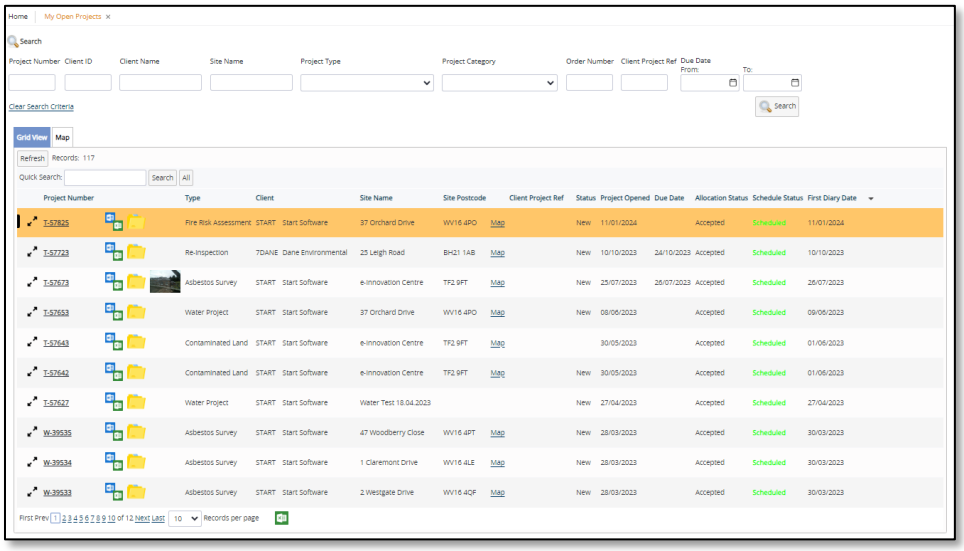
6.8.6 Checking the scheduled status of your accepted jobs

You can check the scheduled status of all accepted projects to get an overview of project status.

> *You must be in the Project Manager Group to see this functionality.*

To check the scheduled status:

1. Select “My Open Projects” from the Projects menu.



All open, ie not completed and closed, and accepted projects are listed. The schedule status is colour-coded as follows:

- Unscheduled
- Provisionally Scheduled
- Scheduled.

2. Use the search features to filter the list as required.

> ☞ Refer to 1.4, Searching in Alpha Tracker, for further details on search criteria that you can use in Alpha Tracker search fields.

You can access the project details by clicking the underlined links.

6.9 Scheduling weekend teams

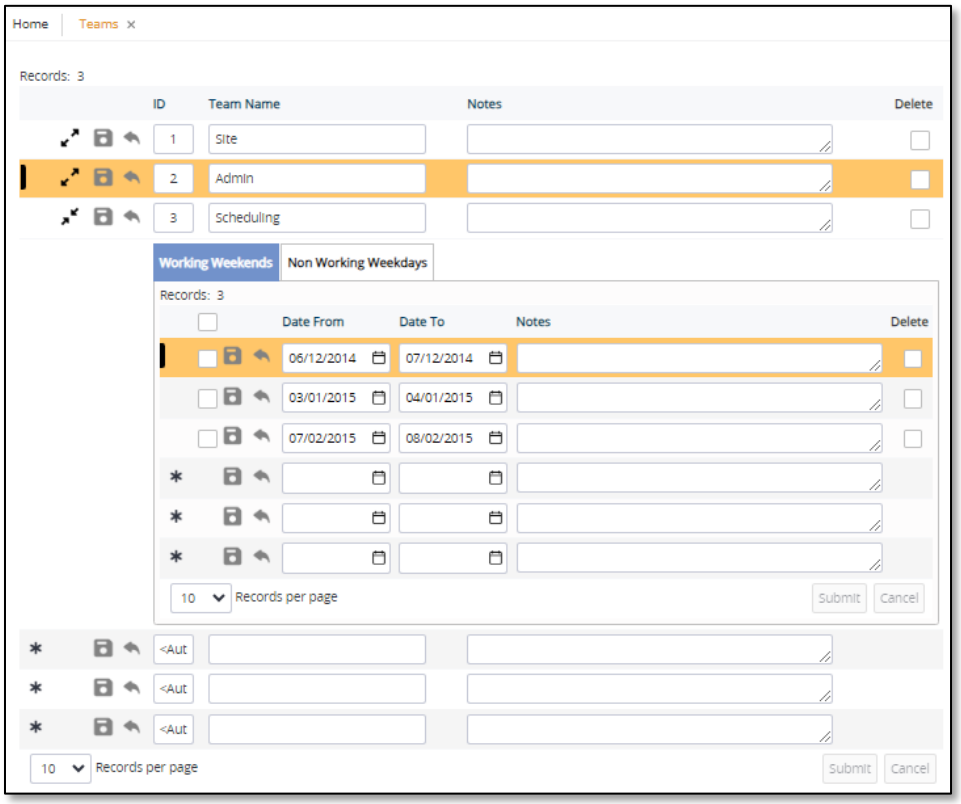
Alpha Tracker facilitates the organisation of staff into teams and the scheduling of weekend rotas for these teams. You need to:

- create the teams
- define their working weekends
- assign staff to each team.

If you attempt to schedule an appointment in the Calendar for a team member on a non-working weekend / non-working weekday then a warning is displayed.

1. Open the General submenu from the Setup menu and select “Teams” to display the Teams screen and create the individual teams.

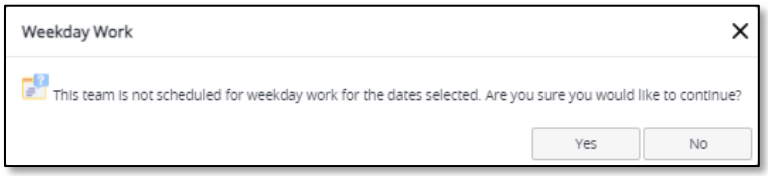
2. Define the working weekends and non-working weekdays for each team by clicking on the row expander button next to a team.



The two tabs let you define the weekends on which the team is scheduled to work and any individual weekdays when the team is not scheduled to work.

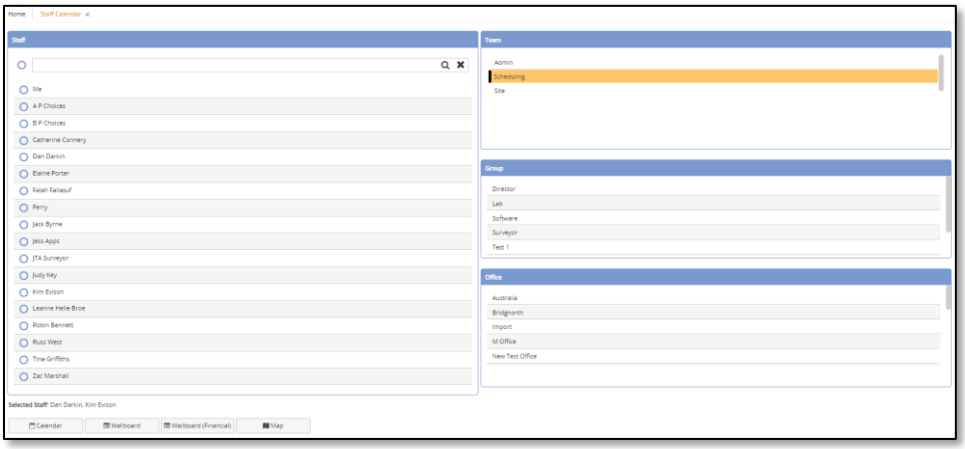
3. Open the General submenu from the Setup menu and select “Staff” and assign members of staff to each team by using the **Team** field on the Staff screen.

4. On the Calendar make appointments as normal. The Add/Edit Event screen on which you define an appointment displays the team name if the selected member of staff belongs to a team. If you try to make an appointment for a member of staff whose team is not scheduled to be working, a warning message is displayed.



You are not prevented from making the appointment.

5. To help you view appointments for a Team, you can use the “Staff Calendar” menu option from the Diary submenu of the Resources menu and select the team. Click the Calendar or Wallboard button to display the appointments for the team.



6.10 Map scheduling

Map Scheduling is a feature specifically designed to help you schedule site visits with the aid of a map. This feature is particularly useful for site visits grouped together as sub-projects under a master project, such as for domestic housing projects. From one screen, it helps you:

- create sub-projects for the sites to be included in the batch to be scheduled
- see the sub-projects in a list and on a map
- schedule appointments
- route the appointments and optimise the route.
- send SMS messages to the sub-project site contacts.

The sites of projects to be scheduled in the Map Scheduler must be geocoded (have their longitude and latitude recorded) so that they can be plotted on the map and the routing features can be used.

To send SMS messages you will require a Twilio account. Contact Start Software if you need further details on setting up a Twilio account.

The Map Scheduler is fully linked to the Staff Training Matrix, if it is in use, preventing the addition of appointments for unqualified staff.

6.10.1 Creating the sub-projects

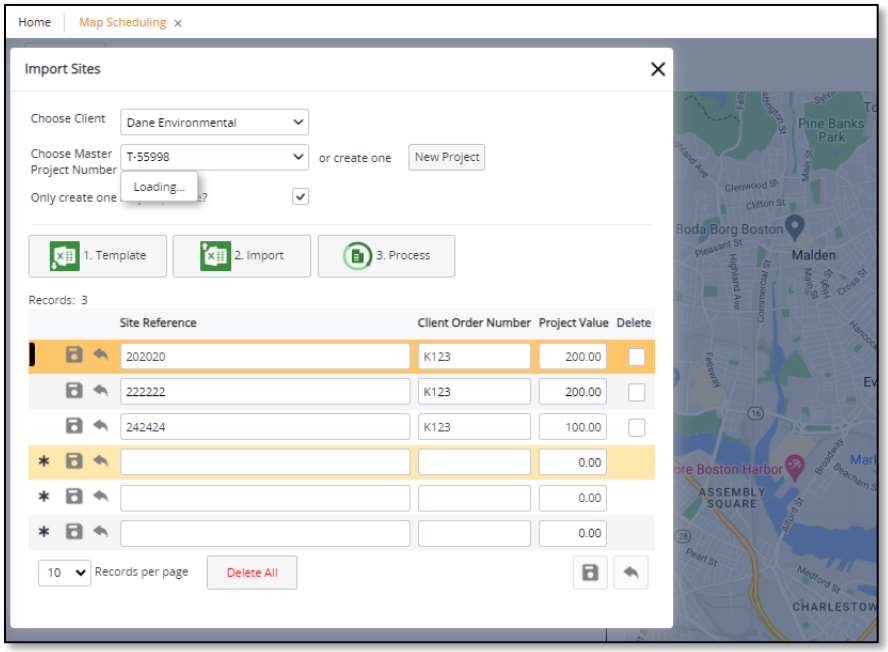
The Map Scheduler includes a Site Importer button that lets you specify the site visits you want to schedule. Each of the sites must already exist in Alpha Tracker. It is also helpful to create the master project in advance.

You could, for example, import the full list of sites that will be included in the programme of work (by using the Site Import menu option, from the Import/Export section of the Setup menu) so that they exist as sites in Alpha Tracker, and then use the Site Importer button to create sub-projects for those sites you are ready to schedule. The sub-projects will be linked to a master project that defines the programme of work.

☞ Refer to Section 4.4, Grouping projects together, for further information on master projects.

To specify the sites you are going to be working on next and create a sub-project for each of them:

1. Select “Map Scheduling” from the Diary section on the Resources menu.
2. Click the Site Importer button in the top left-hand corner.
3. Select the client, and then the master project for which you are specifying sites.



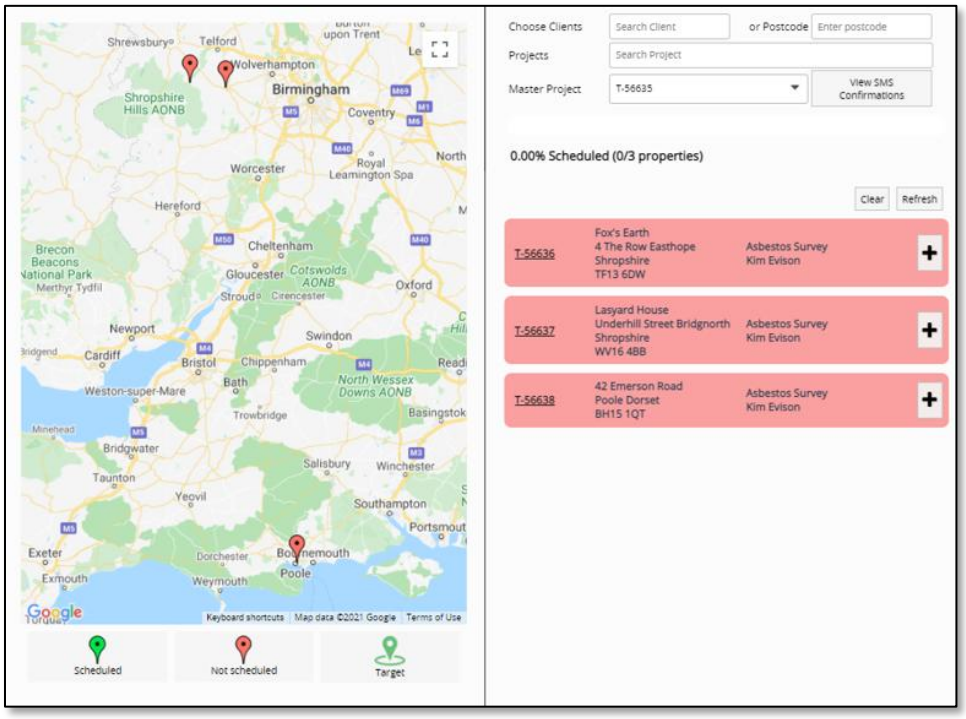
4. Import the list of sites by following the standard import procedure:
   - **1. Template**: first download the template spreadsheet and fill this in with the list of sites (only the Site Reference/UPRN is required)
   - **2. Import:** upload the completed spreadsheet to populate the screen with the list of sites
   - **3. Process:** check the list is correct then click the 3. Process button to create sub-projects for each of the listed sites. These sub-projects are linked to the specified master and have the same Project Type.

   A message informs you when the processing is complete.

6.10.2 Displaying the sub-projects in a list and on a map

On the right-hand side of the Map Scheduler you can display the list of sub-projects in your master project and see their locations on a map.

1. Select your master project(s) from the dropdown of open master projects. The list of sub-projects is displayed (red ones are unscheduled) and the site locations are plotted on the map.

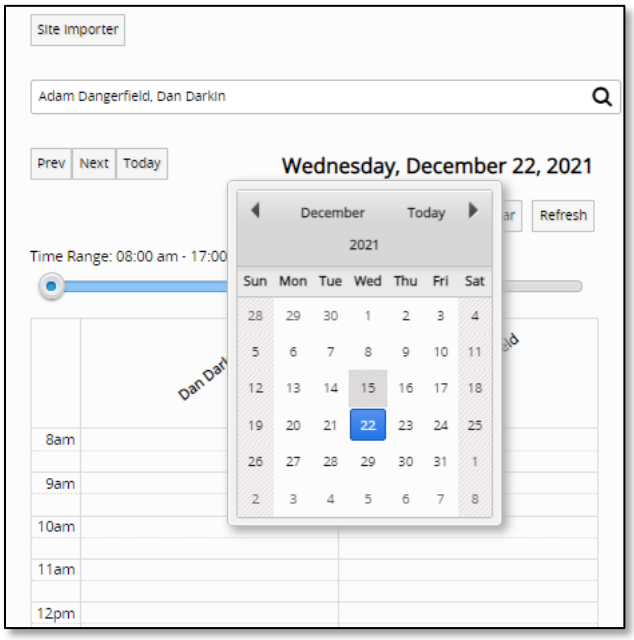


2. Obtain details on projects or sites as follows:
   - click the project number link on a sub-project to display its details on the Project screen
   - hover on a map pin to see the sub-project number, site name and address
   - click on a map pin and then click on Select to highlight the matching sub-project in the list
   - click on the exclamation mark icon on the project, if present, to display contact details and any notes if present in the **Project Notes**, **Project Special Instructions** and **Site Notes** fields.
3. Refer to the map to assess locations and distances and work out how you want to schedule appointments for the sub-projects.

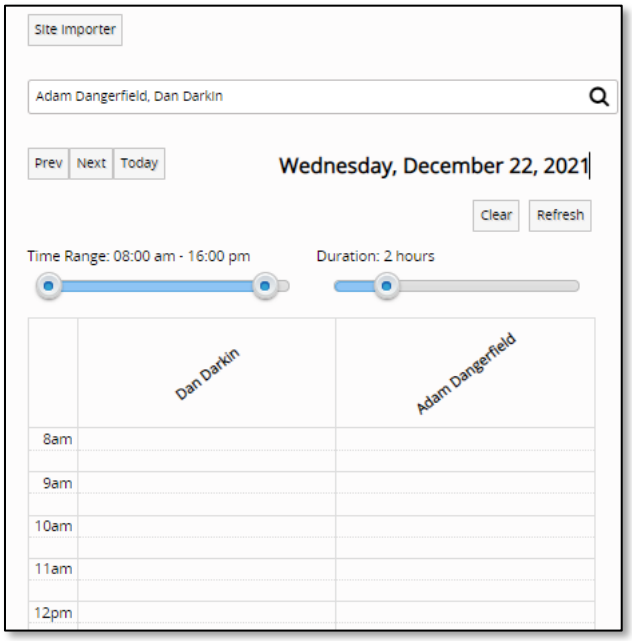
6.10.3 Schedule appointments

Select the member(s) of staff for whom you are going to book appointments, and set the parameters for the appointments you want the Map Scheduler to make. Then simply select the sub-projects in the order that you want them to be scheduled.

1. On the left-hand side of the screen, click in the Search box and select one or two members of staff, or a small team, to load their diaries.
2. Set the date for which you want to make appointments. You can use the Previous, Next and Today buttons, or you can click on the displayed date to pop up a date picker.



3. Set the parameters for the new appointments by using the sliders to define:
   - the length of the working day
   - the length of each appointment.

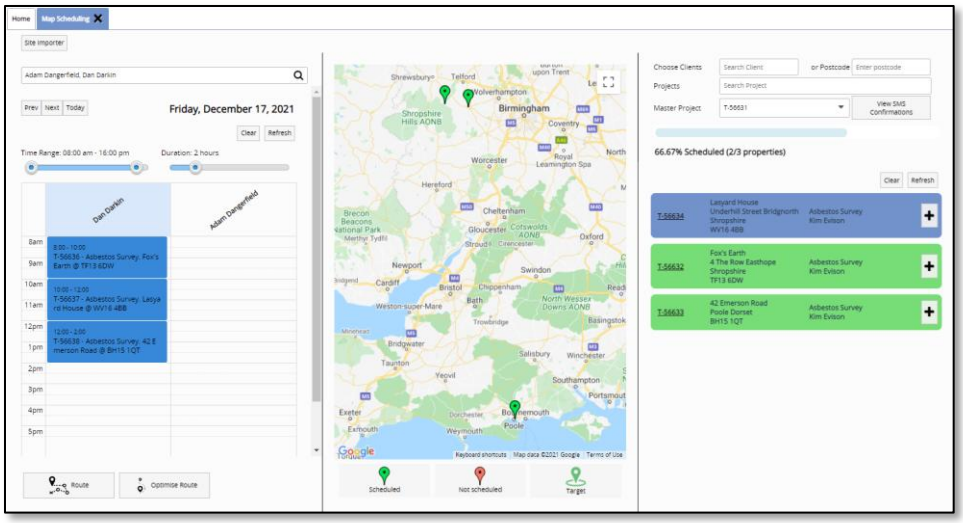


4. If you have multiple members of staff's diaries displayed, select who you want to schedule appointments for by clicking on their name to highlight it.

5. Click the plus button on a sub-project to book it into the first available slot in the selected diary.

   Scheduled sub-projects turn green and move to the bottom of the list. Their map pin also turns green. The diary section fills with appointments.

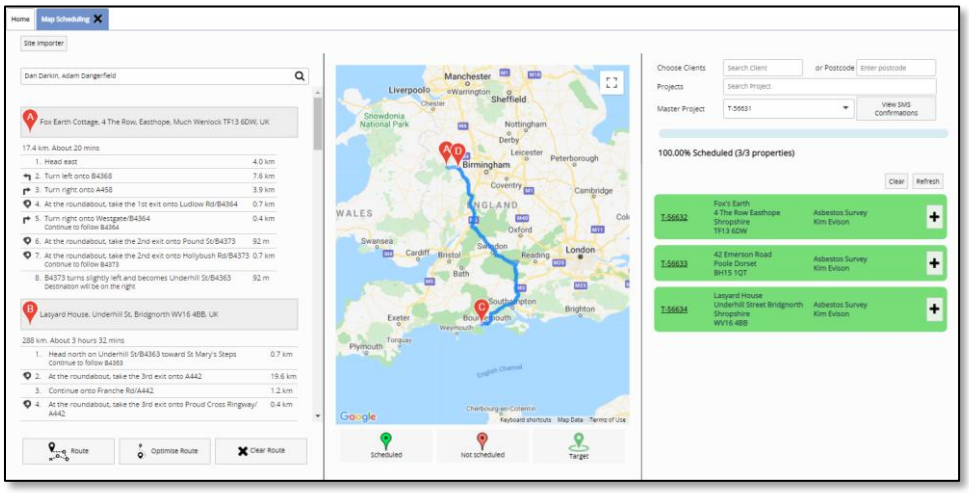
6. Continue booking appointments by clicking the plus buttons on the sub-projects in the order that you want to schedule them.



6.10.4 Routing the appointments

When you have scheduled appointments, you can display the proposed route between the sites on the map to check that it is sensible. You can also get Google to display an optimised route to compare against your route, and edit the diary appointments if necessary.

1. Click the Route button below the diaried appointments to plot the proposed route between the sites, in the order they have been scheduled. The directions are also displayed in place of the diary



2. Click Clear Route to return to the diaried appointments.
3. Click Optimise Route to see the route and directions recommended by Google.
4. If you want to amend an appointment, eg to change its time, display the diaried appointments, then double click on the appointment to display the Appointment Details screen. Change the times as necessary and save the appointment.

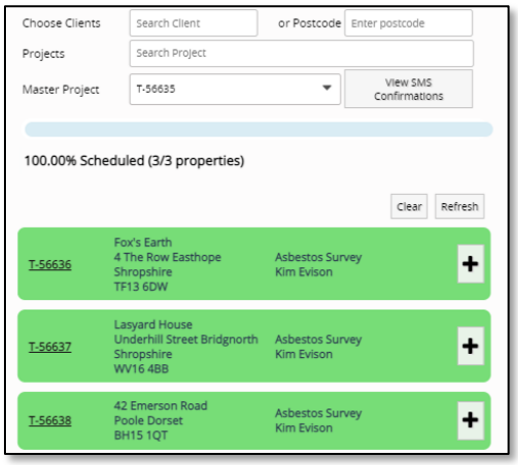
6.10.5 Send SMS messages to the site contacts

When you are happy with the appointments and routes, you can choose to send SMS (text) messages to the site contacts, informing them of the appointments that have been scheduled.

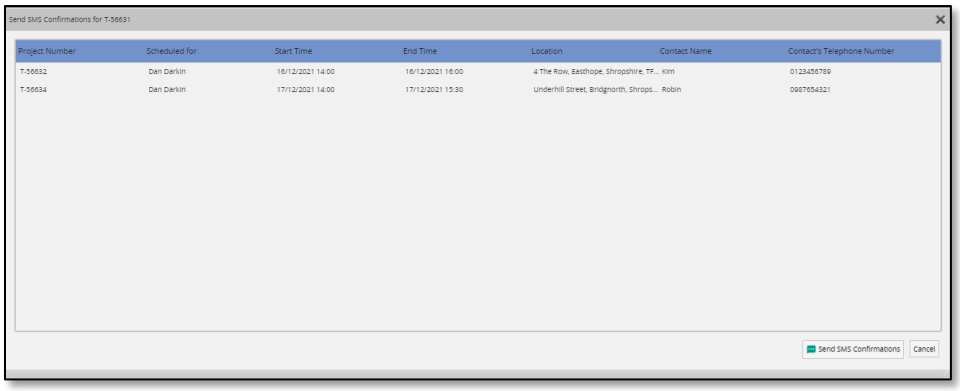
Clicking the View SMS Confirmations button displays the list of messages that will be sent. An entry is added to the list for each scheduled appointment for sub-projects in the selected master project, if an SMS has not already been sent for that appointment. When you confirm the list, the SMS messages are sent.

To send SMS messages you will require a Twilio account. Contact Start Software if you need further details on setting up a Twilio account.

1. Ensure the required master project number is displayed in the top right-hand corner of the screen.



2. Click the View SMS Confirmations button.



3. Check the list. You can return to the projects or diaries to make amendments to contacts or appointments as necessary. When you are happy the list is correct, click the Send SMS Confirmations button.

   SMS messages are sent to the site contacts listed. The SMS messages are configurable using settings, but usually contain the appointment details and a link to confirm, change or decline the appointment.

4. The contact clicks the link in the SMS message to display details of the appointment and they are presented with three options:

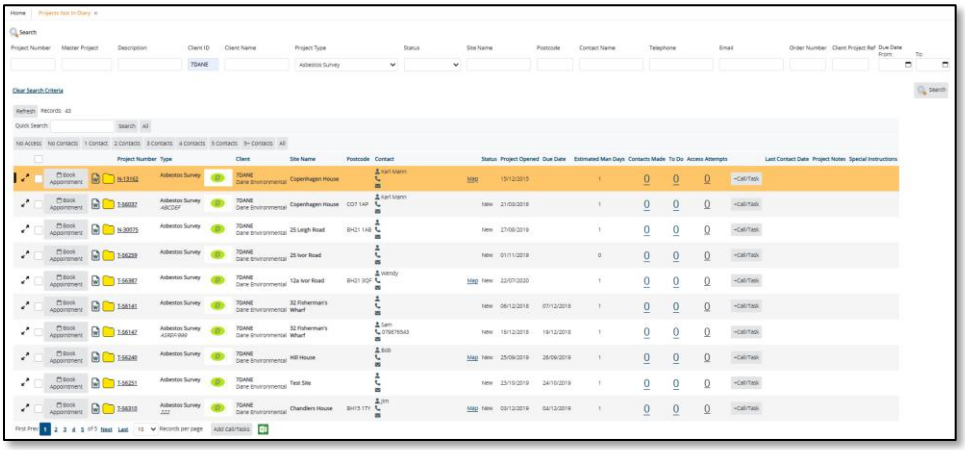
5. Depending on the reply received from the contact, the appointment is confirmed, aborted or rearranged. A rearranged appointment is marked as tentative as you will need to check and confirm it. All appointments where SMS messages have been sent are marked with a new icon:

6.11 Identifying projects not scheduled

The Projects Not In Diary screen provides an easy way to identify open projects where you do not have an appointment scheduled in the diary. It is particularly useful for consultancies who are booking and re-booking large numbers of appointments as you can clearly see the number of contacts made and planned regarding a project.

To identify projects not scheduled in the diary:

1. Select “Projects Not In Diary” from the Projects menu. All projects that need to be scheduled in the diary are listed, including those where a previous appointment existed but the surveyor could not gain access to the site (ie the Location 000 record was marked as No Access).



The screen includes details to help you make an appointment, such as Site Name, Site Contact Name, Phone and Email, and Project Notes and Special Instructions to provide further information.

2. Use the search fields at the top of the screen to filter the projects. For example, you might want to display projects for one client only, or for one master project only.

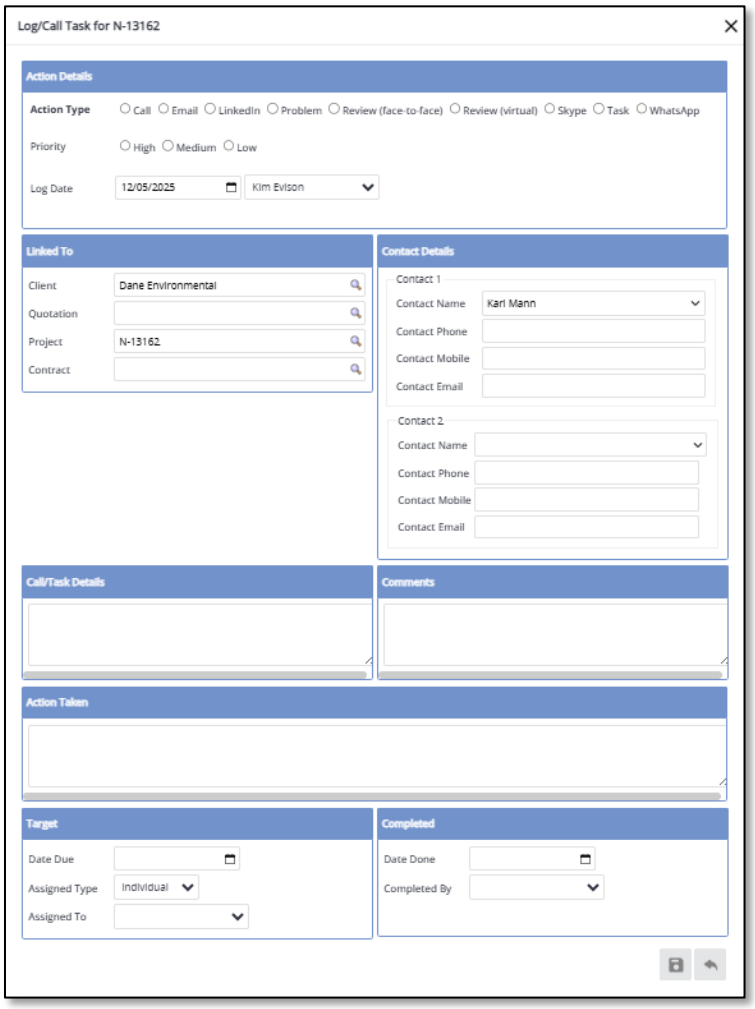
3. Use the pre-set filter buttons to display projects that:

- are marked as No Access
- have had no contacts made
- have had one, two, three, four, five or more than five contacts made.

4. Check on previous contact by clicking on the underlined number in the Contacts Made and To Do columns. The information displays in a window in the middle of the screen.

5. Check on previous attempts to complete an appointment by clicking on the underlined number in the “Access Attempts” column. The number is the count of the aborted appointments for the project. Clicking on the number lists the aborted appointments and their details.

6. If you make contact but are unsuccessful in booking an appointment, log the attempt by clicking the +Call/Task button.

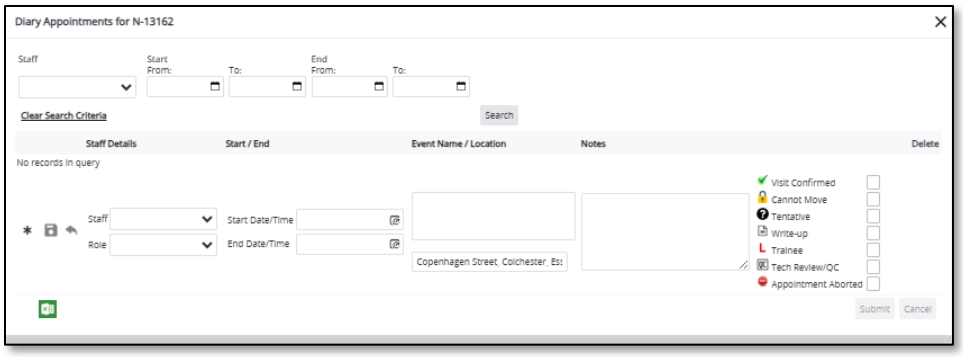


Fill in at least the **Action Type**, **Contact Details**, **Action Taken** and **Completed** details.

To help with multiple contacts with clients/tenants, you can also log contacts made on multiple projects at once. Use the checkboxes on the right of the screen to select the projects to which you want to record the same contact information, then click the Add Call/Tasks button that is displayed at the bottom of the screen.

7. To schedule an appointment, click the Book Appointment button, enter the appointment details and save them.

8. Click the Refresh button to refresh the list so that only projects without diary appointments are displayed.



*There is a tickbox on the Project Types screen called **No Diary Appointments**. If this box is ticked, then projects of this type are excluded from the Projects Not In Diary screen.*

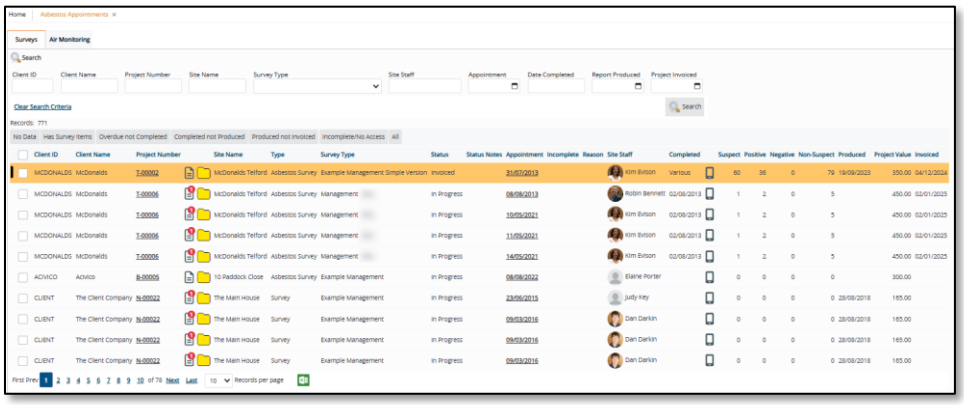
6.12 Managing asbestos appointments

Appointments for Asbestos Survey projects can be monitored and managed by using the Asbestos Appointments screen. This screen helps you keep track of site work. You can, for example, search for appointments scheduled for a particular date, for a specific member of staff, see whether data has been synchronised and received in the project, and how many items have been recorded. 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. For example, if you filtered the display to show all the appointments for yesterday and then used the No Data button, you would get a list showing which surveyors had not sent in their survey data for yesterday. You could do a similar search to find all appointments that were marked as incomplete or not accessed.

To use this screen:

1. Select “Asbestos Appointments” from the Asbestos section on the Resources menu. All appointments for open projects are displayed.



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.
   - **Site Staff** tells you which member of staff the appointment was for
   - **Incomplete Reason** indicates whether there was no access to site
   - **Completed** indicates whether data has been sent into the project, the dates that data was sent into the project are displayed - if there are more than three dates then “Various” is displayed
   - the number columns give a breakdown of the suspect, positive, negative and non-suspect items.
3. Use the pre-set filter buttons to apply filters to show appointments at a particular status. For example:
   - **No Data** – to find appointments where no data has yet been synchronised
   - **Has Survey Items** - to find those where some survey items have been recorded
   - **Overdue not Completed** – to find those where the appointment is in the past and no data has been received in the project
   - **Completed not Produced** – to find those where the site 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
   - **Incomplete/No Access** – to find those appointments marked as incomplete, including where no access was gained.
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 Survey Data screen.

7. CARRYING OUT THE SURVEY

This section contains an outline of how to record survey details on your mobile device using Tracker Mobile.

It also describes how to view, check and edit in Alpha Tracker the survey details that have been sent in by your surveyors using Tracker Mobile. When the surveyor has sent in the results of a survey, these details are immediately available for checking and editing in Alpha Tracker.

7.1 Recording survey results

All open projects are automatically downloaded to your mobile device the next time you synchronise, usually on a 10-minute cycle.

The process of recording the results of a survey on Tracker Mobile involves the following steps:

- start Tracker Mobile
- record a survey item
- check items or revise entries
- synchronise.

To use Tracker Mobile to record survey results:

1. Start Mobile Data Studio on your phone.

2. Tap on the Tracker Mobile project:

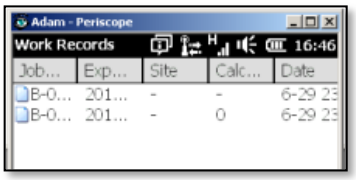
   You are now ready to start the survey.

3. Tap **New Session**, complete the survey information then tap **Menu** and select *Finish Session*.

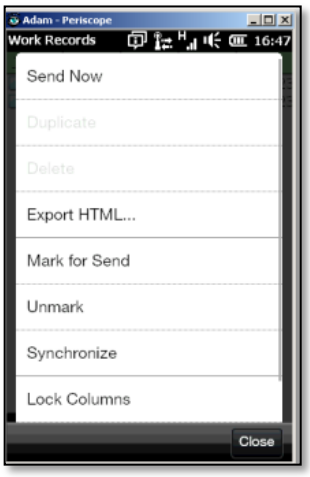
> *Tip: You can enter up to eight non-suspect items per sheet (session) and a maximum of one suspect item. For more non-suspect or suspect items in a room, create additional sheets (sessions) for the same room.*

4. Once you have recorded items, they appear in a list which is displayed after you tap on *Finish*. You can review or edit any item on the list by simply tapping on it to select the item.

5. To send the data back in:
   - from the “list” screen



   - tap **Menu** then select *Mark for Send*



   - tap **Menu** again and select *Synchronise*.

Two checks let you confirm the data you have sent in:

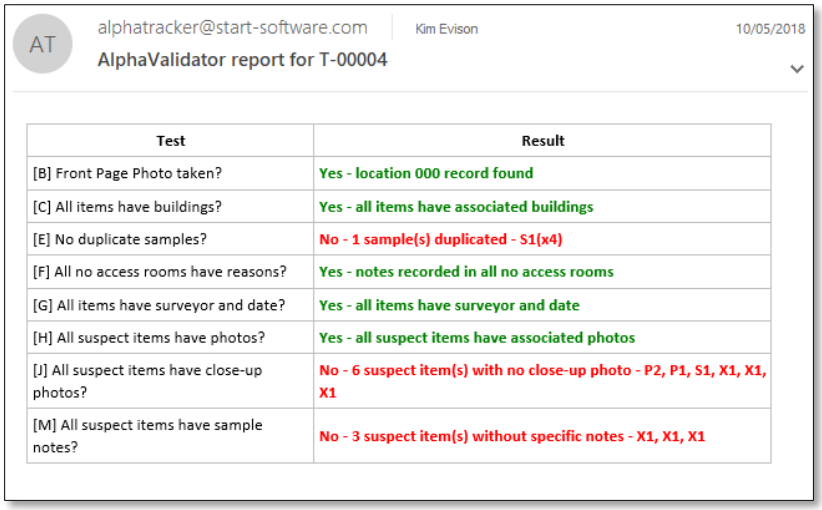
- The first is a confirmation email that you receive summarising the number of items sent in on a project. You will always receive this email and are advised to keep it in case of queries regarding the survey data. For example:

From: Alpha Tracker
Sent: 24 June 2014 15:27
To: Kim Evison
Subject: Tracker Mobile data received for A-00002

Project Number	A-00002
Surveyor	Dan Darkin
Sessions	27
Site Name	Lasyard House
Unit ID	Judy
Cover Sheet(s)	4
Samples [S]	8
Presumed [P]	3
Strongly Presumed [SP]	4
Cross-Referenced [X]	1
No Access Areas	6
Photos	23
Close-up Photos	13
Samples	*2 [photo] 1 [photo] 3 [photo] 1 [photo] 2 [photo] 1 [photo] 2 [photo] [photo]*
Duplicated Samples	

Please keep this email in case of queries about this survey data. Contact your Tracker/Alpha Tracker administrator if you believe that the information shown here is inaccurate

- The second is the results of AlphaValidator tests run on the data to test for completeness. AlphaValidator must be enabled on your system for this to be sent. A subset of the tests enabled on your system is run. The email shows the tests applied listed in the left-hand column and the results in the right-hand column. All "passes" are displayed in green and "failures" in red. For example:



Test	Result
[B] Front Page Photo taken?	Yes - location 000 record found
[C] All items have buildings?	Yes - all items have associated buildings
[E] No duplicate samples?	No - 1 sample(s) duplicated - S1(x4)
[F] All no access rooms have reasons?	Yes - notes recorded in all no access rooms
[G] All items have surveyor and date?	Yes - all items have surveyor and date
[H] All suspect items have photos?	Yes - all suspect items have associated photos
[J] All suspect items have close-up photos?	No - 6 suspect item(s) with no close-up photo - P2, P1, S1, X1, X1, X1
[M] All suspect items have sample notes?	No - 3 suspect item(s) without specific notes - X1, X1, X1

7.2 Reviewing survey data

To review the survey details sent in by a surveyor:

1. Search for the survey project in Alpha Tracker.

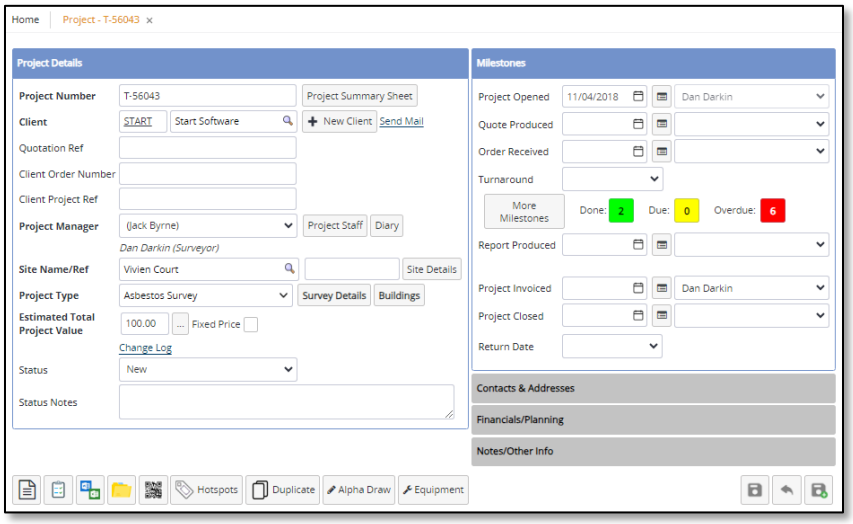
   You can search for the project in a number of ways:

   - entering a key word, project number or client reference in the quick search field at the top of the Projects menu
   - selecting the "Project List" menu option and entering search criteria to find the required project
   - selecting one of the "Open Projects" menu options which let you list projects in a number of ways.

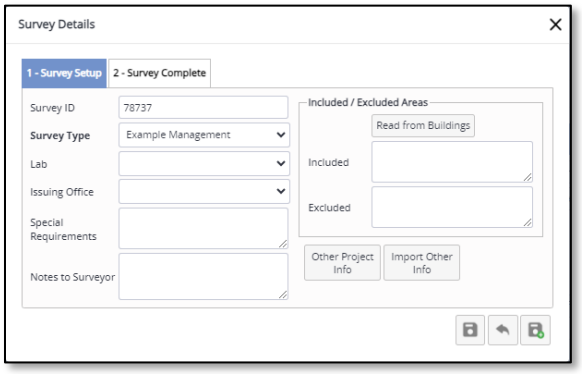
> ☞ Refer to 1.4, Searching in Alpha Tracker, for further details on search criteria that you can use in Alpha Tracker search fields.

2. Click on the required project number to open the survey project.

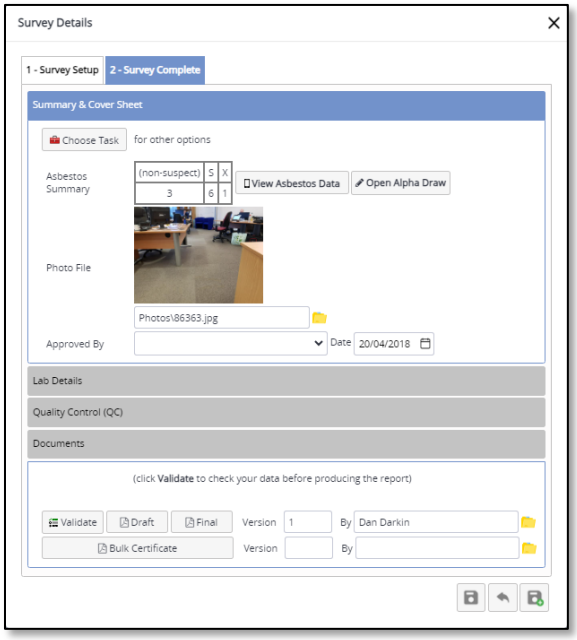
> *Note that you can jump straight to the Survey Data screen by clicking the mobile phone icon on the Project List.*



3. Click the **Survey Details** button to open the Survey Details screen.

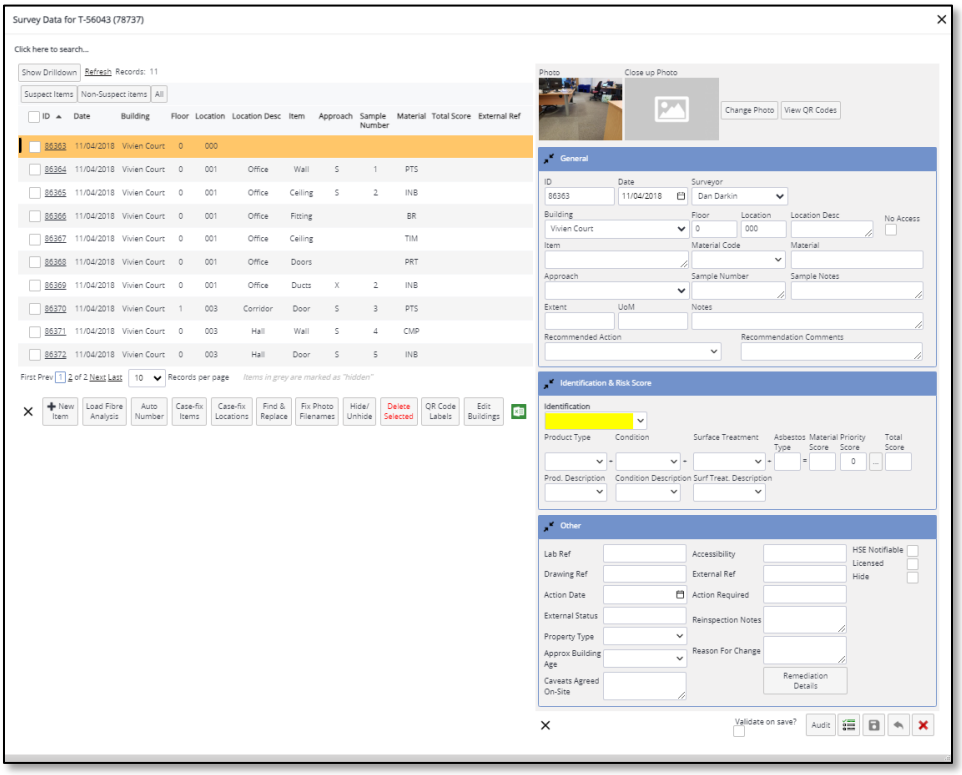


4. You will now be working with the second tab on the Survey Details screen, "2 – Survey Complete", so click this tab at the top of the screen.



A summary of the data is displayed and also the front-page photo if one was taken under Location 000.

5. Click the **View Asbestos Data** button to display the survey data captured for the project.



There is a row for each item in the survey on the left-hand side. Click on a row to display its details on the right-hand side. The information displayed includes the following:

- The location is indicated by a floor number, followed by the location number (room) and then a brief description of the location. The floor number should be 1, 2, 3 etc, for the floors above ground, 0 for the ground floor, -1 for the basement and so on.

  The location number should be a sequential number, starting from 01 within each floor, or as directed by a floor plan, office numbering or other such scheme.

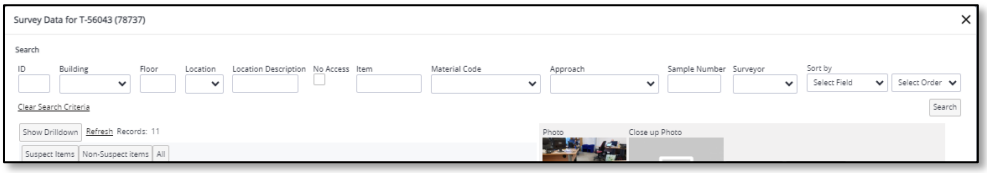
  The description should be a brief text description, such as Office or Reception.
- The **No Access** tick box is only ticked if no access could be gained to the location, due for example to a locked door, physical difficulty in gaining access or a Health & Safety issue.

  If this is ticked, the item, material and risk scores etc should be left blank.

