



CLIENT PORTAL/PROPERTY MANAGEMENT USER GUIDE

Version 1.3



DOCUMENT CONTROL

Document

Alpha Tracker Client Portal/ Property Management User Guide

Current Version

Version	Date	Issued Pages	Reason For Issue
1.3	Apr 2024	All	Logo updated

Previous Versions

Version	Date	Issued Pages	Reason For Issue
1.2	Apr 2022	All	Details of pre-set filters, new data flag
1.1	Dec 2021	All	Sign in, Project pipeline, Client upload subfolders.
1.0	Feb 2020	All	First issue

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1. INTRODUCTION

The Alpha Tracker Client Portal provides direct access to your Alpha Tracker-produced reports, documents, project and other data live over the Internet. It has an easy-to-use interface that lets you drill down to the required information quickly and easily.

The aim of this User Guide is to help you prepare your data in Alpha Tracker and work with it as required in the Client Portal. It includes information on the following:

- sharing data between Alpha Tracker systems, explaining how to accept data from a linked system
- making projects visible to the Client Portal
- how to view site and project data on the Client Portal
- the options available to customise what is displayed on the Client Portal
- how to upload additional files to the Client Portal
- hotspotting drawings and viewing these on the Client Portal
- recording removal or remediation details between surveys
- re-inspecting data by sending survey data to a surveying company for re-inspection.

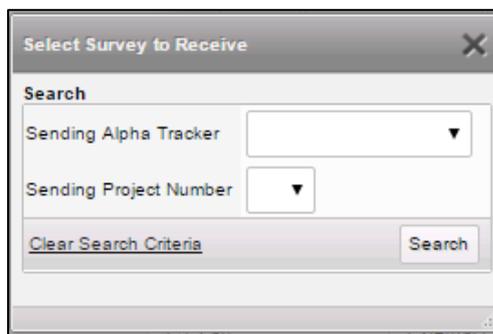
2. RECEIVING DATA FROM A LINKED SYSTEM

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.

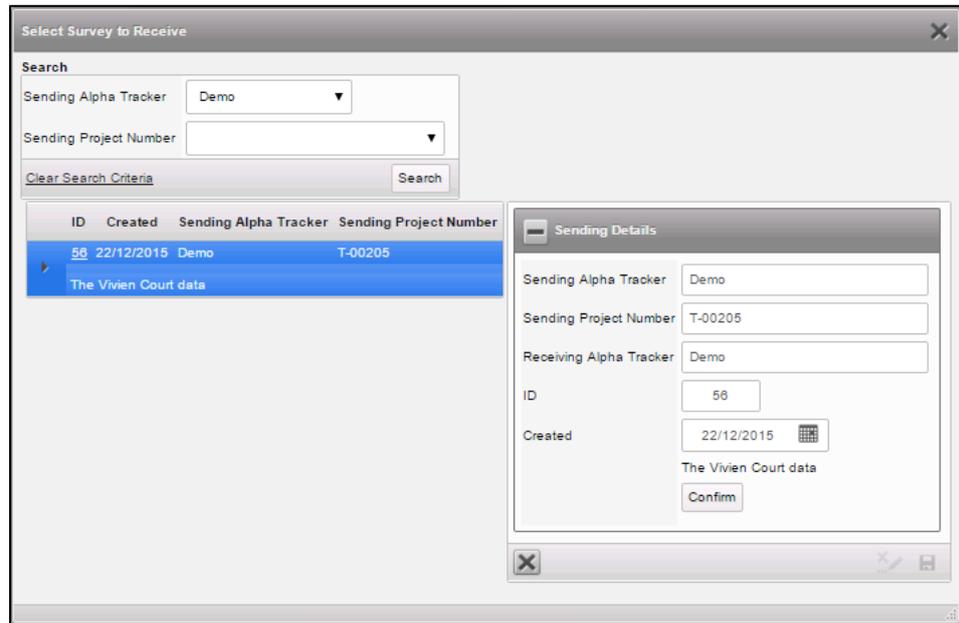
You can then select the project that you want to receive.

To receive a project:

1. Use the "New Project" option 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 and from the Choose Task menu, at the top on the right-hand side of the screen, select "Receive Data from another Alpha Tracker" and click **OK**. A screen is displayed for you to select the data to receive.