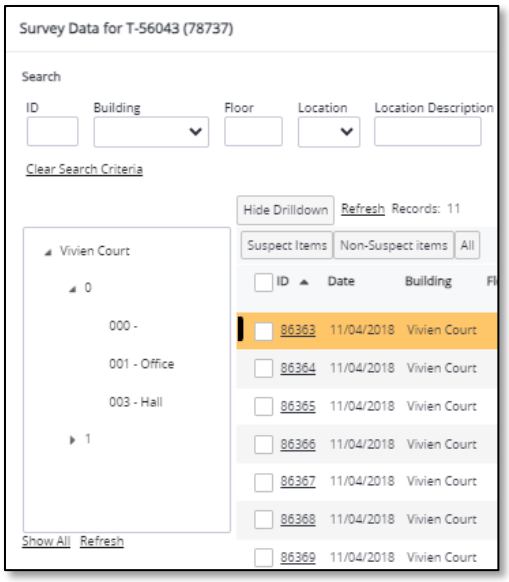
  No Access records and NAG items are coloured in red on the Survey Items.
- For each of the items inspected, the item and the material from which it is made are noted, using the appropriate three-letter material code, eg CON for concrete.
- The sampling status of an item is indicated as follows:
  - S – sampled
  - SP – strongly presumed to be asbestos
  - P – presumed to be asbestos

  - PS – previously sampled (used in re-inspections)
  - R – removed (used in re-inspections)
  - X – same material as another sample already taken.
- The sample number is displayed.
- The extent of the suspected item is described in the most appropriate units in the Extent and UoM fields, for example 10 and m2.
- The product type, 0 – 3, indicates what sort of material was found.
- The condition –a value 0 – 3, indicates the extent of damage to the item.
- A value, 0 – 3, and a description indicate the surface treatment present on the item.
- If photographs of the item were taken, thumbnail images are displayed in the top right, and you can preview a large version of the image(s) by clicking on them or by clicking on the Change Photo button which also lets you select a different photo from the project folder or to upload a new photo.
- A breakdown of any Priority Assessment scores can be displayed by clicking on the **…** button next to the **Priority Score** field.

You can search the Survey Items screen by clicking **Click here to search…** in the top left and then using the search fields displayed.



You can also click **Show Drilldown** to help you filter by building, floor and location name/number:



The underlined ID on each row of data (first column) is an XML link which downloads the XML file for the item to your PC. You can use programs such as Notepad to read the original XML data sent in by the Surveyor.

6. Review the survey data displayed to ensure that it is complete and consistent. If changes are necessary, amend the survey data by overtyping values or selecting from the drop-down lists.

> ☞ You can also run the Data Validator to check survey data automatically. Refer to 10.1, Checking the survey is complete, for details on automatic data validation.

The options available from the **Choose Task** button, amongst other things, let you check the survey data is tidy, accurate and complete by giving you different ways of looking at the survey data so that you can filter out the data you do not want to work with, for example you can:

- show only samples (approach S)
- show only suspect items (approach S, SP, P and X)
- display data with large photos and summary data
- display a list of duplicate non-suspect items from which you can amend or delete.

> ☞ Refer to 7.3, Re-using survey data, for details on the **Re-use Survey Data** option.

You can also use the Find & Replace button at the bottom left of the Survey Items screen to help you make changes to multiple records. This function lets you specify the fields to be searched (from a fixed list) and makes automatic text replacements.

7. Save any changes you have made to the survey data by clicking the **Save** button.

You can export the survey data to an Excel spreadsheet from the Survey Items screen by clicking the Excel icon at the bottom of the screen.

Another button at the bottom of the screen allows you to auto-number the items within the survey. Clicking the **Auto Number Items** button enters a sequence number in the **External Ref** field. You can choose whether the numbers start from 1 or from a custom number. In case you are using sequential numbers for a client, the highest number used in the External Ref field across all projects for the current client is shown on the screen. It is also possible to make the External Ref field more visible by adding it to the Survey Items grid, ie to the left-hand side of the Survey Items screen. Any existing data in the **External Ref** field is overwritten by the auto-numbering.

You can also manually create survey items by using the **New** button. There are further buttons to automatically fix the case on certain fields and perform other actions such as hiding (suppressing) individual rows of data from the report.

Deletion of survey items is allowed by some users. Individual survey items can be deleted or multiple items can be ticked and all deleted at the click of a button.

Don't forget to update the status and milestones on the project to keep the project details up-to-date.

7.3 Re-using survey data

Survey data can be re-used in a number of ways. It can, for example, be sent back to the original surveyor if it contains a number of errors that need to be corrected. It can also be sent to a different surveyor, under the same or a new project number.

When survey data is re-used, it is the original XML files that were created on the handset in Tracker Mobile that are copied – this does not include any survey items that have been manually added or amended in Alpha Tracker.

To re-use survey data:

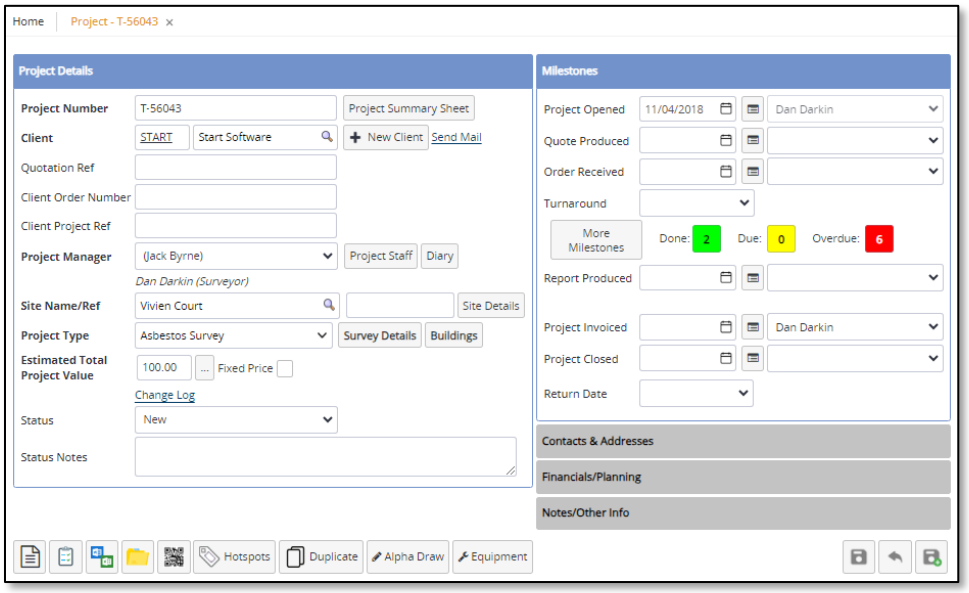
1. Search for the survey project in Alpha Tracker.

   You can search for the project in a number of ways:

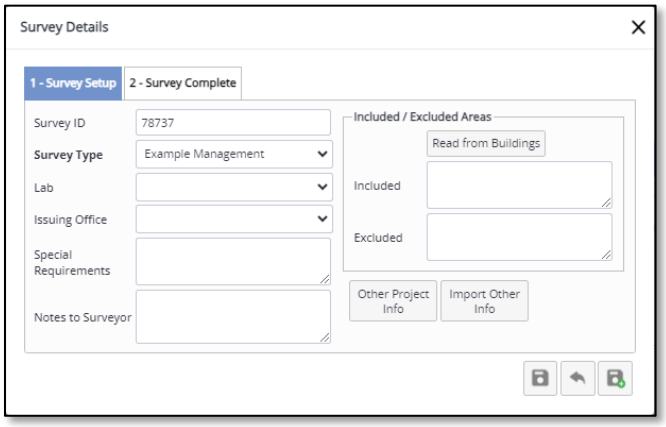
   - entering a key word, project number or client reference in the quick search field at the top of the Projects menu
   - selecting the "Project List" menu option and entering search criteria to find the required project
   - selecting one of the "Open Projects" menu options which let you list projects in a number of ways.

Refer to 1.4, Searching in Alpha Tracker, for further details on search criteria that you can use in Alpha Tracker search fields.

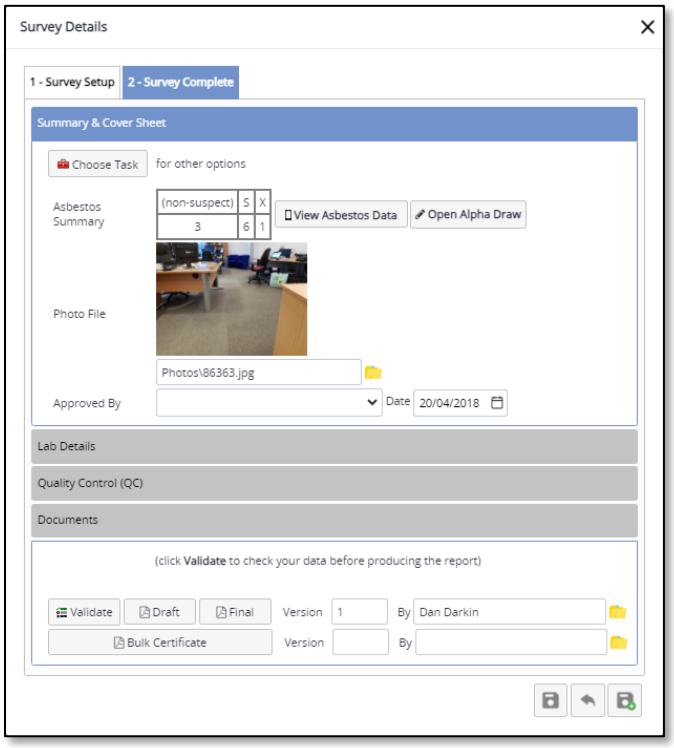
2. Click on the required project number to open the survey project.



3. Click the **Survey Details** button to open the Survey Details screen.



4. You will now be working with the second tab on the Survey Details screen, “2 – Survey Complete”, so click this tab at the top of the screen.



5. Click the **Choose Task** button, select "Re-use Survey Data" and choose the appropriate option from the **Type** drop-down list. The options are:

- Send handset data back to the original handset(s)

  Use this option if you wish to return survey data back to the handset of the surveyor who originated the data. You might, for example, use this option to return data that contains lots of errors to the originating surveyor.

  If you select this option, there is no other information required.

- Send handset data back to a different handset

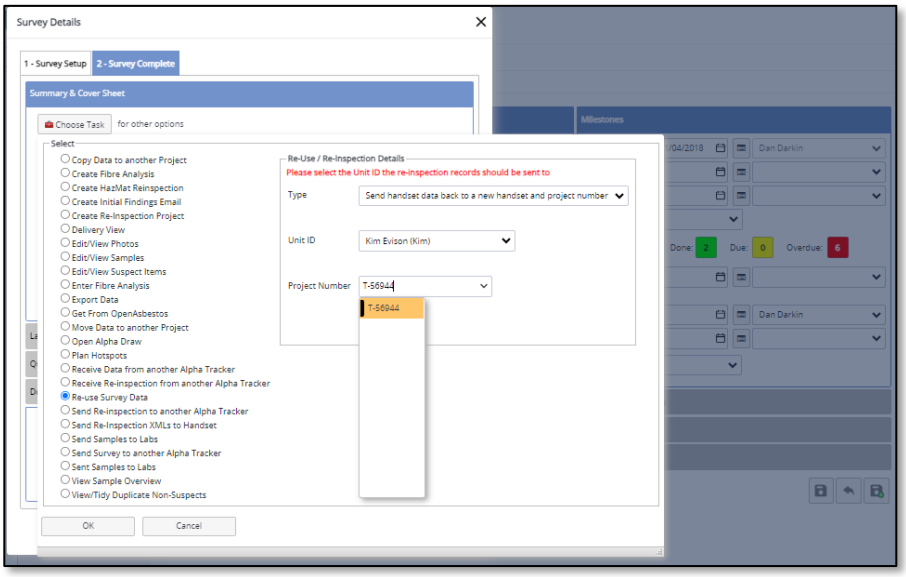
  Use this option to send the survey data received from one surveyor to the handset of another surveyor. You might, for example, use this option so that one surveyor can audit or check the entries of another.

  If you select this option, then you must also specify the **Unit ID** of the handset to which you are sending the data.

- Send handset data back to a new handset and project number.

  Use this option if you wish to copy the survey data from one project into another project. You might, for example, want to copy data from one project to another if the projects are expected to be almost identical, such as for flats in the same building, or if you wish to audit a surveyor's work and keep the results in a different project (eg a "Q" project).

  If you select this option, then you must specify both the **Unit ID** of the handset to which you are sending the data and the new project number to which it is to be assigned. You must have already created the new project, which must not be complete/closed, so that you can select it from the drop-down on the **Project Number** field. The following screen shows an example:



6. Click **OK** to send the survey data. When the specified Unit ID, or the originating Unit ID depending on your selection, next synchronises, the survey records will be pushed down.

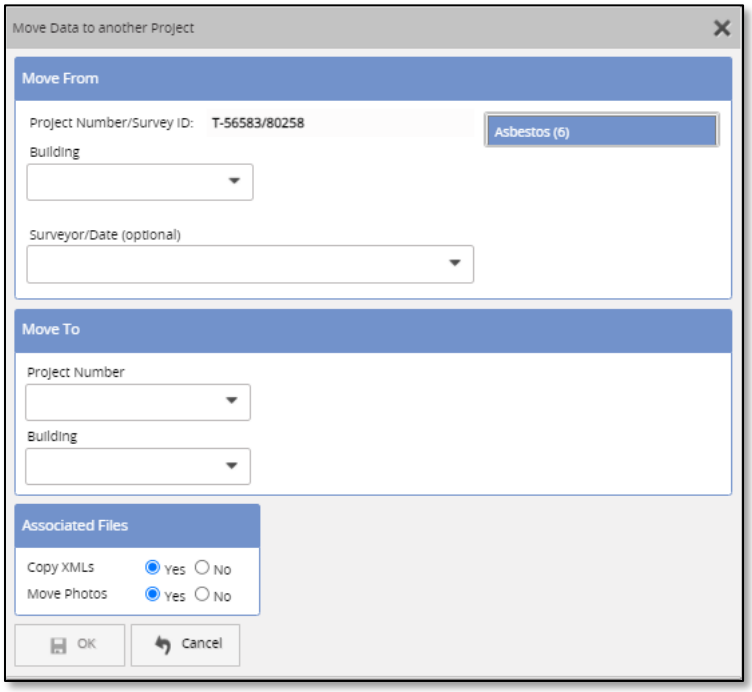
The surveyor can then check and complete the survey items as required and sent them back in. If you are working under the same project number then be aware that the original survey items are not overwritten but new records are created, so you may need to tidy the survey data to remove any possible duplicates.

7.4 Moving data from one project to another

If a surveyor sends data in under the wrong project number, there is a screen you can use to move the survey data from one project to another.

Please use this option with caution. If you are in any doubt about moving survey items, contact Start Support for help.

1. Search for the project that contains the survey data to move and display the Survey Details screen as described above.
2. Click the **Choose Task** button, select "Move Data to another Project" and click **OK**. A screen is displayed in which you must define which data to move and where it is to move to:



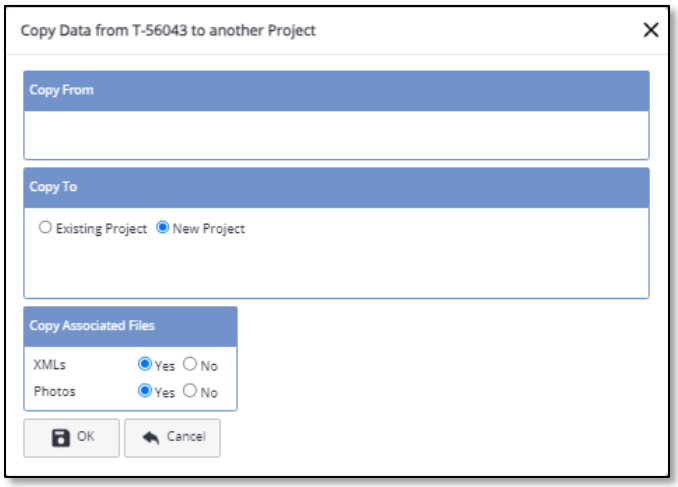
3. Complete the definition of the data you want to move. The current project and survey number are pre-populated as the source of the data. (You may need to also select the survey data type – if there is only one option it is auto-selected.) Select the building and, optionally, the surveyor and date to complete the source details.
4. Specify where the data is to be moved to. Select the project number and building to which the data is to be moved.
5. Set the two further options to specify whether you want the XML files to be copied and any photos moved to the destination project. These are usually set to "Yes".
6. Click **OK** to move the survey data. A message informs you when the process is complete and XMLs and photos have been moved.

7.5 Copying survey data to a new project

It is possible to copy survey data from one project into a new survey project, without having to send it back to a handset (ie without using the Re-use Survey Data option). Alpha Tracker creates the new project for you, using the same office letter as the original project.

Please use this option with caution. If you are in any doubt about copying survey data, contact Start Support for help.

1. Search for the project that contains the survey data to copy and display the Survey Details screen as described above.
2. Click the **Choose Task** button, select "Copy Data to New Project" and click **OK**. A window is displayed for you to specify whether the data is to be copied into a new or an existing project.



3. Select **Existing Project** and select the **Project Number**, or select **New Project** if you want the system to create a new project for the data.
4. Set the two further options to specify whether you want the XML files and any photos to be copied to the destination project. These are usually set to "Yes".
5. Click **OK** to copy the survey data. A message informs you when the process is complete and XMLs and photos have been copied.

8. ENTERING LAB RESULTS

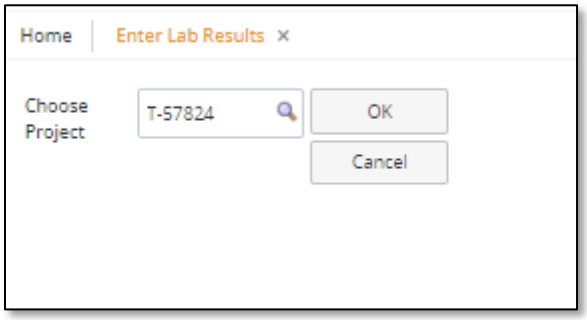
Any samples that have been taken require laboratory analysis. Lab results can be entered:

- manually against the survey items if you receive summary results from an external lab
- directly as fibre analysis records by an internal lab
- manually against the survey items by an external lab, using a restricted login.

8.1 Entering external lab results manually

If you receive summary results from an external lab, when the results are received you must update the survey with the analysis results.

1. From the Survey Quick Start menu, select step 5 “Enter Lab Results”.
2. Type in or search for and select the required project number.



3. Click **OK** to display the list of samples in the project.

4. Use the dropdown on the highlighted yellow **Identification** field to enter the analysis results as received from the laboratory.

   The **Asbestos Type**, **Material Score** and **Total Risk Score** are automatically completed according to the asbestos identification selected. If multiple asbestos types are identified in the analysis, you can either select a mixed identification if these have been set up for you, or type these in separated by a comma (eg “Crocidolite, Amosite”) – the details from the highest scoring type are used.

> *Ensure that you tab or click out of the last **Identification** field before saving so that all the scores, including those for the last sample, are set.*

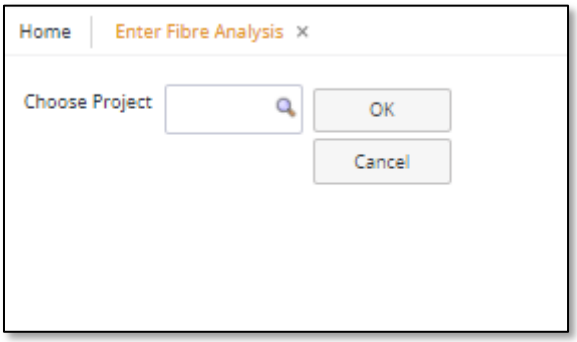
5. Save any changes you have made to the survey data by clicking the **Save** button and then close the screen.

If you wish, you can also complete further details on the project. For example, you can complete the **Date of Analysis** field in the Lab Details section of the Survey Details screen with the date on which the lab analysis was received. If appropriate you can also complete who performed the analysis in the **Analysed By** field and the certificate number in the **Certificate Ref** field.

8.2 Entering fibre analysis

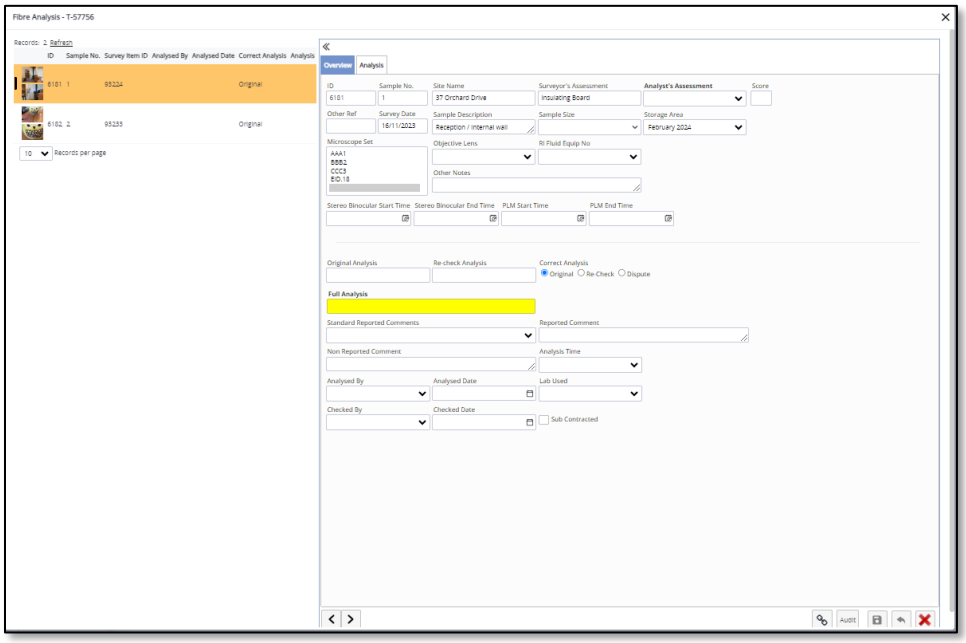
If you have an internal lab, then the lab staff can enter the full fibre analysis results directly into Alpha Tracker. When all fibre analysis results have been entered, the survey must be updated with the analysis – this is usually set to occur automatically.

1. Select the "Enter Fibre Analysis" option from the Lab menu to display the Enter Fibre Analysis screen.



2. Type the project number for which you want to enter fibre analysis results in the **Choose Project** field and click **OK**. Alternatively, you can click on the magnifying glass icon and search for the project if you do not know its number. Use the **Select** link to select the required project.

   A fibre analysis record is created for each sample in the project if they do not already exist. The Fibre Analysis screen then opens with a list of the fibre analysis records displayed on the left, for example:



If your permissions allow, you can also access the fibre analysis records by selecting the "Enter Fibre Analysis" option from the Choose Task list on the survey. A message informs and stops you if you do not have the necessary permissions. Alternatively, you could work from the Lab Project List.

The first record is automatically highlighted and its details displayed on the right, on the Overview tab. At the top you can see:

- Fibre Analysis Record ID
- Sample No.
- Site Name
- Surveyor's Assessment (of the material)
- Survey Date (if applicable)
- Sample Description.

There may also be other location or reference details displayed.

3. Enter the details of the sample in the top section of the Overview tab:
   - select a description of the sample size in the **Sample Size** field. You can also type in your own description
   - select your assessment of the material in the **Analyst's Assessment** field – the number of lab points accrued by analysing a sample of this material is displayed. Should the sample turn out to be negative (NAD), then two points are accrued
   - type your own reference in the **Other Ref** field if needed
   - enter details of the microscope and lens used in the **Objective Lens** and **Microscope** fields (the default selections for the **Microscope** field can be set for each member of staff on the Staff screen)
   - record your start and end times for both stereo binocular and PLM microscopes in the four date/time fields.

There may be other fields present too, depending on how your system is configured, for example you may have a field for **Physical Appearance**. The only mandatory field in this section of the screen is the **Analyst's Assessment**.

Many of the fields on the Fibre Analysis screen can be renamed to suit how your lab works; some can also be hidden.

*If you need to add further information about the material, such as the presence of additional materials, then record the main material in the **Analyst Assessment** field and type a description of any additional materials present in the **Reported Comment** field which may be displayed on your certificates if your templates allow.*
It is also possible to create compound materials in your Materials List (by using Setup|Lab and Surveys|Materials) if this better suits your reporting needs.
*Alternatively, an **Additional Materials** field can be displayed to allow the selection of multiple materials.*

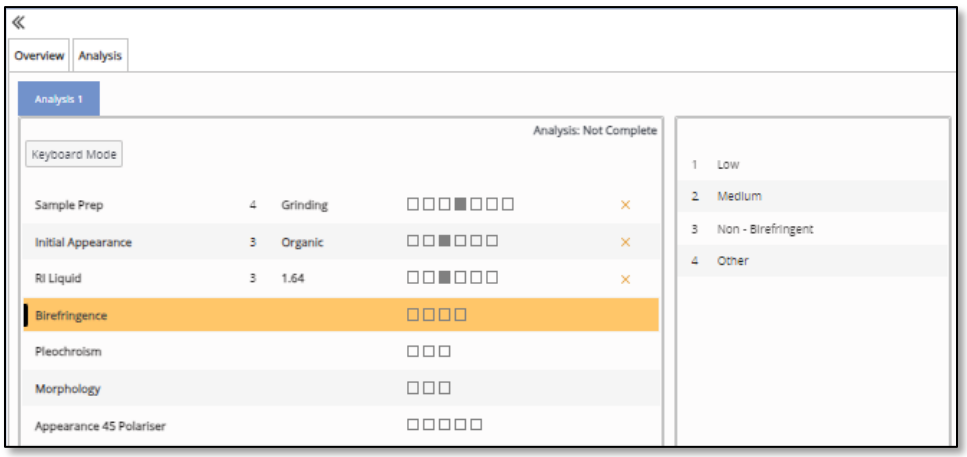
4. Select the Analysis tab and record the first set of analysis results on the **Analysis 1** tab.

As a minimum, the **Analysis** field only needs to be completed.

You can enter your analysis results in the following ways:

- If you like to use your mouse - click on the first row, eg Sample Prep, and select a value from those displayed on the right, eg Grinding. The next row and its options are automatically displayed.
- Alternatively, click on the square block corresponding to the required option.
- If you prefer numbers – click the **Keyboard Mode** button (or press **Shift+Ctrl+K**) then type in a sequence of numbers to make your selection, eg 41362021 selects the fourth option on the first row, the first option on the second row, the third option on the third row, and so on.
- Or, still using the **Keyboard Mode**, use the arrow keys to navigate to any option and the number keys to make your selection.

The selected value is displayed in words, showing its number, and also as a visual pattern. For example:



The cross allows you to clear the selected values.

5. Record any further analyses for the sample on the other Analysis tabs.

To allow for the recording of multiple analyses for one sample there are eight Analysis tabs available. The next in sequence is displayed once you have selected an Analysis/Identification.

6. Return to the Overview tab and record any comments in the following fields:
   - **Reported Comments** –this field is used for any comments to be included on the certificate
   - **Non-Reported Comments** –this field is used for any comments that are not to appear on the certificate
   - **Standard Comments** – if present, this field lets you select from a list of pre-set comments. These may be set to display on the certificate.

   Who performed the analysis and when are entered automatically in the **Analysed By** and **Analysed Date** fields once an analysis is recorded.

   The **Checked by** and **Date** fields may be completed later when these checks are done or left to be completed by the blind-checking process.

   The **Original Analysis** and **Re-check Analysis** fields and the **Correct Analysis** radio buttons are not used at this stage; they are only completed if Alpha Tracker's blind-checking process is used.

Refer to Section 8.6, Checking analysis results, for details on how to perform the blind checks.

7. Save the fibre analysis record by clicking the Save icon.

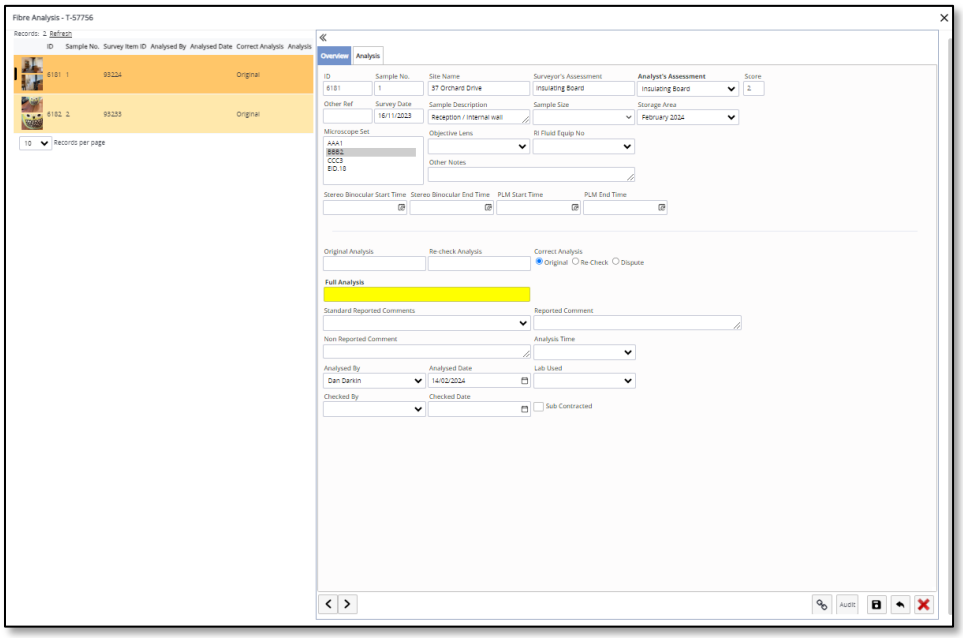
   The analysis selected in the **Analysis** field(s) is displayed in the yellow **Full Analysis** field once the record is saved. If multiple analyses for the same sample were recorded, all are displayed with the following exceptions:
   - If the same analysis is recorded more than once, then the duplicate is not displayed.
   - Similarly, a 'No asbestos detected' or 'Inconclusive' analysis result is not displayed if there is also a positive asbestos identification made – in this case, only the positive identification is displayed in the **Full Analysis** field.

   Multiple analyses are displayed in alphabetical order (unless a preferred order is specified against the Asbestos Types in the Setup menu.)

   If you record a negative/NAD result, Alpha Tracker forces you to record a second analysis of the sample. (However, Australian/New Zealand clients may choose to switch this off.)

   Your system may be set up with fibre analysis validation which will display a message and prevent you from saving an analysis if you have selected field entries which do not agree with the identification you have selected, eg if you have selected RI Liquid 1.70 with an Identification of Chrysotile. This is to ensure that your results are consistent.

   You can also use the **Sub Contracted** tickbox in combination with the validation so that if it is ticked the validation is switched off. This allows users to save just the analysis as everything else is greyed out. If it is not ticked then entries must follow the validation.



If there are any errors in the data, for example, if two NAD analyses are required and only one recorded, or the data fails validation, then the record is not saved and a message is displayed at the top of the screen or by the relevant field.

8. Click the next record in the list on the left to move on to the next sample.

   You can see your progress through the samples in the project by reviewing the list on the left. The identification of each analysis is displayed where one is recorded.

9. Repeat steps 3 – 8 to record the analysis results of the next sample and continue until all sample analysis results for the project are recorded.

If there is a discrepancy between the Surveyor's Assessment of the material and the Analyst's Assessment then the system can act in different ways, depending on your procedures and how Alpha Tracker is set up. It may, for example, simply send an email notification or it may substitute the Analyst's Assessment for the Surveyor's in the survey data.

8.3 Setting default fibre analysis settings

There is an optional facility within Alpha Tracker that allows you to back fill fibre analysis results so that you need only enter the Analysis, eg Chrysotile, and other fields are automatically completed. If the setting has been activated for you, you can set the default backfill values for each Analysis and use them to enter results quickly.

To set the default backfill values:

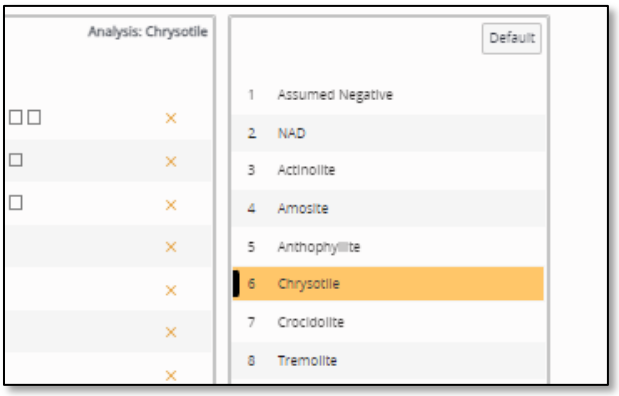
1. Complete the fibre analysis fields as normal, selecting the appropriate values for the "ideal" or "normal" settings for your chosen identification.

   You might, for example, set the following values for an analysis identification of "Crocidolite":

   - Morphology – Straight
   - RI Liquid – 1.70

- First Order Red Tint – Length fast
- Birefringence – Low
- Pleochroism – Blue-grey
- Colour Perpendicular Polariser – Blue
- Angle of Extinction – Straight
- Colour Parallel Polariser – Blue.

2. Select the appropriate analysis, eg “Crocidolite” or “Chrysotile”.
3. Click the **Default** button that appears above the list of values for the **Analysis** field.



A message asks you to confirm that you want to set the default.

4. Confirm the default settings to set the displayed values as the default values.

To use the default backfill:

1. Instead of setting all the values on the fibre analysis, select only the identification in the **Analysis** field. For example, select “Crocidolite”.
2. Click the **Default** button to fill the other fibre analysis fields automatically.

*If required, the **Default** button can be displayed for specific users only by using a setting in the system. If the setting is blank, then all Lab users can see the button (if it is switched on). If the setting has usernames entered, only those users will be able to see the button.*

To amend the default backfill values:

1. Select “Lab Backfill” from the Lab and Surveys submenu on the Setup menu.
2. Search for and select the Analysis identification for which you want to amend default settings.
3. Amend the setting as required by entering the required values in the **Field Value** field and save your changes.

*You could also delete all the records for an analysis identification so that the next time you enter the fibre analysis results on the Fibre Analysis screen you can reset the default values by clicking on the **Default** button.*

8.4 Updating the survey with results

Updating the survey with the completed fibre analysis results can be done at the click of a button or it can be automated so that the results pull through into the survey as soon as they are done. To update the survey manually:

1. Search for and display the survey project.

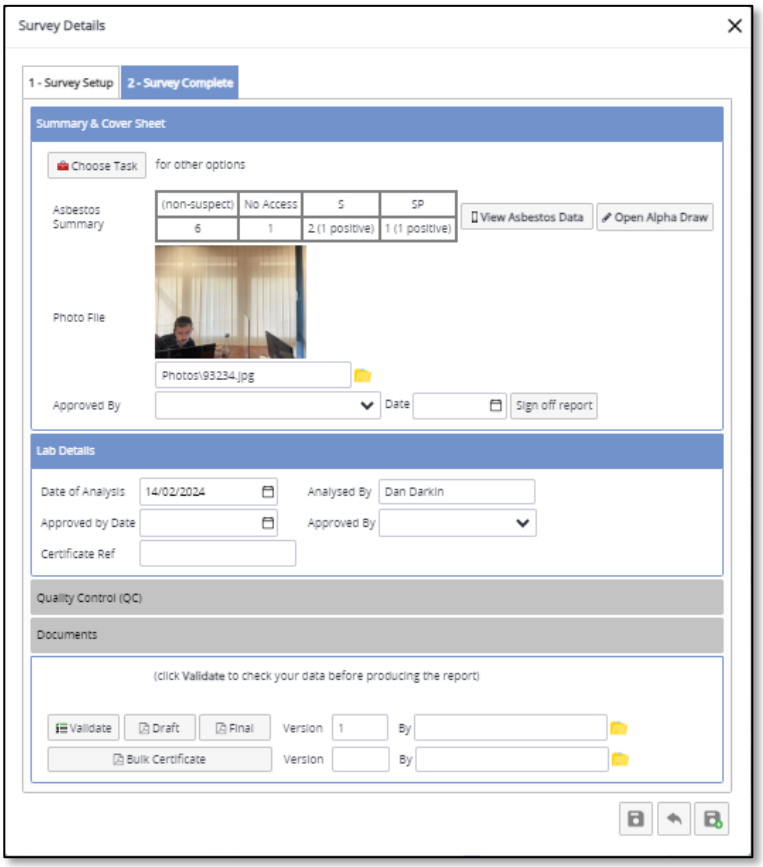
> *Note that when all samples have been marked with an analysis in the fibre analysis table, a "Samples Analysed" flag is displayed on the Project List to help you identify projects where analysis is complete.*

2. Click the **Survey Details** button to open the Survey Details screen and display the second tab "2 – Survey Complete".
3. Click the **View Asbestos Data** to display the survey data captured for the project.
4. Click the **Load Fibre Analysis** button to update the survey items. The following fields are updated for the sample ('S') records and also for the cross-referenced sample ('X') records:
   - Identification
   - Asbestos Type
   - Material Score.

   The **Overall Score** is also updated, adding the new **Material Score** to the **Priority Score**.
5. Return to the Survey Details screen and complete the fields under **Lab Details** as appropriate.

   The **Date of Analysis** and **Analysed By** are automatically updated if they were initially blank. You can also complete the **Approved By Date** and **Approved By** fields if required.
6. Generate the Bulk Certificate for the project samples by clicking the **Bulk Certificate** button in the Documents section. When the certificate has finished generating it will be emailed to you and also available for download by using the Open Document Folder icon.

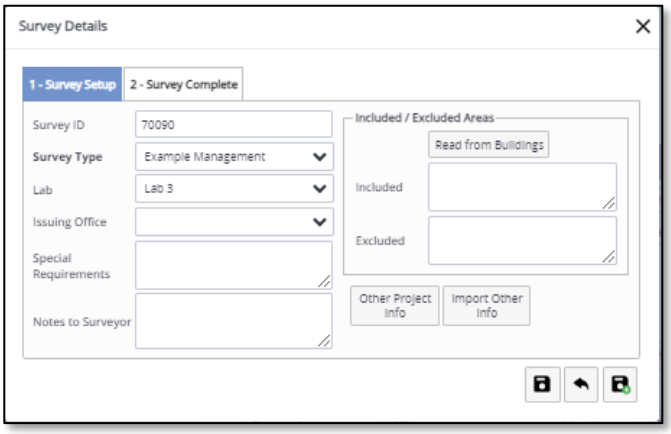
> *Note that your report templates may be set up to include the generation of the bulk certificate so that you do not need to generate it separately.*



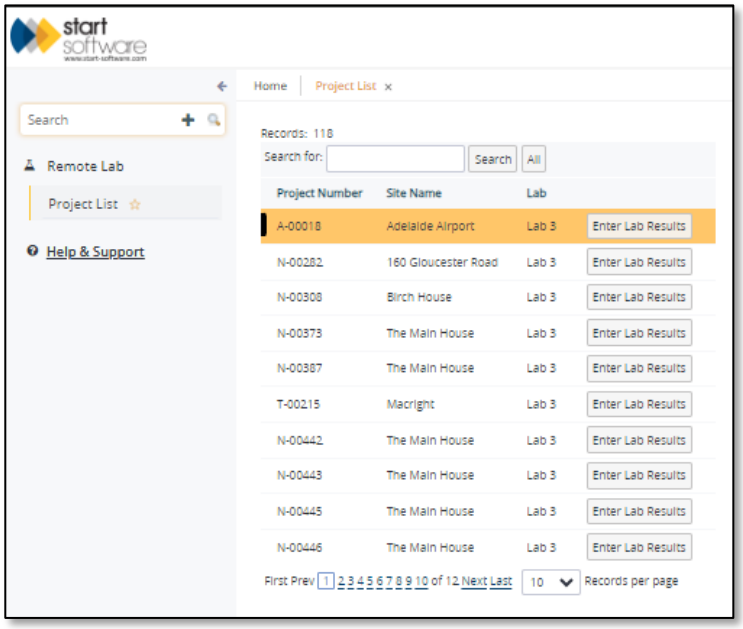
8.5 Entering analysis results by a remote lab

If you use an external lab, then the external lab can enter the fibre analysis results directly into Alpha Tracker as it runs in a web browser. The external lab will have restricted access so that they can only enter analysis results, not access other areas of Alpha Tracker, and can only access projects to which you specifically allow them access.

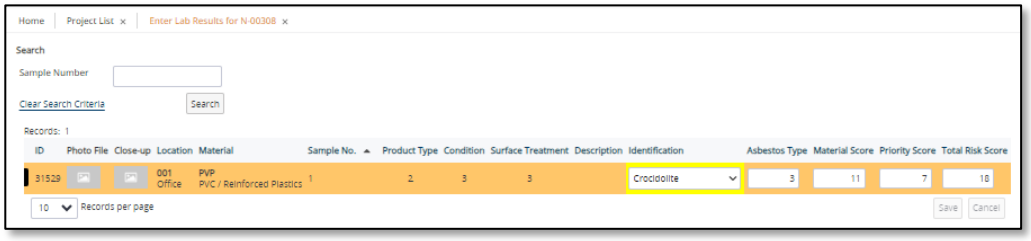
The external lab will require their own login details. They will then be able to see a list of projects that you assign to them by using the **Lab** field on the Survey Details screen.



When logged in, the remote lab see this screen:



The remote lab select the appropriate project number and can enter the identification against the samples in the project (in the yellow highlighted field). All other details are display-only on the screen.



Once the external lab has completed entering analysis results, the results are available in the survey. And when you complete the Report Produced milestone on the project, it is no longer visible on the list of projects for the remote lab.

8.6 Checking analysis results

A selection of analysis results is usually checked each day to confirm the accuracy of the lab analysis. Tracker has an automatic Lab checking system to count points and select samples for checking. This method enables you to manually select the samples and to record the results.

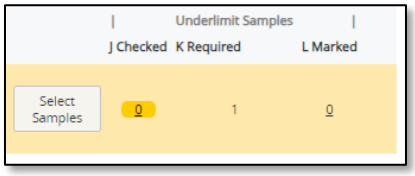
To check analysis:

1. Select “Lab Check Result” from the Lab menu.
2. Enter the date for which you want to check analysis and click **Search** to display a summary of analysis records for that date.

The information displayed summarises work done in the lab, with the points accrued by each analyst for that date, points from both analysis and checking, and the number of points/samples that need to be checked.

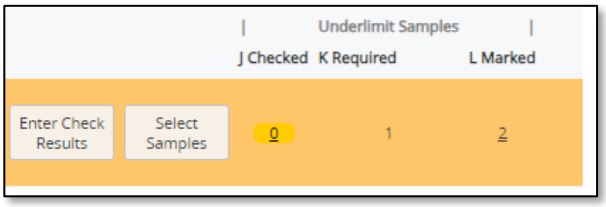
To the left of the **Select Samples** button, columns G, H and I show details for overlimit samples, ie samples analysed over 40 points – how many checks are required (G), how many samples have been selected for checking (H), and how many checks have been completed (I). If the number checked is less than the number required, it is highlighted in yellow.

To the right of the **Select Samples** button, columns J, K and L show the same details for underlimit samples, ie samples analysed under 40 points. Again, if the number checked is less than the number required, it is highlighted in yellow.

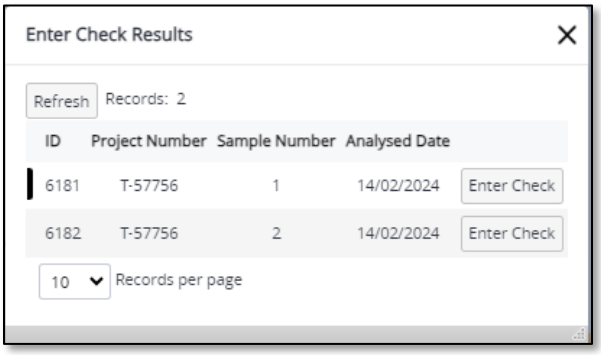


3. To manually select the samples to be checked:
   - On a row where the Checked figure is highlighted, click **Select Samples** to display a list of the samples eligible for checking.
   - Tick the samples that you want to select to check:
     - when checking *overlimit* samples, your selections should be made from the samples that are displayed in red, as these were analysed once the analyst had exceeded 40 points
     - when checking *underlimit* samples, your selections should be made from the samples displayed in white, as these are the samples analysed under 40 points.
   - Save your selections and close the sample selection screen. You return to the Lab Check Results screen with an **Enter Check Results** button now displayed for the analyst. (The button may be greyed out if your permissions do not allow you to carry out the check.)

> *Note that you can overselect the number of samples for checking. This means you can use the **Select Samples** button at any time to mark samples for checking, even if no checks are required, allowing you to use the process to check as many samples as you want.*

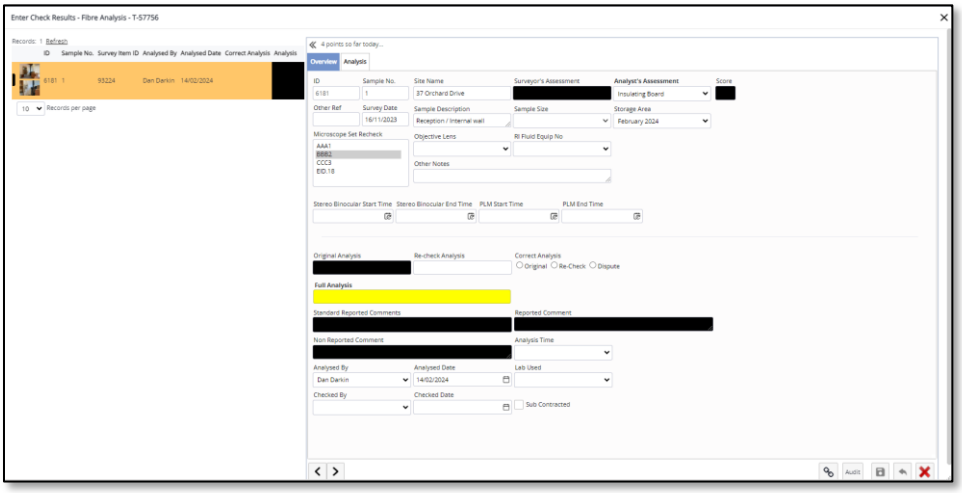


4. Click **Enter Check Results** to open the screen listing the samples to check.



Work through each sample in turn.

5. Click the **Enter Check** button. The Fibre Analysis screen opens with the original analysis and some other fields blacked out.



6. Record your check analysis in exactly the same way as you would for a normal sample analysis, recording full analysis details using as many Analysis tabs as you need. All details from the original analysis are hidden.

   When you are doing check analyses, the tab numbers follow on from those of the original analysis and the names display "(Re-check)" after the number.

7. Save your analysis when it is complete.

   The **Re-check Analysis** field is completed with your analysis results. If this is the same as the original analysis then the **Correct Analysis - Original** radio button is selected.

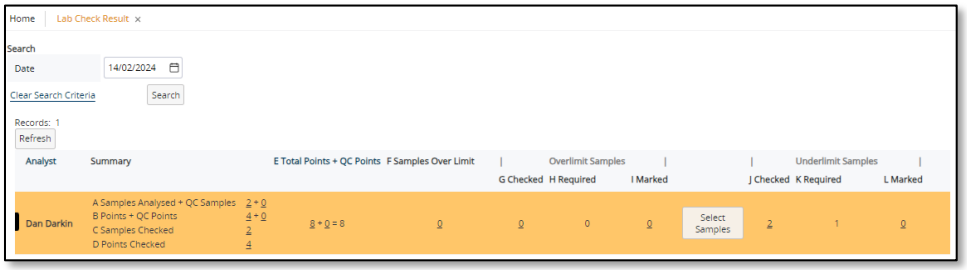
   If the result is different to the original analysis then the Re-check Analysis is displayed with a line through it and the **Correct Analysis - Dispute** radio button is automatically

selected. An email is sent out to the Lab Notifications email address if the analysis is disputed.

Your name and the date are entered in the **Checked By** and **Date** fields.

If there is a difference in the results, this can either be resolved immediately by selecting a radio button to indicate whether the original or the re-check analysis is correct, or you can move on to the next check sample and resolve all disputed analyses in a batch by using the “Resolve Disputes” menu option.

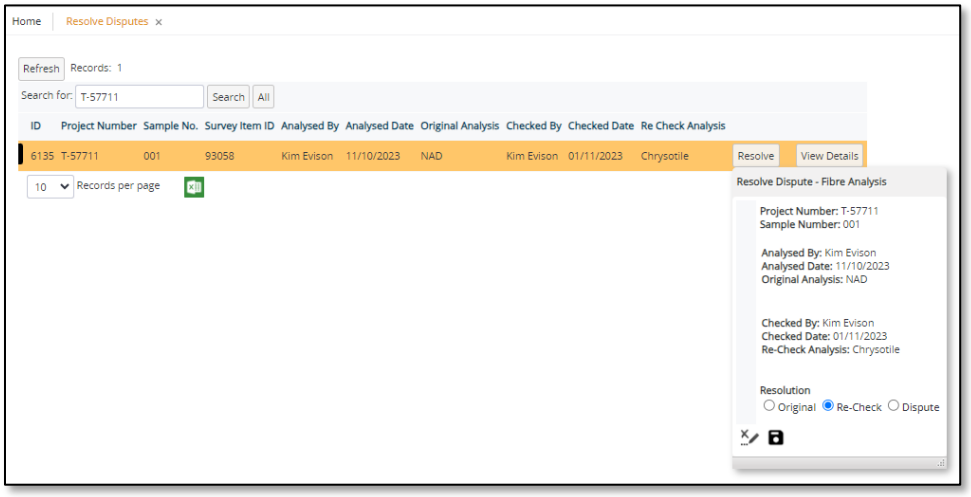
8. Move on to the next sample until all selected samples are checked.
9. Refresh the Lab Check Result screen to see updated details and to confirm that no outstanding checks are required.



8.7 Resolving disputed analysis

If your lab checks result in disputed analysis, where the original analysis and the checker’s analysis differ, then you can use the “Resolve Disputes” menu option to list all disputed samples and resolve the dispute. Resolving the dispute means selecting which of the analyses is to be used as the correct analysis.

1. Select “Resolve Disputes” from the Lab menu to display the Resolve Disputes screen which lists all samples that currently have the **Correct Analysis - Dispute** radio button set.
2. Use the **Resolve** button to display a summary of the dispute, select the appropriate radio button – **Original** or **Re-Check** – to indicate which analysis is to be used and save the change.



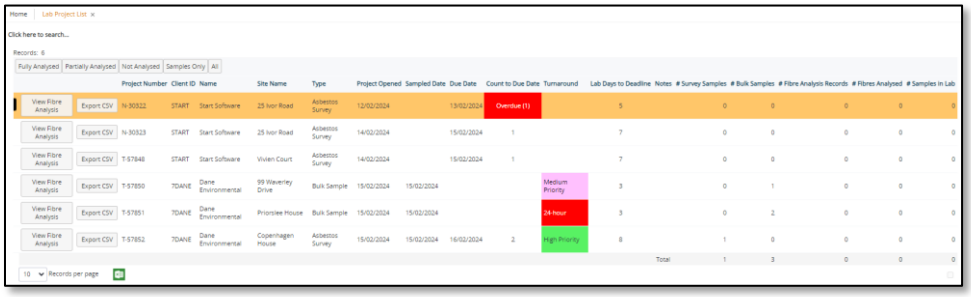
3. Alternatively, click **View Details** to display the full Fibre Analysis details and resolve the dispute there by selecting the **Correct Analysis – Original** or **Correct Analysis – Re-Check** radio button. Save your changes.

8.8 Searching for lab analysis records

There are two main screens for searching for lab analysis records in Alpha Tracker. You can either use the *Lab Project List* option which shows one entry per project, or you can use the *Fibre Analysis Records* option which lists each sample individually.

To display the Lab Project List:

1. Select the "Lab Project List" option from the Lab menu.

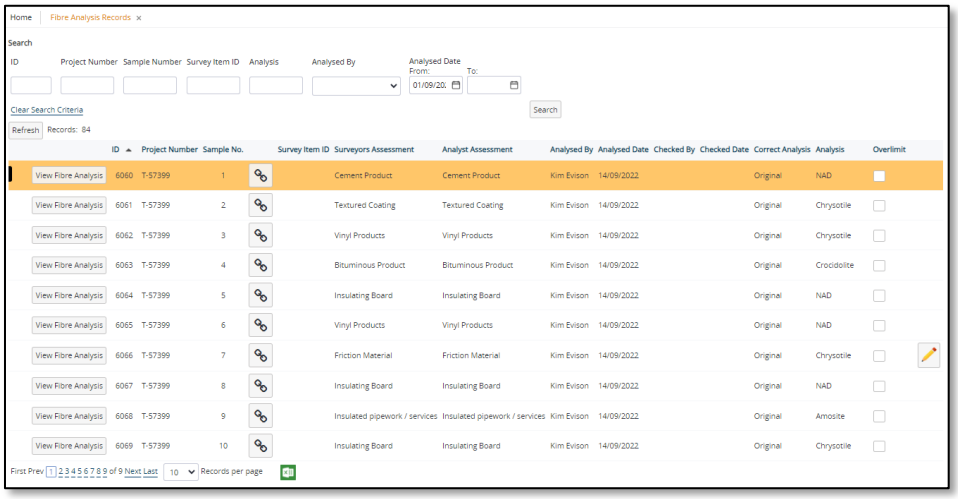


2. Enter your search criteria in the top part of the screen to filter the list. This screen allows searching by the number of survey samples in a project, so that you can for example set the filters to show only jobs that have had survey data returned. You can also use the pre-set filter buttons to display only fully analysed, partially analysed, not analysed or all projects.

3. Display the fibre analysis records for a selected project by clicking on the **View Fibre Analysis** button.

To display the Fibre Analysis Records screen:

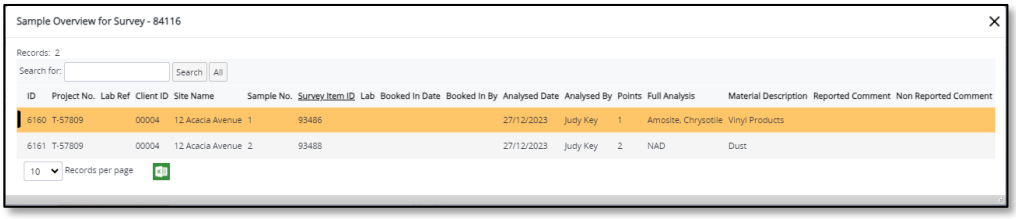
1. Select the "Fibre Analysis Records" option from the Lab menu.



2. Enter your search criteria in the top part of the screen to filter the list. This screen allows searching by, for example, sample number, analysis and analyst name.
3. If comments are recorded on the fibre analysis, display them from this screen by clicking the pencil icon on the right.
4. Display the full fibre analysis record by clicking on the **View Fibre Analysis** button.

8.9 Displaying a summary of the lab analysis

An option on the Choose Task menu on Surveys displays the Sample Overview. The Sample Overview gives a summary of the lab analysis for a project.



You can also display this summary by selecting the *Sample Overview* option on the Lab menu.

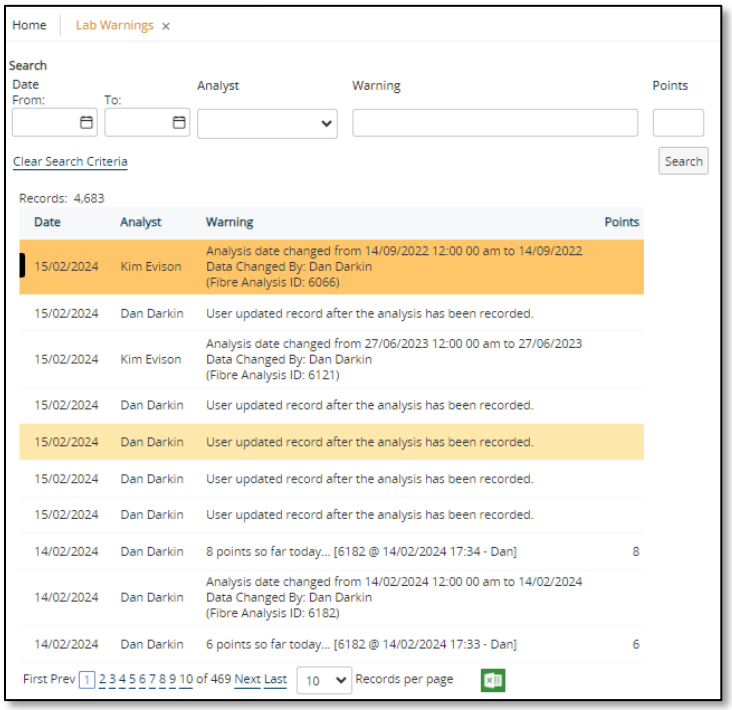
8.10 Displaying Lab warnings

There is an option on the Lab menu that lets you display a list of all the Lab warnings that have been issued. Lab warnings include any messages that are displayed on the Fibre Analysis screen, including:

- number of lab points accrued by an analyst
- warnings when certain point limits have been reached
- logging of a user updating an analysis after it has been saved.

To display the Lab warnings:

1. Select the “Lab Warnings” option from the Lab menu to display the Lab Warnings screen.



2. Scroll through the list or use the **Search** fields at the top of the screen to see the warnings that have been issued.

There is a range of settings in the system that allows you to define the points levels to which analysts work. You can also specify the messages to be displayed when these levels are reached and send email notifications to a specified email address (“Send Lab Notifications”). For example, you can set the level 1 points limit at 40 and display a message such as “WARNING! You have reached 40 points today. You must now have random samples re-checked” to the analyst when this level is reached. The Lab Warnings screen lets you see and search warnings logged.

8.11 Checking the audit log

Alpha Tracker keeps a full audit trail of changes to the Fibre Analysis screen so that you can identify who changed what and when. You can access the audit log for a specific fibre analysis record by clicking the **Audit** button on the Fibre Analysis screen when the record is displayed. Alternatively, you can view all audit records by using the “Fibre Analysis Audit” option on the Lab menu.

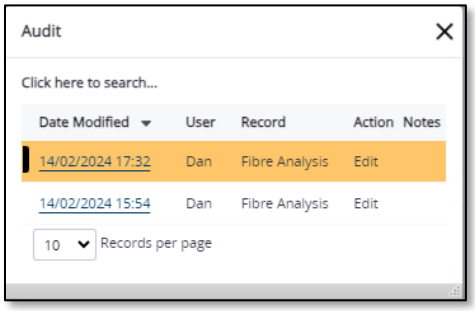
Changes made to the "Other Notes", "Trace Analysis" and "Trace Analytical Result" screens, if you are using these, as well as to the main Fibre Analysis screen are recorded in the audit log.

8.11.1 Inspecting the audit log for individual records

To display changes made to a selected record:

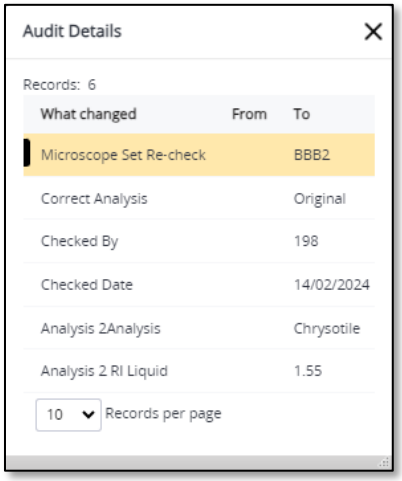
1. Display the required fibre analysis record on the Fibre Analysis screen.

2. Click the Audit button in the bottom right corner. A list is displayed.



This list shows the sessions during which changes were made, who by, when and a summary of the action.

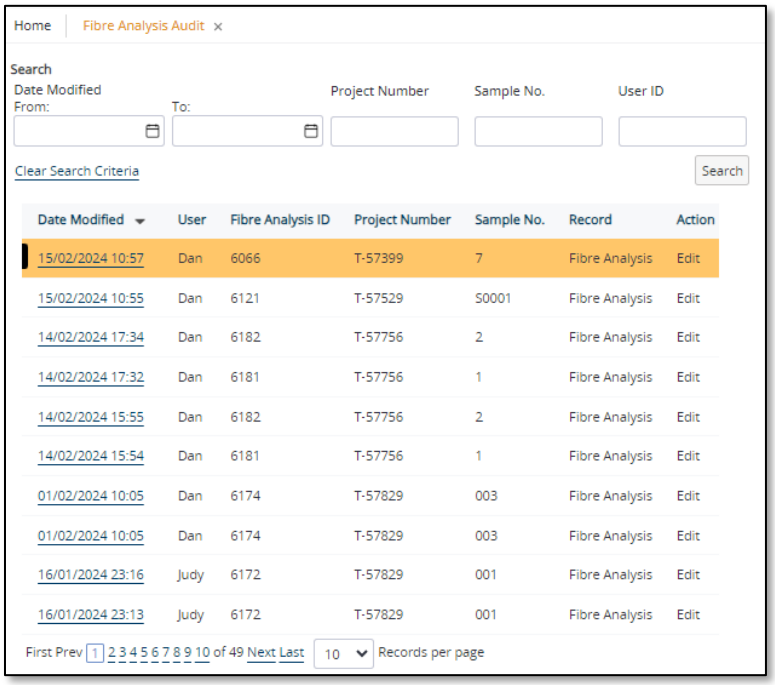
3. Click on an underlined **Date Modified** entry to display full details of all changes made during that session on the Audit Details screen.



8.11.2 Querying the full audit log

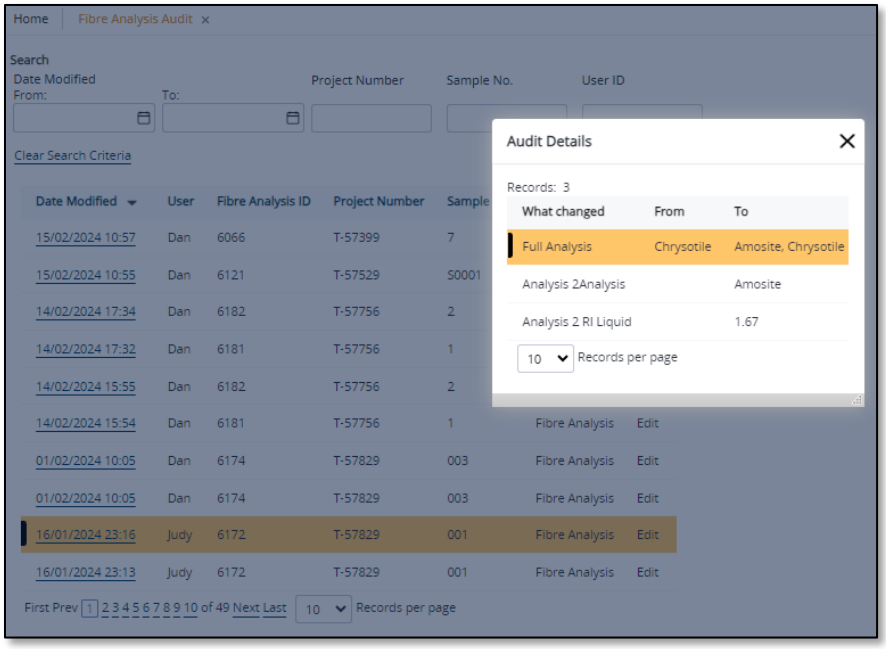
To query the full audit log:

1. Select “Fibre Analysis Audit” from the Lab menu. The Fibre Analysis Audit screen is displayed.



2. Enter search criteria in the fields at the top of the screen and click Search to find the details you require. For example, enter a specific project number, date range or username (this is the login username).

3. Click on an underlined **Date Modified** entry to display full details of all changes made during that session on the Audit Details screen



8.12 Sample tracking

Alpha Tracker includes a sample tracking feature to help you track the chain of custody of samples. This sample traceability can work in one of two ways, which method is used depends on system settings:

- manual sample tracking

  which lists the expected samples (as captured in the survey data) and lets you confirm and change their location manually
- barcode sample tracking

  which starts with the surveyor scanning a barcode label when entering sample details to link the sample and barcode, and then the barcode being scanned at each location to book the sample(s) into a location.

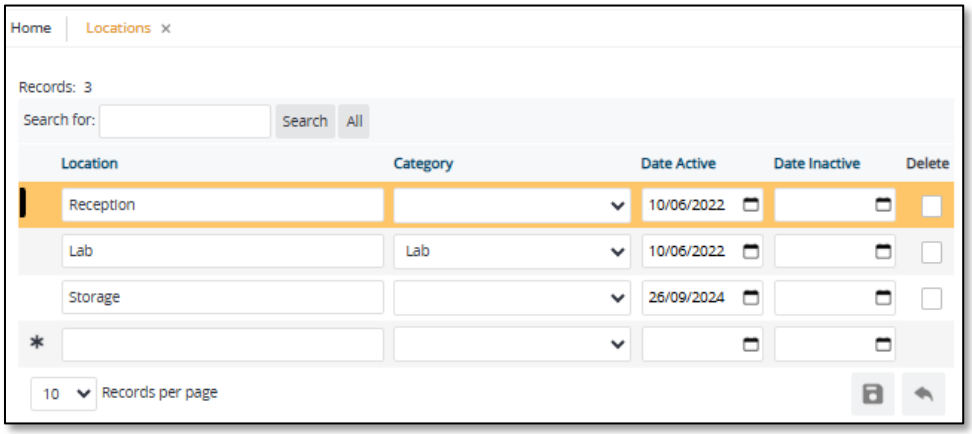
8.12.1 Using manual sample tracking

When using manual sample tracking, you must specify the locations where you will be booking in samples. You can then use these locations to book samples in. You can also query the system to check where samples are located.

Specifying the locations

To specify your locations:

1. Select “Locations” from the Sample Tracking menu, under the Resources menu, to display the Locations screen.



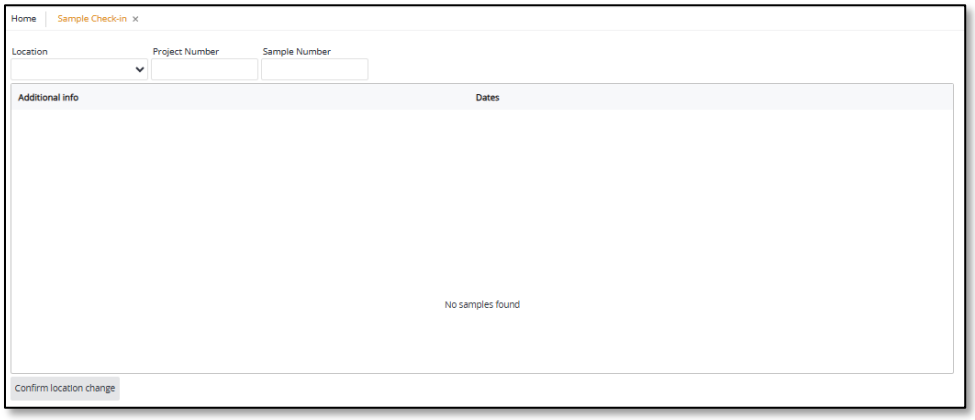
2. Enter details of each location where you will be booking in samples. To add a new location, type the details into the row marked with an asterisk to specify:
   - **Location** – the name by which you want to refer to the location
   - **Category** – if the location is a lab, select “Lab” from the dropdown. (This enables the key milestone “Samples received in lab” to identify when samples have been received)
   - **Date Active** and **Date Inactive** – you can leave these blank, or specify when a location is to become active or has become inactive.

3. Save any changes to the locations.

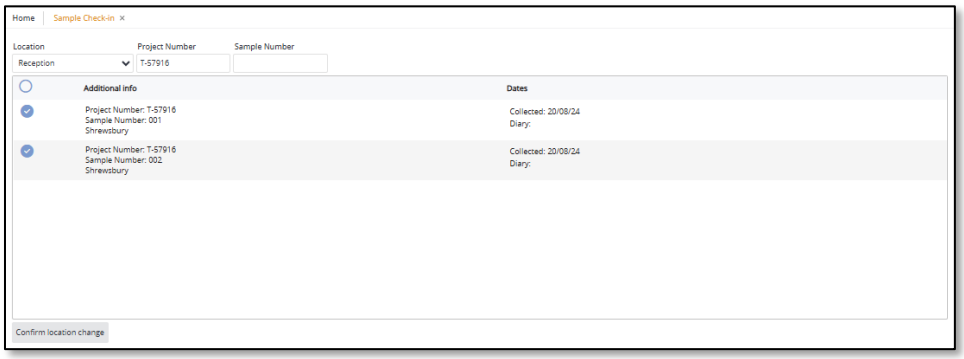
Booking samples into a location

To book samples into a location, eg when they are received at Reception, or at the Lab:

1. Select “Sample Check-in” from the Sample Tracking menu, under the Resources menu.



2. Select the location where you are receiving/booking in samples in the **Location** field.
3. Type the project number of the samples in the **Project Number** field, then click out of the field or hit **Enter** to display the samples in the survey data.
4. Tick the samples that you are receiving. You can tick all at once by using the tickbox in the header row.



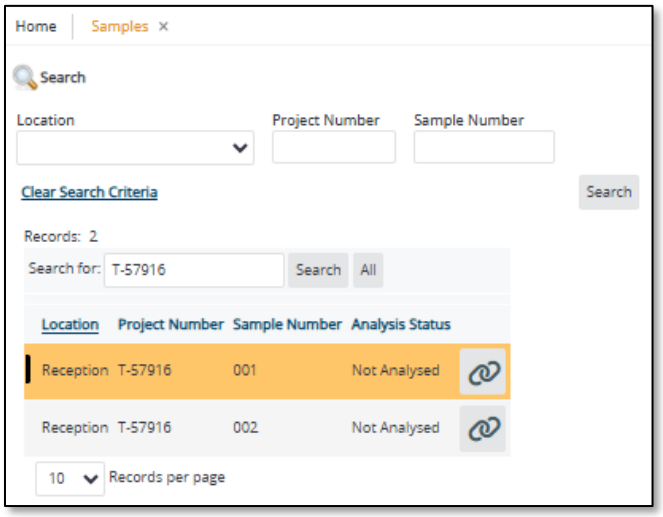
5. Register the samples’ new location by clicking the Confirm Location Change button and clicking Yes to confirm that you want to make the change.

Checking the location of samples

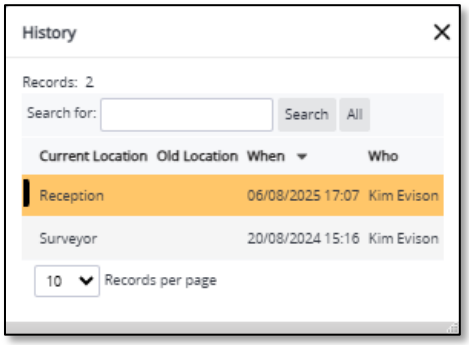
To check the location of samples:

1. Select “Samples” from the Samples Tracking menu, under the Resources menu.
2. Type the project number of the samples you want to locate into the quick search box and click **Search**, or open the search fields and enter your search criteria there.

   The location and status of the samples is displayed.



3. Click the chain icon to display the history of a sample's locations. The first location of a sample is labelled "Surveyor" and this shows the date the sample was taken.



You can also access the chain of custody history from the Fibre Analysis screen and the Fibre Analysis Records screen.

8.12.2 Using barcode sample tracking

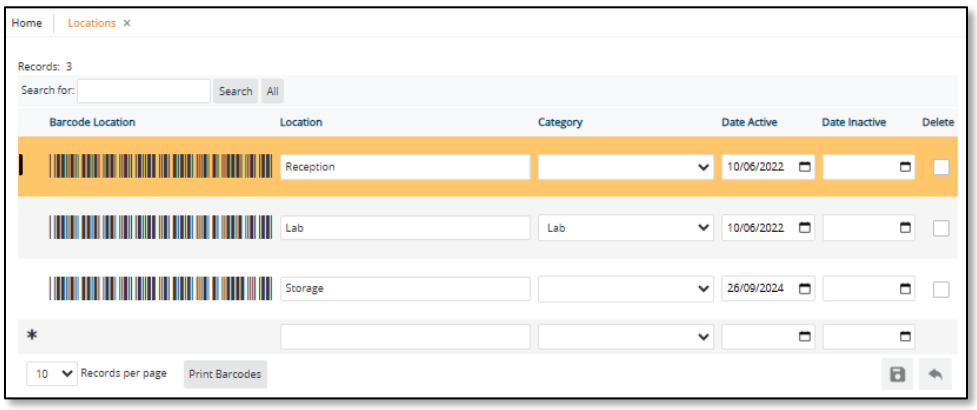
You can use barcode technology to track and log sample locations so that you can easily identify where a sample is, for example whether it is with the surveyor, has been dropped at Reception, received in your Lab or moved into storage.

When using barcode sample tracking, you must specify the locations where you will be booking in samples, print out barcodes for these, and you must also print out sheets of barcoded sample labels. The barcoded sample labels are linked to the individual samples by the surveyor when capturing the survey. You can then book samples into locations by scanning both the location and the sample barcode. You can also query the system to check where samples are located.

Specifying the locations and printing their barcodes

To specify your locations:

1. Select “Locations” from the Sample Tracking menu, under the Resources menu, to display the Locations screen.



2. Enter details of each location where you will be booking in samples. To add a new location, type the details into the row marked with an asterisk to specify:
   - **Location** – the name by which you want to refer to the location
   - **Category** – if the location is a lab, select “Lab” from the dropdown. (This enables the key milestone “Samples received in lab” to identify when samples have been received)
   - **Date Active** and **Date Inactive** – you can leave these blank, or specify when a location is to become active or has become inactive.

   The barcodes are generated automatically.
3. Save any changes to the locations.
4. Print out copies of the barcodes by using the Print Barcodes button at the bottom of the screen. These can be placed in the locations ready for scanning when you are booking the samples into these locations.

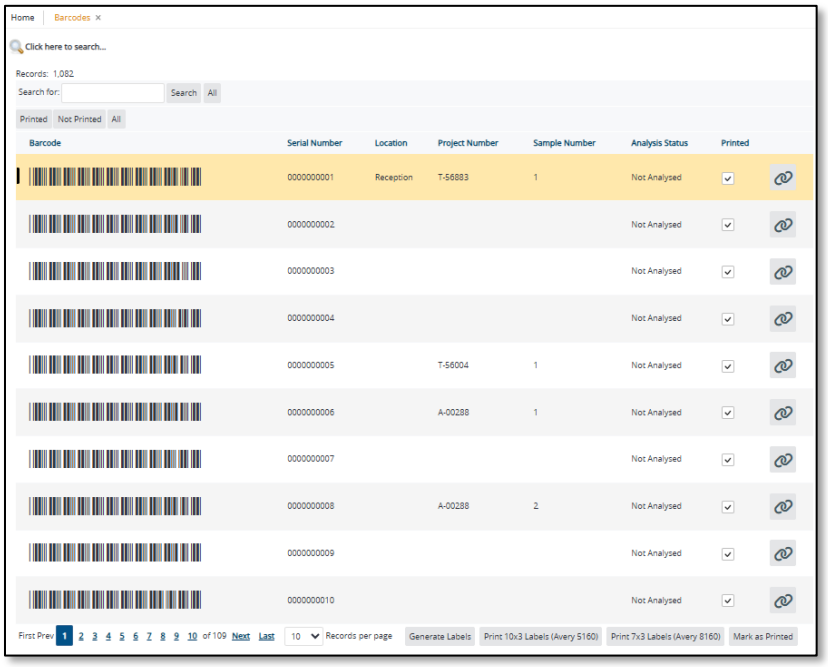
Note that you do not need to create a location for with “Surveyor” as this is automatically assigned when a sample barcode is first scanned.

Generating the sample barcodes

The sample barcodes can be printed out onto standard Avery labels and given to surveyors ready for them to attach to their sample bags.

To generate the sample barcodes:

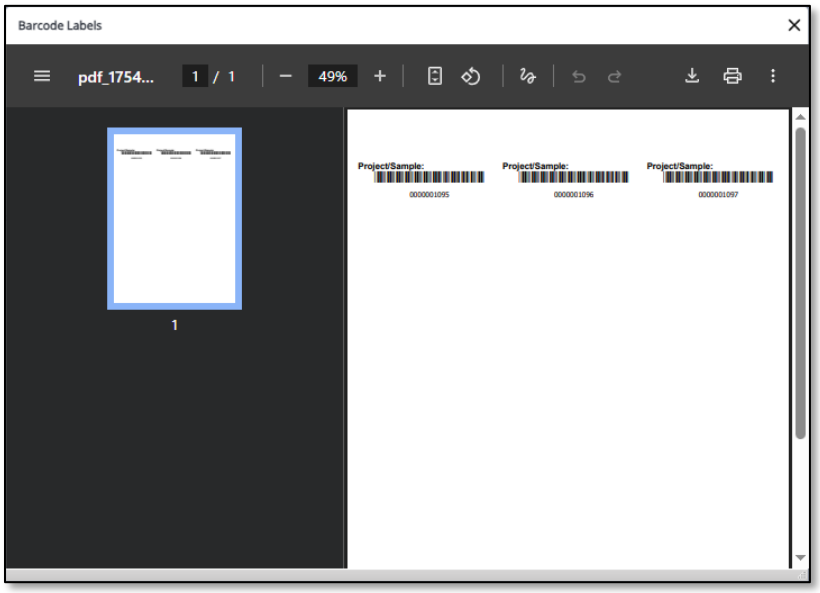
1. Select “Barcodes” from the Sample tracking menu, under the Resources menu to display the Barcodes screen which lists all barcodes that have been generated.



2. Click the **Generate Labels** button to create a new batch of barcodes. You are asked to specify how many barcodes you want to print.

3. Specify the number you require and click **Generate Labels**.

   You might for example create a batch of 30 barcodes and then print them as 30 will fit on one standard label sheet. The screen displays the new barcodes (as “Not Printed”), then a print screen opens for you to print the labels.



4. Print the labels as required.

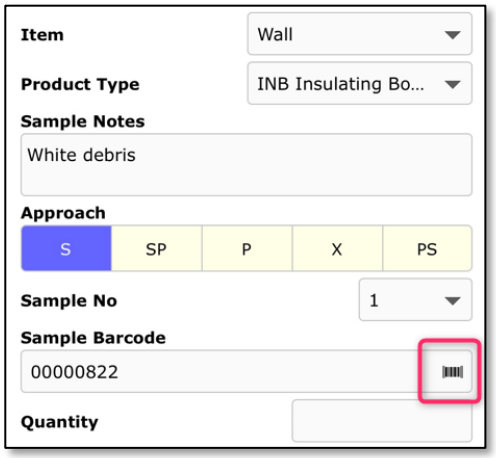
   When you close the print screen, a message asks if you want to mark the labels as printed. Do this if all the labels have printed successfully. You could also choose to print and mark unprinted labels manually at any time after generating them by using the buttons at the bottom of the screen.

Issue the barcode sheets to your surveyors. The order in which they use the sample barcodes does not matter as each is unique.

Linking barcodes to samples

Each number on the sheets is unique. Surveyors attach the labels to their sample bags, writing on the project number and sample number.

In Tracker Mobile, when capturing the details of a sample, the surveyor taps the **Sample Barcode** field to open the camera on their mobile device and scans the barcode on the label to associate that barcode with those sample details.



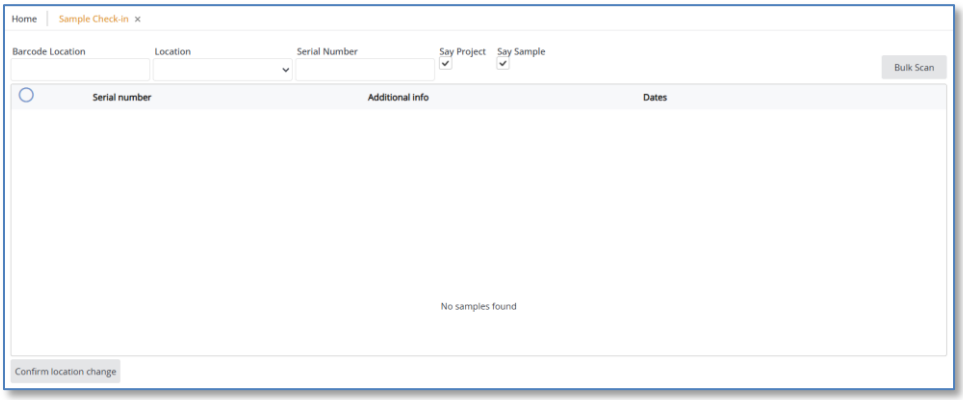
When the data is synchronised and Alpha Tracker receives the survey data, the tracking against the specified barcode shows the sample as being with “Surveyor”.

Booking samples with barcodes into a location

To book samples into a location you must have set up your locations by using the Barcode Locations screen to define and print a barcode for each location. For example, you might have a location for Reception and another for Lab, and have printed copies of the barcodes placed in those locations.

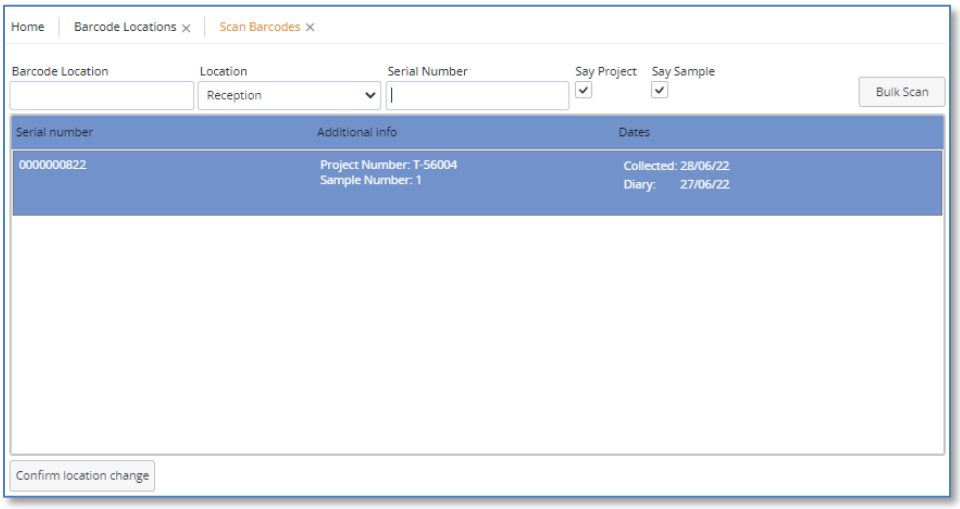
To book samples into a location, eg when they are received at Reception, or at the Lab:

1. Select “Sample Check-in” from the Sample Tracking menu, under the Resources menu.



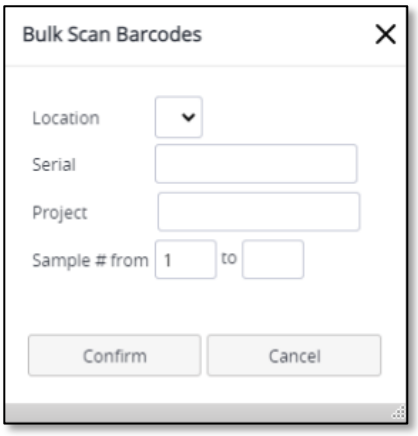
2. Select the location where you are receiving/booking in samples in the **Location** field or scan in the barcode in the **Barcode Location** field.
3. In the **Serial Number** field, scan in the sample barcode.

   The sample is added to the list on screen, the project number and sample number flash up on the screen to confirm - and if you have **Say Project** and/or **Say Sample** ticked, and speakers, the system will read out the project number and sample number.



4. Register the new location of the samples listed by clicking the **Confirm Location Change** button and clicking **Yes** to confirm that you want to make the change.

There is also a bulk scanning feature which enables you to record a change of location for a whole batch of samples in one go rather than individually. All the samples should belong to the same project. To use this feature, click the **Bulk Scan** button on the Sample Check-in screen, record the details by selecting the Location, scanning any one of the sample barcodes from the project to input the project number, then enter the range of sample numbers and click **Confirm**.



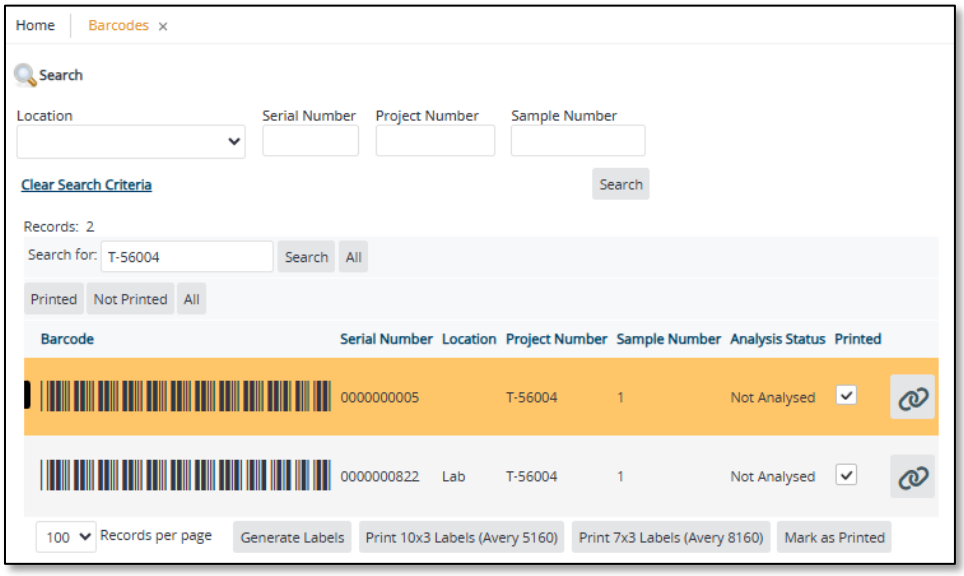
Checking the location of samples with barcodes

You can check the location of samples that have barcodes by

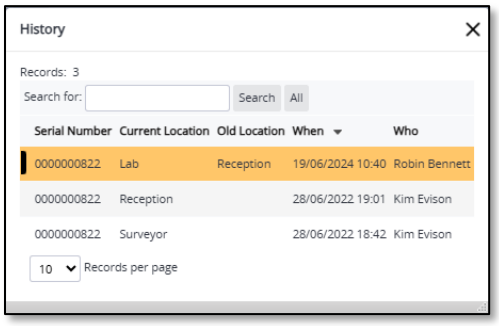
To check the location of samples:

1. Select “Barcodes” from the Sample Tracking menu, under the Resources menu.
2. Type the project number of the samples you want to locate into the quick search box and click **Search**, or open the search fields and enter your search criteria there.

   The location and status of the samples is displayed.



3. Click the chain icon to display the history of a sample's locations. The first location of a sample is labelled "Surveyor" and this shows the date the sample was taken. Each subsequent change of location is listed, with the date, time and who carried out the action.



You can also access the chain of custody history from the Fibre Analysis screen and the Fibre Analysis Records screen.

9. USING BULK SAMPLE PROJECTS

There is a type of project in Alpha Tracker called Bulk Sample. Bulk Sample projects are designed to help you manage large numbers of samples, whether the analysis is handled in-house or outsourced. Alpha Tracker allows you to work with Bulk Sample projects and to perform the following tasks:

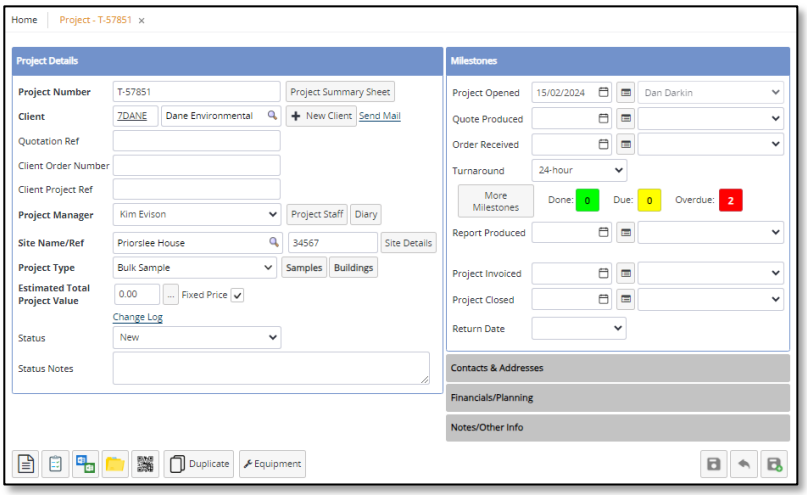
- create a Bulk Sample project (this is typically an admin task)
- record Bulk Sample analysis results (this is a lab task)
- load the Bulk Sample analysis results into the project ready for the certificate to be produced (this is typically an admin task and produces the certificates).

9.1 Creating a Bulk Sample project

You create a Bulk Sample project in the same way as you create any other project, ensuring that you select the Bulk Sample project type.

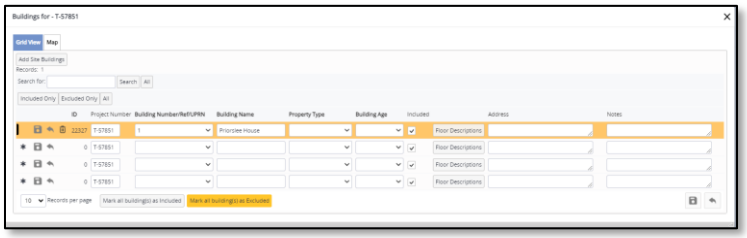
☞ Refer to 4.1, Creating a new project, for details on how to create a new project.

If the project type of the new project is “Bulk Sample”, then a **Buildings** and a **Samples** button are available for you on the New Project screen to specify details specific to the Bulk Sample project.

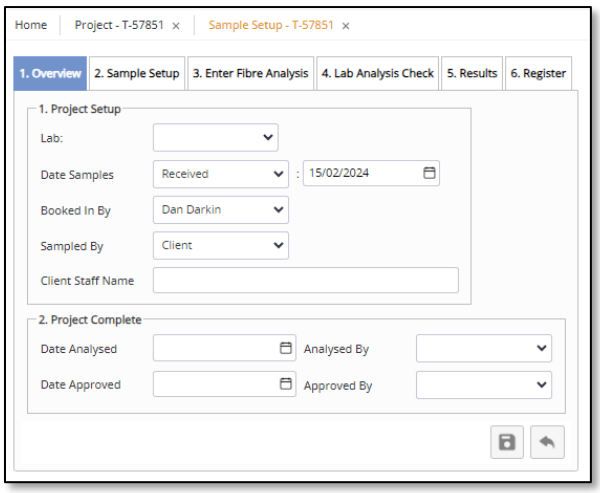


To set up the additional details for a Bulk Sample project:

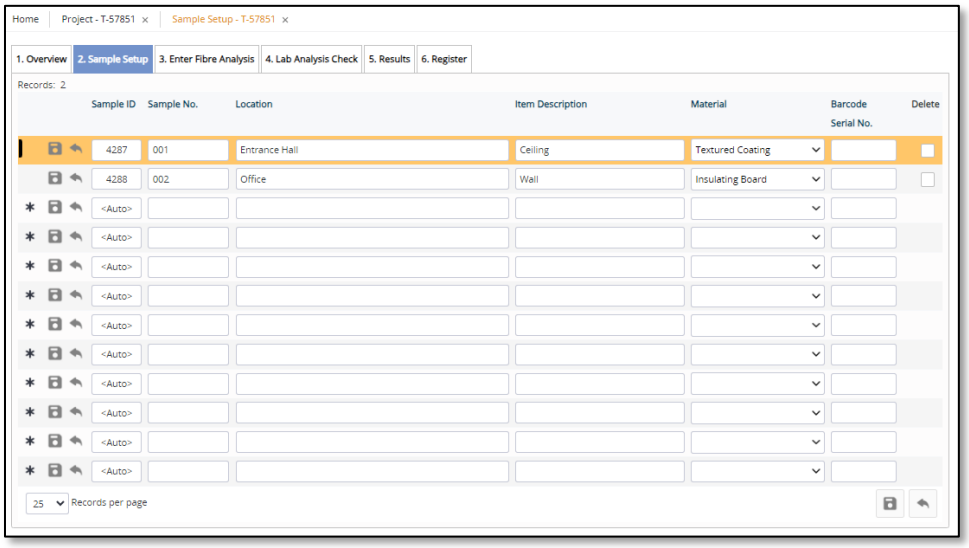
1. If required, click the **Buildings** button to display the Buildings screen for the current project.



2. Enter the details of the buildings included in the Bulk Sample project into the blank rows marked with an asterisk. One building is automatically set up for you from the site information. Click the **Save** button to save the building details and then close the Buildings screen.
3. Click the **Samples** button on the New Project screen to display the Bulk Sample screen.
4. On the Bulk Sample Setup tab, specify the lab that will be analysing the samples in the **Lab** field. By selecting the lab here you are allowing that lab access via their login to the fibre analysis screens for these samples. Select the blank entry if you are not using an external lab.

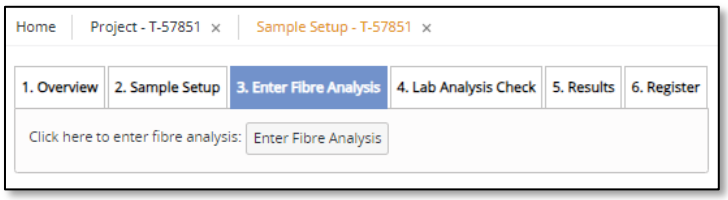


5. In the **Date Samples** field select 'Taken' or 'Received' to indicate whether the samples were taken in-house or were received from a third party and in the adjacent field, type the date the samples were taken or received as appropriate.
6. If not automatically displayed, specify who booked in the samples in the **Booked In By** field.
7. Specify who took the samples in the **Sampled By** field. You can specify "Client" if it was not one of your surveyors who took the samples but the client who provided them.
8. Save the Bulk Sample Setup details. The remaining fields are completed after analysis.
9. On the Sample Setup tab, for each sample supplied, record the sample number, location and material of the sample in the **Number, Location, Item** and **Material** fields to build a list of the samples included in the Bulk Sample project.

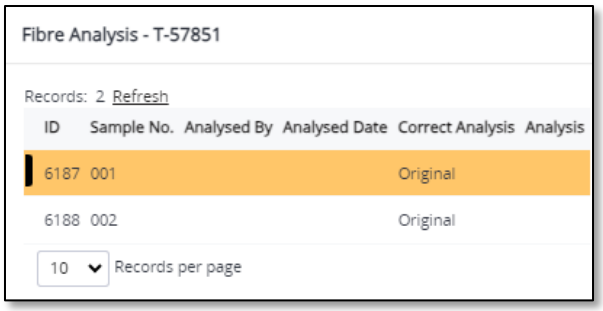


10. Save the sample details that you have set up.

11. Click on the Enter Fibre Analysis tab if you intend to record analysis results straight away.



12. Click the **Enter Fibre Analysis** button to display the list of samples and begin recording the analysis results.



9.2 Recording Bulk Sample analysis results

Analysis results for Bulk Sample projects are recorded in exactly the same way as the analysis results for Survey projects.

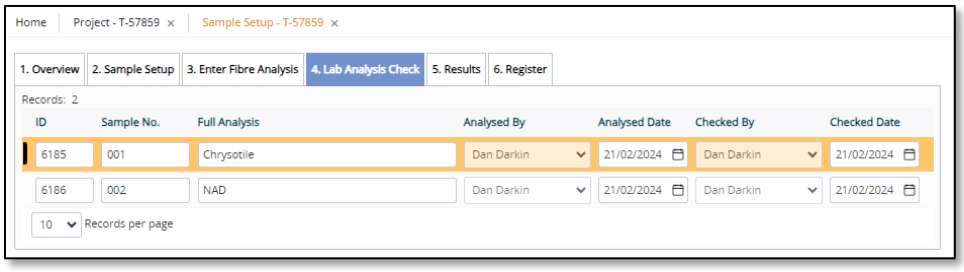
☞ Refer to Section 8, ENTERING LAB RESULTS, for details on entering the analysis results.