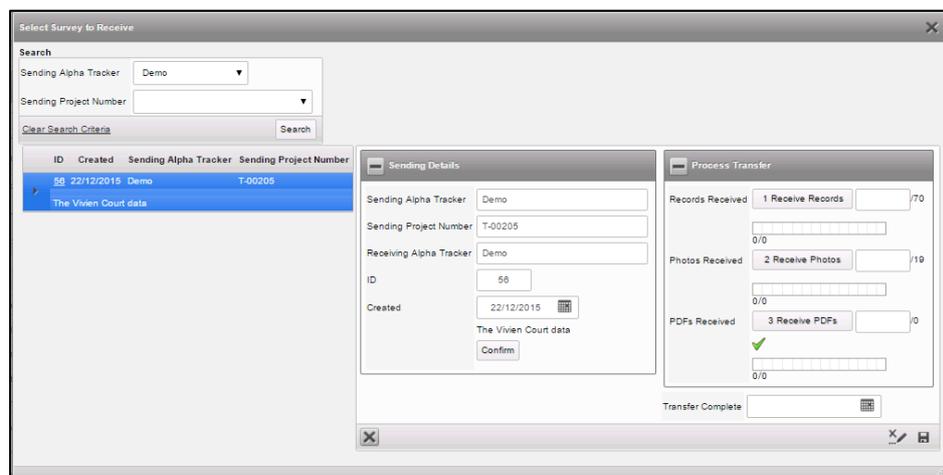


5. In the **Sending Alpha Tracker** field, select the system from which you want to receive data.
6. In the **Sending Project Number** field, select the project that you want to receive into your project.
The list contains the projects that have been sent to you by the system specified in the **Sending Alpha Tracker** field and are waiting to be received by you.
7. Click **Save**. 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.

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.

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.

The survey data is now present on your system as if you carried out the survey yourself.

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”.

To do this:

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.

Milestones

Project Opened 12/12/2019 Dan Darkin

Quote Produced

Order Received

Turnaround

More Milestones Done: 5 Due: 0 Overdue: 3

Report Produced 04/02/2020 Dan Darkin

Issue Reason/Log

Show On Web 

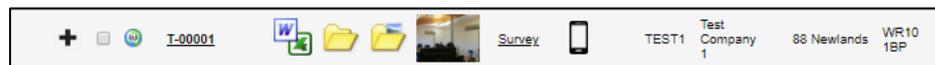
Project Invoiced

Project Closed

Return Date

3. Tick the **Show On Web** tickbox.

The project will now display a small blue/green world symbol next to it on lists in Alpha Tracker, eg:



4. VIEWING SITE AND PROJECT DATA IN THE PORTAL

This section describes how you can use the options on the Alpha Tracker Client Portal to view your data, including:

- site listings and locations
- registers
- photographs
- reports
- project pipeline.



If you view data by site, then you are looking at the current position for that site, taking into account all projects that have been undertaken at that site. This will give you the current view. If you view data for reports then you are looking at a “snapshot”, this is the situation at the site when this report was produced and may not be the current situation.

4.1 Exploring the Sites section

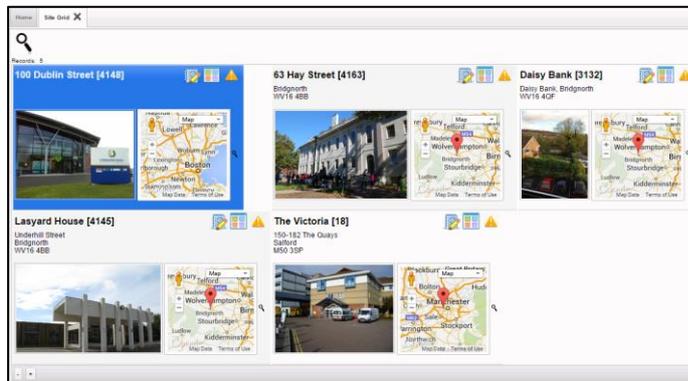
Site-related information shows you the current position for that site, taking into account all projects that have been undertaken at that site.