9.3 Loading the Bulk Sample analysis results

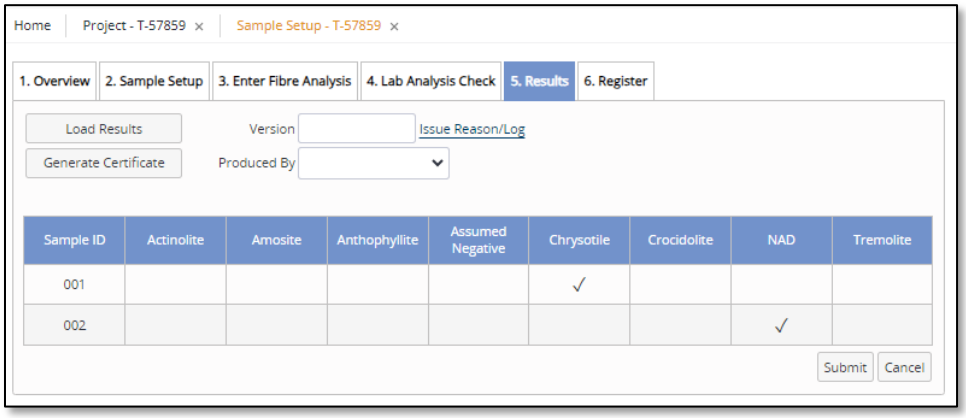
When you receive notification that the Bulk Sample analysis results have been recorded, you can load the results into the project record so that they are available for inclusion in reports. This task is often an administrative task, not one done in the laboratory.

To load the Bulk Sample analysis results:

1. Search for the required project and display its project details.
2. Click the **Samples** button to display the Bulk Sample screen.
3. Click on the Lab Analysis Check tab to see the summary of the analysis.



4. Click on the Results tab to display the lab results with the appropriate boxes ticked for each sample. If they are not displayed, click the **Load Results** button.



5. On the Results tab, click the **Generate Certificate** button to produce the Bulk Certificate report for the Bulk Sample project.

   Depending on your system setup, there may be restrictions on who can generate certificates and when, eg only when the analysis has been approved, or on who can amend certain fields and when.

   The **Issue/Reason Log** link opens a dialog in which you can record details of reasons for reissuing certificates.

Don't forget to update the status and milestones on the project to keep the project details up-to-date.

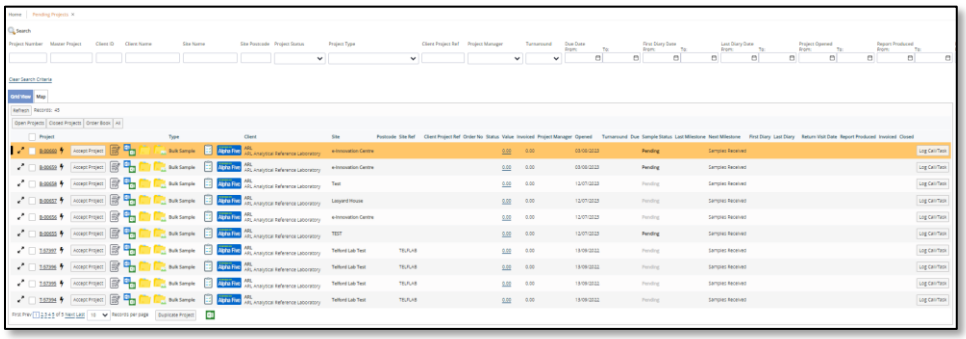
9.4 Receiving bulk samples via the Client Portal

If your Alpha Tracker is set to allow clients to log bulk samples via the Client Portal, then there is a process to follow to accept the samples.

An email notification is sent when a client has submitted some bulk samples via the Client Portal. To receive this, your email address must be in the setting "emailAddressForClientSubmittedSamplesNotifications". You can then accept these projects and analyse them as normal.

1. Select "Pending Projects" from the Projects menu to display the screen that lists all auto-created projects from samples submitted via the Client Portal.

   These projects display a **Sample Status** of "Pending" in grey. The list tells you the projects for which you are expecting to receive physical samples.



2. When you receive the actual samples, click the **Accept Project** button to accept the project.

   An email is sent to the address specified in the setting "emailAddressForClientSubmittedSamplesAcceptedProjects" to indicate that the samples are ready for analysis. If no email address is specified, the email is sent to all members of the Lab group and the client's Account Manager.

   If the project has a milestone linked to the Key Milestone "Samples received in Lab", then that milestone is updated. The Sample Status is updated to "Samples Received".

3. Analyse the samples and record the results as usual.

Note that if your clients can log samples via the Client Portal then they will also be able to view analysis results by using the "Review Samples" menu option.

10. PRODUCING THE SURVEY REPORT

This section describes how to generate a survey report in Alpha Tracker once the survey data has been entered and the lab analysis completed. It also explains how to locate reports you have created, and to review and edit the contents of the report.

There is also a section on how to share the survey data with other Alpha Tracker systems.

10.1 Checking the survey is complete

Before producing the report you should check that the survey data is complete and valid. With one click Alpha Tracker can perform a set of automated checks on surveys to ensure that obvious points are checked.

The checks made are determined by a system setting which lets you run either the full set or a selection of them. There are also certain checks that are determined by the survey type (0-9). These can be run in addition to the specified set and are linked to the Survey Type so may be client-specific. Contact Start Software if you would like to change the set of checks that run.

The standard (full) set of data validation checks consists of:

- **[A] Data present?** – Checks that survey data has been sent in. Provides a count of the number of data items present.
- **[B] Front Page Photo taken?** – Checks whether a record with location 000 is present.
- **[C] All items have buildings?** – Checks that a building has been selected for each item.
- **[D] All samples analysed?** – Checks that analysis results are present against each sampled (S) and cross referenced (X) item. Identifies those without analysis.
- **[E] No duplicate samples?** – Checks whether sample numbers have been used more than once. Identifies the duplicated samples.
- **[F] All no access rooms have reasons?** – Checks that the **Notes** field contains text on items where the room is marked as No Access. Identifies those without notes.
- **[G] All items have surveyor and date?** – Checks that all items have both a surveyor and survey date recorded.
- **[H] All suspect items have photos?** – Checks that a photo is present on all items where an approach (S, P, SP, X) is entered. Identifies those without photos.
- **[I] All positive samples and presumeds have recommendations?** – Checks whether an entry exists in Recommended Action for sampled (S and X) items with a positive analysis and for presumed (P and SP) items. Identifies those without a recommendation.
- **[J] All suspect items have close-up photos?** – Checks that a close-up photo is present for all items where an approach (S, P, SP, X) is entered. Identifies those without close-up photos.
- **[K] All presumed or confirmed items have material scores?** – Checks that a material score is present for all items with an approach of P or SP and for all items with an approach of S or X that have a positive identification. Identifies those without a material score.

- **[L] All presumed or confirmed items have priority scores?** – Checks that a priority score is present for all items with an approach of P or SP and for all items with an approach of S or X that have a positive identification. Identifies those without a priority score.
- **[M] All suspect items have sample notes? –** Checks that the **Sample Notes** field has been completed for all items where an approach (S, P, SP, X) is entered. Identifies those without sample notes.
- **[N] All samples and x-refs are numbered?** – Ensures a sample number is present for all items with an S or X approach.
- **[O] Asbestos types are consistent for all materials?** – Reports if a material is present in the survey data with more than one asbestos result, for example if Textured Coating items are present with both Chrysotile and NAD results.
- **[P] Single location name per location number?** – Checks that a location number hasn't been given more than one name.
- **[Q] All no-access rooms have notes/reasons?** – Checks that the **Notes** field contains text on items where the room is marked as No Access. Identifies those without notes.
- **[R] Drawing files exist** – Checks whether drawings have been uploaded for insertion into the report.
- **[S] Certificate files exist** – Checks whether plans have been uploaded for insertion into the report.

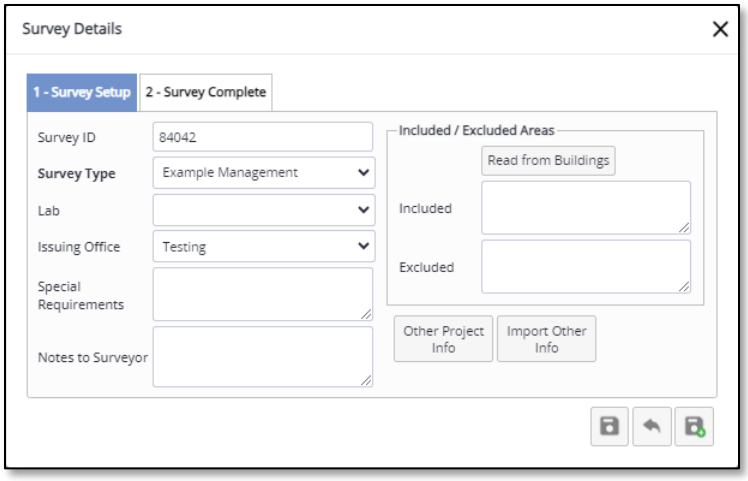
You can run these checks either from the Survey Details screen or in a more interactive fashion from the Survey Data screen using the hi-tech Alpha Validator.

All validator checks are advisory only, so you can decide to accept or ignore "failures" and still continue to produce a report.

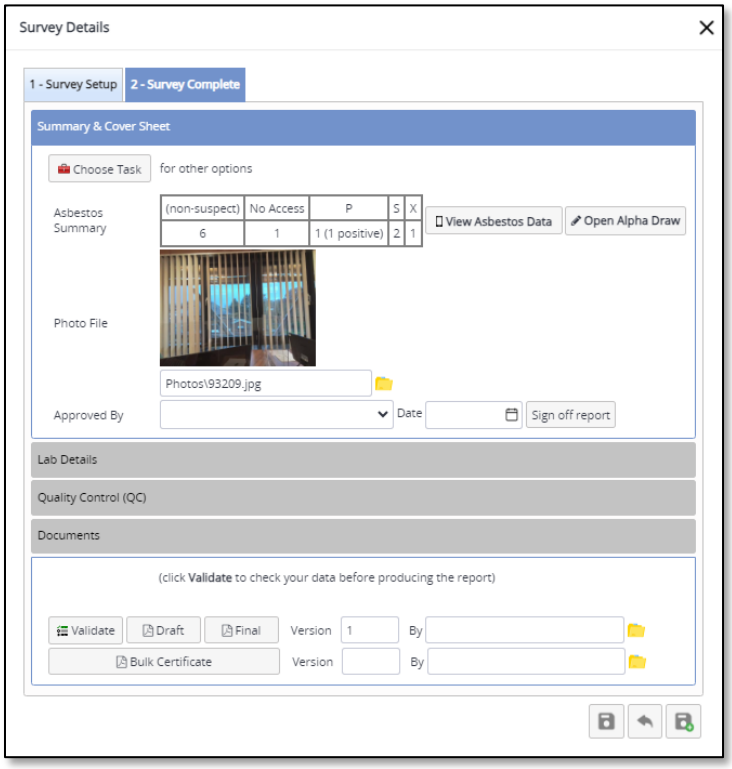
10.1.1 Validating from Survey Details

To validate survey data from Survey Details:

1. Search for and display the survey project.
2. Click the **Survey Details** button to open the Survey Details screen – or click the underlined Project Type for the project on the Project list screen. The Survey Details screen is displayed, for example:

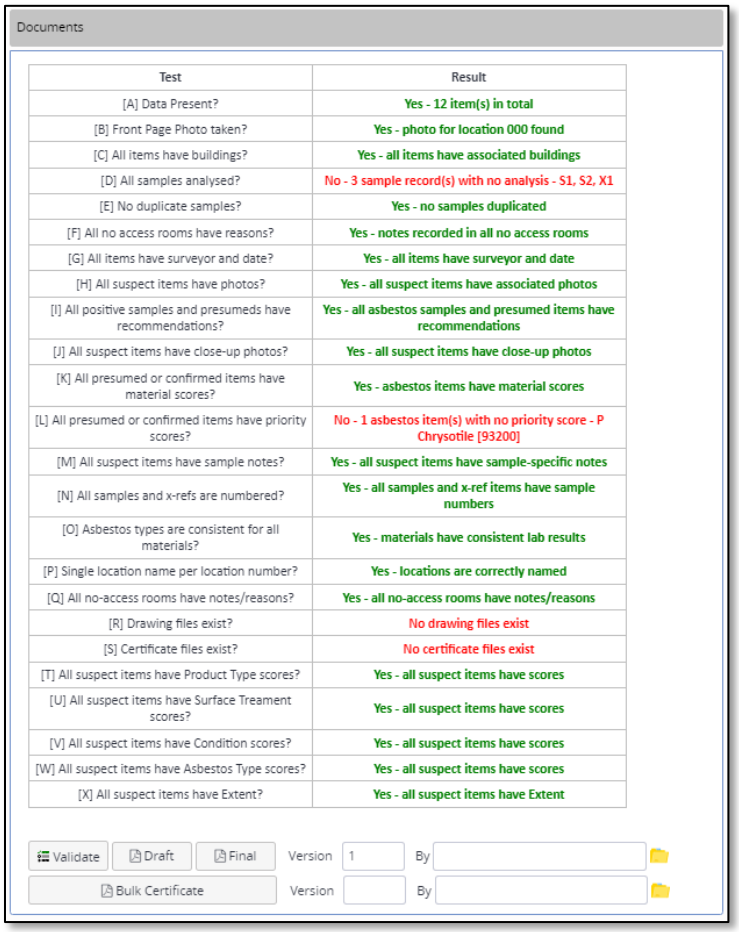


3. Click on the “2 – Survey Complete” tab to display it.



4. Click **Validate** to run the validation checks. These checks can also be set to run automatically when you request a report.

   A message informs you when the checks have completed. Click **OK** to close the message. The validation results are displayed.


Documents

Test	Result
[A] Data Present?	Yes - 12 item(s) in total
[B] Front Page Photo taken?	Yes - photo for location 000 found
[C] All items have buildings?	Yes - all items have associated buildings
[D] All samples analysed?	No - 3 sample record(s) with no analysis - S1, S2, X1
[E] No duplicate samples?	Yes - no samples duplicated
[F] All no access rooms have reasons?	Yes - notes recorded in all no access rooms
[G] All items have surveyor and date?	Yes - all items have surveyor and date
[H] All suspect items have photos?	Yes - all suspect items have associated photos
[I] All positive samples and presumeds have recommendations?	Yes - all asbestos samples and presumed items have recommendations
[J] All suspect items have close-up photos?	Yes - all suspect items have close-up photos
[K] All presumed or confirmed items have material scores?	Yes - asbestos items have material scores
[L] All presumed or confirmed items have priority scores?	No - 1 asbestos item(s) with no priority score - P Chrysotile [93200]
[M] All suspect items have sample notes?	Yes - all suspect items have sample-specific notes
[N] All samples and x-refs are numbered?	Yes - all samples and x-ref items have sample numbers
[O] Asbestos types are consistent for all materials?	Yes - materials have consistent lab results
[P] Single location name per location number?	Yes - locations are correctly named
[Q] All no-access rooms have notes/reasons?	Yes - all no-access rooms have notes/reasons
[R] Drawing files exist?	No drawing files exist
[S] Certificate files exist?	No certificate files exist
[T] All suspect items have Product Type scores?	Yes - all suspect items have scores
[U] All suspect items have Surface Treament scores?	Yes - all suspect items have scores
[V] All suspect items have Condition scores?	Yes - all suspect items have scores
[W] All suspect items have Asbestos Type scores?	Yes - all suspect items have scores
[X] All suspect items have Extent?	Yes - all suspect items have Extent

Validate Draft Final Version 1 By
Bulk Certificate Version By

The tests applied are listed in the left-hand column and the results in the right-hand column. All “passes” are displayed in green and “failures” in red.

A data_check.htm file is created and stored in the project folder each time you run the validation checks. This is backed up and renamed _1, _2 etc like other generated files to provide a history of data validation checks run.

5. If there are any red results from the validation check, display the survey data and correct as necessary. The text of the results should indicate the problem record(s).

6. Re-run the data validation checks until you are happy the survey data is complete and the report is ready to be run. The validator checks are advisory only, so you can decide to accept or ignore “failures” and still continue to produce a report.

10.1.2 Validating from Survey Data

The new hi-tech Alpha Validator feature works from the Survey Data screen to help you ensure that survey data is properly complete as you are checking/editing the data. It also saves you from having to return to the Survey Details to re-run validation after making changes.

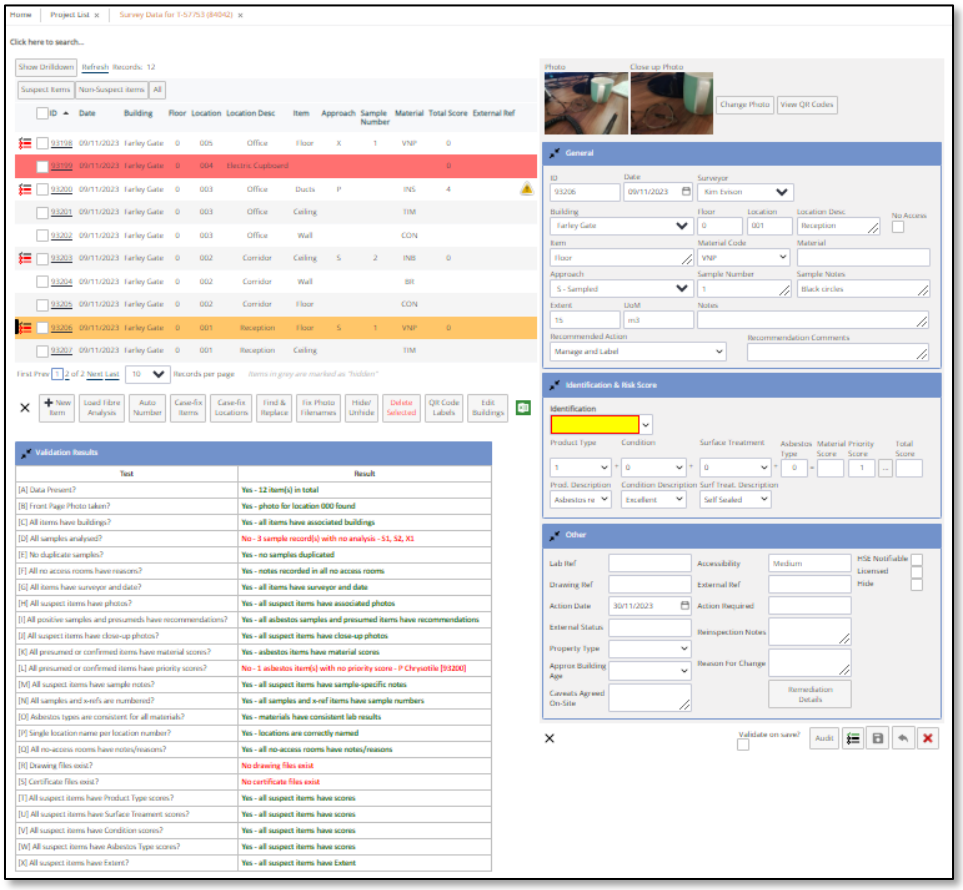
If you want this validation to run automatically whenever survey item changes are saved, then the setting “Should Alpha Validator automatically run after each Survey Item is saved?” needs to be set to yes. Alternatively, you can run the validation on saving data for a particular

project, or completely manually, by clicking the new buttons in the bottom right of the Survey Data screen.

To validate survey data from Survey Data:

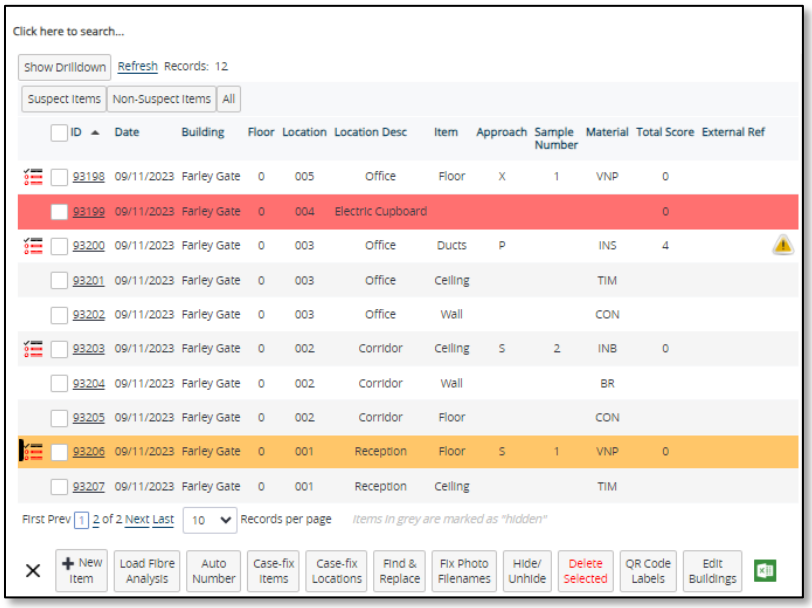
1. Search for and display the survey project data. For example, search on the Projects List then click the mobile icon to jump directly to the survey data for this project.
2. Click the **Validate** button at the bottom of the screen to run the validation manually.

Any fields with an issue are outlined in red, as well as the green and red validation results being displayed. In this example, the selected record has no **Identification**:



In addition, you can see that other records require your attention as they are marked with a red validation icon as having failed this validation in the list so that you can easily identify the records that need fixing.

For example:

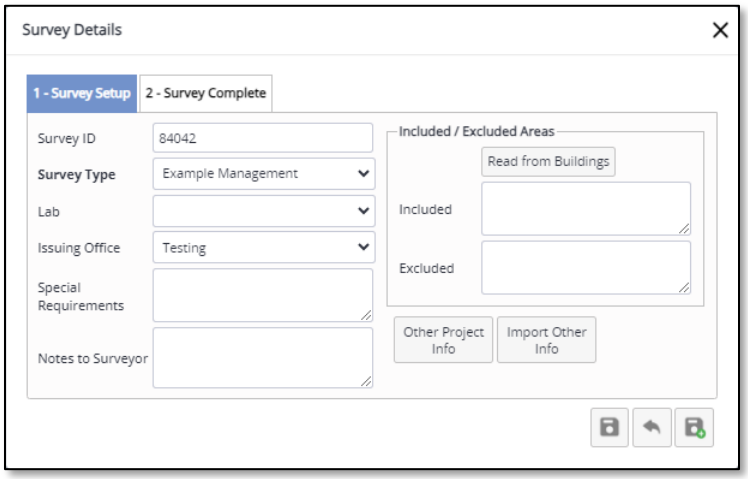


3. Tick the **Validate on save?** button.
4. Make changes to the data to correct the issues. Whenever you save the data the validation will now re-run.

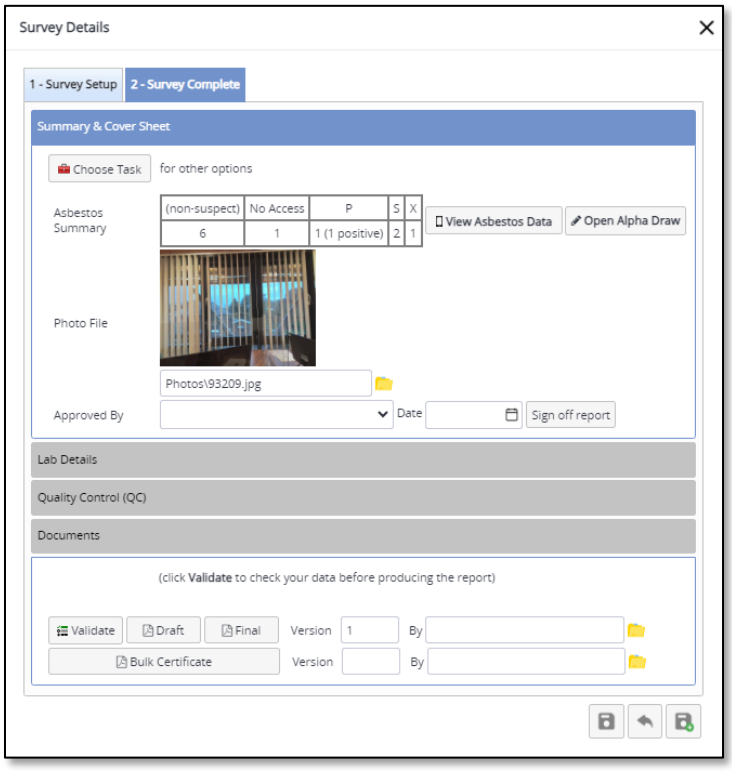
10.2 Generating the survey report

To generate the survey report:

1. Search for and display the survey project.
2. Click the **Survey Details** button to open the Survey Details screen – or click the underlined Project Type for the project on the Project list screen. The Survey Details screen is displayed, for example:



3. Click on the "2 – Survey Complete" tab to display it.



4. Ensure all required details are present for the project. For example:
   - Summary & Cover Sheet
     - ensure summary details are present showing that results have been entered
     - **Front Page Photo** and **Photo Filename** should show the filename of the photo you want to appear on the front page of the report
     - **Approved By** and **Approved By Date** should show the name of the member of staff who is authorising the report and the sign-off date (depending on your procedures you may not complete this until a draft report has been authorised). If the "Sign Off Report" button is present you can use this to complete both fields. Security settings restrict the use of these fields and button to users in the Superuser and Quality groups. Furthermore, only the names of users who are in the Quality group will appear on the dropdown list on the **Approved By** field (although the Surveyor's name may also be added to the list if the Survey Type is set up to allow this).

     It is possible to configure your Alpha Tracker so that entering a date in the **Approved By Date** field prevents the production of any further reports for the project. A system setting controls whether document production is stopped. If it is switched on, the **Produce Report** buttons are greyed out when a date is entered.
   - Lab Details
     - **Date of Analysis** – the date on which lab analysis was received
     - **Analysed By** – who performed the lab analysis
     - **Certificate Ref** – the reference number of the certificate if appropriate
   - Quality Control
     - **Quality Control Date**, **Name** and **Notes** if appropriate.

You can also check the survey data is tidy, accurate and complete by using the options available from the **Choose Task** button. These options give you different ways of looking at the survey data so that you can filter out the data you do not want to work with, for example you can:

- show only samples (approach S)
- show all survey items
- show only suspect items (approach S, SP, P and X)
- display only photos
- display a list of duplicate non-suspect items which you can amend or delete from.

5. Click the **Draft** or **Final** button to begin document generation.

   The difference between the **Draft** and **Final** buttons is in the naming of the filename. The draft report has "DRAFT" at the front of the filename so that it is clear that this file is a draft report and this also prevents the file from appearing on Tracker Web Server by mistake.

   Draft status can easily be removed from a file by clicking the "Remove Draft Status" button on the Documents list.

   The naming of the filename can be controlled by system settings to include the project's site name and/or the survey type.

   Note that validation may be set to run automatically when you request a report. Also, if the Draft and Final buttons are greyed out, you should check that you have selected a Survey Type for this project on the "1 – Survey Setup" tab. The Survey Type is needed to determine which template to use when generating the report.

6. When the report has been generated you will receive an email notification with the report attached. The report document and PDF will also appear in the Documents list which you can view by clicking on the Open Document Folder icon.

You can produce the report any number of times. All previous versions are saved as numbered backups.

While the normal process is to produce one report when you click Draft or Final, it is possible to set up the system to generate more than one document. To do this, multiple report formats are specified against a Survey Type as a comma-separated list. One document request is created for each report format, and these can each have a friendly name so that you can distinguish them.

10.3 Viewing and editing the report

When a report has generated, you receive an email notification which has the report as an attachment. The report is then also available for download to your PC from the Documents folder. You can edit the downloaded report and, when it is complete, upload the report again.

You can also upload other documents to the project folder such as certificates and drawings, automatically storing them in the correct subfolder. And a **Delete** button lets you delete files that are no longer required from the project folder.

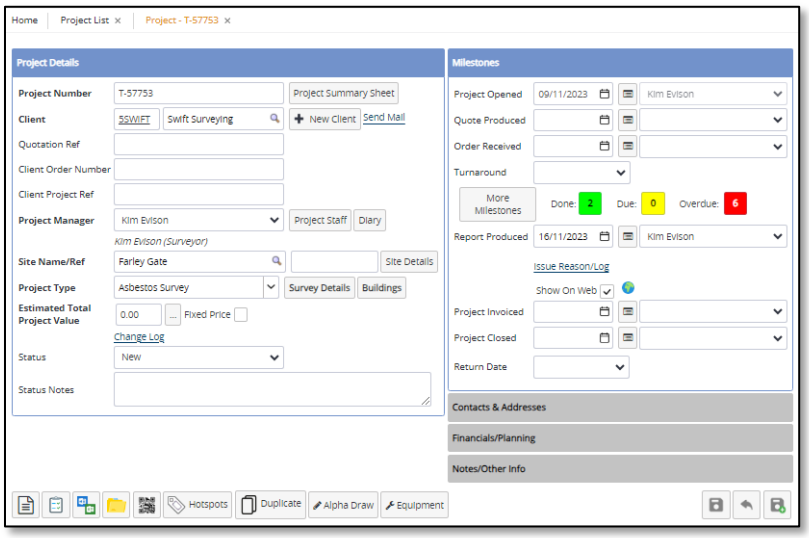
To view and edit the report:

1. Search for the survey project.

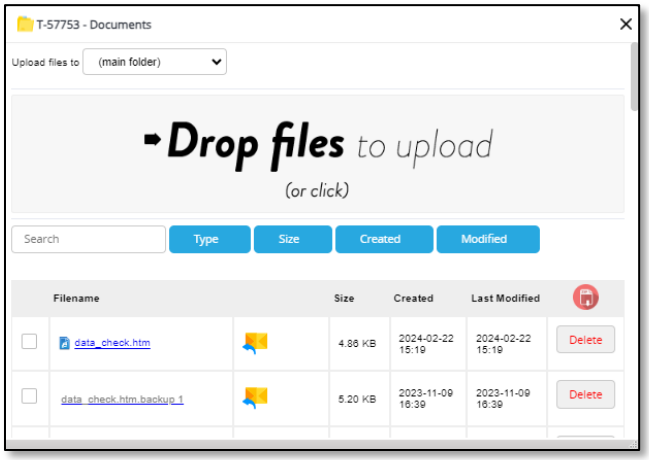
   You can search for the project in a number of ways:

   - entering a key word, project number or client reference in the quick search field at the top of the Projects menu
   - selecting the “Project List” menu option and entering search criteria to find the required project
   - selecting one of the “Open Projects” menu options which let you list projects in a number of ways.

2. If you wish, click on the required project number to open the survey project.



3. Display the Documents by clicking the yellow Open Document Folder icon at the bottom of the Projects screen or on the appropriate row of one of the list screens.

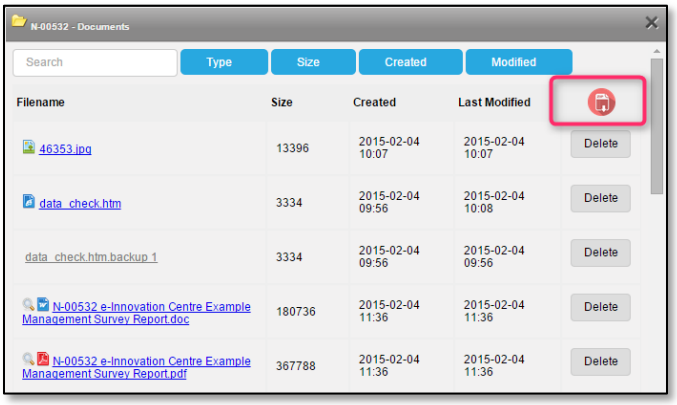


4. Find and click on the underlined project report that you want to review. The document is downloaded to your PC.

   A search field at the top of the Documents screen helps you quickly find the required files. Simply type part of the filename in the Search field to filter the list.

You can also sort the displayed files by using the blue sort buttons at the top – clicking twice on the Modified button, for example, puts the latest document at the top of the list.

Files that can be previewed display a small magnifying glass next to the filetype icon – click on this to preview the file without downloading it.



You can also download all files in a folder in one go as a ZIP. Click the red button in the top right-hand corner of the document folder to start the all-files.zip download to your PC. There is a setting that lets you choose whether subfolders are included in or excluded from the downloaded zip file.

5. Open the report in Microsoft® Word on your PC and edit the content as required.
6. Save the amended report and PDF it if required.
7. Upload the amended report.

In the Document folder:

- Ensure **Upload files to** is set to the correct destination. By default, it is set to the main folder, but if you want to upload files to a subfolder you must select the subfolder here.
- Scroll down to the bottom of the files listed in the Document folder until you reach the Drop zone – this may be positioned at the top or the bottom of the folder.
- Either click in the Drop zone and browse to the files to upload, or drag and drop the files onto the drop zone.

*Don't forget to update the status and milestones on the project to keep the project details up-to-date. In particular, it is important to enter a date in the Report Produced milestone when the final version of the report has been produced. A **Show On Web** tickbox is then available. When ticked, the project and its reports become available on the Client Portal.*

10.4 Uploading reports and other files

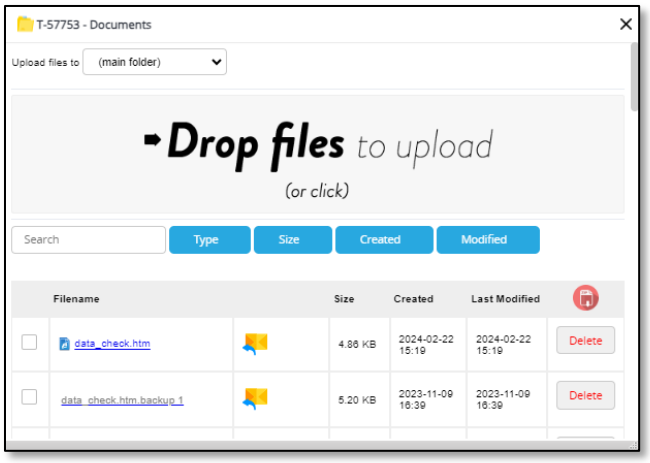
Uploading documents to the project folders is straight forward. You need only select the destination (main folder or a specific subfolder) and then browse to, or drag and drop, the files to upload.

If you save certificates and drawings as *.jpg files and store them in the automatically created subfolders (eg Certificates and Drawings) it is possible for these files to be inserted automatically into your reports. Single-page drawings and certificates can also be uploaded in PDF format without needing to convert them to JPG first. If you do not use the named subfolders, make sure that the filename contains the word “drawing” or “certificate” for them to be recognised. It *isn’t* possible to mix and match file-types and the system will look for PDFs before JPGs. So, if there is one PDF drawing the system will *not* look for any JPG drawings. You could use JPG certificates however in the same document (as long as there was not a PDF certificate).

To upload files:

1. Open the project for which you want to upload a file.
2. Click the Open Document Folder icon at the bottom of the Project screen to display the files linked to this project. (This folder is also accessible from the Project List and the Survey Details screen.)

3. Ensure **Upload files to** is set to the correct destination. By default, it is set to the main folder, but if you want to upload files to a subfolder you must select the subfolder here.



4. Scroll down to the bottom of the files listed in the Document folder until you reach the Drop zone (this may also be positioned at the top).
5. In the Drop zone, use either of these methods:
   - click in the Drop zone, which opens a file selection window, and browse to and select the files to upload
   - open File Explorer, browse to the files you want to upload then drag and drop the files onto the drop zone.

You can make use of subfolders in the project files if you wish. For example, photos can be made to drop automatically into a separate subfolder. To do this you need the “Photo Subfolder Name” setting to specify the name of the subfolder and for this also to be specified in settings.xml in Tracker Upload Manager. The photos are dropped into the subfolder when new data is processed from Tracker Mobile.

You can also specify a list of project subfolders to be automatically created by using the "ProjectSubfolders" setting.

If you upload a file with the same filename as one that is already present in the document folder, the original is backed up automatically.

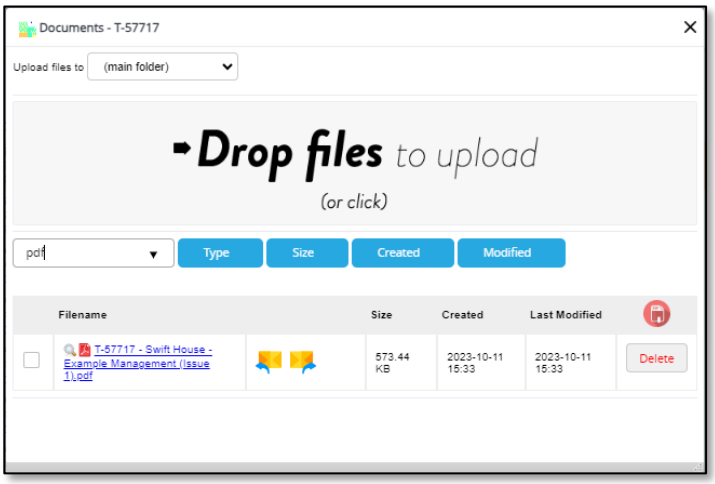
10.5 Emailing files to your clients

You can choose how you send the final reports to your clients. For example, you might want to attach the PDF of the report to a standard email that you send from your Outlook account, or you might choose to use one of the Alpha Tracker features to:

- email the PDF directly from the Document folder
- automatically email the PDF directly to clients.

10.5.1 Emailing files from the Document folder

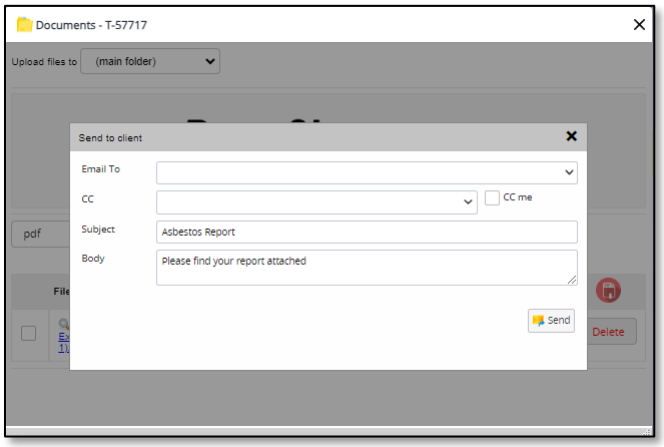
You can email files from the Documents folder directly to your clients or to yourself by using the envelope icons. You can do this from the Document folders on quotations and on projects.



- To email any of the files to yourself (to the email address associated with your login), find the file in the Document folder and click the **Email to Me** button. The email is sent immediately.

- To email your report out to the client, simply find the PDF in the document folder and click the **Email to Client** button. (This is only available for PDFs.)

A window is displayed allowing you to choose who the email is to go to and to type a message.



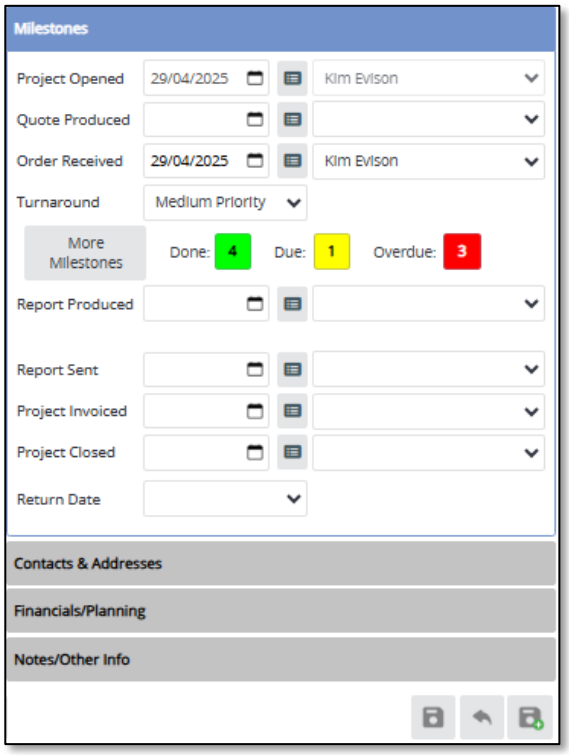
The **Email To** and **CC** fields let you select from the Report Recipients or to type in an email address. Tick the **CC me** box to automatically send a copy to yourself too. If you are using Tracker Filer, simply enter your Tracker Filer email address in the setting "Tracker Filer Email Address", so that a **CC Tracker Filer** tickbox also appears.

You can also set the **Subject** and **Body** to prefill with standard text by using settings. You might, for example, have "Project Number: {PN} , Ref: {Client_Project_Ref}, Site: {Site Name}" to prefill the Subject line with the project number, reference and site name.

If the name of the selected PDF includes "DRAFT", then you will see a warning. All emails sent to clients are logged in the Access Log.

10.5.2 Automatic emailing of asbestos survey reports

Asbestos survey reports can be automatically emailed directly to your clients from Alpha Tracker. If you choose to use this function, you will need to have the Alpha Tracker Work Queue installed; it is the Work Queue that automatically sends the reports. The "Report Sent" field should also be switched on to display on the Project screen – it is displayed as a new milestone below Report Produced and is automatically completed if the report is automatically sent.



There are also settings to complete to define the criteria that will identify which survey reports are ready to send. You can control these aspects of the process:

- which clients are to be included in the automatic sending of reports (you must set a flag on the Client Details of each client who is to be included)
- whether reports are ready to send when the Survey Approved Date is completed, or when the QC Date is completed
- if all automatically sent report emails should be CC'd to a specific address
- default text for the subject and body of the emails
- the sending address visible on the emails.

Please contact Start Software on 0333 301 1010 for help setting up the automatic sending of survey reports.

The Alpha Tracker Work Queue identifies the projects matching the selection criteria where the Report Produced milestone is complete and the Report Sent milestone is not complete, and then emails the reports. By default, the Alpha Tracker Work Queue runs every minute, but this is configurable.

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

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

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

10.6 Hotspotting drawings

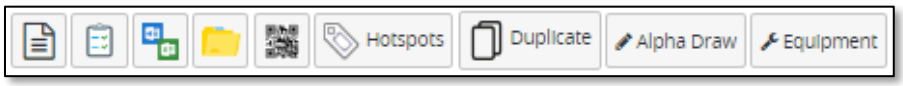
The Hotspot Editor is a feature that lets you annotate a plan or drawing with the survey items from the project. It only works with "survey" type projects.

To access the Hotspot Editor:

1. Upload the required plans (as .jpg files) to the "Drawings" subfolder for the project.

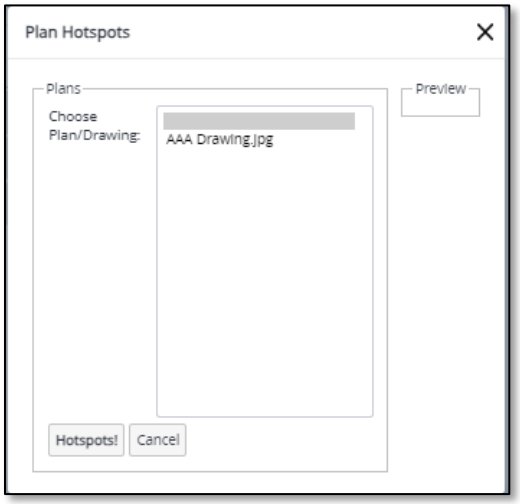
   You can open the project's document folder, select the subfolder in **Upload files to** and use the drop zone to drag and drop, or click and select, to upload the .jpg file(s).

2. Open the project and click the **Hotspots** button which is displayed in the row of buttons:

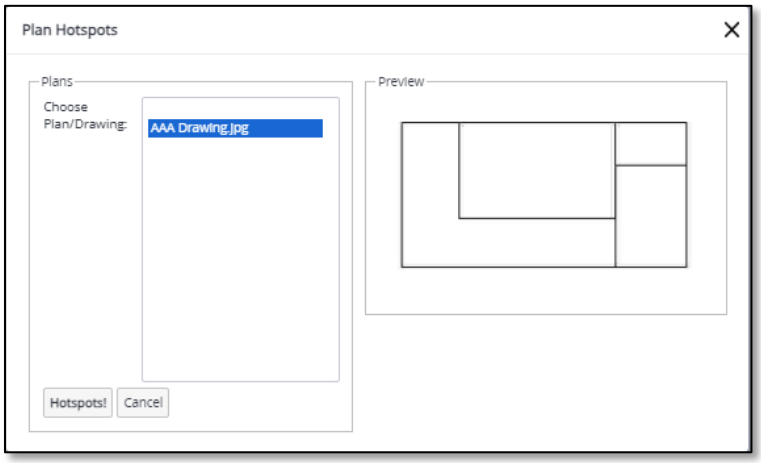


   Alternatively, click **Survey Details** to display the Survey Details screen, click on the second tab "2 – Survey Complete", then click **Choose Task** and select "Plan Hotspots".

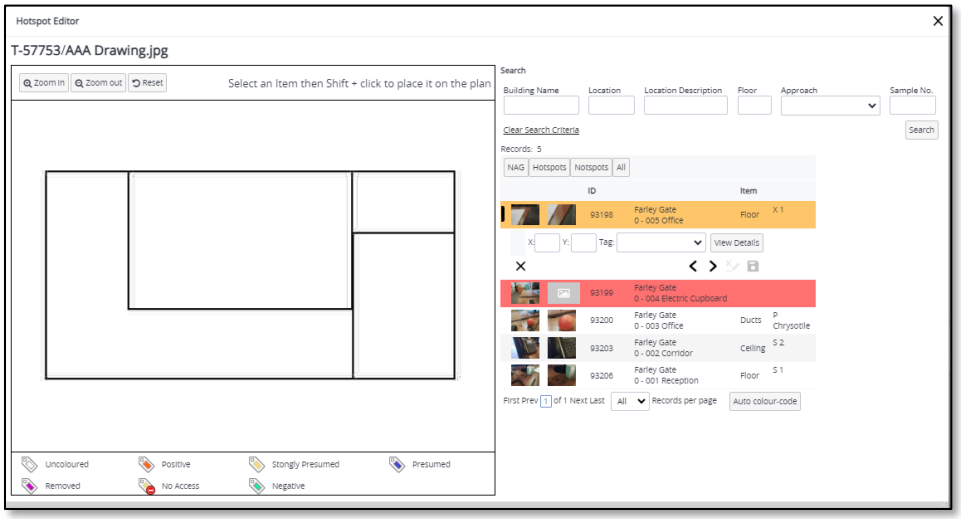
   A list of the plans in the Drawings subfolder for this project is displayed.



3. Select the required plan to preview it.



4. Click **Hotspots!** to open the Hotspot Editor



The list on the right displays the survey items for the project that you can place on the plan. This consists of all survey items with an approach (eg S, P, SP, X, PS) and also No Access items (NAG).

To place an item on the plan:

1. Use the filters at the top of the list to reduce the size of the list as necessary.

   For example, show only Sampled items by setting the Approach filter to “S” and clicking **Search**, or show only items not yet placed on a plan by clicking the **Notspots** pre-set filter button. (Notspots are not yet on the drawing, as opposed to Hotspots which have already been placed on a plan.)

2. On the list on the right, click on the survey item that you want to place on the plan.

   A row of information is displayed below the item. For an item that has not already been placed this is blank.

3. Hold down the Shift key and click where you want to drop the hotspot on the plan.

4. Click on another record of your choice, and place that on the plan by holding down the Shift key and clicking where you want to drop the hotspot.

You can control how the items (the hotspots) placed on the plan are labelled by using the "Hotspot Text Template" setting and other related "Hotspot Text…" settings. You could, for example, have the text template in the format {Approach}{Sample_Number} ({ID}), which would output something like "S3 (167225)". The other "Hotspot Text…" settings allow you to control text attributes (bold, italic, underline), font and point size.

To move an item on the plan:

1. Click on the item on the list, or click on the tag on the plan so that the item is automatically selected on the list.
2. Hold down the Shift key and click where you want to move the hotspot on the plan.

To remove a tag from the current plan so that the item can be placed on a different plan:

1. Click on the item on the list, or click on the tag on the plan so that the item is automatically selected on the list.
2. Click the **Remove from Plan** button.

All tags when first placed on a plan are grey unless you specifically select a colour, meaning that the item has no identification associated with it. Once identifications are known, you can automatically apply colour-coding to the tags:

1. Click the **Auto colour-code** button at the bottom of the list to apply the tag colours according to identification.

   The screen refreshes and displays the coloured tags according to the key displayed on screen:

To navigate the display:

1. Zoom the plan in and out with the controls above the plan.
2. Pan by holding down your mouse button.
3. The item details on the list on the right are clear and concise and include the item photos. See scoring details and larger photos by clicking the **View Details** button.
4. Hover on a hotspot to display brief details. Click on it to select the item on the right so that you can move it, change its tag or access more item information. Or select an item from the list and see the hotspot flash to show you where it has been placed on the plan.

10.7 Sharing survey data

Survey data can be shared between linked Alpha Tracker systems enabling you to send completed surveys to another Alpha Tracker where the data can be stored and reported as if it had been created on the system.

You can:

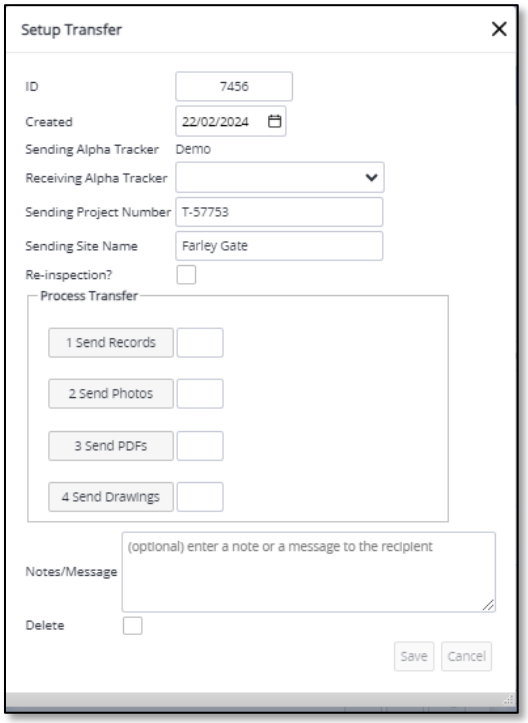
- send a report and its survey data to a linked system
- receive a report and its survey data from a linked system
- display which systems your Alpha Tracker is linked to
- display details of transfers from or to your system.

10.7.1 Sending a report and its survey data to a linked system

When you have completed a survey and produced and finalised the report, you can choose to send both the report and all the supporting survey data to a linked Alpha Tracker system. All the data is sent to a holding server, from where it can be requested by the receiving party.

To send a survey:

1. Open the required project on the Projects screen and click Survey Details to display the Survey Details screen. Click on the second tab, “2 – Survey Complete”.
2. From the Choose Task menu, at the top on the right-hand side of the screen, select “Send Survey to another Alpha Tracker” and click **OK**. A screen is displayed for you to enter details of the data transfer.



3. Select the Alpha Tracker system to which you want to send the survey from the drop-down list on the **Receiving Alpha Tracker** field.

   The project number and the site name of the project you are sending are displayed for reference.

4. Click each of the Process Transfer buttons in turn to send the data. A progress bar indicates the progress of the transfer and a message is displayed when the transfer is complete. When the transfer is complete, you can then click the next button in the sequence. The buttons are:
   - **Send Records** – to send the actual survey data
   - **Send Photos** – to send the photos in the survey
   - **Send PDFs** – to send the PDF files in the project
   - **Send Drawings** – to send the contents of the Drawing subfolder.

   The data is copied to a holding server, where it waits to be requested by the recipient.

> *If there are PDFs in your Project folder that you do not want to be included in the transfer, put them into a sub folder of the main Project folder. It is only PDFs in the main Project folder that are included in the data transfer.*

5. Write a message, if required, to the recipient of the survey in the **Notes/Message** box.
6. Click **Save** to save the transfer details and close the screen.

10.7.2 Receiving a report and survey data from a linked system

If you are receiving survey data from a linked Alpha Tracker system, then you need first to set up a project and survey in your Alpha Tracker, into which to transfer the data.

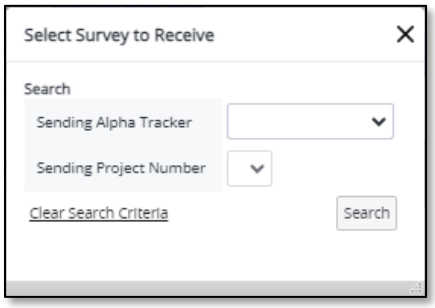
You can then select the project that you want to receive.

To receive a project:

1. Use the “New Project” from the Projects menu (or an alternative method) and create a new project.

   Get the next number for the project and select the client – this may be your Housing Department or similar. Enter the site name where the survey was carried out and select the Asbestos Survey project type.

2. Click the **Survey Details** button to display the Survey Details screen and select the type of survey that has been carried out on the property.
3. Save the Survey Details.
4. Return to the Survey Details screen, click on the second tab “2 – Survey Complete” and from the Choose Task menu select “Receive Data from another Alpha Tracker” and click **OK**. A screen is displayed for you to select the data to receive.

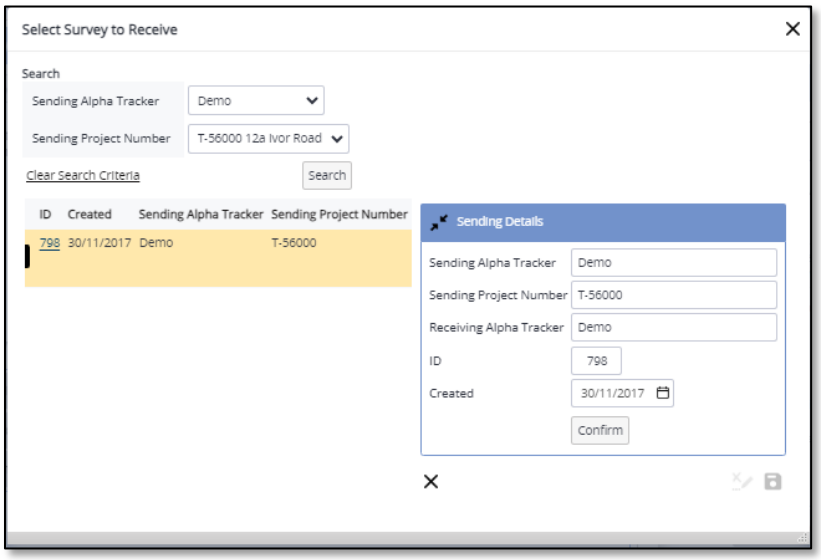


5. In the **Sending Alpha Tracker** field, select the system from which you want to receive data.

6. In the **Sending Project Number** field, select the project that you want to receive into your project.

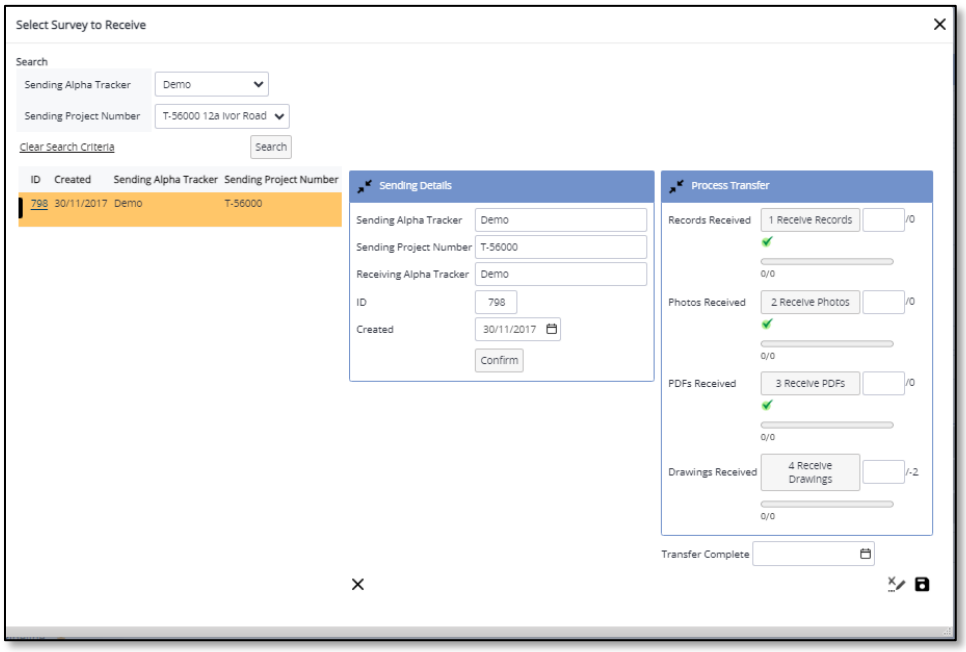
   The list contains the projects that have been sent to you by the system specified in the **Sending Alpha Tracker** field and are waiting to be received by you.

7. Click **Search**. Details of the project are displayed, including any message attached to the project.



8. Check the details displayed in the Sending Details area of the screen and click **Confirm** if this is the project that you are expecting.

   After an initial “Thank you” message, the Process Transfer area of the screen is displayed, with buttons to process the data.



9. Click each of the Process Transfer buttons in turn to receive the data. A progress bar indicates the progress of the transfer and a message is displayed when the transfer is complete. When the transfer is complete, you can then click the next button in the sequence. The buttons are:
   - **Receive Records** – to receive the actual survey data
   - **Receive Photos** – to receive the photos in the survey
   - **Receive PDFs** – to receive the PDF files in the project
   - **Receive Drawings** – to receive the contents of the Drawings subfolder.

   There are numbers displayed next to the buttons to indicate the number of records that should expect to receive. If the data is retrieved correctly, then the number of records actually received is also displayed as well as a tick to indicate that the data has been pulled down.

10. Select the date in the **Transfer Complete** field when all records have been received.

11. Save and close the screen.

    If you return to a refreshed Survey Details screen you can see the summary data for the received survey, as well as the front page photo of the report on the second tab "2 – Survey Complete".

    The survey data is now present on your system as if you carried out the survey yourself.

10.7.3 Linking Alpha Tracker systems

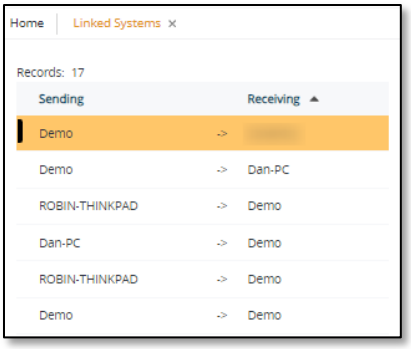
The linked systems must be specified in both Alpha Trackers.

Please contact Start Software on 0333 301 1010 to set up the linking of systems.

Users with advanced permissions are able to display which systems they are linked to as follows:

1. Select “Linked Systems” from the System menu, under Setup.

   The systems to which you are linked, as both a sender and a receiver are displayed, for example:



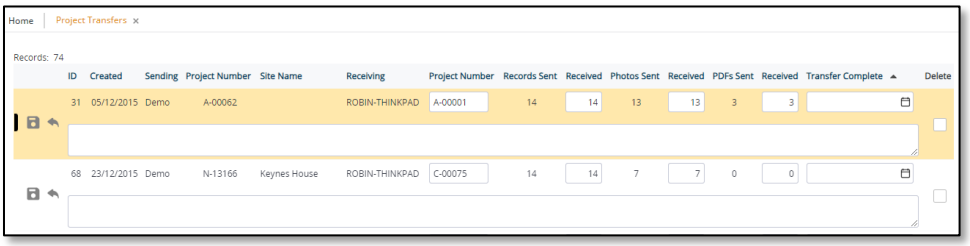
You cannot amend these details.

10.7.4 Displaying transfer details

Users with advanced permissions are able to display details of transfers that have taken place to and from their system as follows:

1. Select “Transfers” from the Lab and Surveys menu, under Setup.

   The details include the sending and receiving project numbers, dates and numbers of records transferred, for example:



You cannot amend these details.

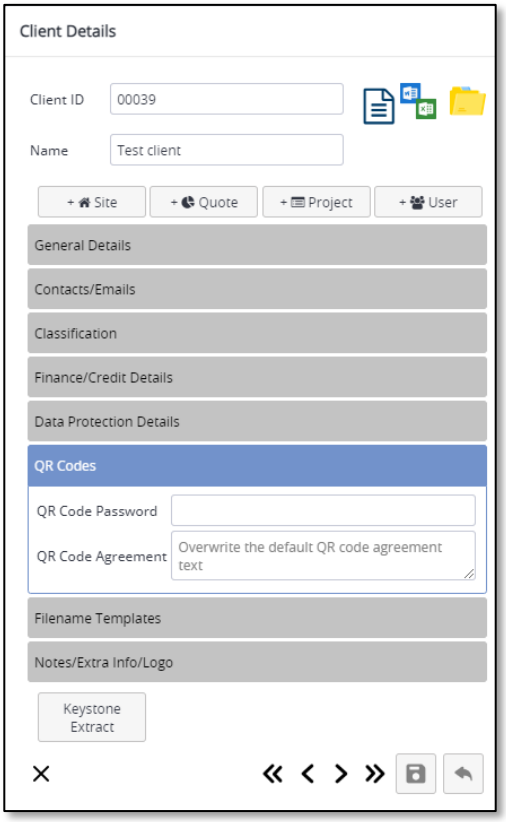
10.8 Using QR codes

QR codes can now be used within surveys. Initially, the idea of using QR codes is that if someone scans the QR code at a future date using their smartphone or tablet, the service can allow them access to the relevant Client Portal for more information about that report.

Alpha Tracker generates public and private QR codes – for projects, sites and survey items (room-based or individual items):

- *Public* QR codes are likely to be used most often and they have a passcode built in which enables the user to see the data as per the report **without** the need to enter a login. That is, they see the same information as the report.
- *Private* codes are generated without the passcode and so require a login to work.

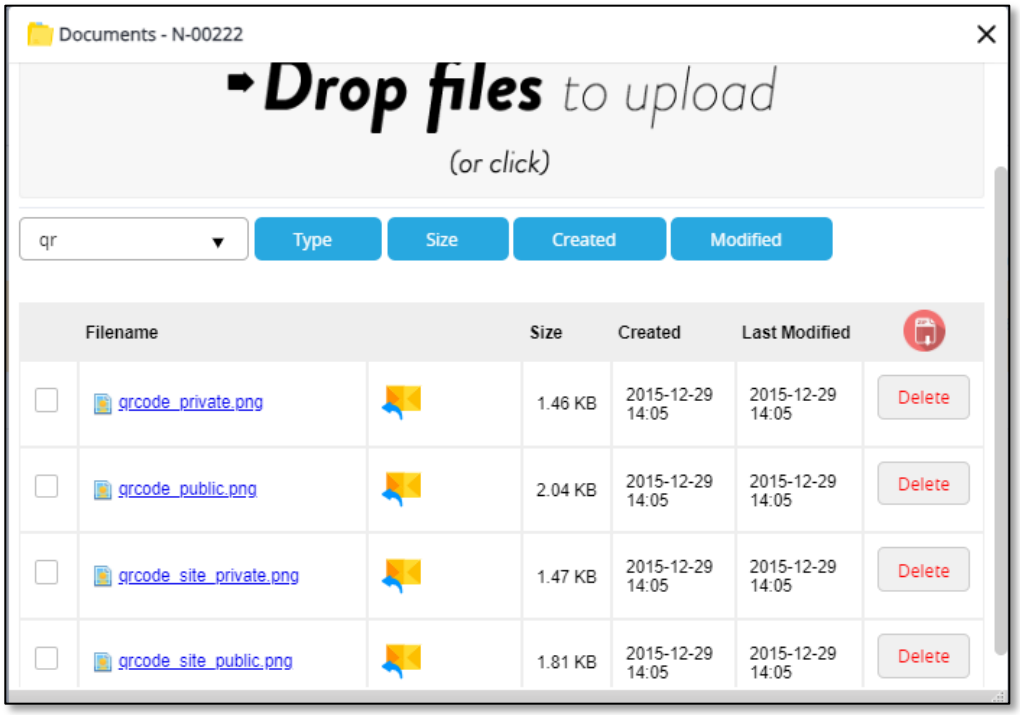
With private QR codes, your client is taken to a "landing page" to enter their name, company, password and to agree to a statement before viewing data. You can specify the default text of the statement in the setting "QR Code Agreement Text" and you can enter the **QR Code Password** for a client and overwrite the default text for this client on the Client Details screen, QR Codes tab:



New tags can be added to your report templates to show the appropriate Project QR code. You might, for example, want to include them on the front cover.

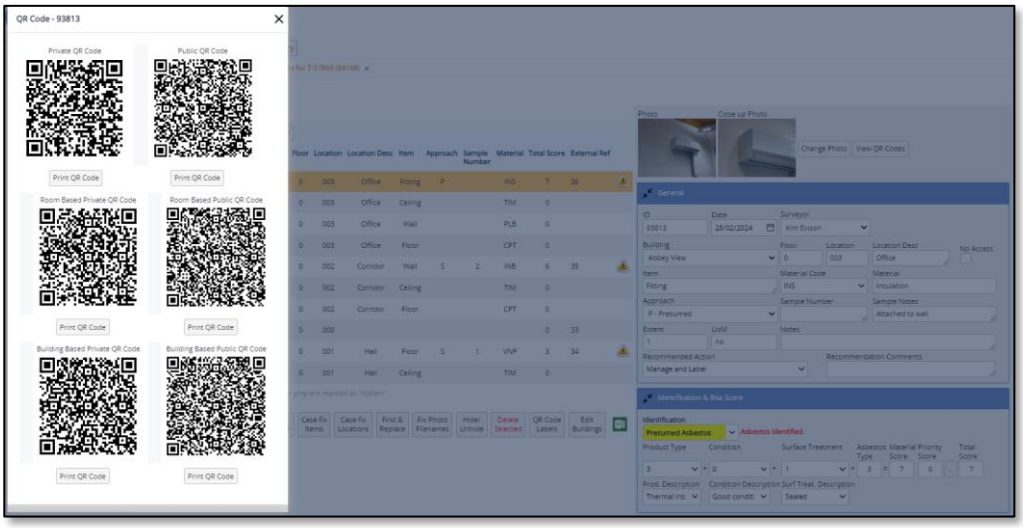
Site QR codes might be used within a physical site – for example on Visitor Books at reception, or on labels on the walls. These Site QR codes would be available for the emergency services or a contractor to scan to get more info about asbestos at the site. Again, there are public and private versions. Room-based QR codes could be used in a similar way, listing surveyed items in the room.

The QR codes are generated and saved within the project document folder and the site document folder as PNG images. They are generated when the project document folder or the site document folder is opened, or when a report is produced if they have not already been generated. This screen shows an example of the files generated in the project document folder.

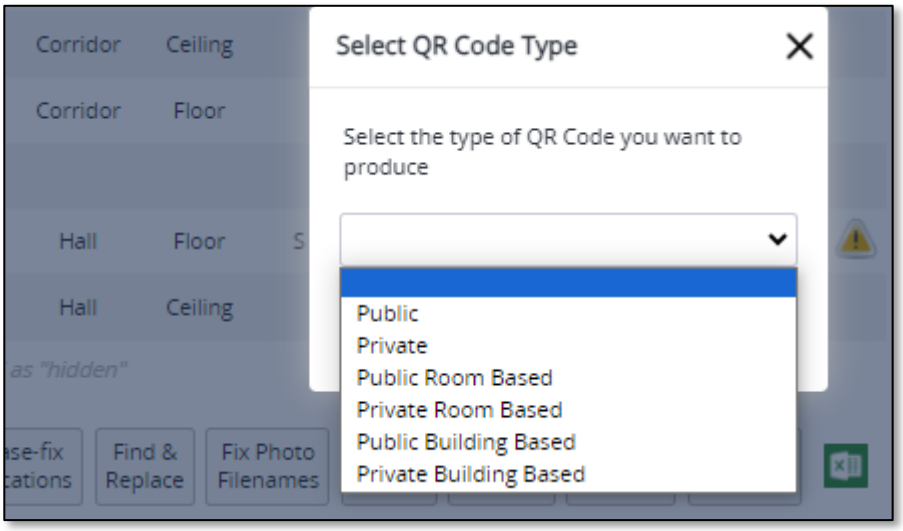


Records are kept, and stored independently, of all requests for register or report data, making it possible to determine whether a site register was accessed.

Survey item QR codes are generated when survey items are present in the project. They can be displayed on the Survey Data screen by highlighting an item and then clicking the View QR Codes button (next to the photos). The codes can be printed.



You can also print labels of survey item QR codes by clicking the QR Code Labels button at the bottom of the Survey Data screen. You are asked to specify which type of QR Code you want to produce.



Also on QR codes, there is functionality to download reports from project QR codes, and Site QR codes can display the PDFs available in the Client Uploads subfolder of the site.

When QR Codes are downloaded, an Excel file is included in the download and contains the URLs for the QR codes. QR codes may be downloaded from the site asbestos register or from a project. The URLs for the QR code may be used to access the Alpha Tracker register data from external systems.

☞ Please contact Support if you are interested in using the QR code service.

11. REGISTERS AND RE-INSPECTIONS

This section describes how you can:

- display the Asbestos Register for a site
- update items on the Asbestos Register for a site
- create Re-inspection projects from the Asbestos Register for a site
- create Re-inspection projects from a survey project.

11.1 Displaying the Asbestos Register

The Asbestos Register shows you the current position regarding asbestos items at a site. Regardless of the number of projects that you may have carried out at the site, the latest position is displayed. So, if for example a site first had a management survey carried out and then a refurbishment to the kitchen, and subsequently had an asbestos item removed, the Asbestos Register can give you the latest position taking into account all asbestos items recorded and changed, including the removal.

For a survey to be reflected in the Asbestos Register there is one condition:

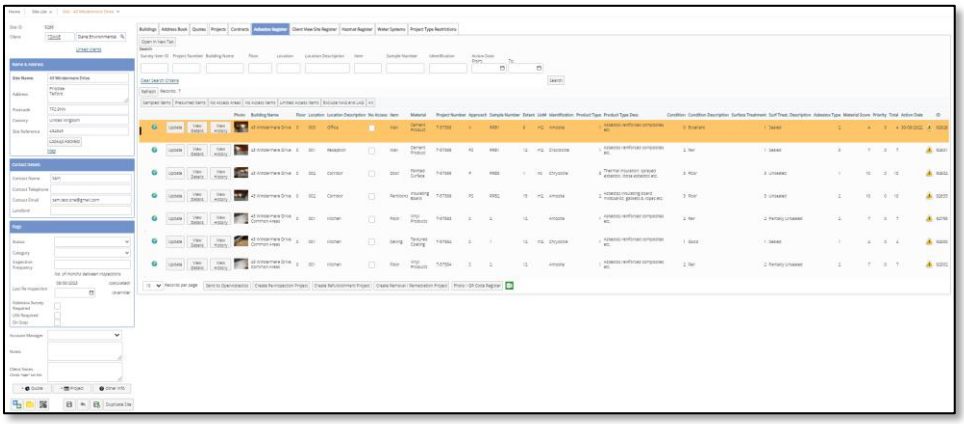
- there must be a date in the **Report Produced** milestone for the project

For a survey to be reflected in the Client View Site Register there are two conditions:

- there must be a date in the **Report Produced** milestone for the project
- the **Show On Web** tickbox on the project must be ticked.

The Asbestos Register is displayed from the site:

1. Select “Site List” from the Sites menu and use the search fields at the top of the screen to find the required site. Click on the underlined **Site Name** to display the details.
2. Click on the Asbestos Register tab to show the Asbestos Register for the current site.



Alternatively, display a project for the site and click the **Site Details** button on the project.

You can:

- update the survey item if, for example, the item has been removed or remediated by clicking the **Update** button. If you make changes to any fields that relate to the material score, then the **Material Score** and the **Total Score** are recalculated to reflect the changes. Note that this method of updating an item is only for ad hoc updates in between surveys
- view the details of the survey item by clicking the **View Details** button
- view the previous details recorded for an item (if previous details exist) by clicking the **View History** button
- create a Re-inspection project from the site survey items
- create a Removal or Remediation project from the site survey items
- display, download or print a register including photos and/or QR codes.

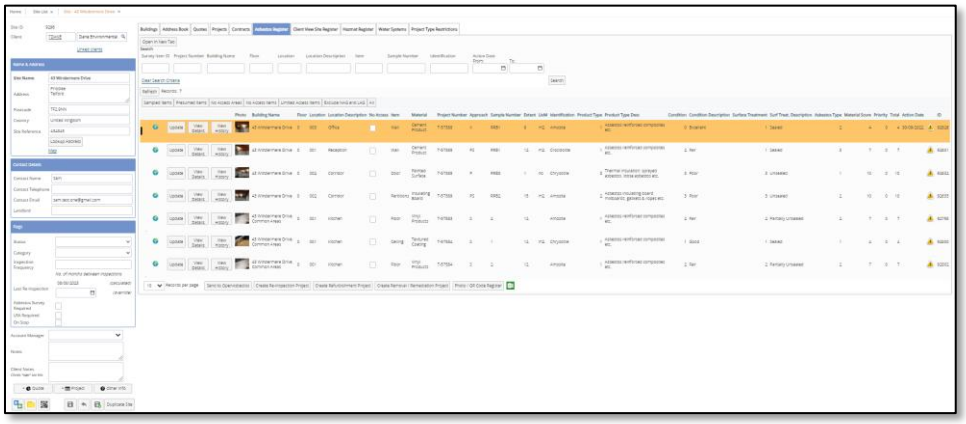
☞ Refer to Section 11.3, Re-inspecting a site, for details on creating Re-inspection or Removal/Remediation projects from the Site Asbestos Register.

If you want a preview of what your client can see on the Registers from the Client Portal, then click on the Client View Site Register tab. The screen has filter buttons to show only the Asbestos Register, Sampled Items, No Access Areas etc for the Site. You also have the Print PDF button available so that you can print the register for the site too.

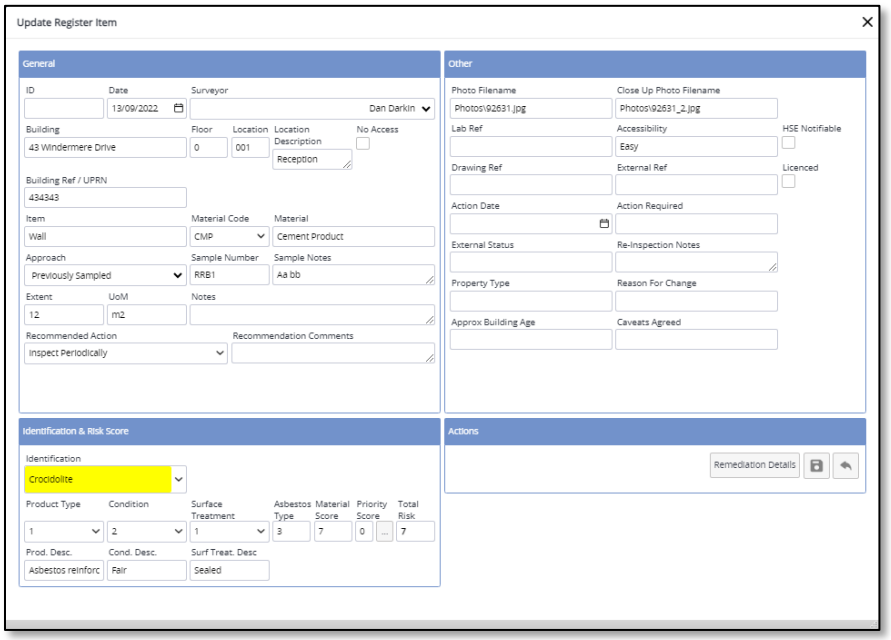
11.2 Updating the Asbestos Register

If you need to manage your site information, keeping the Asbestos Register up to date with changed or removed items, then you can manually update the Asbestos Register. To do this:

1. Search for and display the details of the required site and then click on the Asbestos Register tab.



2. Use the search fields at the top of the screen and/or the filter buttons immediately above the item list to display the item(s) to update.
3. Click the **Update** button. An editable screen is displayed, showing the details of the survey item.



4. Amend the details as necessary.

5. To mark an item as removed, either:
   - change the **Identification** to “Removed”, or
   - if available, click the **Remediation Details** button, and set the **Remediation Type** to “Removal” *and* either the **Remediation Status** to “Complete” or set a **Remediation Complete** date.

6. Save the changes and close the screen. You return to the Asbestos Register with the item updated.

   You can see that the item has been updated as the **View History** button is no longer greyed out, ie the item now has a history that you can view.

7. Click the **View History** button on the item to check the previous entries and the **View Details** button to check the current entry.

11.3 Re-inspecting a site

This section describes how to create re-inspection projects from the Asbestos Register. The main steps in performing the re-inspection are:

- locate the site that you want to re-inspect
- select the records from the Asbestos Register for the site
- create the re-inspection project
- send the records for the re-inspection project to a specific mobile device or hold in a pending subfolder until you choose to send them
- carry out the re-inspection, capturing new data as necessary
- synchronise to send in the re-inspection data
- check the data and create the report.

11.3.1 Performing a site re-inspection

When creating a Re-inspection project from the Asbestos Register you are able to select from the most up-to-date survey items across the whole site. So, if for example a site first had a management survey carried out and then a refurbishment to the kitchen, and subsequently had an asbestos item removed, the Re-inspection project can include all (or a selected few) of the asbestos items on the Asbestos Register, taking into account all asbestos items recorded and changed, including the removal.

The new Re-inspection project that is created is given the default office letter of the logged in user. If a site has moved between clients, then the latest client associated with the site record is used in the project creation.

Re-inspections usually have a Project Type of “Re-inspection” and a Survey Type of “Re-inspection”.

A repository setting lets you change the default project type of “Re-inspection” projects when they are created by Alpha Tracker, either from the Site Register or from a Survey. The setting is “Default Re-Inspection Project Type”. So if you call your re-inspection projects by a different name you can continue to do so when creating them automatically.

It is also important to note that Alpha Tracker looks for projects with the project type category of “Asbestos Re-Inspection” not the project type description of “Re-Inspection”.

Also, re-inspection projects must be sent to a specific handset – they are not automatically sent out to all surveyors. The specific handset must be uniquely identified by its Unit ID. When creating a Re-inspection project from the Asbestos Register it is possible to delay the sending of the records to the handset.

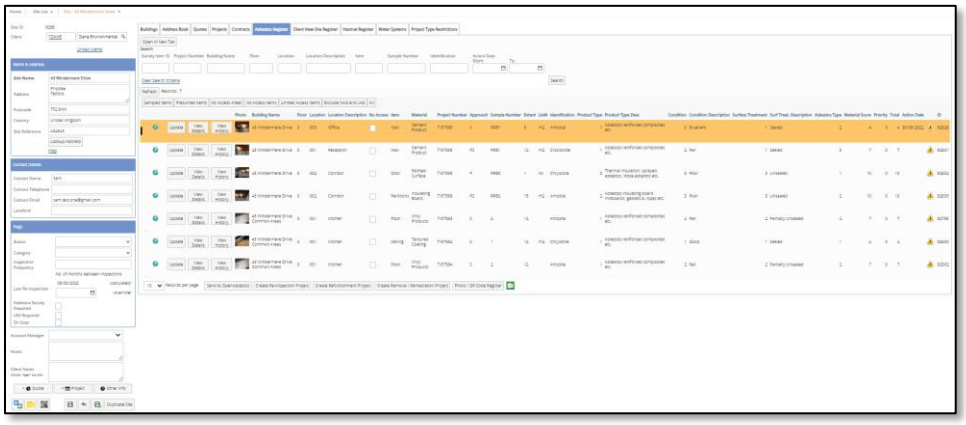
To create a re-inspection:

1. Display the details of the site that you want to re-inspect.

   You might do this by:

   - selecting “Site List” from the Sites menu and searching for the required site by using the search fields at the top of the screen
   - typing part of the site name in the quick search box on the Sites menu and then selecting from the matching entries.

2. Click the Asbestos Register tab to display the asbestos items at the site.



3. Use the search fields at the top of the Asbestos Register and/or the filter buttons to display the records that you want to include in the Re-inspection project.

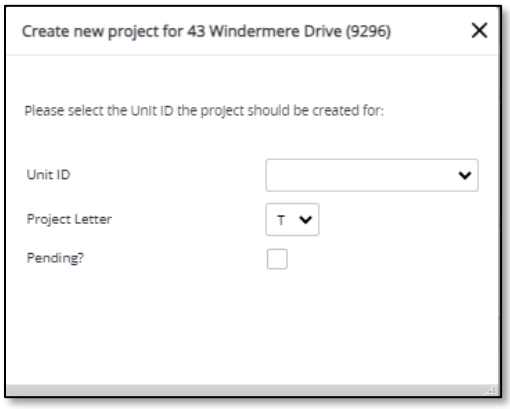
   If you want to re-inspect the whole site you do not need to filter the list at all. However, if for example you want to re-inspect only the first floor then you could use the **Floor** search field to select only those items. Or use the **Location Description** to search for items only in the Kitchen.

   Similarly, if you want to re-inspect only the sampled items on the first floor you can use a combination of the **Floor** search field and the **Sampled Items** button to display only these selected records.

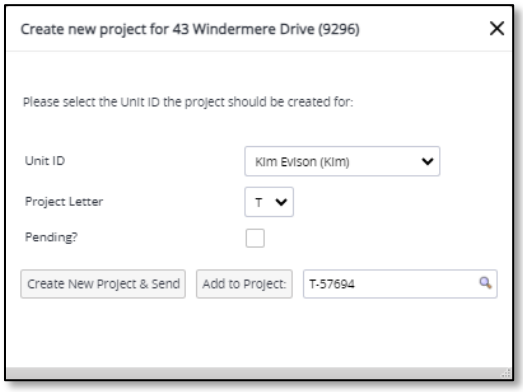
Where it is not possible to use the search fields and filter buttons to show the exact set of records you require (eg all first floor items plus all NAG areas across all floors), then the process is to send sets of records to the same project number. First send one set of records to the new Re-inspection project (eg all first floor items), then re-set your selection criteria and append another set of records to the same Re-inspection project (eg all NAG areas), and another etc.

*Note that if your system shows pending items, then any items marked as pending in the Asbestos Register (with a question mark symbol) will not be included in re-inspections. Pending items come from projects that have had the **Show On Web** tickbox ticked but do not have a date in the **Document Produced** milestone. Their pending status is removed once their project has a **Document Produced** date.*

4. Click the **Create Re-Inspection Project** button at the bottom of the list. A Create Re-Inspection Project screen is displayed.



5. Select the Unit ID of the handset to which you want to send the Re-inspection project records in the **Unit ID** field. Further fields are displayed.

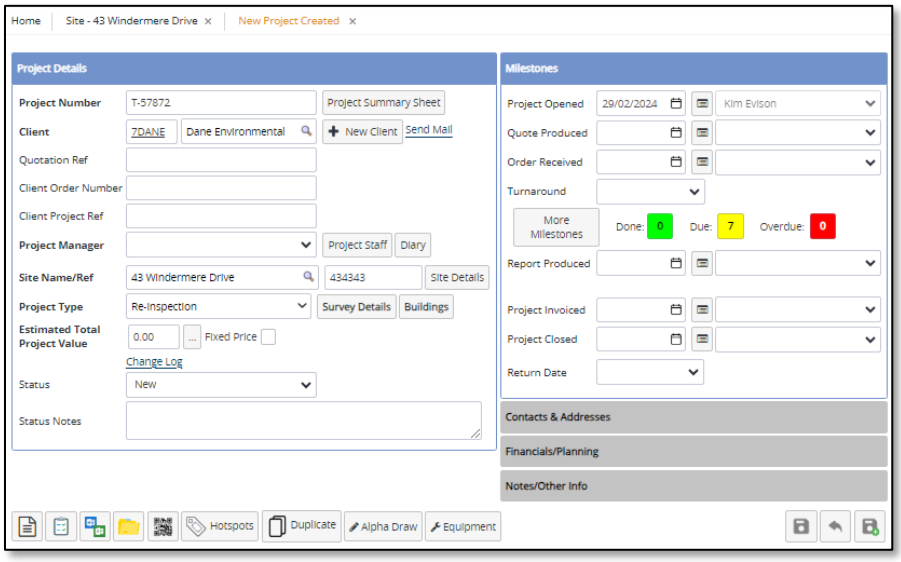


6. If you do not want the records to be immediately available on the specified handset, tick the **Pending?** tickbox and select to send the records on a **Specific Date** or **Link to a Diary Appointment**. Otherwise, leave the tickbox blank.

Re-inspection projects must be sent to a specific handset – they are not automatically sent out to all surveyors.

7. Click **Create New Project & Send** to create a new re-inspection project and send the displayed items.

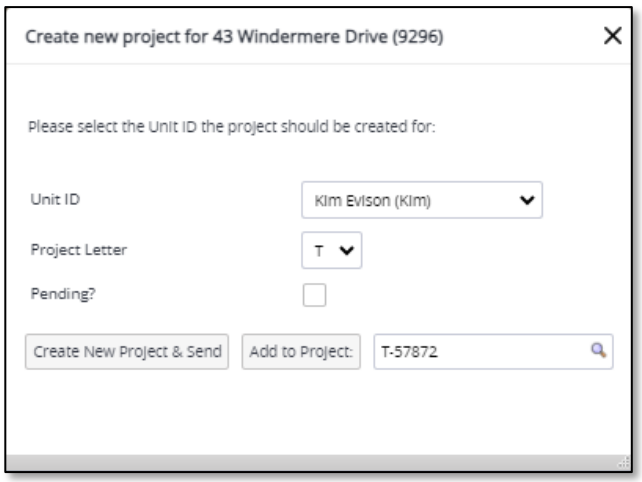
   A message informs you of the new project number and then the new project is opened and displayed. For example:



The new project has a Project Type of “Re-inspection” (unless the default setting is changed on your system) and a Survey Type of “Re-inspection”.

8. Complete the project details as necessary to set up the new project, save your changes and close the New Project screen. You return to the Site Details screen.

9. If you want to append another set of records to the re-inspection project:
   - re-set the search fields and filter buttons to show the required records
   - click Create Re-Inspection Project again
   - select the same or a different handset in the **Unit ID** field (if you select a different handset you are sharing the records in the re-inspection project between different surveyors)
   - check that the project number displayed (last project created) is the re-inspection project to which you want to append records, change it if not by either typing or using the magnifying glass button to search and select
   - click the **Add to Project:** button.



A message informs you that the XML files have been sent to the specified re-inspection project and the project opens for you to make any required changes. Close the New Re-Inspection Project screen to return to the Site Details screen.

10. Repeat step 9 as many times as necessary to add all the required items to the re-inspection project.

    The re-inspection survey data will arrive at the specified mobile device once your Tracker Mobile has synchronised survey and project information. This may take 5 minutes or so, depending on your system settings. If your device is always connected then the data arrives automatically, if not then it arrives after you have connected and synchronised. If you have selected Pending, then the data will arrive later, as specified.

11. When the records have arrived on the handset, synchronise to download the new project.

    The new sessions are displayed in pink.

12. Go into each session, checking and entering survey data wherever necessary. The data from the previous survey can be seen on Tracker Mobile for reference. Previously sampled items are marked with an approach of “PS” (Previously Sampled). Photographs are also included.

    Amongst other things, you might need to record a change in Condition or Surface Treatment of a survey item and the Reason for Change. You might also need to take a new photograph or record a new Recommendation or Reinspection Notes.

    If an item has been removed, change the identification from, for example, Chrysotile, to Removed. This then automatically sets the scores to 0. It also lets you search for Removed items easily on the Survey Items screen later.

    As each new session is opened it changes colour to white.

13. Mark and send the completed sessions as usual to send the re-inspection data to Alpha Tracker.

You can now enter lab results for any new samples taken, check the data and produce the report in exactly the same way as you would for a normal survey.

☞ Refer to Section 8, ENTERING LAB RESULTS, and Section 10, PRODUCING THE SURVEY REPORT, for details on performing these tasks.

A **View History** button on Survey Items (and also on the Asbestos Register) lets you see which values have changed in this re-inspection.

11.4 Re-inspecting a project

This section describes how to perform re-inspections of previous surveys. The main steps in performing a re-inspection are:

- locate the survey project that you are re-inspecting
- create the re-inspection project from the original survey (or from a re-inspection of the survey)
- send the records for the re-inspection project to a specific mobile device
- carry out the re-inspection, capturing new data as necessary
- synchronise to send in the re-inspection data
- check the data and create the report.

11.4.1 Performing a project re-inspection

Re-inspection projects can be created from existing projects – where a site has previously been surveyed.

The project from which you create a re-inspection must have a **Project Type** of "Survey" or "Re-inspection". It must also be an open project – at least it must be open while you create the re-inspection. If there is a date in the project's **Project Closed** field you can temporarily delete the date to re-open the project and type it back in again once you have finished.

In Alpha Tracker, re-inspections are classed as a special type of Asbestos Survey. They have a Project Type of "Re-inspection", which is set up in the Project Types screen with a Category of "Asbestos Survey", and they have a Survey Type of "Re-inspection".

A repository setting lets you change the default project type of "Re-inspection" projects when they are created by Alpha Tracker, either from the Site Register or from a Survey. The setting is "Default Re-Inspection Project Type". So if you call your re-inspection projects by a different name you can continue to do so when creating them automatically.

Also, re-inspection projects must be sent to a specific handset – they are not automatically sent out to all surveyors. The specific handset must be uniquely identified by its Unit ID.

To create a re-inspection:

1. Open the survey project that you want to re-inspect. It can be either a survey or a re-inspection project and it must be an open project, ie with no closed date.
2. Click the **Survey Details** button to open the Survey Details screen and select the second tab "2 – Survey Complete".
3. Click the **Choose Task** button, select "Create Re-inspection Project" and click **OK**.

   You are asked to specify the Unit ID of the handset to which the re-inspection records are to be sent. Unit IDs are recorded on the Staff screen.
4. Select the required unit from the drop-down list and click OK.

   A message informs you that a project has been created for the re-inspection and gives its project number.

5. Close the message and the Survey Details screen to display the newly created Re-inspection project on a new screen.

   Relevant details are copied to the new Re-inspection project, including Client, Site Name and contact names and addresses. The project has a Project Type of “Re-inspection” (unless the default setting is changed on your system) and if you view the Survey Details you can see it has a Survey Type of “Re-inspection”.

6. Complete other project fields as necessary.

   The re-inspection survey data will arrive at the specified mobile device once your Tracker Mobile has synchronised survey and project information. This may take 5 minutes or so, depending on your system settings. If your device is always connected then the data arrives automatically, if not then it arrives after you have connected and synchronised.

7. When the records have arrived on the handset, synchronise and download the new project.

   The new sessions are displayed in pink.

8. Go into each session, checking and entering survey data wherever necessary. The data from the previous survey can be seen on Tracker Mobile for reference. Previously sampled items are marked with an approach of “PS” (Previously Sampled). Photographs are also included.

   Amongst other things, you might need to record a change in Condition or Surface Treatment of a survey item and the Reason for Change. You might also need to take a new photograph or record a new Recommendation or Reinspection Notes.

   If an item has been removed, change the identification from, for example, Chrysotile, to Removed. This then automatically sets the scores to 0. It also lets you search for Removed items easily on the Survey Items screen later.

   As each new session is done it changes colour to white.

9. Mark and send the completed sessions as usual to send the re-inspection data to Alpha Tracker.

You can now enter lab results for any new samples taken, check the data and produce the report in exactly the same way as you would for a normal survey.

☞ Refer to Section 8, ENTERING LAB RESULTS, and Section 10, PRODUCING THE SURVEY REPORT, for details on performing these tasks.

A History button on Survey Items lets you see which values have changed in this re-inspection.

11.5 Creating Refurb projects from a register

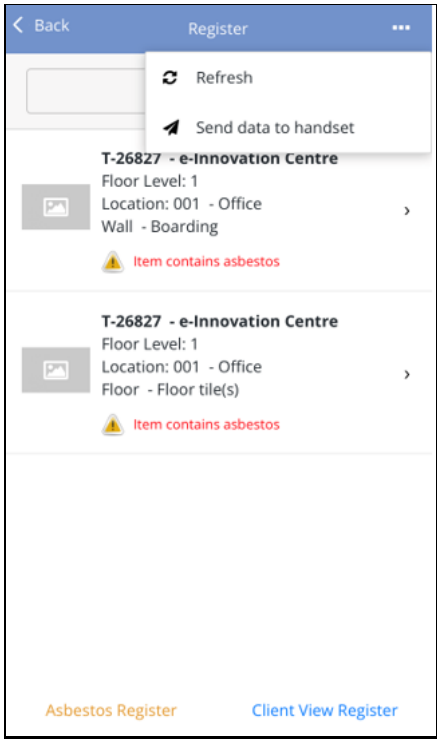
Just like creating re-inspections from the Site Asbestos Register, you can easily create Refurbishment projects from the register, so that you are updating items in the register rather than adding to them.

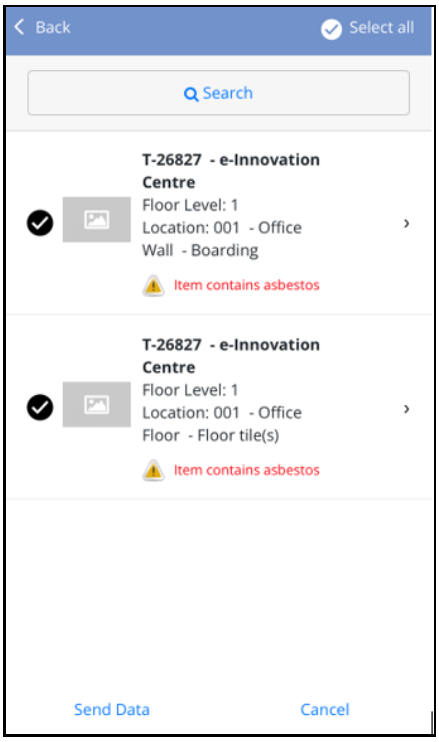
Instead of using the Site Asbestos Register, for Refurbishment projects you use the Client View Site Register. A button on the Client View Site Register lets you select the items to include, specify the handset to send the records to and create the project/add the records to a project.

Two settings control this feature: “Default Refurbishment Project Type” and “Refurbishments from Client View Register” - yes/no. Contact Support at Start Software if you need help to set up this way of working.

11.6 Re-inspecting using the app

There is also an option to use the Alpha Tracker Mobile app for re-inspections, and allow surveyors to pull down data that they select from the site register for re-inspection. The benefit of this method is that the person setting up the re-inspection project does not need to select the data that is to be re-inspected. The surveyor can open a site register on the app on the day, and use the “...” menu option to select “Send data to handset”. They can then use the checkboxes on each row to select the required data, or use the select all/deselect all toggle at the top right of the screen.





The “Send Data” button then displays a list of their appointments, two days ahead and 2 days in the past. The surveyor simply selects the reinspection project to which the records are to

be sent, and confirms the sending of the items to their phone/tablet. If the appointment is in the future, they have the option to send the data immediately or have it marked as pending and sent on the relevant date.

If you have multiple client-specific Tracker Mobiles in use, then you can also choose which app to send re-inspection data to.

If your system settings allow you to create reinspections from the Client View Site Register, then you can also do this on the app.

12. TIMESHEETS, INVOICING & CONTRACTS

Alpha Tracker has a time recording facility to enable you to keep track of time spent on projects. You can use it to record time spent by whom, when, on which tasks/roles, on which projects.

The timesheets on a project can be used in conjunction with associated costs to build up a total costs figure, giving you full visibility of the costs on a project at invoicing time.

Invoices can be generated externally and simply recorded in Alpha Tracker (external invoices), generated as ad hoc invoices or generated direct from projects.

Alpha Tracker also lets you record details of contracts, their invoicing schedules and review notes to help track the progress of contracts.

12.1 Recording time and costs

Costs on a project can be recorded in Alpha Tracker by noting details of:

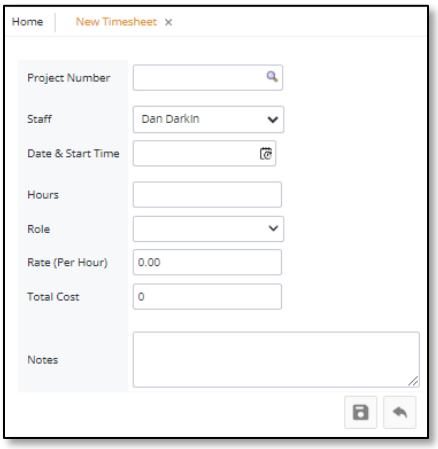
- time spent on projects
- costs associated with a project.

The total of both costs can be displayed as one figure on the Projects screen, in the **Total Current Costs** field on the Financials/Planning tab.

12.1.1 Recording time spent on projects

To record time spent on projects:

1. Click on the “New Timesheet” menu option to display the New Timesheet screen.



2. Select the project number against which you want to record time from the dropdown list on the **Project Number** field and your name from the staff list on the **Staff** field.
3. Use the date picker on the **Date/time** field to select the day for which you are recording time and the number of hours spent in the **Hours** field.
4. Select the role which reflects the work done on the project from the dropdown list on the **Role** field. The charge rate applicable to the selected role and the total cost (hours x rate) are displayed.