Options in the Sites section of the menu on the Client Portal let you view your sites as a list or as a grid. You may also have a sites displayed as points on a map on the Home tab. You can choose whichever view suits you best. For example:

- “Site List” lists your sites and also shows summary compliance data:

Site Name	Last Activity	Last Inspection	Site Reference (UPRN)	Site Address	Postcode	
The Victoria	16/02/2015	16/02/2015		150-182 The Quays Salford	M50 3SP	  
Daisy Bank	12/02/2015	12/02/2015		Daisy Bank, Bridgnorth	WV16 4DF	  
100 Dublin Street	16/09/2015	16/09/2015		Edinburgh	EH1 3PX	  
63 Hay Street	16/02/2015	16/02/2015		Haye-on-Wye	HR3 5AA	  
25 Ivor Road	19/10/2015	19/10/2015		Coffe Mullen Winsome Dorset	BH21 3QF	  
12 The Green	01/01/1900	01/01/1900		Worcester	WR1 1BP	  
Innovation Centre	28/10/2015	28/10/2015				  
Squirrel Trees	04/12/2015	04/12/2015		Brownsea Island		  
Lasyard House	16/02/2015	16/02/2015	ARL123	Underhill Street Bridgnorth	WV16 4BB	  

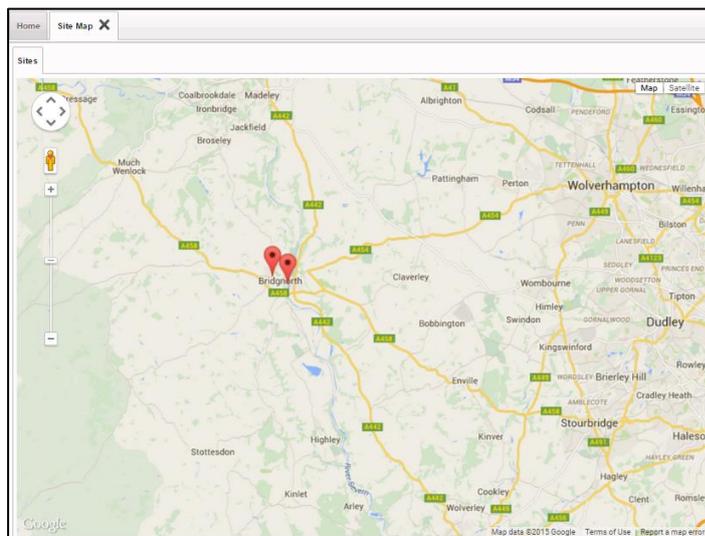
- “Site Grid” shows site information in a grid pattern:



- “Dashboards” (which may be displayed on the Home page) show the following information in graphical format:
 - risk of asbestos (all sites) – the number of items at high, medium and low risk across all your sites
 - reports issued – the number of reports issued and the month they were issued
 - top five items by recommendation – the proportion of items with each different recommendation.



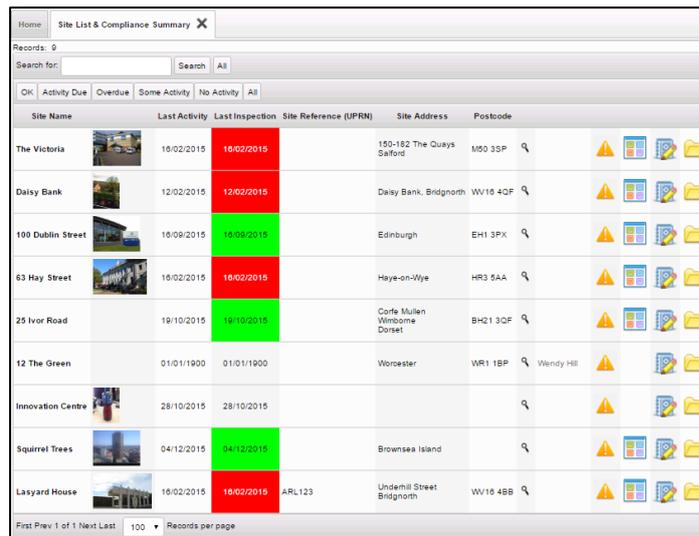
- The “Site Map” (which may be displayed on the Home tab) displays your sites on a map:



4.1.1 The Site List and Compliance Summary

The Site List and Compliance Summary displays all your sites and gives an indication of activity at the sites.