> ☞ Refer to 2.1.9, Maintaining rates, for instructions on how to set up the roles and rates.

5. Type any notes regarding the time being recorded in the **Notes** field.
6. Save the timesheet by clicking the **Submit** button.

12.1.2 Enquiring on time spent on projects

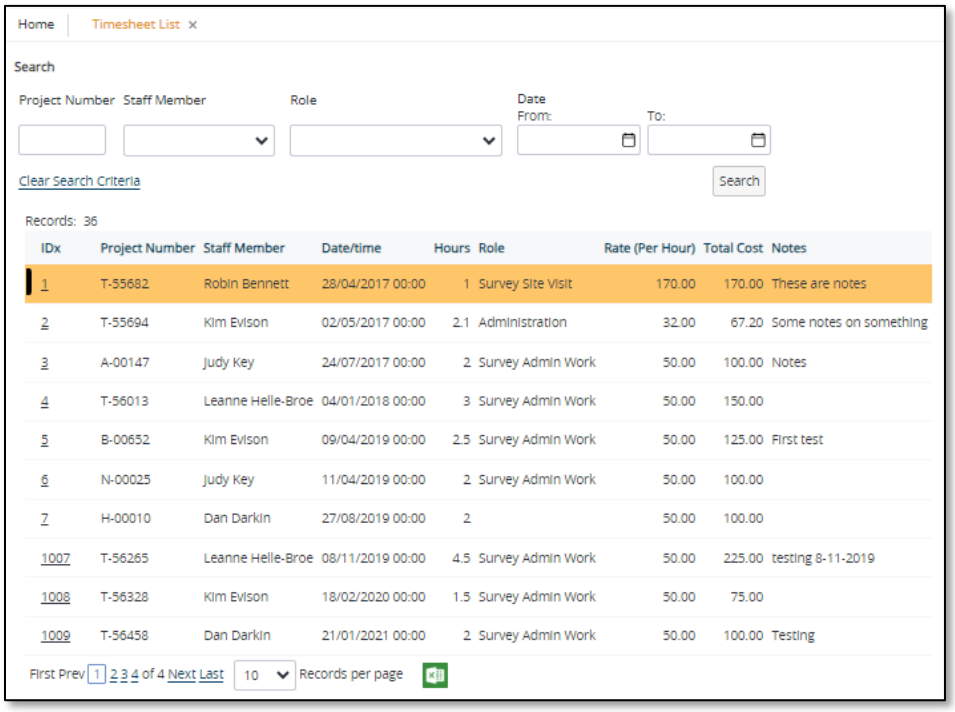
You can query the timesheet data in your Alpha Tracker by using the search facility to filter the data displayed. The search facility gives you the ability to enquire by:

- project number
- staff member
- date range.

It also displays a total of the costs displayed on screen.

To enquire on timesheets:

1. Click on the "Timesheet List" menu option to display the Timesheet List screen.



2. Filter the Timesheet List as required to see time recorded. For example:
   - select the member of staff and a from and to date to see timesheet records for a person over a specific period
   - enter a project number and select a member of staff to see how much time they have logged on the project
   - enter just the project number to see how much time all staff have logged on the project.

☞ Refer to 1.4, Searching in Alpha Tracker, for further details on search criteria that you can use in Alpha Tracker search fields.

The total cost of the time displayed is calculated and displayed at the bottom of the list.

The total cost of time recorded for a project is added to any associated costs for the project and displayed in the **Total Current Costs** field on the Financials/Planning tab for the project. This figure is then available for you to use in your invoicing as required.

☞ Refer to 12.1.3, Recording associated costs, for details on how to add costs to a project.

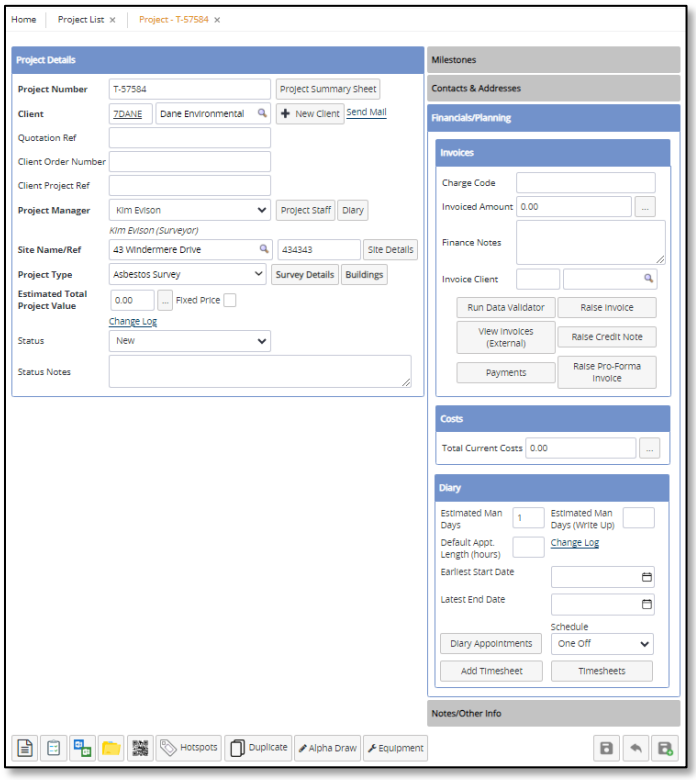
12.1.3 Recording associated costs

Any costs associated with a project, such as the cost of equipment hire or administration, can be recorded on the project by using the Associated Costs button. The costs entered are added to any time-related costs that may have been recorded for the project by using the Timesheets menu option and displayed as the **Total Current Costs** on the project.

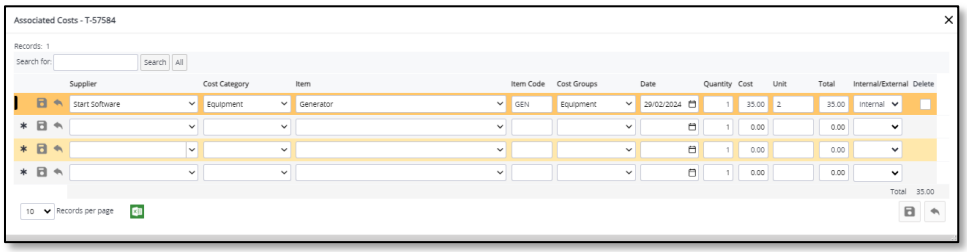
To record associated costs on a project:

1. Search for the project.

   You can search for the project in a number of ways:
   - entering a key word, project number or client reference in the quick search field at the top of the Projects menu
   - selecting the “Project List” menu option and entering search criteria to find the required project
   - selecting one of the “Open Projects” menu options which let you list projects in a number of ways.
2. Click on the required project number to open the project.



3. Display the Financials/Planning tab and click the **Associated Costs** button (labelled "…" in the Costs section) to display the Associated Costs screen.



> *You can set values for the Supplier and Cost Category fields to make selection easier by using the Suppliers menu options "Supplier List" and "Cost Categories".*
>
> *Note also that only users in the "Superuser" group can use the delete function on Associated Costs.*

4. Type in the details for the project cost, for example enter the service or item, the supplier, date, any reference such as an order number and the total cost of the service or item.

5. **Submit** the details, close the screen and return to the Projects screen. The **Total Current Costs** field is updated with the new total of all costs (Associated and Timesheets).

The costs are now available for you to use in your invoicing if required and to help with financial planning on the Wallboard.

12.2 Recording and raising invoices

Invoices can be generated:

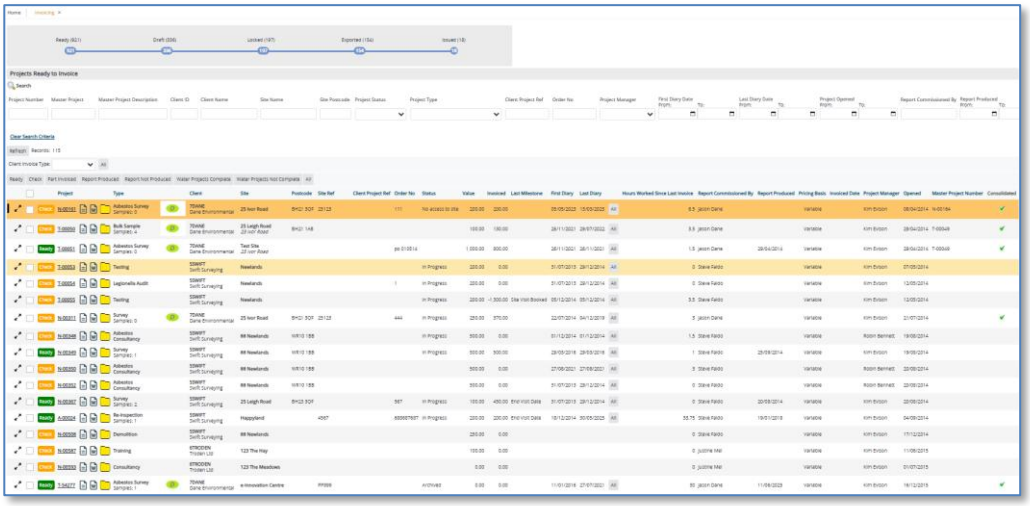
- using the Invoicing screen that manages the entire invoicing process from selecting which projects to invoice, raising draft invoices, locking/authorising them and exporting
- externally and simply recorded in Alpha Tracker (external invoices)
- directly from projects
- as ad hoc invoices.

There is also a separate screen that identifies the projects that are waiting to be invoiced and options to export invoices to Sage or Xero.

12.2.1 Using the integrated invoicing process

The Invoicing screen in Alpha Tracker guides you through the process of invoicing projects by using a sequence of tabs, all on the same screen:

- Projects Ready to Invoice
- Draft Invoices
- Locked Invoices
- Exported
- Issued.



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

- **Ready** - These are the projects ready to invoice. This is the same list as displayed on the Projects Ready to Invoice screen. Tick the box against the projects for which you want to raise invoices, then click the Invoice Selected button that is displayed below the list once some projects are selected. Invoices are raised for the selected projects, and the projects drop off the Ready list. Totals of the Value and Invoiced columns are displayed at the bottom of the Projects Ready to Invoice.

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

Understanding Projects Ready to Invoice

The projects that are listed on the Projects Ready to Invoice tab fulfil certain criteria; they are projects the system thinks you might want to invoice based on a series of business rules, project attributes and configurable system settings.

The system settings that influence project eligibility for invoicing work as follows:

- only open projects are included unless the setting “Show Closed Projects on Projects Ready to Invoice” is changed to “yes”. The default is “no”
- detailed invoice-related checks are applied unless the setting “Show Projects With No Invoice Date on Projects Ready to Invoice” is changed to “yes”. The default is “no”. If this is changed to “yes” then all projects regardless of previous invoices are included
- only projects which have a value are included unless the setting “Show Projects With Zero Value on Projects Ready to Invoice” is changed to “yes”. The default is “no”.

A project must meet all the following criteria to appear on Projects Ready to Invoice:

- the project must have a valid Client ID
- the project must have a valid Project Type
- it must not be a “U-” project
- it must be an open project (unless the setting “Show Closed Projects on Projects Ready to Invoice” is changed to “yes”)
- as long as the setting “Show Projects With No Invoice Date on Projects Ready to Invoice” is “no”, the project:
  - if fixed price, must have an invoiced amount less than the estimated project value
  - if not fixed price, is automatically eligible unless blocked by other filters
- it can only have a zero value if the setting “Show Projects With Zero Value on Projects Ready to Invoice” is “yes”

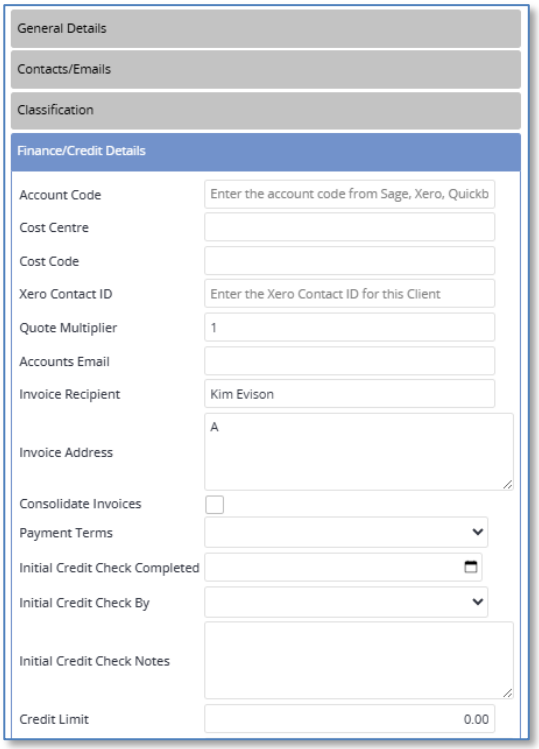
- if the project is of a type that requires a report (eg Project Category = Asbestos Survey), then the Report Produced milestone date must be completed
- if the project has a status that has Projects Ready to Invoice ticked, then the project is automatically included
- if new work has happened since the last invoice, then the project is included – this is determined by checking if new appointments or timesheets exist after the last invoice.

If you want the Projects Ready to Invoice list to work in the same way that it used, ie only selecting projects where the Report Produced milestone has been completed, then click the Report Produced pre-set filter button that is displayed on Projects Ready to Invoice.

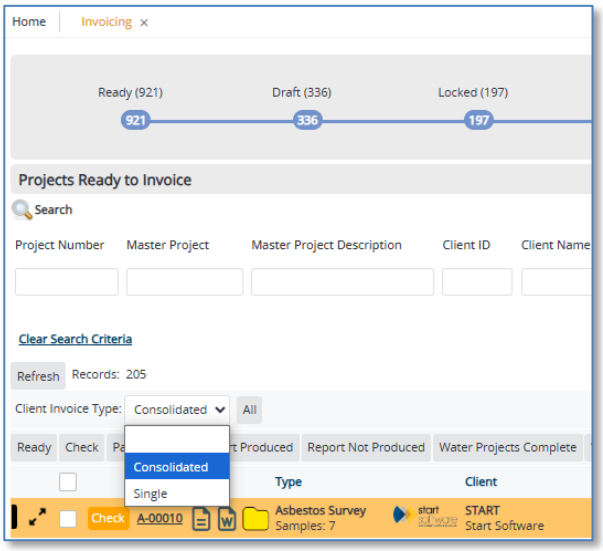
Selecting consolidated invoicing

Consolidated invoicing allows you to raise only one invoice for your client, no matter how many projects you are invoicing.

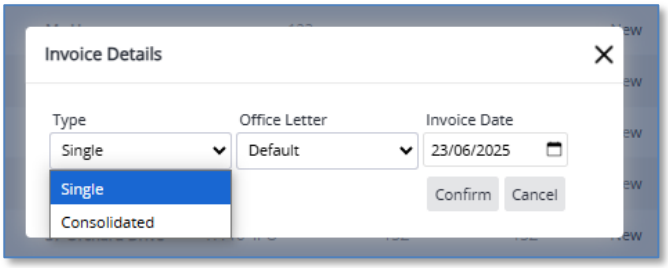
You can flag the clients who require consolidated invoices on the Clients screen, and this flag is displayed as a filter on the Projects Ready To Invoice list. Tick the box **Consolidate Invoices** in the Finance/Credit Details on the Client Details screen:



Display projects for clients requiring consolidated invoicing only:



When raising the invoices, select “Single” to raise one invoice for each project or “Consolidated” to raise one invoice per client.



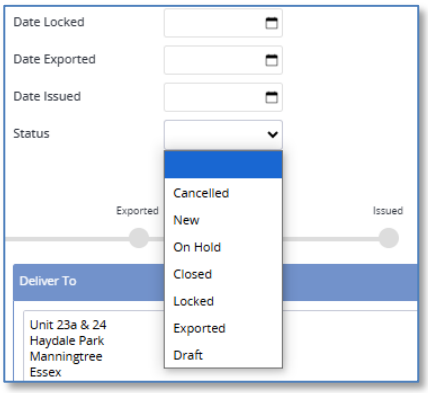
Part invoicing

Part invoicing, or interim invoicing, is a smart feature that will prompt you to invoice the remaining amount. For example, if you have a project with a fixed price value of £100 and raise an invoice for £60, then the next invoice raised for that project will be for £40 (not £100 as previously).

However, if you have the setting “UseCostbreakDownForInvoices” set to “yes”, then any invoices raised where a cost breakdown exists will include exactly the lines from the cost breakdown. In this case, if you part invoice, you will have to amend the amounts manually.

Cancelling invoices

If you raise an invoice in error and want to mark it as “Cancelled” rather than deleting it, you can use the **Status** dropdown on the Invoice Details screen.



Set the values to appear on the dropdown list by selecting “Lookups” from the General section of the Setup menu and setting the **Category** to “Invoice Status”. Apply a status by opening the invoice details and selecting from the dropdown.

The **Status** field can also be seen on the four tabs of the Invoicing screen that list details of invoices rather than projects (Draft, Approved/Locked, Exported and Issued). Note that if the status of an invoice is “Cancelled”, then the invoice will not show on these tabs.

If you delete an invoice, then the Invoiced Date is also deleted from the associated project if there are no invoices in the system after the deletion. 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.

Emailing invoices to your clients

The Invoicing screen includes a feature to email clients the invoices directly to your clients. These invoices would be at the Locked (or Exported, or Issued) stage. Select the invoices that you want to send by ticking them on the Locked Invoices tab of the Invoicing screen, then click the **Email PDF** button. The email is sent to the email address held on the Client Details, in the **Accounts Email** field and, if entered, also from the **Accounts Email** on the project.

One email is sent with the invoice(s) attached. 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”). You can specify an email address to automatically CC when emailing invoices by using the setting “Email address to CC when emailing invoices”.

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.

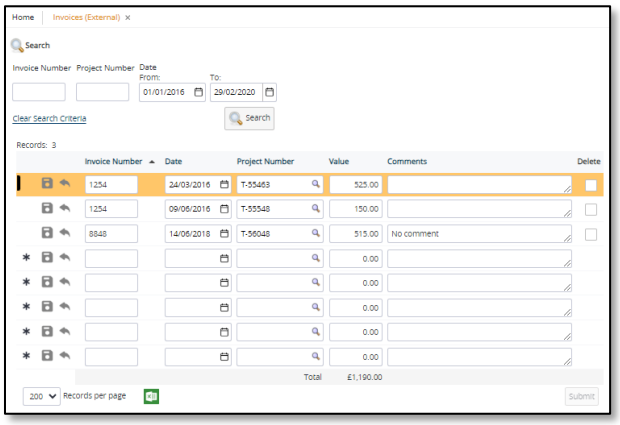
As an alternative, you can also send invoice emails by using the Send PDF button in the Invoice folder.

12.2.2 Recording an external invoice

Recording external invoice details helps you to keep track of the financial aspects of your projects. The invoices themselves are raised in a system external to Alpha Tracker.

To enter external invoice details:

1. Select the "Invoices (External)" option from the Finance menu to display the Invoices (External) screen.
2. Enter some search criteria in the top part of the screen to display some invoices. You might, for example, select a project number in the **Project Number** field and then click **Search** to display all invoices for a particular project.



Any matching invoices recorded on your system are listed.

> ☞ Refer to 1.4, Searching in Alpha Tracker, for further details on search criteria that you can use in Alpha Tracker search fields.

3. To add a new invoice, in a blank row marked with an asterisk, enter values for the **Invoice Number**, **Date**, **Project Number**, **Value** and **Comments** fields.
4. To delete an invoice entry, click on the **Delete** tickbox on the appropriate row.
5. Save your changes and close the Invoices window.

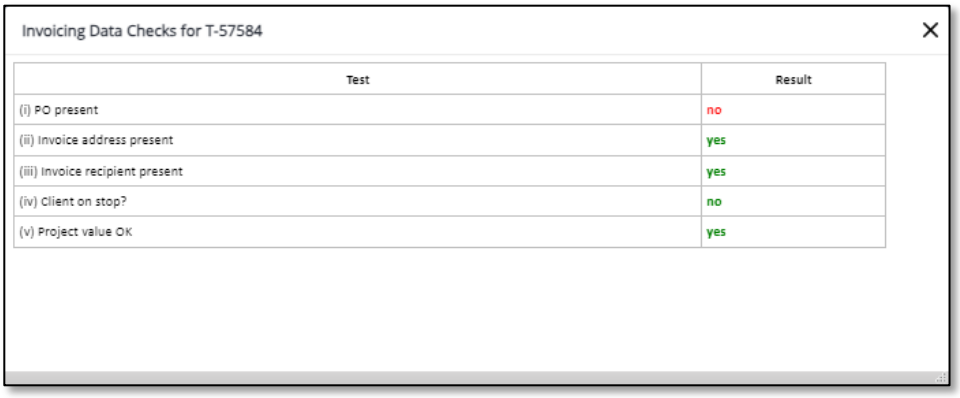
> ✎ *Don't forget to update the status and milestones on the project to keep the project details up-to-date.*

12.2.3 Raising an invoice

You can raise an invoice directly from a project to invoice for the full or part of the project.

> ☞ See Section 12.2.1, Using the integrated invoicing process, for details on using the Invoicing screen.

Before raising an invoice you can use AlphaValidator to run pre-invoicing checks. Click the **Run Data Validator** button on the Financials/Planning tab on the Project screen to run the checks and display the results. The Data Validator checks that a PO number, Invoice Address and Invoice Recipient are present and also checks that the Client is not marked as being on stop and that the Project has a valid estimated total value.


Invoicing Data Checks for T-57584

Test	Result
(i) PO present	no
(ii) Invoice address present	yes
(iii) Invoice recipient present	yes
(iv) Client on stop?	no
(v) Project value OK	yes

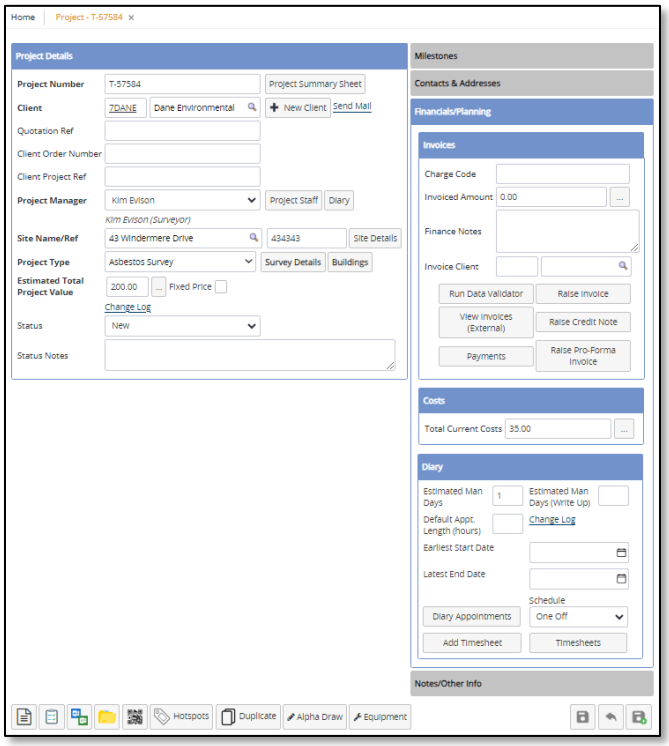
To raise an invoice:

1. Search for the project.

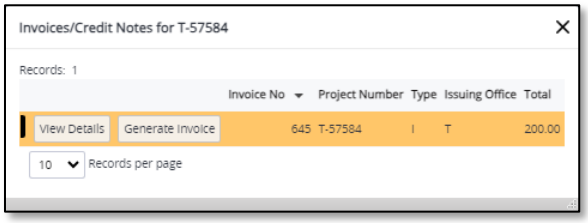
   You can search for the project in a number of ways:

   - entering a key word, project number or client reference in the quick search field at the top of the Projects menu
   - selecting the “Project List” menu option and entering search criteria to find the required project
   - selecting one of the “Open Projects” menu options which let you list projects in a number of ways.

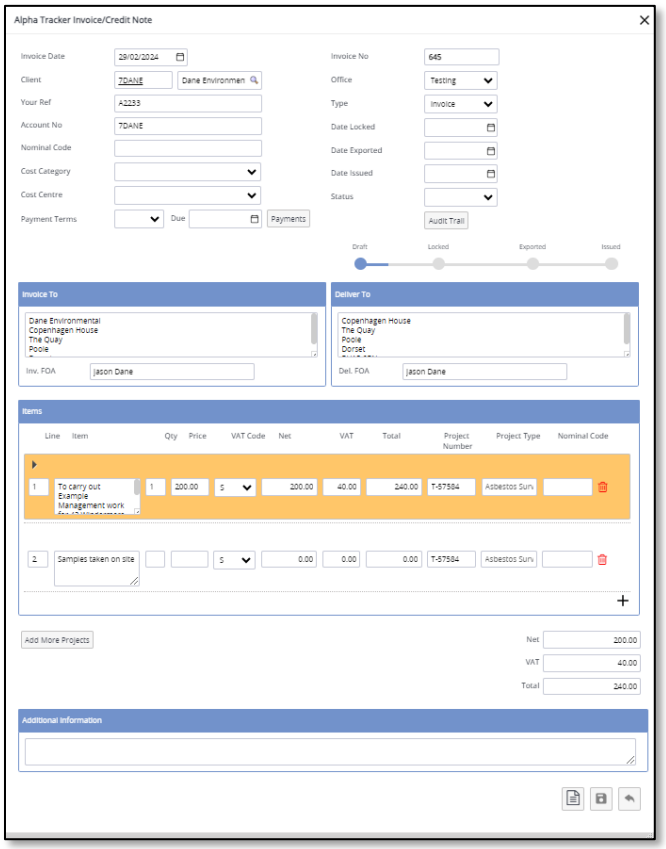
2. Click on the required project number to open the project.
3. Click on the Financials/Planning tab.



4. Click the **Raise Invoice** button. An Invoices screen lists the generated invoice and any previously generated invoices – the most recent is at the top of the list.



5. Click the **View Details** button to see the content of the invoice, for example:



You can also click the **Generate Invoice** button to see the generated invoice as a PDF file. Click in the bottom right corner of the PDF to display controls that let you save another copy of the invoice or print it direct.

It is also possible to customise invoice templates in Alpha Tracker, either by embedding multiple PDF invoice formats or by using Word to generate invoices and saving them in an Invoices subfolder of the normal Tracker documents folder. Contact Start Software if you would like to generate invoices in this way.

6. Check the details of the invoice and amend as necessary (if your permissions allow). You can, for example, add further lines to an invoice by clicking the small plus button above the totals. You can also amend the amounts as required.

   Dates can also be changed, but a setting may restrict the number of days by which an invoice may be backdated by anyone other than a Superuser. Settings may also determine which addresses are used on invoices, eg whether the site address is used as the delivery address.

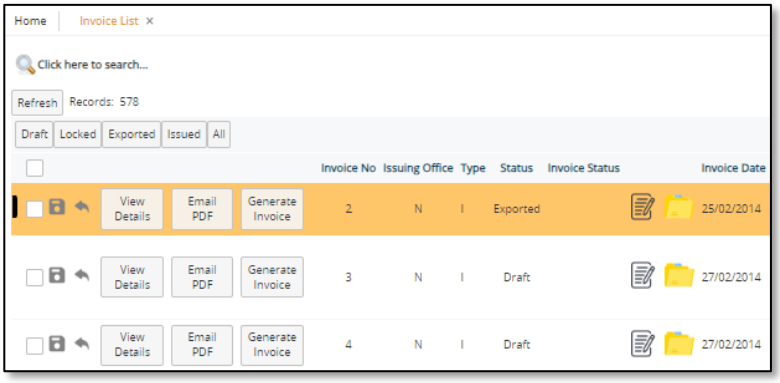
   The **Date Printed** can be manually set when you have printed the invoice to prevent subsequent changes to the invoice details (except by Superusers). The **Date Locked** field is automatically populated during the export (eg to Sage) process and also prevents further changes.

*An audit trail is kept on invoices to track the generation, editing, printing, exporting etc of invoices. Click the **Audit Trail** button on an invoice to see the changes - you can also search the list.*

7. Save any changes by clicking the **Submit** button.

You can search for and view any invoices raised this way either from the project (by clicking the "…" button next to the **Invoiced Amount** field) or by using the "Invoice List" menu option.

On the Invoice List screen there is a document folder displayed where copies of invoices and related documents can be stored. There is also an **Email PDF** button that will email a copy of the PDF invoice to the logged in user; it will also save the new PDF file to the Invoices folder on the server.



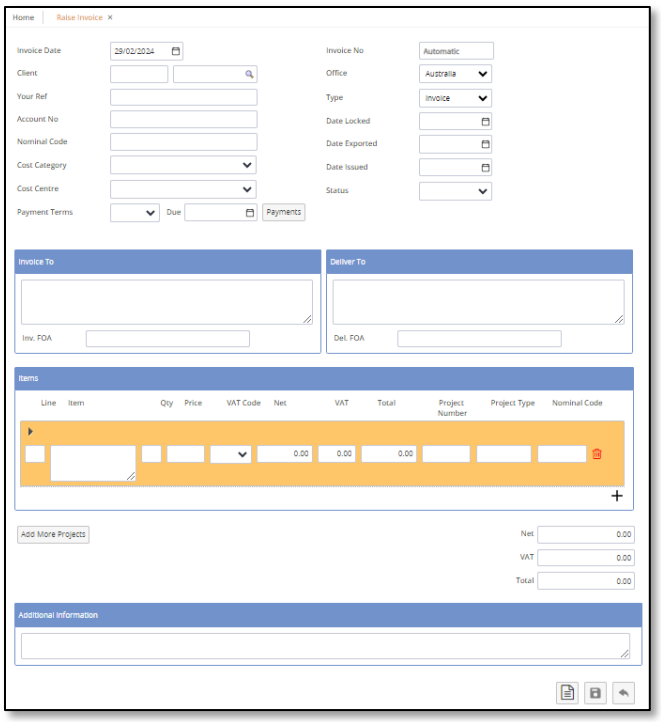
A **Download to Excel** button on the Invoice List screen lets you download invoice details. Use the search boxes at the top of the screen to filter the Invoice List so that it shows only the set of invoices you are interested in, then simply click the **Download to Excel** button. This button is also available on the Invoices (External) screen.

12.2.4 Raising an ad hoc invoice

Ad hoc invoices can be raised to record general invoices, not linked to projects. When raising an ad hoc invoice you must enter all the details, including the client address and invoice line details, yourself. You can specify whether you are raising an invoice or a credit note by selecting from the drop-down list on the **Type** field. Alternatively, you can use the separate "Raise Credit Note" menu option.

To raise an ad hoc invoice:

1. Select the “Raise Invoice” option from the Finance menu.



2. Complete all the invoice details.

   If this is an invoice, select “Invoice” in the **Type** field. If this is a credit note, select “Credit Note” in the **Type** field.

   If you need to enter more than one line on the invoice, use the small plus button above the invoice totals.

   If you want to add additional lines for more projects, use the **Add More Projects** button to help you select the required project. When raising a credit note, the Add More Projects button only displays for selection projects which have been invoiced.

3. Save the ad hoc invoice by clicking the **Submit** button.

You can search for and view any invoices raised this way by using the “Invoices” menu option. Any credit notes can be viewed by using the “Credit Notes” menu option.

12.2.5 Identifying projects ready to invoice

You can use the “Projects Ready To Invoice” menu option to list all projects that are eligible for invoicing.

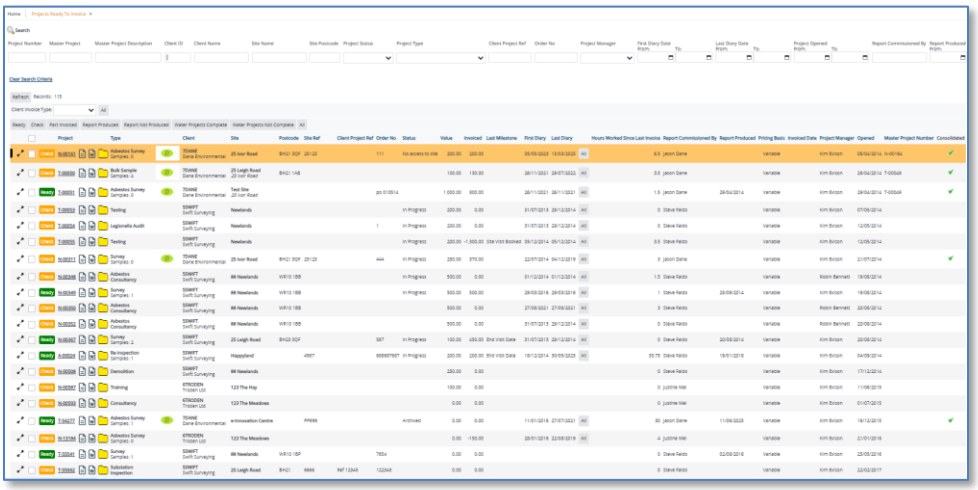
> *Note that this screen displays the same content as the Projects Ready to Invoice tab on the Invoicing screen (available from the Finance menu), which guides you through the entire invoicing process.*

If you choose to work from the Projects Ready To Invoice screen, instead of the Invoicing screen, then you can still tick the projects you want to invoice and then use the button at the bottom of the screen to raise the (draft) invoices. Alternatively, you can open each project listed separately and raise the individual invoice from there.

> ☞ See Section 12.2.1, Using the integrated invoicing process, for details on using the Invoicing screen.

To list the projects ready to invoice:

1. Select “Projects Ready To Invoice” from the Projects menu to display the Projects Ready To Invoice screen listing all projects eligible for invoicing.



See Understanding Projects Ready to Invoice, under Section 12.2.1, Using the integrated invoicing process, for details on how a project is identified as being eligible for invoicing.

2. Work your way through the list by:
   - selecting the projects to invoice and clicking the **Invoice Selected** button to raise the invoices
   - or by clicking on the underlined Project Number to open a project, raising an invoice against it and then closing the Project screen.
3. Refresh the Projects Ready To Invoice screen by clicking the **Refresh** button at the top so that the newly invoiced projects disappear from the list.

12.2.6 Exporting invoices

The separate “Export” options, eg for exporting to Sage, have been removed from the menus. These exports are now only available as part of the integrated invoicing process from the Invoicing screen.

☞ See Section 12.2.1, Using the integrated invoicing process, for details on using the Invoicing screen.

12.2.7 Receiving payments

You can record the receipt of payments from clients against invoices in Alpha Tracker to keep track of the financial position of clients.

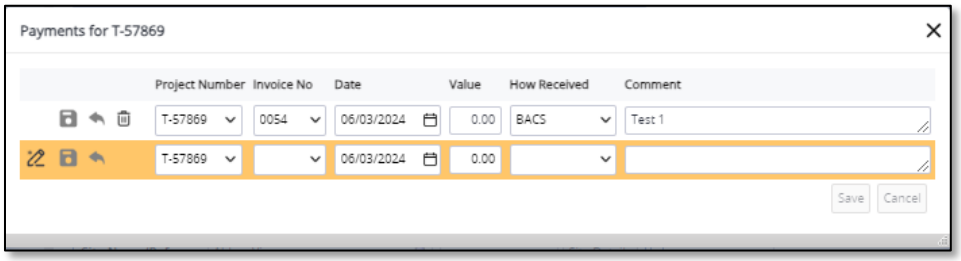
To record payments:

1. Search for the project.

   You can search for the project in a number of ways:

   - entering a key word, project number or client reference in the quick search field at the top of the Projects menu
   - selecting the “Project List” menu option and entering search criteria to find the required project
   - selecting one of the “Open Projects” menu options which let you list projects in a number of ways.

2. Click on the required project number to open the project.
3. Click on the Financials/Planning tab and click the **Payments** button.



   Any payments already received for the project are listed.

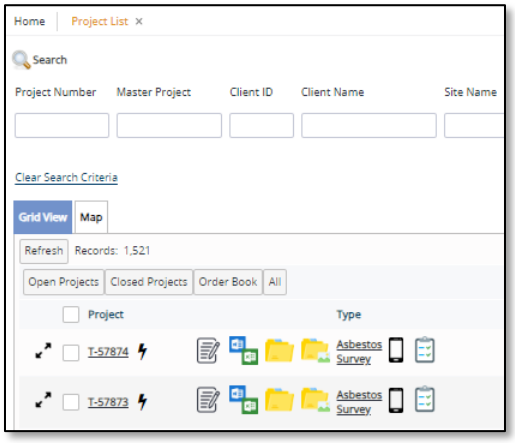
4. Record details of new payments received in the blank row, including details of the invoice number, date received, value, form of payment and any notes.
5. Save the changes and close the window.

*You can also view payments relating to individual invoice numbers when creating or editing invoices by clicking on the **Payments** button displayed above the **Invoice To** address.*

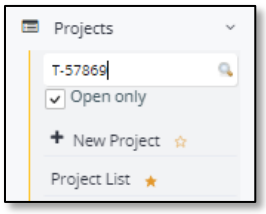
12.3 Closing projects

There is no need to archive projects in Alpha Tracker but you can reduce your list of active projects by closing projects. Closing projects makes lists of projects easier to manage. For example, you can:

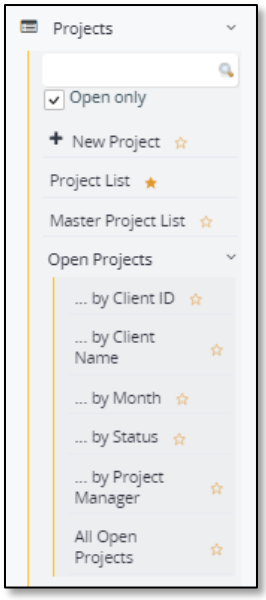
- Filter many list screens, such as the Project List, to show only Open or only Closed projects:



- Perform a Quick-search for Open projects (untick the “Open Projects only” box to include all projects):



- List Open Projects:

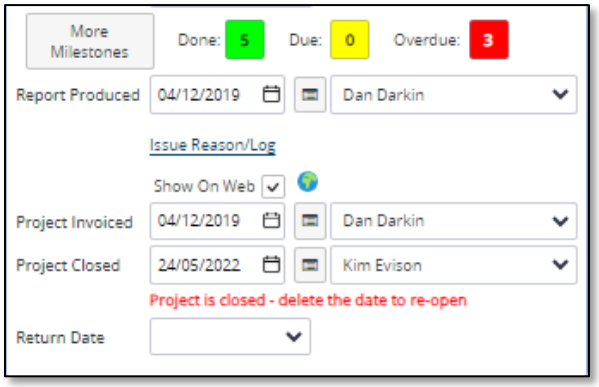


Most importantly, closing projects reduces the number of projects on the Project dropdown list on Tracker Mobile for your surveyors. By reducing the number of projects on this list, you make it easier for surveyors to find the project they need.

You can close projects at almost any stage, for example after you have invoiced or after you have received payment. If you attempt to close a project before you have invoiced the project, a message asks you to confirm the action, pointing out that there is no invoice date on the project – you can still close the project.

To close projects one by one:

1. Display the required project on the Project screen.
2. Enter a date into the **Project Closed** milestone. Double-clicking in the field enters today's date and your name against the milestone.

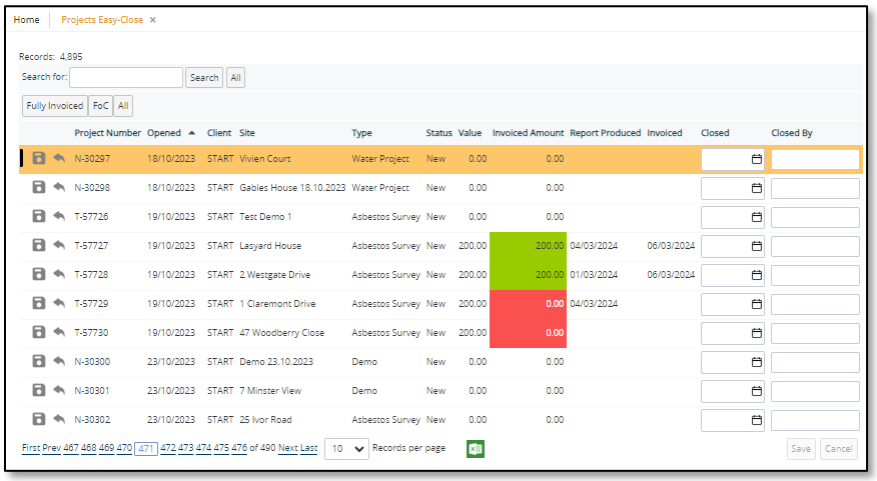


Messages are displayed if the total invoiced amount is less that the estimated project value and if the Invoiced milestone is not complete. In both cases, you have the option to continue and close the project if you wish.

You can re-open a project at any time simply by deleting the date out of the **Project Closed** milestone field.

To close a batch of projects:

1. Select "Easy-Close" from the Projects menu.



All open projects are listed, with an indicator to show whether they are fully invoiced or not. The total of invoices for a project is displayed in the **Invoiced** column. This is compared to the **Estimated Project Value** in the **Estimated** column, and if the **Invoiced** figure is equal to or greater than the **Estimated** figure then it is displayed in green.

Therefore, fully invoiced projects are marked in green and can be closed.

2. On a green project, double click in the **Closed** date field to insert today's date and your name. This completes the **Project Closed** milestone on the project for you.

   Messages are displayed if the total invoiced amount is less that the estimated project value and if the Invoiced milestone is not complete. In both cases, you have the option to continue and close the project if you wish.

3. Repeat step 2 as required, then click **Save** to update and close the projects.

The "Invoiced" column on the Projects Easy-Close screen reads from the "Invoiced Amount" on the project rather than directly from invoice records so that it also works for external invoicing. The Excel download button lets you download the contents to a spreadsheet. Also, if you make use of the **Status** field on projects, you can now search on project status on the Project Easy-Close screen to help you find exactly the projects you want to close.

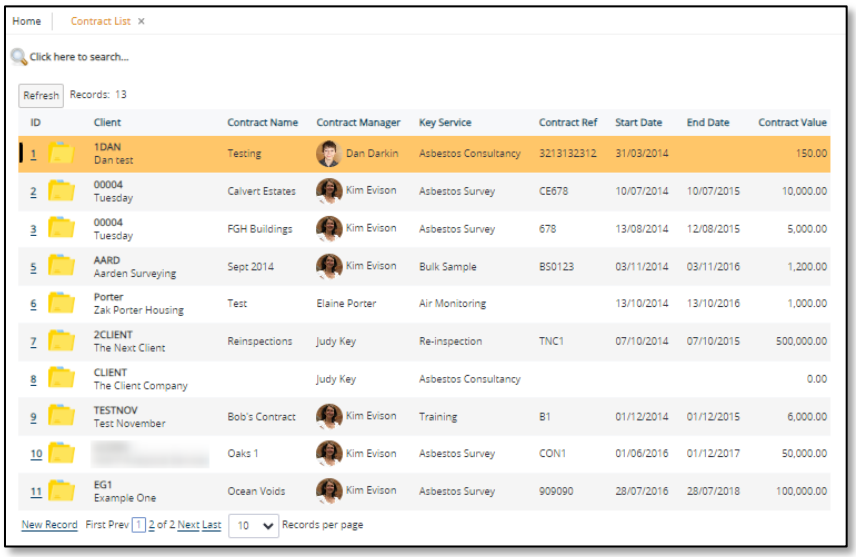
12.4 Managing contracts

Alpha Tracker lets you manage and track contracts by providing a facility to record contract details and link these to invoicing schedules, contract reviews and a schedule of rates. These details are grouped together in one place under the "Contracts" menu option.

12.4.1 Recording contract details

To add details of new contracts:

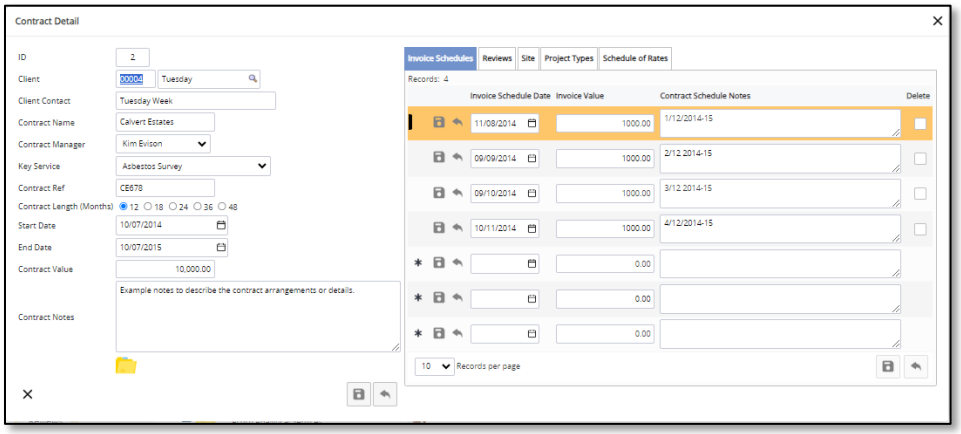
1. Select "Contract List" from the Contracts menu to display the screen listing all or any existing contracts.



ID	Client	Contract Name	Contract Manager	Key Service	Contract Ref	Start Date	End Date	Contract Value
1	1DAN Dan test	Testing	Dan Darkin	Asbestos Consultancy	3213132312	31/03/2014		150.00
2	00004 Tuesday	Calvert Estates	Kim Evison	Asbestos Survey	CE678	10/07/2014	10/07/2015	10,000.00
3	00004 Tuesday	FGH Buildings	Kim Evison	Asbestos Survey	678	13/08/2014	12/08/2015	5,000.00
5	AARD Aarden Surveying	Sept 2014	Kim Evison	Bulk Sample	BS0123	03/11/2014	03/11/2016	1,200.00
6	Porter Zak Porter Housing	Test	Elaine Porter	Air Monitoring		13/10/2014	13/10/2016	1,000.00
7	2CLIENT The Next Client	Reinspections	Judy Key	Re-inspection	TNC1	07/10/2014	07/10/2015	500,000.00
8	CLIENT The Client Company		Judy Key	Asbestos Consultancy				0.00
9	TESTNOV Test November	Bob's Contract	Kim Evison	Training	B1	01/12/2014	01/12/2015	6,000.00
10		Oaks 1	Kim Evison	Asbestos Survey	CON1	01/06/2016	01/12/2017	50,000.00
11	EG1 Example One	Ocean Voids	Kim Evison	Asbestos Survey	909090	28/07/2016	28/07/2018	100,000.00

There is a Document folder for each Contract on the system, enabling you to upload and store contract-related documents. Click a folder icon to access a Document folder.

2. Use the search fields at the top of the screen to search for an existing contract and then click on its row to display its details or click the **New Record** link at the bottom of the list to open the blank Contract Detail window.



Tabs on the right of the screen show invoice schedule, review details, sites, job types and a schedule of rates if these are recorded for the contract.

You can link contracts and projects by selecting the contract in the **Contract** field on a project. Once linked you can use the schedule of rates defined for the contract to set the breakdown for the project value.

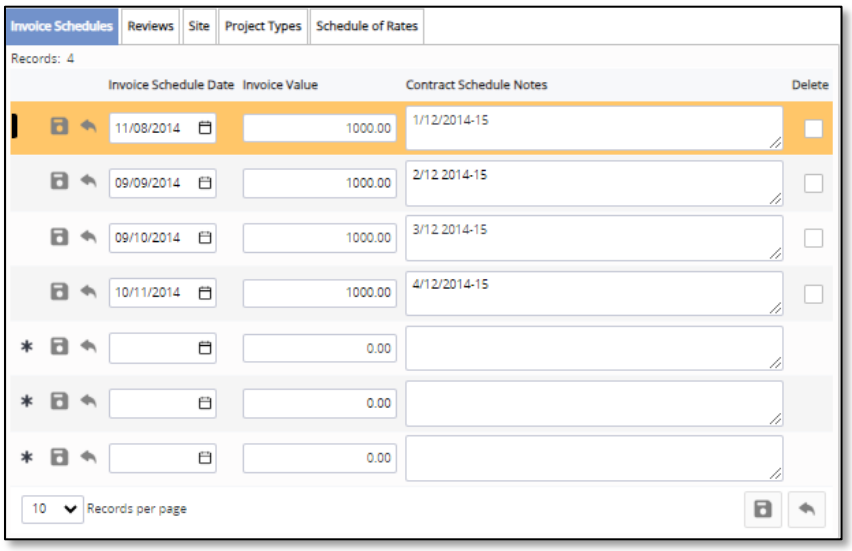
3. Record the details of the contract including:
   - **Client** and **Client Contact** – client and the contact at the client
   - **Contract Name** and **Contract Ref** – an identifying name for the contract and reference number
   - **Contract Manager** and **Key Service** – the person managing the contract and its principal service
   - **Contract Length, Start Date** and **End Date** – the end date is calculated if you enter a length and start date
   - **Contract Value** – the value of the contract
   - **Contract Notes** – any notes relevant to the contract.
4. Add any additional details to the tabs on the right to define the contract, including invoice schedule, review details, sites, project types and schedule of rates.
5. Save the contract details by clicking the **Save** icon.

12.4.2 Adding an invoice schedule to a contract

If a contract has a specific invoicing schedule you may find it useful to record the dates and amounts alongside the contract. Once you have recorded invoice schedule details these can be viewed from the Contract Details on the Invoice Schedules tab – it is also possible to add new records from this tab by typing into the rows provided.

To record an invoicing schedule:

1. Select "Invoice Schedules" from the Contracts menu to display a list of all existing invoice schedules.



2. Enter new schedule details by using the blank rows at the bottom of the list and then:
   - selecting the date of the scheduled invoice in the **Invoice Schedule Date** field
   - specifying the value of the scheduled invoice on that date in the **Invoice Value** field
   - typing any notes in the **Contract Schedule Notes** field.
3. Click the **Submit** button to save the invoice schedule details.

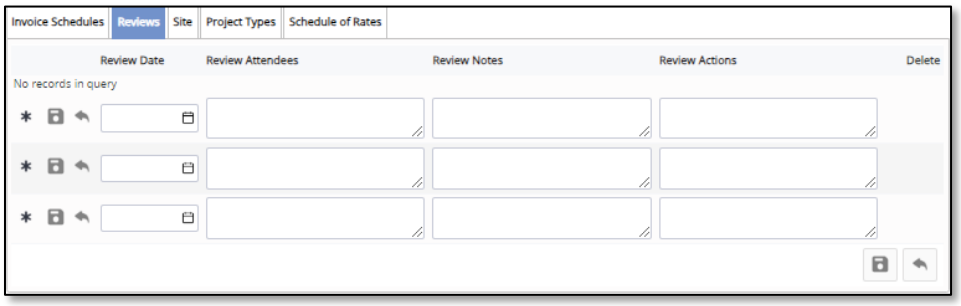
The **Delete** tickbox at the end of a row enables you to delete individual invoice schedule records if required – simply click the box and click **Submit**.

12.4.3 Adding review notes to a contract

Notes on any review of contracts can be stored alongside your contracts. Once you have recorded review notes these can be viewed from the Contract Details on the Reviews tab – it is also possible to add new records from this tab by typing into the rows provided.

To record an invoicing schedule:

1. Select "Reviews" from the Contracts menu to display a list of all existing review notes.



2. In a blank row enter details of the review including:
   - the name of the contract in the **Contract ID** field
   - the date the review was/is to be held in the **Review Date** field
   - names of people attending the review in the **Review Attendees** field
   - notes of what was discussed in the **Review Notes** field
   - actions resulting from the review in the **Review Actions** field.

   You can also view and log tasks directly from Contracts Review by using the buttons on the right of the rows. Simply click the **Log Tasks** button and enter details of the task to log; it is automatically linked to the Contract ID. The tasks can be logged for both clients and staff and you can use the options under the Calls/Tasks menu to track them.

3. Click the **Submit** button to save the review details.

The **Delete** tickbox at the end of a row enables you to delete individual review entries if required – simply click the box and click **Submit**.

13. LOGGING CALLS AND TASKS

Alpha Tracker contains Customer Relationship Management (CRM) functionality to help you manage contact with clients and log tasks due and done. You can use these features to:

- record all contact to/from clients, such as:
  - inbound phone calls
  - outbound phone calls
  - emails
- build up a client history
- log follow-up tasks
- maintain a “To Do” list
- check actions due
- record actions done
- track contact with clients.

13.1 Logging a call or task

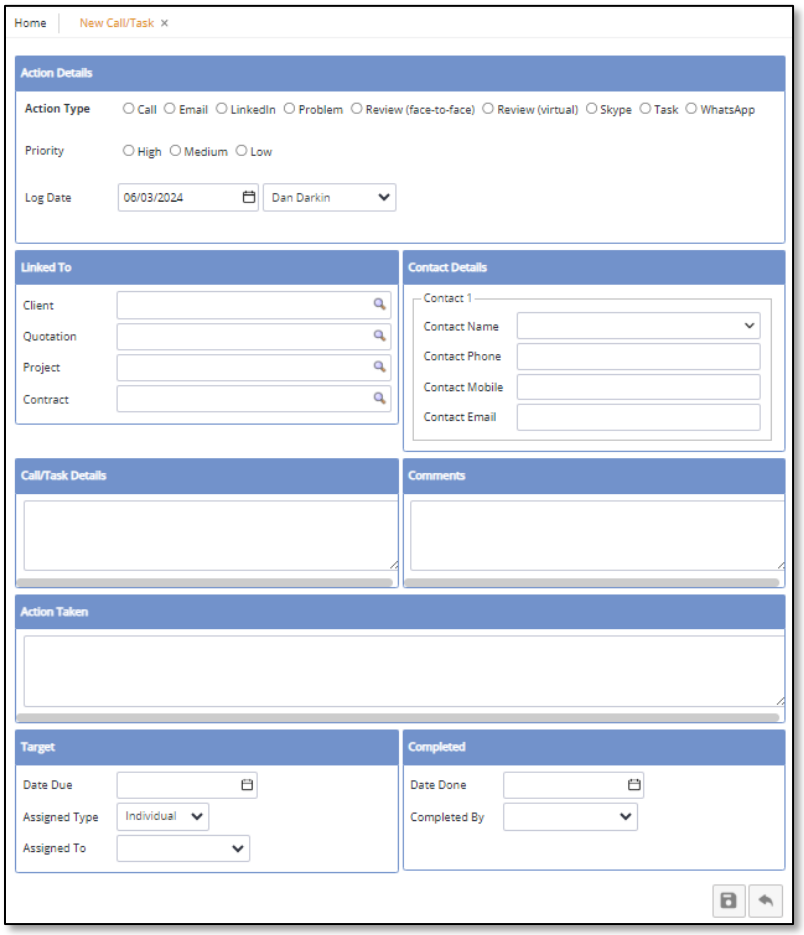
Both calls and tasks are recorded in the same way in Alpha Tracker; they are classed as different types of action. You can define other action types too.

☞	Refer to 2.1.10, Maintaining CRM action types, for details on how to define you own action types.

If you are recording a task then you will also need to record a target date for completion so that the task can be tracked. Any tasks that you create are added to the To Do List of the person to whom you have assigned the task. To complete a task, a completion date must be entered against the task.

To log a call/task:

1. Select “New Call/Task” from the Calls/Tasks menu to display the screen on which you can enter the call/task details.



2. Select the appropriate **Action Type** and **Priority**. Today's date and your logged in user ID are displayed by default. You can change the log date if the call or task should be recorded for a different day.

3. In the **Linked To** section, in the **Client** field, enter or search for and select the client to whom the call or task is linked.

   Once you have selected the client you can also select a quotation, project or contract to which the call/task is linked – the lists displayed when you search are automatically filtered according to the selected client. If you do not specify a client first then the lists are not filtered.

4. In the **Contact Details** section, record details of the person to contact.

   The details of the main contact recorded for the selected client are displayed by default. You can change these if required. The **Contact Name** field prompts from the list of contacts recorded in the Address Book for the selected client. You can also record telephone number and email address details.

5. In the **Call/Task Details** box, record a brief description of the content of the call or details of the task.

6. If this is a task that requires action, specify the date that action is due and who by in the **Target** fields.

Tasks can be assigned to individuals, groups, subgroups, offices and teams. Simply make your selection from the **Assigned Type** dropdown and the field below it changes accordingly.

The **Comments**, **Action Taken** and **Completed** fields will be filled in later when the task is completed.

*A task is not marked as complete until the **Date Done** field is filled in – even if the **Completed By** field is showing a name.*

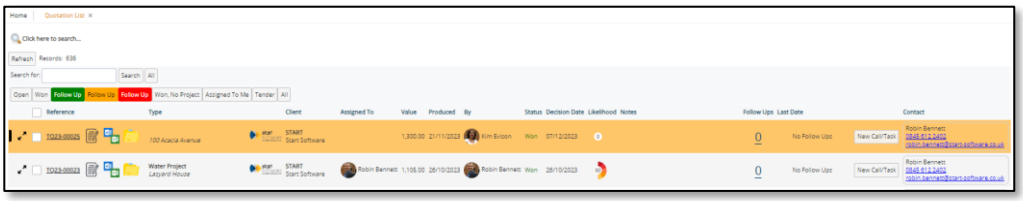
7. Click **Submit** to save the call/task.

Any tasks that you create are added to the To Do list of the person to whom you have assigned the task.

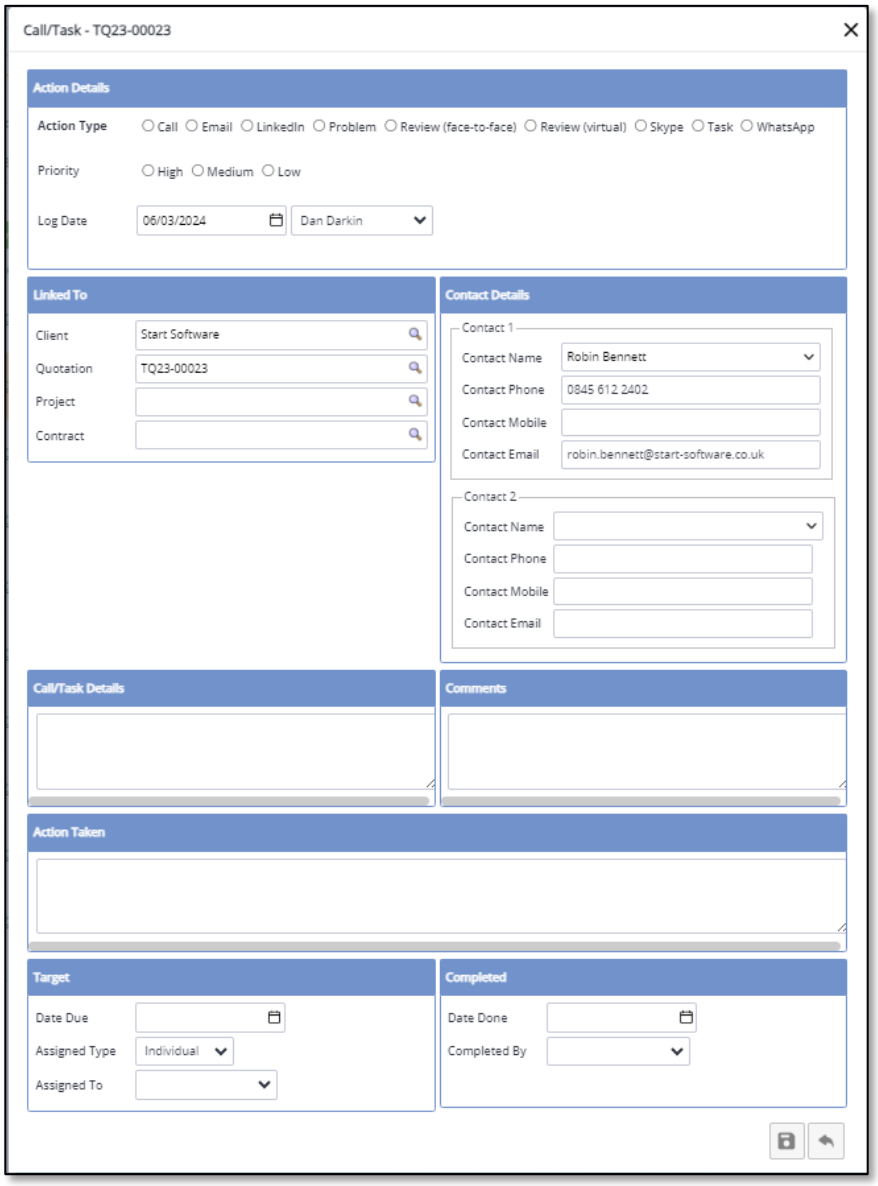
It is possible to configure the system so that notification emails are sent to the individual to whom the call/task is allocated. This is designed to make the person aware that they have a task logged, without them having to check the My Tasks section. There are a number of settings that control how this works.

13.1.1 Using quick links to log a call or task

Besides using the option from the menu, you can also log a call or task from other areas of the system. Some lists, such as the Quotation List or Enquiry List for example, have a **Log Call/Task** button to enable you to access the New Call/Task screen quickly and easily.



Wherever you see this button, you can click it to open the New Call/Task screen as a window with appropriate details pre-filled.

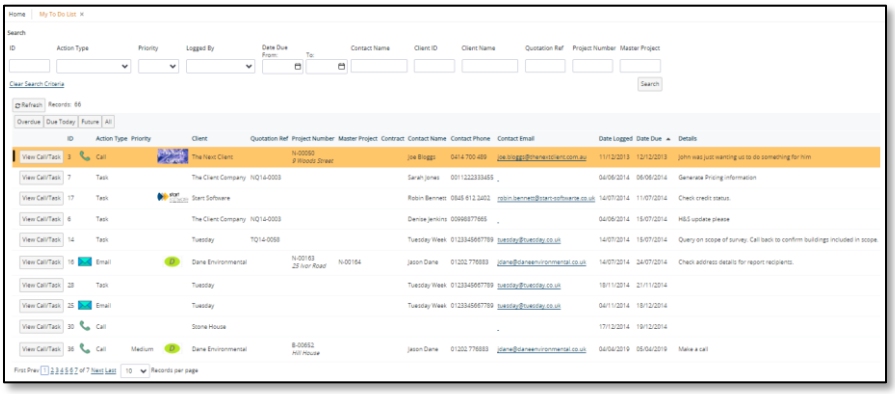


Complete the remaining fields as necessary and save the call or task.

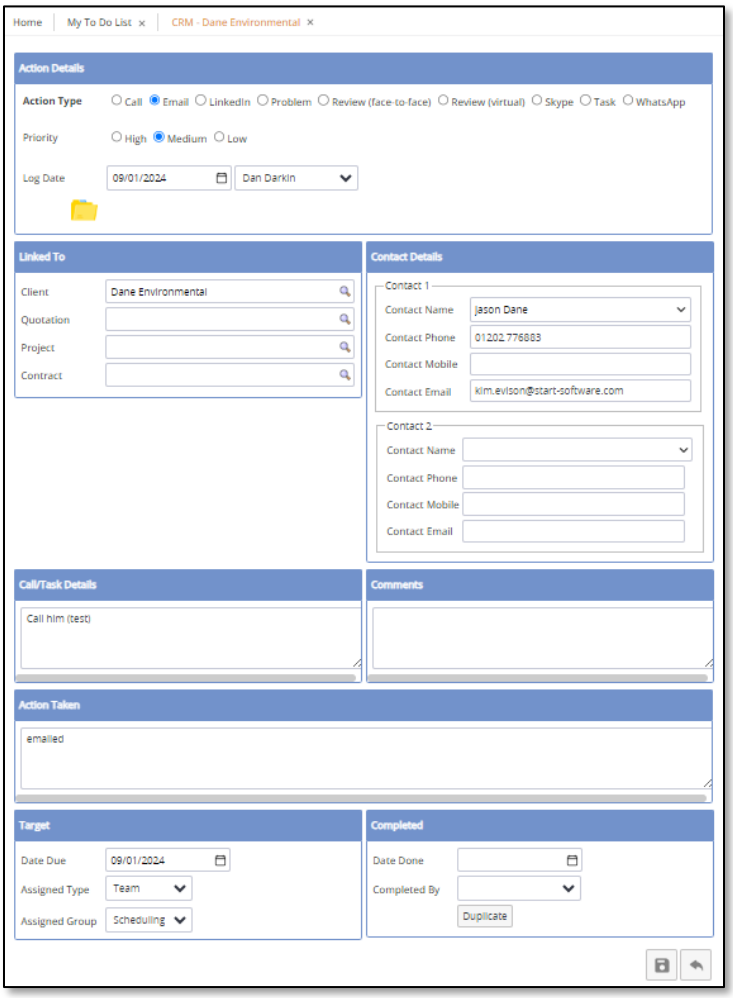
13.2 Checking your To Do list

Any tasks that have been assigned to you will appear on a To Do list. To view your To Do list:

1. Select “My To Do List” from the Calls/Tasks menu. The list of tasks assigned to you is displayed in due date order.



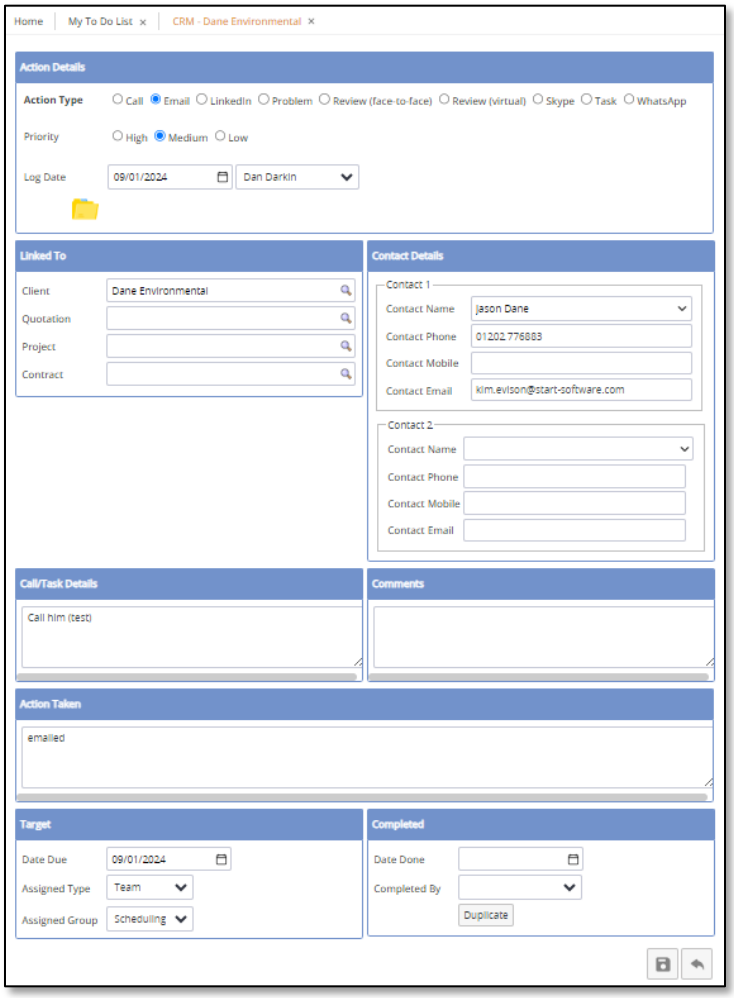
2. View the details of a task by clicking its **View Call/Task** button.



13.3 Completing a call or task

Tasks fall off your To Do list by being either completed or assigned to someone else.

1. Display tasks assigned to you on your My To Do List.
2. Find the required tasks and display its details.



3. Update the Call/Task Details if appropriate and record the date you completed the task in the **Date Done** field. If the task was completed by someone else, select their name from the drop-down list on the **Completed By** field.

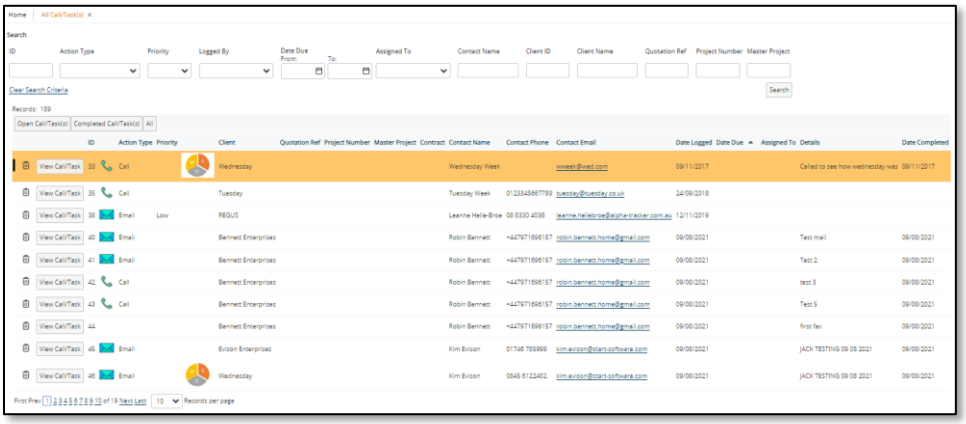
   Alternatively, you could reassign the task to someone else by selecting their name in the **Assigned To** field.
4. Click **Submit** to save the updated task.
5. Refresh your My To Do List screen.

The completed (or reassigned) task no longer appears on your To Do list as an open action.

13.4 Checking all calls/tasks logged

The “All Call/Task(s)” option gives you a view of all the tasks that have been logged in Alpha Tracker, not just those that have been assigned to you. You can search and filter the list as you wish.

1. Click the “All Call/Task(s)” option on the Calls/Tasks menu. All calls/tasks logged in Alpha Tracker are displayed.



2. Use the buttons to show all tasks, open tasks or completed tasks only. You can also use the search fields at the top of the screen to filter the list.
3. Display details of selected calls/tasks by clicking the appropriate **View Call/Task** button.

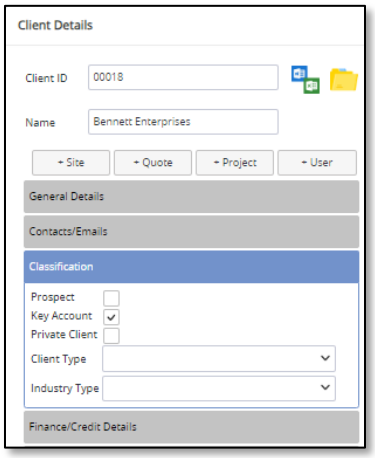
13.5 Tracking client contact

The Account Management option on the CRM menu is designed to help you keep track of your key clients and the contact you have with them. Although Alpha Tracker is typically used by environmental consultancies and organisations with an asbestos problem to solve, it is also used by other types of company to manage day-to-day operations. The Account Management features and screens help all users of Alpha Tracker manage their key accounts.

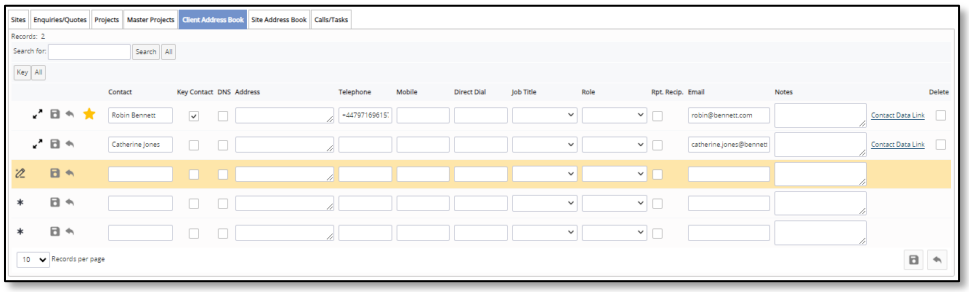
13.5.1 Identifying key contacts

You can mark important contacts at a client as key contacts. You can also mark important clients as key clients. Both are indicated by a yellow star icon.

1. First, decide who your key clients are and mark their Client records by opening their Client Details and ticking the **Key Account** box on the Classification tab.



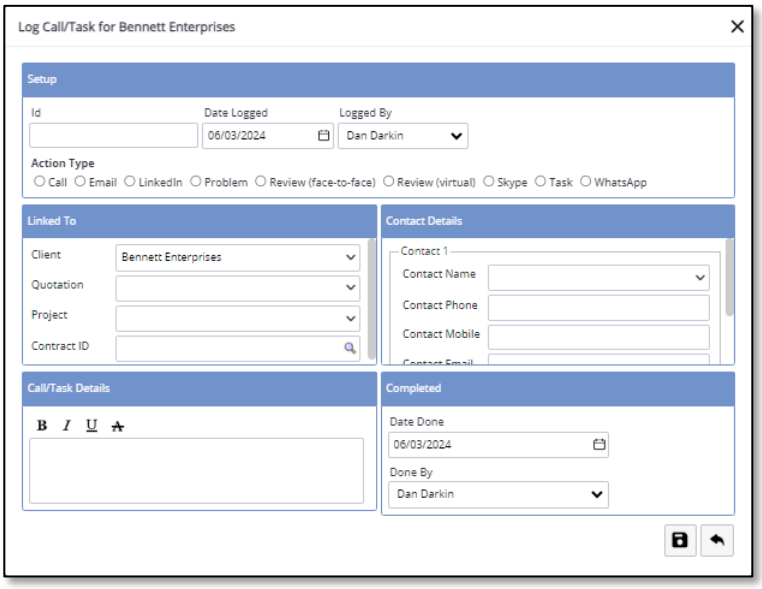
2. Mark the key contacts at all your clients by opening the Client Details, going to the Client Address Book tab and ticking the **Key Contact** tickbox against only the most important contacts. A star is displayed against the contact.



13.5.2 Recording contact with clients

Log contacts made with your clients either manually by using the **Log Call/Task** button on the Account Management or Key Accounts screen, or automatically by using Tracker Filer:

1. Manually record contact with a client by using the **Log Call/Task** button on the Account Management or Key Accounts screen. On the displayed Log Call/Task screen:
   - Select the type of contact by selecting an **Action Type** radio button.
   - Link it to a specific quotation, project or contract, if required, by making a selection in the Linked To section.
   - Specify or select who the contact was with and their details in the Contact Details section.
   - Type the details of the call, email etc in the Call/Task Details section and save.



2. Automatically log contact with a client whenever you email them by using Tracker Filer:
   - "CC" Tracker Filer at your organisation when you email a client (you don't need to specifically mention a quote or project number)
   - Tracker Filer will look at the email address(es) you have sent or cc'd the email to, and then save the emails as records in the Alpha Tracker CRM module.

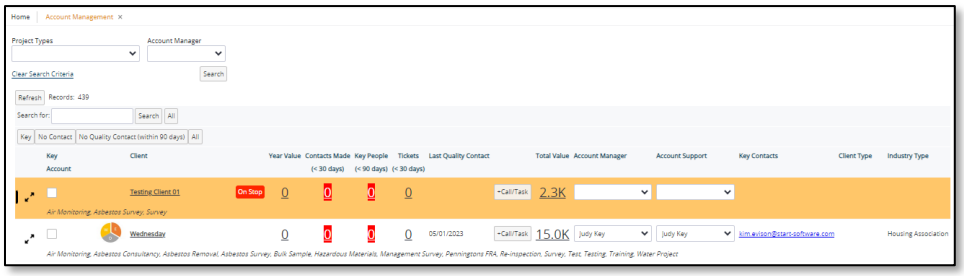
If you don't currently use Tracker Filer, contact Support to arrange to have it installed.

13.5.3 Displaying and monitoring client contact

Make sure you are keeping in touch with your clients by monitoring the figures on the Account Management screen. You can also focus on key clients only by using the Key Accounts screen.

To display your contact with clients:

1. Select "Account Management" from the CRM menu. The Account Management screen is displayed.
2. If required, search for specific account(s) by filtering on **Project Types** or **Account Manager**, or by using the quick search field.



The Account Management screen lists your clients, showing details of year to date and total invoice values, your Account Manager and the email address(es) of the key

contacts at the client. Most importantly it also displays the number of contacts you have made generally in the last 30 days with the client and the number made with key contacts at the client.

3. Click on an underlined entry to drill down to the details, eg to see a list of invoices making up the total invoiced figure, or a list of recent contacts with the client.

   If you are displaying details of recent contacts, the icons next to the contact figures show you the forms of contact made, eg phone call, Teams call, email etc.

> ☞ You can change these icons by using the "CRM Action Types" option under "General" on the Setup menu.

4. Use the preset filter buttons for "Key", "No Contact" and "All" to quickly see only those clients you have marked as key accounts or only those with whom you have had no recent communication.

   The "No Quality Contact (within 90 days)" preset filter button is particularly useful to find clients with whom you have had no face-to-face or video call communication in the last 90 days.

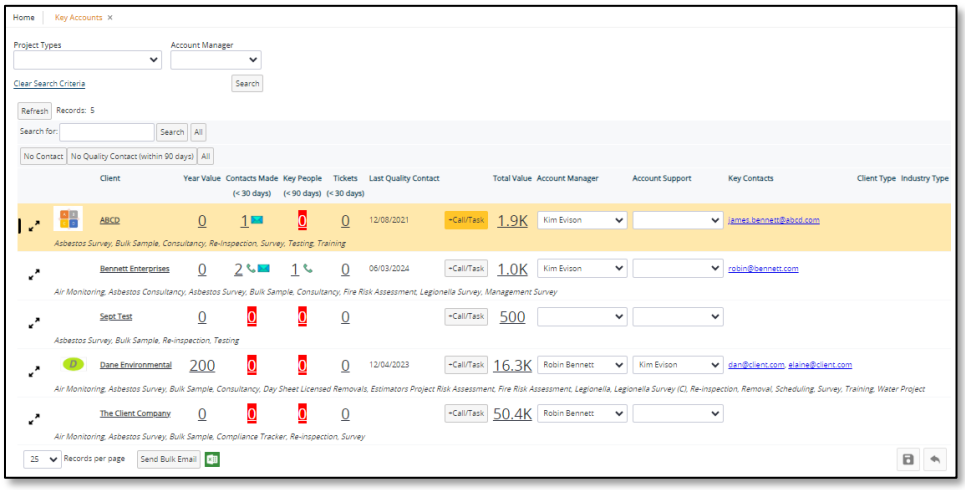
> *There is also a "Key Accounts" menu option if you want to concentrate on key accounts only - it automatically has the "Key" filter applied. You can identify key accounts by the star.*

5. See a list of all your contacts in the Address Book for a client, by clicking on the row expander button on the far left of the row on the Account Management or Key Accounts screen.

13.5.4 Sending and recording bulk emails

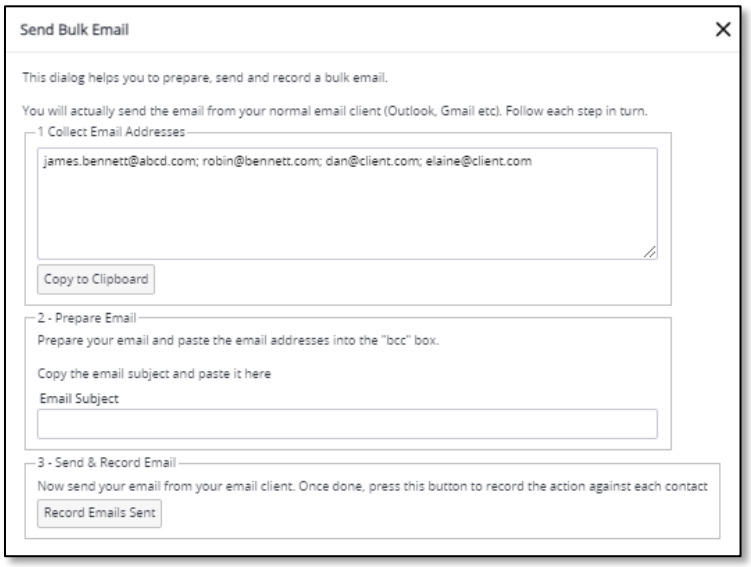
The Key Accounts and the Account Management screens provide an easy method for sending and recording bulk emails. It is particularly useful if you are sending something like a newsletter to your key accounts. This feature gathers the email addresses of the key contacts at the clients, making it easy to prepare the email which you actually send from your normal email client (eg Outlook or Gmail). Once you have sent the email, complete the final step to log this communication with all the recipients in the CRM module.

1. Select "Key Accounts" or "Account Management" from the CRM menu.
2. Filter the display to show the accounts to whom you are sending the bulk email, eg all your key accounts, or key accounts with whom you have had no recent contact.



3. Click the **Send Bulk Email** button at the bottom of the screen to display the screen that guides you through the process of preparing, sending and recording a bulk email.

   The email addresses of all the contacts who have been marked as key contacts at the clients on the list are displayed at step 1.



4. Click **Copy to Clipboard** to copy the list of email addresses to your clipboard.
5. Prepare the email using your usual email client, eg Outlook or Gmail, and paste the list of email addresses into the “Bcc” box.
6. Copy the subject line from the email into the **Email Subject** field in step 2 on the Send Bulk Email screen.
7. Send your email.
8. Click the **Record Emails Sent** button at step 3 on the Send Bulk Email screen to log the email communication with each contact in the CRM module.

14. REPORTING ON YOUR DATA

The Reports section of Alpha Tracker provides a number of standard reports that enable you to extract and report on your data. They may also include some customised reports.

The reports available to you are determined by the user group to which you belong. Therefore, the reports available to a Surveyor will be different to those available to an Administrator or a Lab Analyst for example.

Reporting on your data is easy – simply select the report you want and the data is displayed on screen. You can sort the data as you like, by clicking on the column headings, a search facility helps you find items quickly and at the click of a button you can export the data to a spreadsheet.

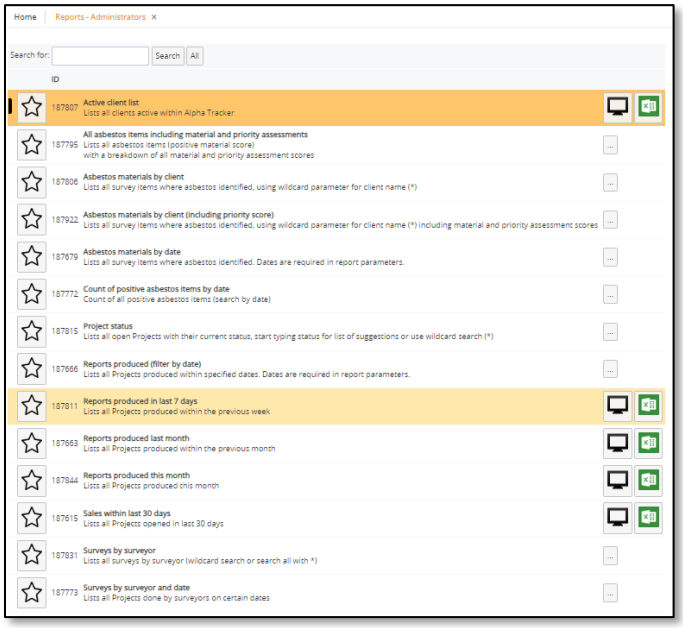
If you have any pre-defined exports set up, you can access these from the Exports option on the “Projects” menu or from the “Reports” menu.

14.1 Running a report

To run a report:

1. Expand the Reports menu and click on the report group for which you want to see the available reports, eg Project Admin, Finance or Management. These report groups correspond to the user groups in Alpha Tracker. Most people will see just one group listed in the Reports menu and this is the group to which they belong.

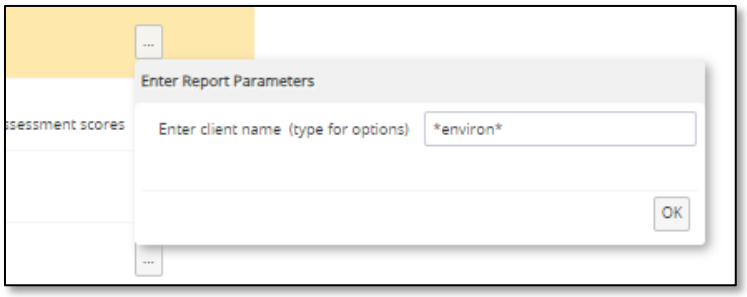
   A list of the available reports is displayed as in the following example:



2. If you have a long list of reports you can enter search text in the **Search for:** field to help you find the report you need. Type in the text and click **Search**. The list is filtered to show only reports matching your search text. Return to the full list of all reports by clicking **All**.

3. If a report requires parameters to filter the data, you will see a **…** button. Click the **…** button and specify the required parameters, then click **OK**.

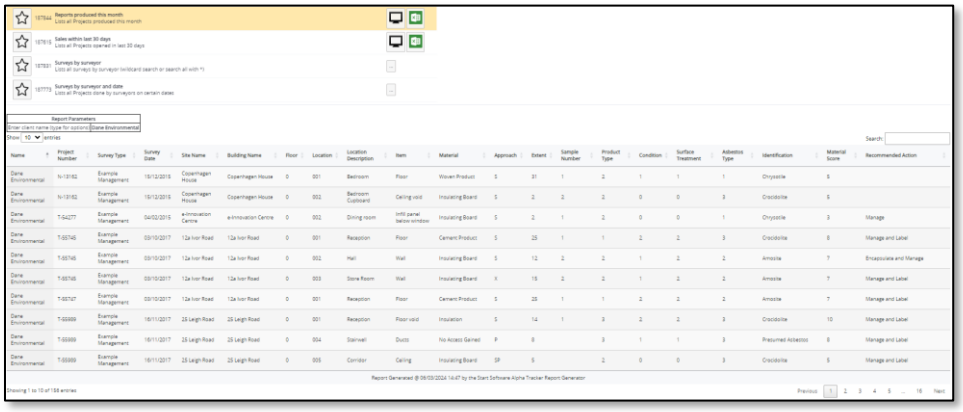
   You can use the asterisk (*) as a wildcard when specifying the parameters. For example, entering "*environ*" as the Client Name parameter will find data for all clients with "Environmental" appearing anywhere in their name.



   Where dates are required, use the calendar on the date parameter field to select the required date and enter it in the appropriate format.

4. Run a report by clicking its **Monitor** or **Download to Excel** button. Depending on your choice the results are output to screen or to an Excel file.

   If you are outputting the results to screen, then these are displayed below the list of available reports. (If your report list is long you may need to scroll down to see the data returned.) Any parameters you specified are displayed between the list of available reports and the results.



5. You can work with the data on screen by:
   - sorting the returned data as required by clicking on a column heading – once to sort A-Z, again to sort Z-A
   - searching for particular entries by typing into the **Search** box on the far right.

15. SHARING DATA ON THE CLIENT PORTAL

15.1 Introduction to the Client Portal

The Alpha Tracker Client Portal provides your clients with direct access to the Alpha Tracker reports, documents, and project data that you have created for them, live over the Internet. You don't have to print and post (or PDF and email) a report to your client, but can give your client access to it directly over the web.

The Client Portal is an integrated part of Alpha Tracker. Your clients log into your Alpha Tracker URL and get a special view giving them direct access to their data. You decide what data they can see, by allowing them to see data related to specific key services. For example, this could include:

- asbestos reports, photos and registers
- water hygiene risk actions, assets and outlets
- open tickets and quotations.

The Client Portal is also a compliance management tool with features to track remedial actions, approved contractors and store vital policy and procedure documents.

This section includes information on the following:

- setting up Client Portal users
- making projects visible to the Client Portal
- what can be seen on the Client Portal
- the options available to customise the information displayed on the Client Portal
- how to upload additional files to the Client Portal
- viewing hotspot drawings on the Portal
- viewing CAD drawings on the Portal
- recording removal or remediation details between surveys
- logging enquiries and accepting/rejecting quotations.

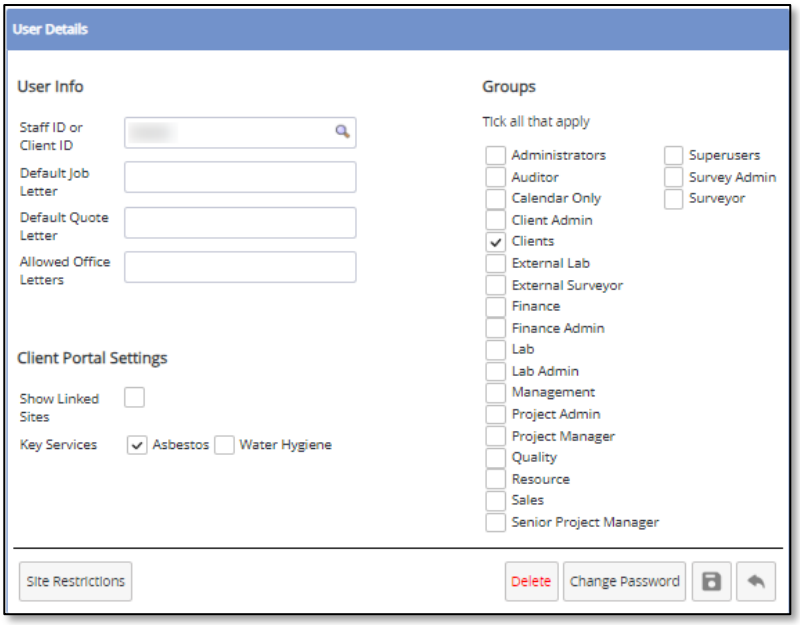
☞ Refer to the Client Portal User Guide for further details on how to use the options in the Client Portal.

15.2 Setting up Client Portal users

Setting up Client Portal users is described in detail in the Alpha Tracker Technical Guide as it is restricted to Superusers. Essentially, Client Portal logins are linked to a Client ID rather than a Staff ID and they must be in either the Clients or the Client Admin permission group and no other group.

In addition, you can specify the key services that are displayed to this Client Portal login. This defines the type of data that the Client Portal login will see. For example, depending on the licence keys in your system you may have options for Asbestos and for Water Hygiene. These work as follows:

- If you tick Asbestos only, the login will only see asbestos-related data.
- If you tick Water Hygiene only, the login will only see water hygiene-related data.
- If you tick both, then the login will see both.
- If you tick neither, then the login will see neither asbestos nor water hygiene data but will see Ticket and Quotation data if this is enabled on your system.



☞ Refer to the Technical Guide for further details on how to set up users.

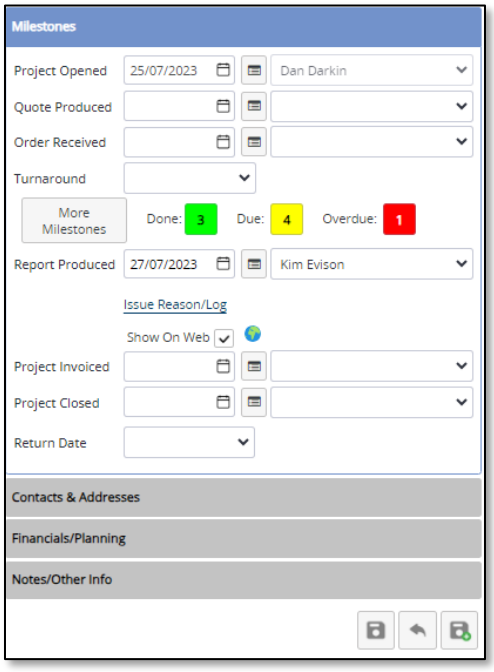
15.3 Making projects visible on the Portal

Only the projects that you want to make available on the Client Portal will be visible to your Portal users. To make a project visible you must mark it as “Show On Web”.

*Note that all sites for the client are visible on the Client Portal, whether or not you have a project for the site. This means that your client can see that the site is in the system even if you have not completed any work for it yet. If you wish to hide a site from the Client Portal, go to the Site Details and set its **Status** to “Hidden from Portal”.*

To make a project visible:

1. Open the project on the Projects screen.
2. If not already present, enter a date in the **Report Produced** milestone so that the **Show On Web** tickbox is displayed. This milestone is usually completed when the report is produced for a project.



3. Tick the **Show On Web** tickbox.

   The project will now display a small symbol next to it on lists in Alpha Tracker, eg:

   If the **Document Produced** date is present and the **Show On Web** tickbox is ticked, then the report is fully available on the Client Portal.

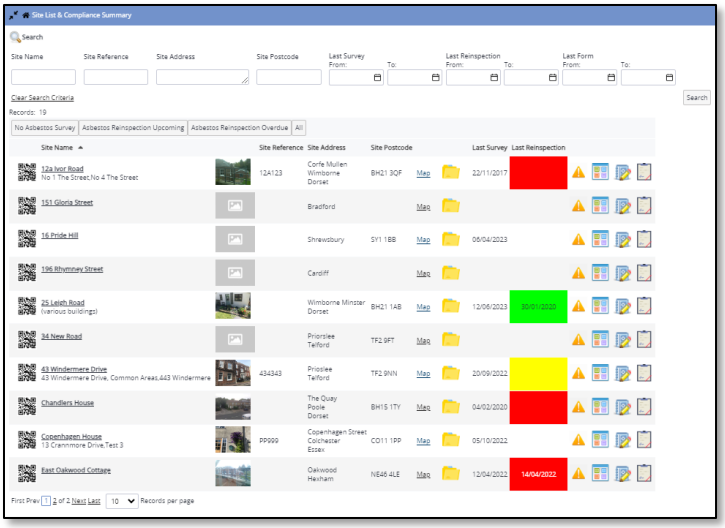
   If, however, the **Document Produced** date is removed and the **Show On Web** tickbox is left ticked, then the report/job is marked as “pending” on the Client Portal. This shows your client that it is underway but that the report is not yet available and the data has not been released.

15.4 What can be seen on the Client Portal?

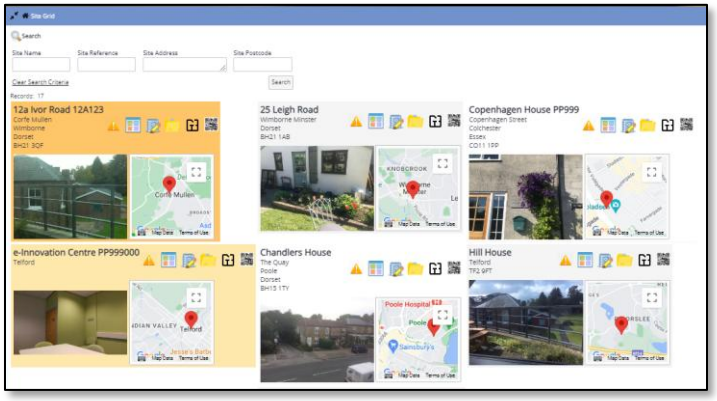
The main sections of the Client Portal display information on sites, compliance and reports. System settings and the Client Portal login determine which sections are visible. For example, on the Home Page a client may see some or all of the following:

- "Project Pipeline" shows complete and incomplete milestones for projects marked as Show On Web, to indicate progress through the main phases of work:

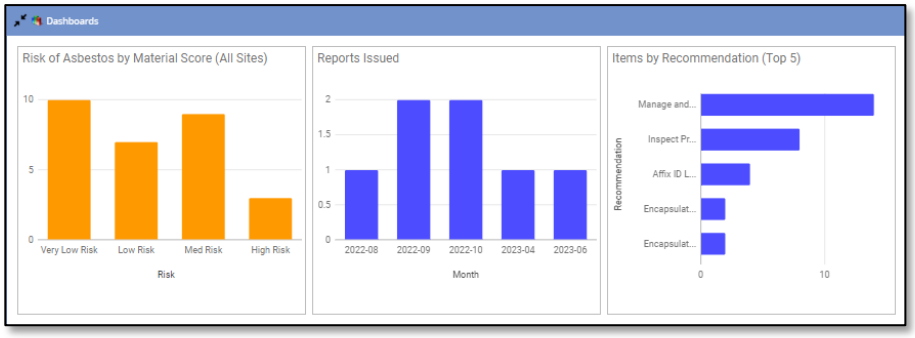
- "Site List & Compliance Summary" lists the client's sites and also shows summary compliance data (which may be for asbestos or water hygiene, or both):



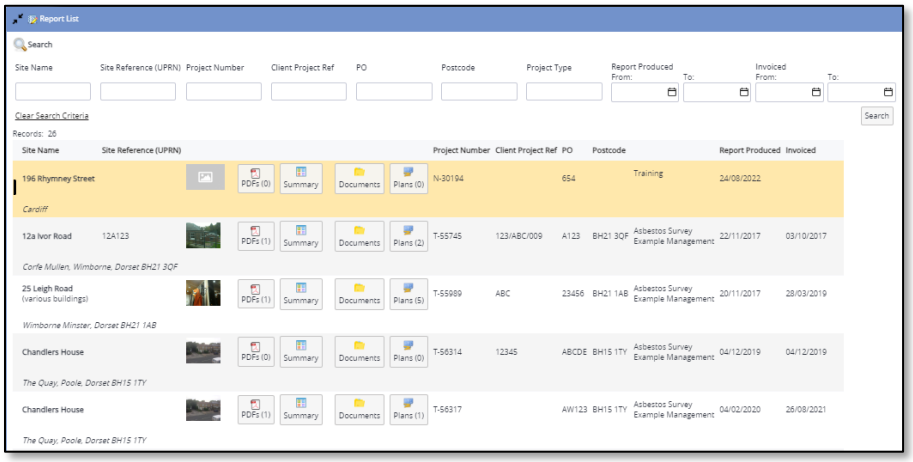
- "Site Grid" shows site information in a grid pattern:



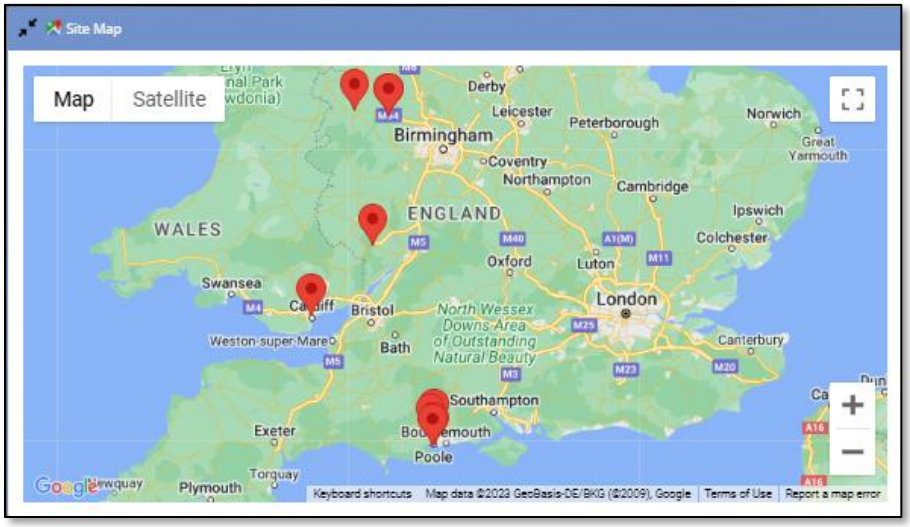
- "Dashboards" show the following information in graphical format:
  - risk of asbestos (all sites) – the number of items at high, medium and low risk across all the client's sites
  - reports issued – the number of reports issued and the month they were issued
  - items by recommendation – the proportion of items with each different recommendation (top five only).