1. Display the Site List and Compliance Summary by selecting the "Site List" option from the Sites menu, or see it on the Home tab.



Site Name	Last Activity	Last Inspection	Site Reference (UPRN)	Site Address	Postcode
The Victoria	10/02/2015	16/02/2015		150-182 The Quays Salford	M50 3SP
Daisy Bank	12/02/2015	12/02/2015		Daisy Bank, Bridgnorth	WV16 4DF
100 Dublin Street	16/09/2015	16/09/2015		Edinburgh	EH1 3PX
63 Hay Street	10/02/2015	16/02/2015		Haye-on-Wye	HR3 5AA
25 Ivor Road	19/10/2015	19/10/2015		Coffe Mullen Wimborne Dorset	BH21 3QF
12 The Green	01/01/1900	01/01/1900		Worcester	WR1 1BP Wendy Hill
Innovation Centre	28/10/2015	28/10/2015			
Squirrel Trees	04/12/2015	04/12/2015		Brownsea Island	
Lasyard House	16/02/2015	16/02/2015	ARL123	Undermill Street Bridgnorth	WV16 4BB

The Site List & Compliance Summary includes Sites which have had no activity. The **Last Activity** column shows the date for the last project marked as "Show On Web" (not including pending projects). The **Last Inspection** column shows the date of the last survey or re-inspection. This list is colour-coded to give you an instant impression of status:

- Green indicates activity within the last 9 months.
- Yellow indicates activity due, where the last activity was between 9 and 12 months.
- Red indicates overdue activity, ie last activity was more than 12 months ago.
- There is no colour if there are no ACMs at the site.

Other columns may also be displayed, some of which are colour-coded in the same way.

Next to the **Postcode** is a magnifying glass icon from which you can display a map of the Site. After the **Postcode**, the contact details are displayed. The Register, Summary, Reports and Documents Folder buttons are also available.

2. Use the buttons to access the following information:

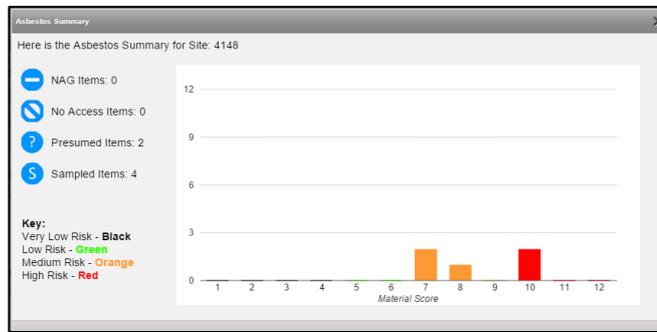


– shows the up-to-date Asbestos Register for the site:

Site Name	Building Name	Floor	Location	Location Description	Material	Project Number	Approach	Sample Number	Risked to M	Identification	Material Score	Priority	Total	Recommended Action	
100 Dublin Street	100 Dublin Street	0	001	Reception	Quartz	1405910	0	0	0	0	0	0	0	0	0
100 Dublin Street	100 Dublin Street	0	001	Reception	Ceiling	Concrete	1405910								
100 Dublin Street	100 Dublin Street	0	001	Reception	Wall	Concrete	1405910								
100 Dublin Street	100 Dublin Street	0	001	Reception	Floor	Vinyl Tile	1405910								
100 Dublin Street	100 Dublin Street	0	002	Stairs		1405910	SP				0	0			
100 Dublin Street	100 Dublin Street	0	002	Stairs	Ceiling	Concrete	1405910								
100 Dublin Street	100 Dublin Street	0	002	Stairs	Wall	Concrete	1405910								
100 Dublin Street	100 Dublin Street	0	002	Stairs	Floor	Vinyl Tile	1405910								
100 Dublin Street	100 Dublin Street	0	004	Ladies WC	Ceiling Void	1405910	P				0	0	0	No action required	
100 Dublin Street	100 Dublin Street	0	005	Waters	Quartz	1405910	0	2	0	0	0	0	10	Investigate and Manage	



– displays an Asbestos Summary for the site, showing the number of items present for each material score and an indicator of the risk level. The risk results are colour-coded for clarity, with a key in the bottom left corner:

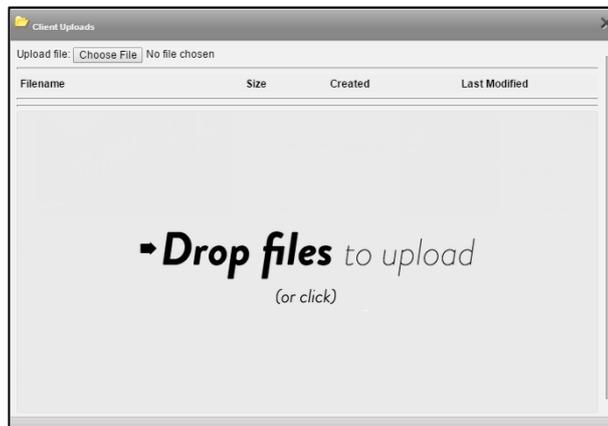


– gives access to the reports produced for the site, with a separate row displayed for each report:

Site Name	Project Number	PO	Site Address	Post Code	Project Type	Report Produced	Invoiced
100 Dublin Street	N-00510				Asbestos Survey	12/01/2015	

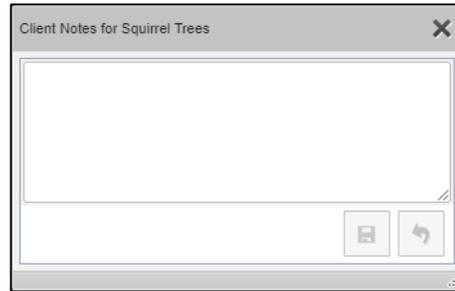


– allows you to access the Client Upload folder where you can store files that are relevant to the site:





– lets you type free-text notes related to a site.



3. Use the filter buttons above the list to filter the display with one click. Sites without ACMs will not show under the Activity Due and Overdue filter buttons.
 - OK – the next inspection date is more than three months away (ie green sites).
 - Activity Due – the next inspection date is less than three months away and the site contains asbestos (ie yellow sites).
 - Overdue – the next inspection date is in the past and the site contains asbestos (ie red sites).
 - Some Activity – the site has had a report completed.
 - No Activity – the site has not had a report completed.

If it is switched on in your Client Portal, there may be a new data flag displayed to draw your attention to updates to data. The new data flag can be seen on the left of the site name on the Site List & Compliance Summary and on the left of the items on the registers, for example:

Site Name	Last Activity	Last Inspection	Last Survey Issued	Last Survey Site Date	Last Re-inspection Issued
new The Birches	29/04/2021	29/04/2021	29/04/2021	29/04/2021	
The Firs	09/03/2017	09/03/2017	09/03/2017	03/03/2017	
The Oaks	12/12/2016	12/12/2016	12/12/2016	01/12/2016	

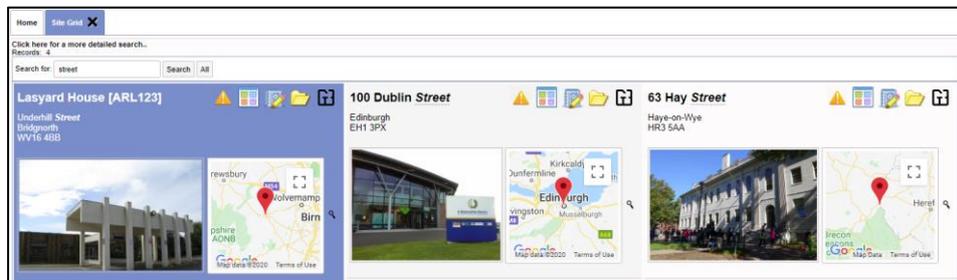
If you want to see all the new data and only the new data on a register, you can filter the records on the register by using the New Data pre-set search button.

4.1.2 The Site Grid

From the Site Grid you can see almost the same information as on the Site List –the layout and the buttons however are slightly different.

The Site Grid displays summary data related to your sites and allows you to:

- see the front page photo of the report
 - see a location map of the site
 - display the Asbestos Register for the site
 - display an Asbestos Summary for the site
 - access the Reports List for the site
 - access the Client Uploads folder for the site
 - display the Site Plans for the site.
1. Display the Site Grid by selecting the “Site Grid” option from the Sites menu.