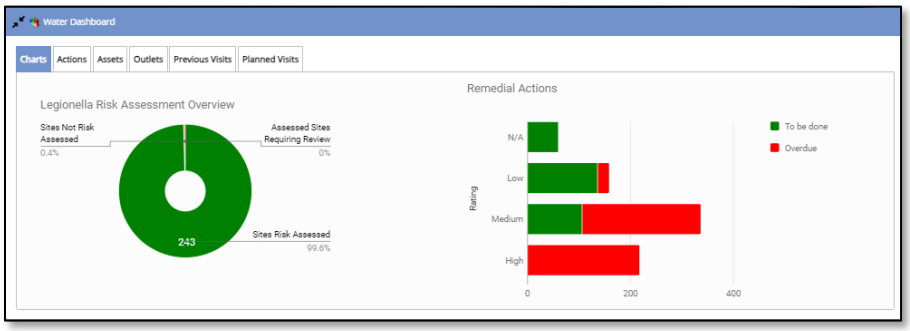
- "Report List" shows a list of all the reports that have been produced across all the client's sites:



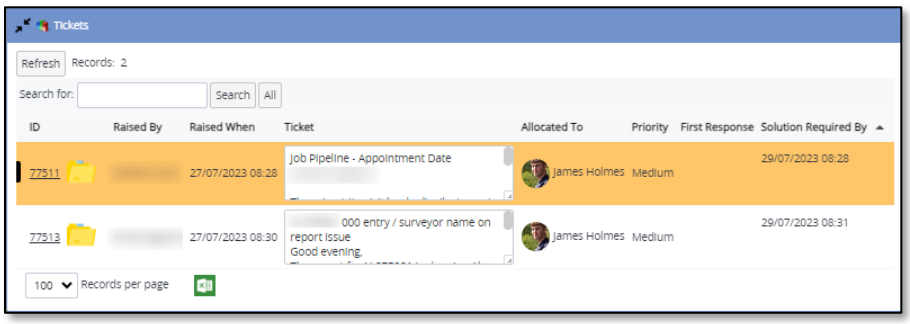
- “Site Map” displays the client’s sites on a map:



- “Water Dashboard” shows water hygiene-related data, including charts, actions, assets, outlets, previous visits and planned visits:



- “Tickets” allows your users to see and track progress on all open tickets that they have raised with you



Clients may also be able to:

- display Registers
- display Photo Registers
- run data extracts
- maintain a library of other documents
- update contact details

- upload bulk sample details
- record removal or remediation details
- log and track enquiries and quotations.

You can control which menu options are available to your clients so some of these options may not be available to some or all of your clients.

Refer to the Client Portal User Guide for further details on how to use the options in the Client Portal.

15.5 Customising the Portal view

The Client Portal can be customised by switching on or off different features in the System Repository. The setup of individual logins to the Client Portal also affects what is displayed.

Please contact support@start-software.com if you would like features to be switched on or off.

This list summarises some of the controls on the Client Portal:

- The filename pattern of pdf to be visible on the portal can be specified.
- Any of the charts on the dashboard can be switched off.
- Individual elements on the Home page can be switched off.
- Which milestones are displayed on the Project Pipeline can be controlled via a tickbox on the Milestone Templates.
- All the buttons and frames within the Main Menu on the Client Portal can be switched on or off. This means that you can control which menu items are displayed via a Client Portal login.
- A new data flag can be displayed on the Site List & Compliance Summary and the registers to draw users attention to new data.
- A new document flag can be displayed on documents uploaded to the “Other Documents” menu option.
- You can prevent “dangerous” file types from being uploaded by clients through the Client Portal by specifying a comma-separated list of banned file extensions eg “.exe,.com”. The default list is “.exe., .com”.
- Blacklisted terms can be listed to specify pdf filename patterns not to display on the portal. Blacklisted terms can be specified for each client.
- You can hide the Register feature on the Report List on the Client Portal. This is set to “yes” by default and is client-specific. This prevents the register for the project being displayed, which is useful if you tend to revisit sites and want your clients to look at the site registers.
- Recommended Actions for NAD items can be hidden from the Client Portal registers.
- You can tag individual projects for display on the client portal to any number of client IDs in addition to the “owning” client’s ID. You specify the additional client IDs in a new field on the Project, **Linked Client IDs**. These linked projects appear on the client portal in

their own section - to make it clear that they are special projects made available to the client logging in.

- You can allow/disallow clients to record remediation and removal details and thereby update the register between surveys.
- You can allow/disallow individual logins to see data related to specific key services, eg asbestos and water hygiene.

Only users in the "Client Admin" group are allowed to save changes to the client contact details on the Client Portal.

> ☞ Refer to the Alpha Tracker Technical Guide for instructions on how to set up Client Portal users and how to monitor client access.

15.6 Uploading files to the Portal

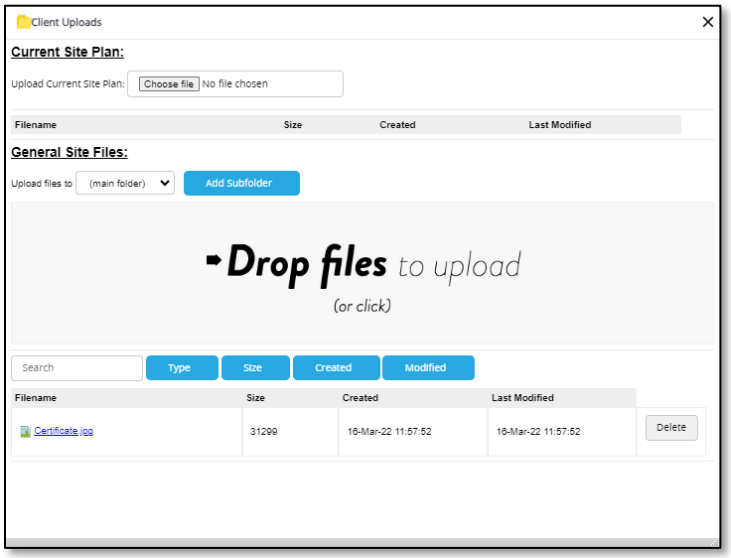
Users of the Client Portal can upload documents to folders on the Client Portal in two places:

- on each Site – this folder is for documents that relate to the whole site
- on each Project – this folder is for documents that are specific to individual projects/surveys.

To upload documents within the Client Portal:

1. Click on the folder icon on a site or a project as appropriate:

2. Click the **Choose File** button to upload a document that you want to file with the site or project, or drag a document to the drop zone.
3. Click the underlined filename to download a document to your PC.
4. Click the **Delete** button if you want to remove a document from the document folder.



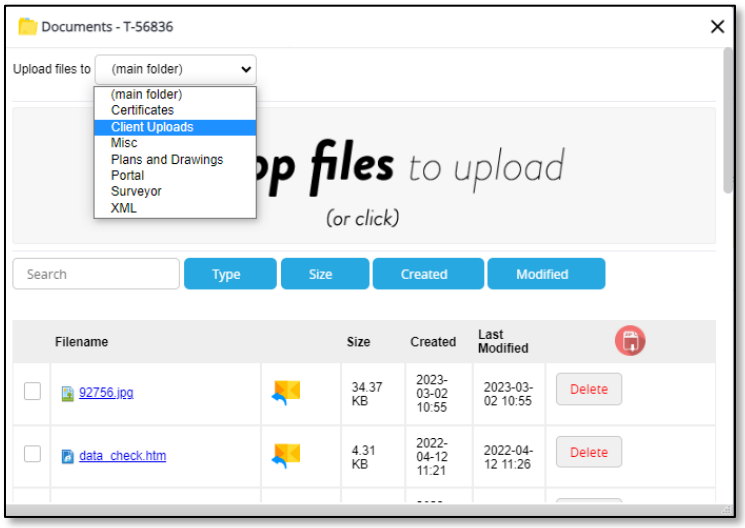
Note that only users in the permission group "Client Admin" have the ability to delete documents. Users in the "Clients" group can upload and download but cannot delete documents.

For general documents with a wider application, for example relating to policies and procedures, training, contractors or QR code usage, you can use the *Other Documents* menu options to upload files.

It is also possible to upload files from a standard Alpha Tracker login so that the files are visible and available for download in the document folders on the Client Portal. You can do this for both Project-related and Site-related documents, simply go to the project or site and use the Document Folder to upload your file to the Client Uploads subfolder.

For example, to upload to the document folder on the Project:

1. Locate the project on the Project List.
2. Click on the Document Folder icon.
3. Use the top **Upload files to** option to select and upload the file to the "Client Uploads" sub-folder.

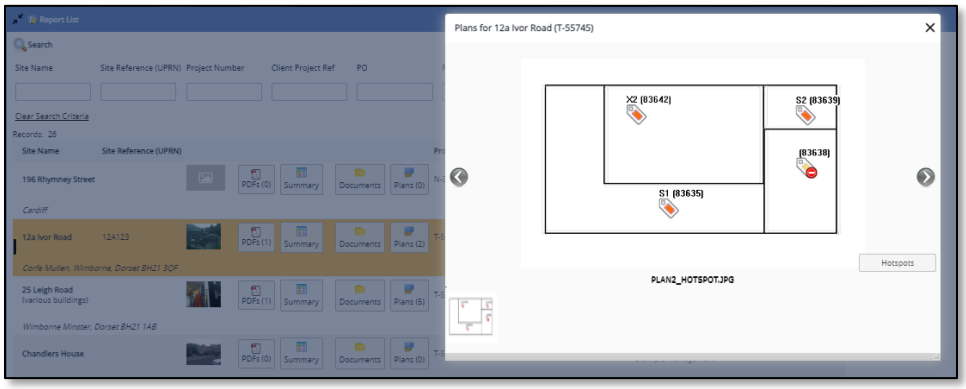


15.7 Viewing hotspot drawings on the Portal

Drawings that you have added hotspots to can be displayed on the Client Portal and all tags viewed. These drawings are linked to individual projects and are usually in the project's Drawings subfolder.

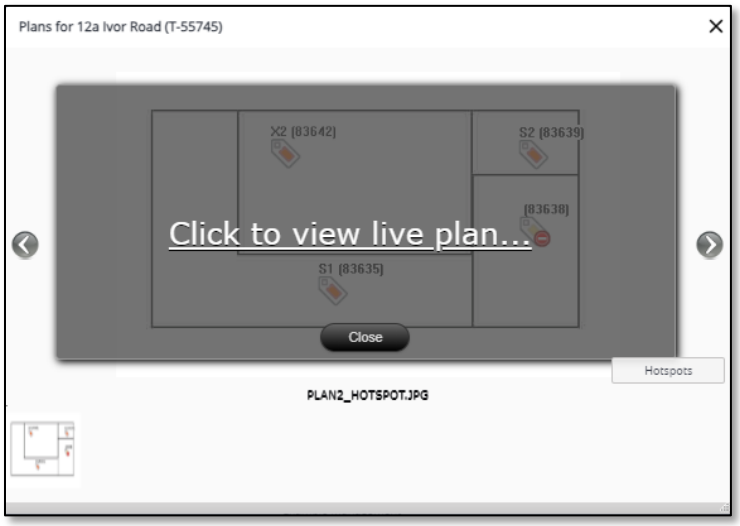
To display the hotspot drawings on the Client Portal:

1. Find the required project on the Report List and click the **Plans** button. The hotspot JPG file is displayed, for example:

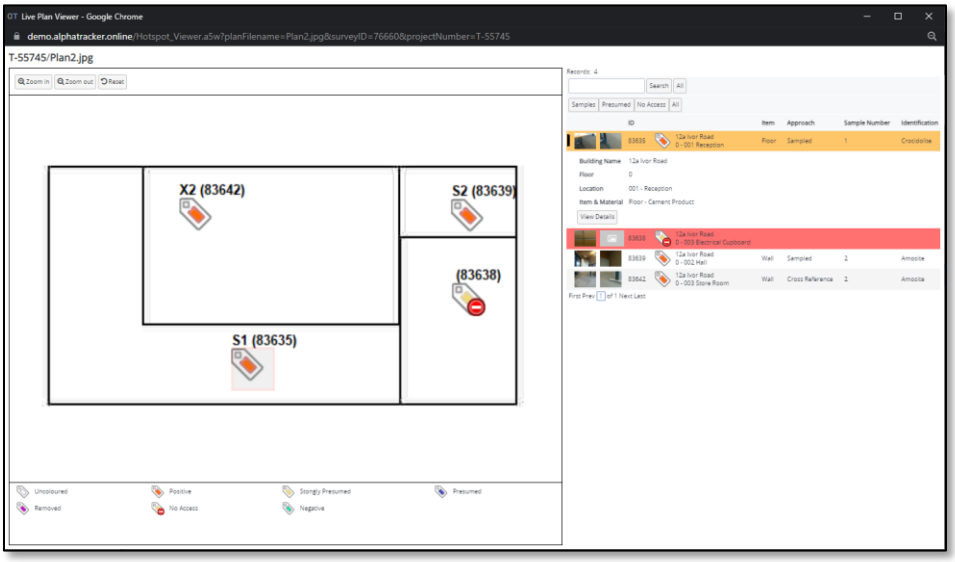


If there is more than one drawing available, then the different drawings are displayed at the bottom of the screen and you can click on the one you want to view or use the left/right arrow buttons to move between them.

2. Click on the Hotspots button and then on the "**Click to view live plan…**" link to access the live drawing.



The live plan is displayed:



On the hotspot drawing you can:

- Use the wheel on your mouse or the + and – buttons above the drawing to zoom in and out.
- Click and hold on the drawing and move the mouse to move the image in any direction.
- Use the **Reset** button to return to the default zoom and view of the drawing.
- Filter the list of tags by using the buttons above the tag list.
- Click on a tag on the drawing to view summary details of the item on the tag list on the right-hand side.
- Click on a tag on the tag list to highlight it on the drawing.
- Print the hotspot drawing by using Ctrl+P.

The hotspots cannot be amended from the Client Portal.

15.8 Viewing CAD drawings on the Portal

It is possible to view CAD drawings (DWG files) on the Client Portal, in the same way as you view hotspot drawings (see above). These drawings are linked to individual projects and are usually in the project's Drawings subfolder.

Find the required project on the Report List and click the **Plans** button to display project plans/drawings.

In order to view the DWG files stored with a project, you need to:

- have a DWG viewer installed
- save a JPG version with the same name and in the same location as the DWG file.

The system displays only JPGs in the Plan viewer. If however the name of the DWG file is the same as the JPG, eg “Plan1.JPG” and “Plan1.DWG”, then clicking the “i” icon displays the DWG file.

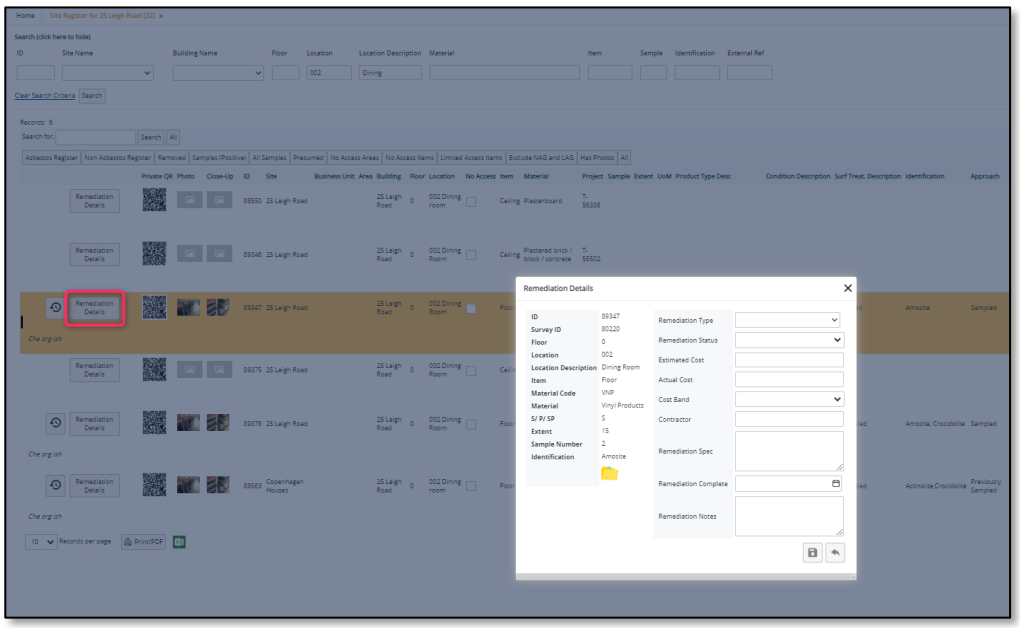
If the user does not have a DWG viewer, then they can see the JPG. Any user who does have a DWG viewer has the ability to click through to the DWG version.

15.9 Recording removal and remediation details

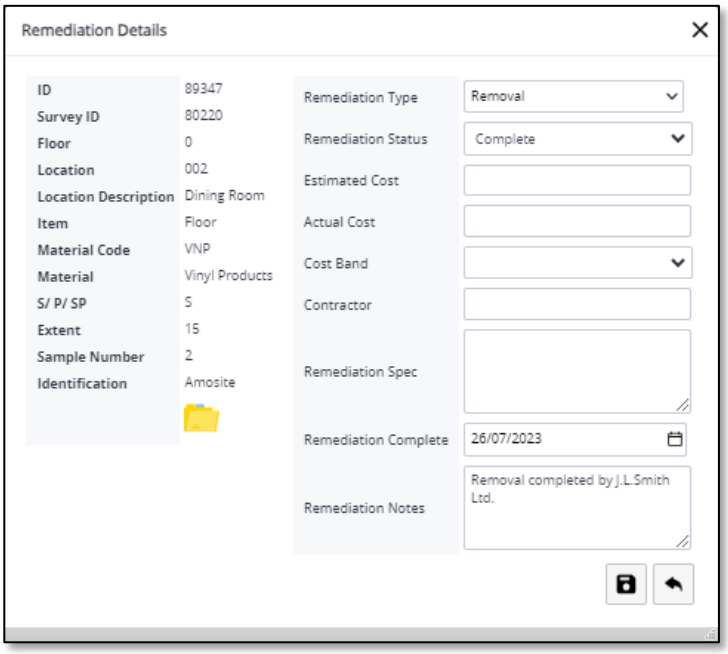
It is possible to update survey items between surveys to reflect remediation or removal work. This can be done from the Asbestos Register in Alpha Tracker but may also be switched on in the Client Portal.

> ☞ Refer to Section 11.2, Updating the Asbestos Register, for details on how to record these updates from a standard Alpha Tracker login.

If it is available within the Client Portal, your client can click the **Remediation Details** button on an item on the Asbestos Register. For example:



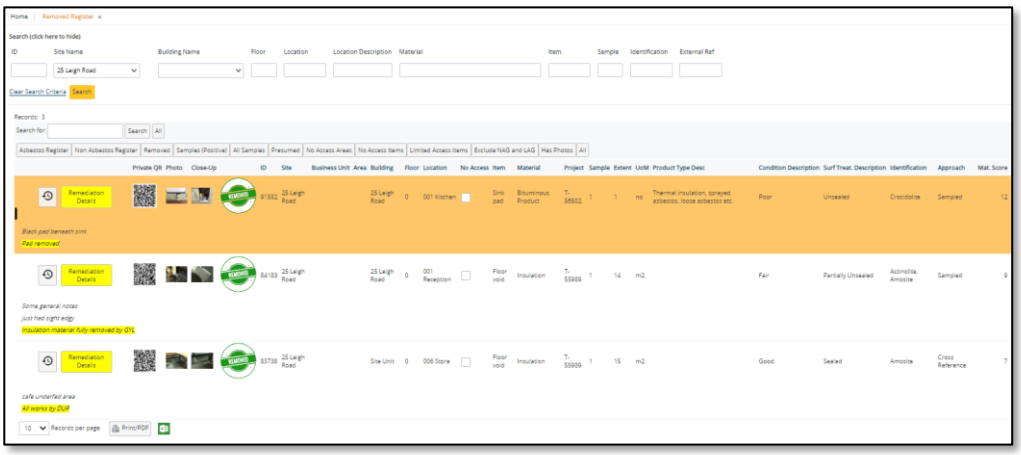
This screen allows your client to record remediation or removal details. The item will only be marked as “Removed” if it has a **Remediation Type** of “Removal” AND either a **Remediation Status** of “Complete” or a **Remediation Complete** date. The following screen shows an example:



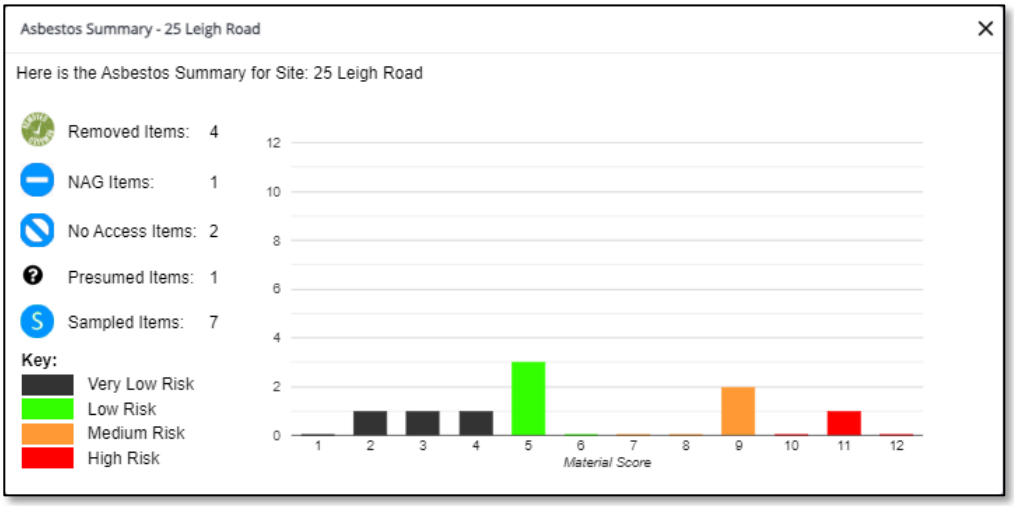
Positive items are marked as “Removed” on the Client Portal if any of the following are true:

- they have an **Approach** of “R”
- they have an **Identification** of “Removed”
- they have a **Remediation Type** of “Removal” AND either a **Remediation Status** of “Complete” or a **Remediation Complete** date.

These removed items are easily identified on the Client Portal by a green “Removed” stamp and can be viewed on the Removed Register:



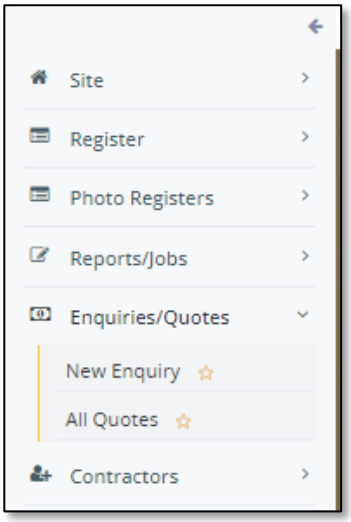
They are also visible on the Asbestos Summary graph:



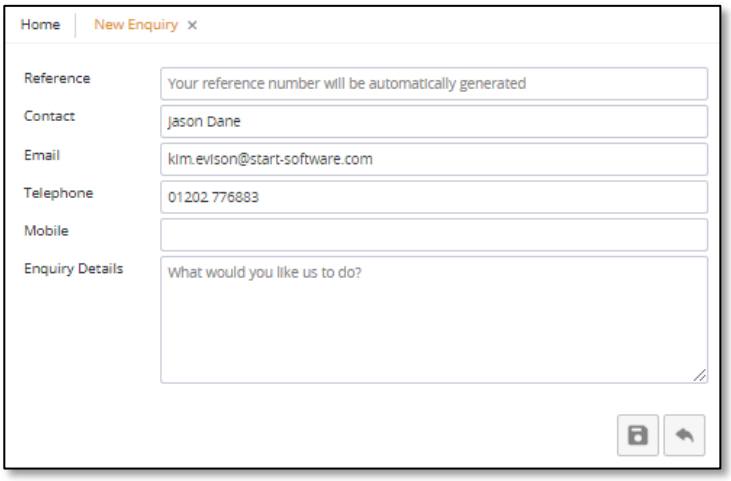
Similarly, any items that have had remediation work recorded are visible on the Remediation Register.

15.10 Logging enquiries, accepting/rejecting quotations

An optional feature on the Client Portal allows your clients to log new enquiries themselves and also to view the status of their enquiries and quotes. You can find these options on the Client Portal, on the Enquiries/Quotes menu if the setting “Show the Enquiry Section on the Client Portal?” is set to yes.

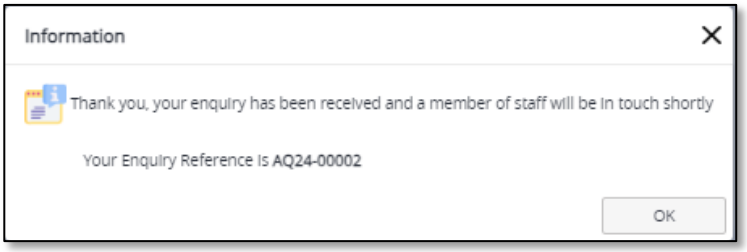


Your clients can log an enquiry by using the New Enquiry menu option:



When an enquiry is raised, an email is sent to the email address specified in the “Client Portal Enquiry Notification Email Address” setting. In addition, the enquiry appears on the Enquiry List with “Client Portal” set as the Source so that you can easily identify it.

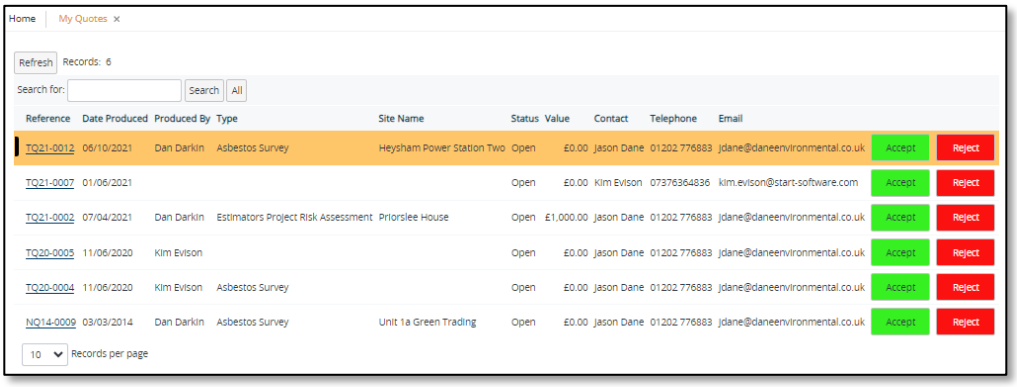
You can set up messages for a client to inform them that you have received their enquiry. This is controlled by the setting "[client name] new enquiry message". For example:



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

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

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

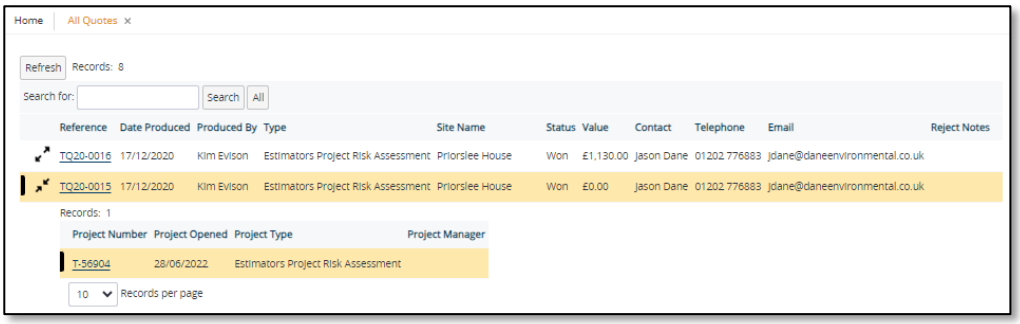


If a quotation is rejected, your client is prompted to enter some reject notes. The quotation is marked as “Lost” and the client’s reject notes are displayed in the **Reason** field.

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

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

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



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

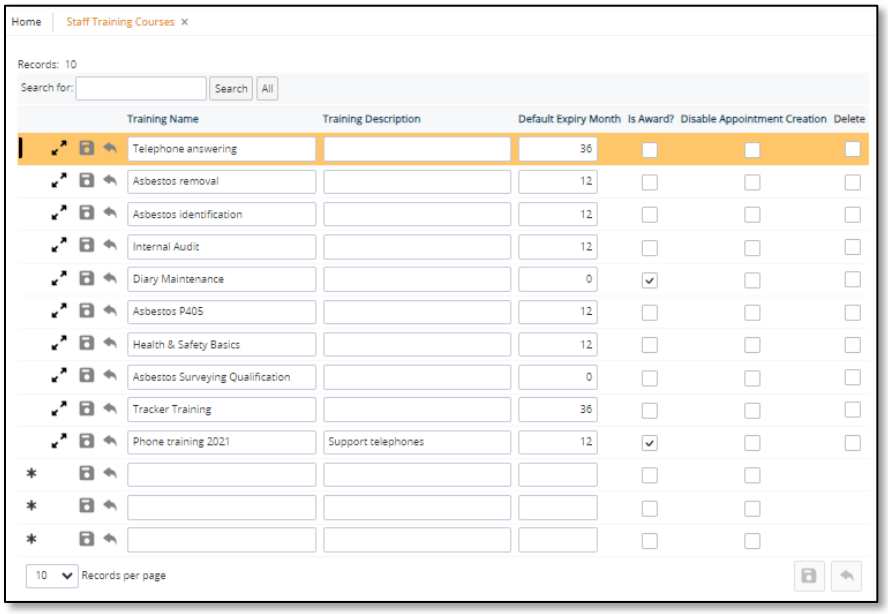
16. STAFF TRAINING

Staff Training is an optional feature in Alpha Tracker that allows you to keep track of any training courses that your staff have attended, the outcome, renewal dates etc and also to upload the relevant certificates. You can view details of staff training in a number of ways, both on screen and in reports. The new Staff Training module appears under the *Resources* menu on Alpha Tracker, subject to a licence.

16.1 Listing training courses

Assuming that all your staff already have Staff records in Alpha Tracker, the first thing to set up is the training courses. To do this:

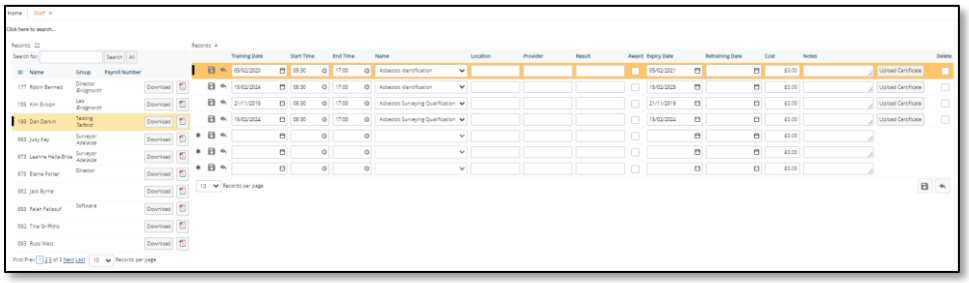
1. Select "Staff Training Courses" from the General section on the Setup menu.
2. Create a record for each training course. You can record a name, description and default expiry date for each course. You can also indicate whether the training course is an award, ie it does not have an expiry date.



16.2 Recording training courses attended

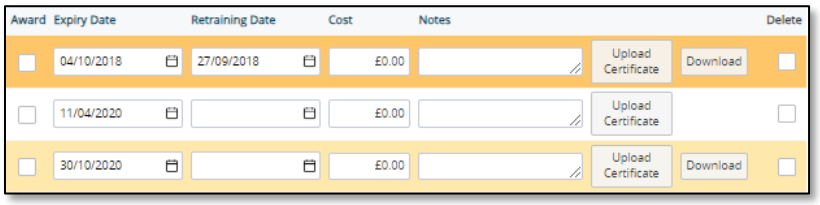
Once training courses are set up you can record training course attendance against members of staff.

1. Select "Staff" from the Staff/Training section of the Resources menu.
2. Click on the person on the left side of the screen and record their training courses on the right.



The default expiry date is automatically entered depending on the course that you select and whether this was entered on the Staff Training Courses screen.

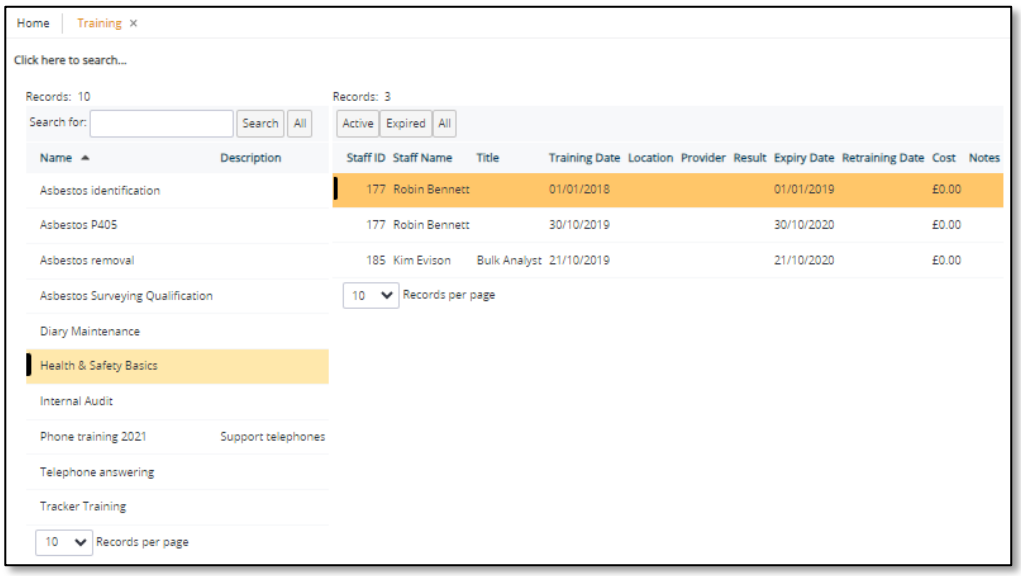
3. Once you have created the training records, use the buttons at the far right of the records to upload and download certificates:



16.3 Who has attended training courses

You can use the Training menu option to display the details the other way round, ie for any selected training course display the members of staff who have attended. There are buttons at the top of the screen to filter the list to show Active and Expired entries.

1. Select "Training" from the Staff/Training section of the Resources menu.



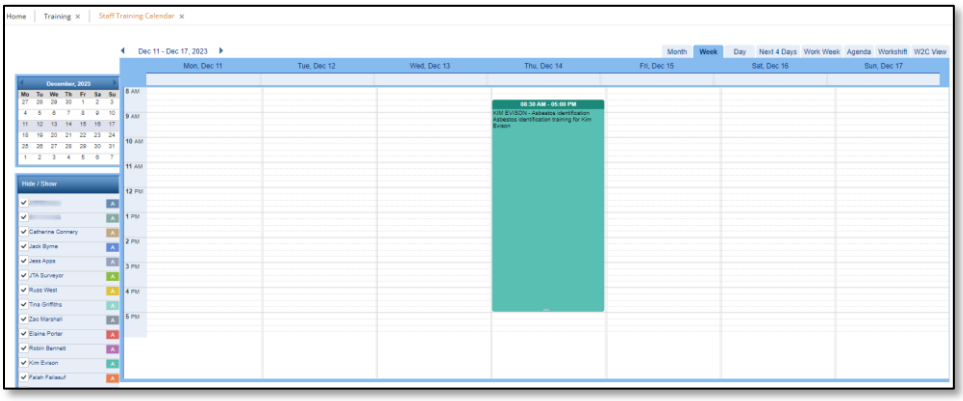
2. Click on the required training course on the left-hand side to display a list of staff who have attended on the right.

3. Use the **Active**, **Expired** and **All** buttons to filter the list.

16.4 Displaying the training calendar

Any training courses that you record for members of staff are added to their Calendar. They are also visible in the Staff/Training Calendar which gives the person in charge of training a filtered view of the Calendar that just includes training courses.

1. Select “Calendar” from the Staff/Training section of the Resources menu. The training calendar is displayed.



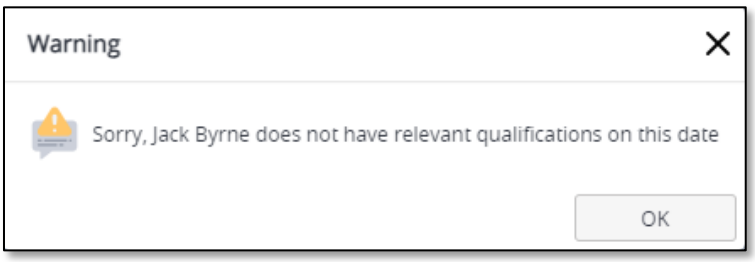
2. View, move or amend the training appointments as necessary.

16.5 Scheduling using qualifications as restraints

You can link Staff Training Courses to Project Types and get the Calendar to advise whether a member of staff has the appropriate qualifications when booking an appointment. For example:

Project Type “Asbestos Surveying” might be linked to training types “Asbestos P405” and “Health & Safety Basics”.

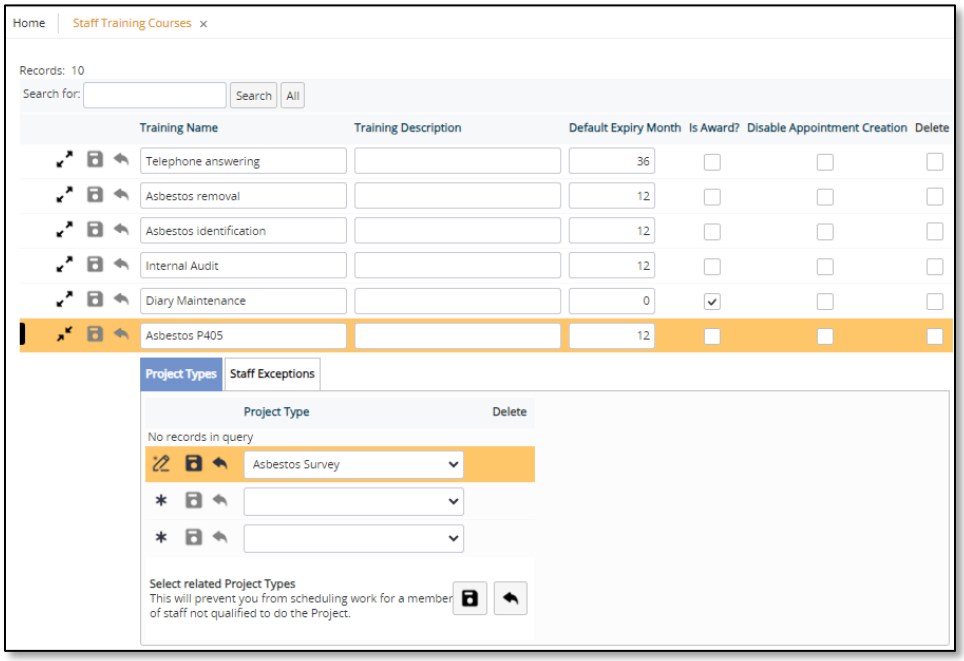
Then, when someone is using the Calendar in Alpha Tracker to schedule Jack onto job N-12345 which is of type “Asbestos Surveying” on 4 September, the system checks to see whether Jack has an Award or an unexpired training course for both “Asbestos P405” and “Health & Safety Basics” on that date. If he doesn’t, the system shows the person scheduling a message, for example:



To link Staff Training Courses to Project Types:

1. Select “Staff Training Courses” from the Setup menu.
2. Click the row expander button next to the required course.

3. Specify the linked Project Types on the Project Types tab.



4. List any staff who are to be excluded from these restrictions on the Staff Exceptions tab.

> *Note that if no Project Types are listed then there are no restrictions for that training course, ie all members of staff will be eligible for scheduling.*

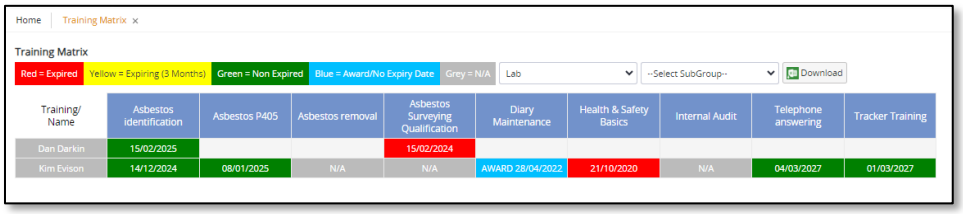
16.6 Displaying the Training Matrix

You can get an overview of the status of your qualifications/certifications by using the Training Matrix. All current members of staff are listed down the left-hand side of the Training Matrix, and training courses are listed across the top. At the intersections you can see the expiry date if that person has attended the course. The expiry dates are colour coded to show:

- Red – Expired
- Yellow – Expiring within 3 months
- Green – Current
- Blue – Award/no expiry date
- Grey – N/A.

1. Select “Training Matrix” from the Staff/Training section of the Resources menu to display the Training Matrix screen.

2. Select a Group and, optionally, a Subgroup from the dropdowns to populate the Training Matrix screen.



3. If required you can download the Training Matrix data to a spreadsheet by clicking the **Download** button.

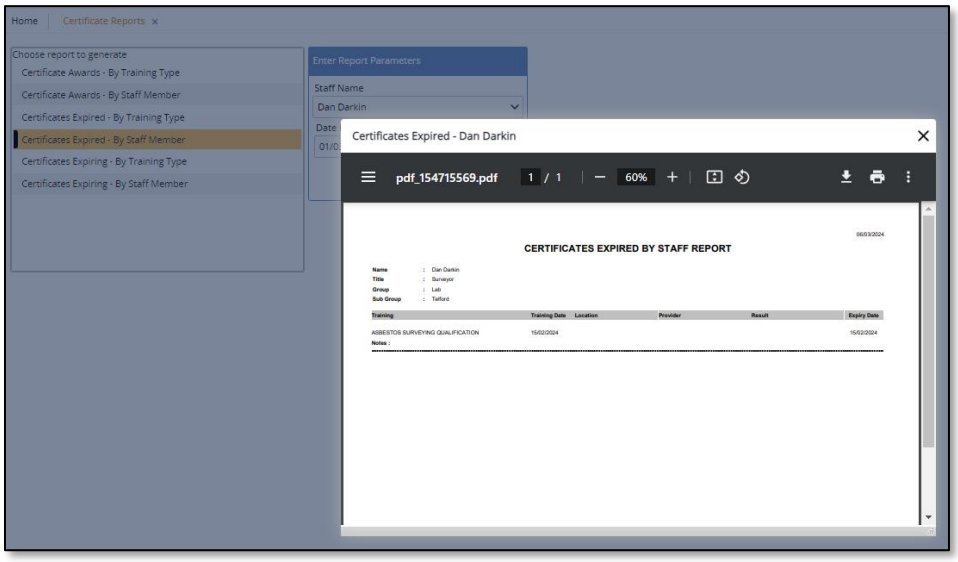
16.7 Reports

There are a number of reports you can produce based on the Staff Training data, including:

- Expired Certificates, listed by training course or by member of staff
- Expiring Certificates, listed by training course or by member of staff
- Training Delivered (between specified dates), listed by training course or by member of staff.

To produce a report:

1. Select the appropriate menu option, eg “Certificate Reports” or “Training Delivered” from the Staff/Training section of the Resources menu.
2. Select the report and specify any parameters. It is generated as a PDF and displayed on the screen, for example:



Move your cursor to the top of the screen displaying the PDF to access controls for downloading, printing etc.

Note that staff marked as “Not Current” in the Staff List are not available for selection in the Staff Name dropdowns on the “Certificate Reports” screens.

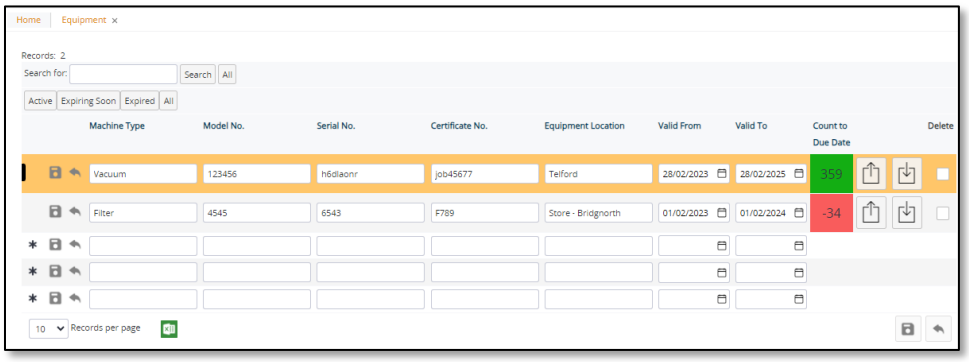
16.8 Managing equipment

An *Equipment* menu option on the Staff Training menu allows you to manage equipment by defining the certification details and uploading/downloading the relevant certificates. You can upload any type of file as a certificate. There is also a colour-coded countdown to the expiry of the certification:

- the number is green if it is more than 30 days in the future
- orange if it is between 30 and 0 days
- red if it is overdue.

Filters at the top of the screen let you quickly display the Expired, Expiring Soon or Active pieces of equipment.

1. Select "Equipment" from the Staff/Training section of the Resources menu to display the Equipment screen.



2. Use the quick search box to find matching entries (the search is across multiple fields) or the pre-set filter buttons to display the Expired, Expiring Soon or Active pieces of equipment.
3. Note the colour-coded countdown to the expiry of the certification.
4. Add a new piece of equipment by typing into one of the three blank rows at the bottom of the screen.
5. Use the buttons on the right of the screen to upload or download certificates.

Note that there is a separate group of Equipment menu options on the Resources menu that let you track your equipment – including by generating and downloading QR codes which can be attached to equipment.