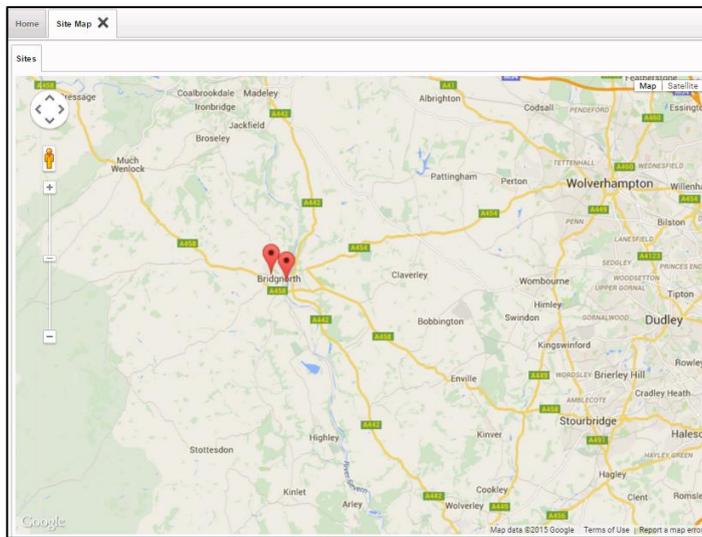
Multiple properties are displayed in the Site Grid. The front page photo and location map are both prominently displayed in the grid layout.

2. Use the Register, Summary, Reports and Documents Folder buttons to display information about the site.

4.1.3 The Site Map

The Site Map on the Home tab displays the location of all your sites as points on a map. You can manipulate the map in the usual ways:

- zoom in and out of the map by using the wheel on your mouse or the plus and minus buttons on the map
- pan left/right/up/down by clicking and dragging the map or using the pan controls in the circle in the top left-hand corner of the map
- drag the person icon onto the map to use Streetview.



4.2 Exploring the Registers section

The Registers section of the Client Portal lets you explore five registers:

- Asbestos Register – all positive asbestos items across all your sites
- Non Asbestos Register – all negative surveyed items across all your sites
- No Access Register – all areas not accessed across all your sites
- Removed Register – all items that have been removed across all your sites
- Remediation Register – all items that have had remedial work undertaken across all your sites.

You can filter any of the registers by site so that you can see the register of your choice for a selected site only.

1. Display the required register by selecting the “Asbestos Register”, “Non Asbestos Register”, “No Access Register”, “Removed Register” or “Remediation Register” option from the Registers menu.

The layout is the same for the first three registers, with the Removed and Remediation Registers showing additional removal or remediation details. The differences in the first three registers are the items selected to display in the register.

Photo	Site Name	Building Name	Floor	Location	Location Description	No Access	Item	Material	Project Number	Approach	Sample Number	Extent	UoM	Identification	Material Score	Priority	Total	Recommended Action	ID
	63 Hay Street	63 Hay Street	0	011	Exploration Office			X-00005							0	0			29347
	Access was not possible because the room was locked and a key was not available.																		
	63 Hay Street	63 Hay Street	0	010	reception			X-00005							0	0			29348
	Access was not possible because the room was locked and a key was not available.																		
	63 Hay Street	63 Hay Street	0	008	Board Room			X-00005							0	0			29349
	Access was not possible because the room was locked and a key was not available.																		
	The Victoria	63 Hay Street	0	011	Exploration Office			X-00011							0	0			29425
	Access was not possible because the room was locked and a key was not available.																		
	The Victoria	63 Hay Street	0	010	reception			X-00011							0	0			29426
	Access was not possible because the room was locked and a key was not available.																		
	The Victoria	63 Hay Street	0	008	Board Room			X-00011							0	0			29427
	Access was not possible because the room was locked and a key was not available.																		
	Layard House		1	002	Kitchen			X-00004				no			8	8			31615
	Daisy Bank	Daisy Bank	1	003	Utility Room			T-00294							0	0			33867
	Access was not possible because the room was locked and a key was not available.																		

2. Use the search fields at the top of the register to search and filter the list as required. You might, for example, want to list only the Chrysotile asbestos items in a specific building.

There are also filter buttons, such as **Sampled Items** and **Presumed Items**, that let you apply pre-configured filters.

Use the navigation controls at the bottom of the page to display subsequent pages of data.

3. You can also sort the data displayed in a Register by clicking on the column headings. For example, clicking once on the Location Description column heading sorts the data A-Z by the room description – clicking a second time reverses the order, Z-A.

- If required, you can export the data displayed on a Register to Excel™ by clicking the **Export to Excel** button at the bottom of the screen:



The data is downloaded to your PC as an *.xls file for you to use as you wish.

Or you can click the **Print/PDF** button at the bottom of the screen to display a pre-formatted pdf of the Site Register Print. Hover on the pdf screen to display controls that let you download or directly print the register.

The screenshot shows the Alpha Tracker Client Portal interface. At the top, there are tabs for 'Removed Register', 'Remediation Register', and 'Non Asbestos Register'. Below the tabs is a search bar with fields for Site Name, Building Name, Floor, Location, Location Description, Material, Item, Sample Number, and Identification. The search criteria are set to 'Daisy Bank'. A 'Clear Search Criteria' button is visible. Below the search bar, there are five records listed, each with a photo and the site name 'Daisy Bank'. A 'Print/PDF' button is located at the bottom left of the main interface.

The 'Register Print - Daisy Bank' window is open, displaying a table of records. The table has the following columns: BUILDING, FLOOR, LOCATION, ITEM, MATERIAL, REF, NO. OF, UNIT, IDENTIFICATION, HAS, PRE, TOX, REACTION, and ID. The data is as follows:

BUILDING	FLOOR	LOCATION	ITEM	MATERIAL	REF	NO. OF	UNIT	IDENTIFICATION	HAS	PRE	TOX	REACTION	ID	
Daisy Bank	1	001 Bathroom 2	Ceiling	Void Insulating Board	T-00294	10	m ²						33961	
Daisy Bank	0	001 Hall			T-00294				0	0	0		33962	
Daisy Bank	0	001 Hall	Ceiling	Plaster Board	T-00294				0	0	0		33963	
Daisy Bank	0	001 Hall	Window Sill/Trimmer		T-00294				0	0	0		33964	
Daisy Bank	1	006 Bathroom 2	Floor	Vinyl Products	T-00294	X	1	5 m ²	Chrysotile			3	3	33965

At the bottom of the window, there is a 'Print/PDF' button and a 'Chrysotile' label.

4.3 Exploring the Photo Registers section

The Photo Registers section of the Client Portal lets you view the photos and related item details in three registers:

- Asbestos Register – all positive asbestos items across all your sites
 - Non Asbestos Register – all negative surveyed items across all your sites
 - No Access Register – all areas not accessed across all your sites.
1. Display the required photo register by selecting the “Asbestos Register”, “Non Asbestos Register” or “No Access Register” option from the Photo Registers menu.

The layout is the same, whichever register you select. The difference is in the items selected to display in the register. The photo for the item is displayed on the left-hand side and the item details are displayed on the right.

Records: 8

Photo	Item Details
	Site Name Building Name Floor 01 Location 009 Location Description Plant Room. Item Pipe work. Material Gaskets (compressed) Approach S Sample Number 5 Extent 4 No. Visible Uo M Identification Chrysotile Material Score 3 Priority 3 Total 3
	Site Name Building Name Floor 01 Location 009 Location Description Plant Room. Item Pipe work. Material Gaskets (compressed) Approach S Sample Number 8 Extent 10 No. Visible Uo M Identification Chrysotile Material Score 3 Priority

2. Use the search fields at the top of the register to search and filter the list as required. You might, for example, want to see only the photos relating to a specific floor of one building.

If no photo was taken for an item, as is often the case for non-suspect items, the item details are still displayed but you will see white space in place of a photo.

4.4 Exploring the Reports/Jobs section

The Reports/Jobs section of the Client Portal provides an overview of the reports that have been produced for you on Alpha Tracker. You can select an option to view:

- “Report Grid” – to see all the reports that have been produced across all your sites in a grid, with front page photos and location maps prominently displayed.



This display is similar to the Site Grid. Refer to Section 4.1.2, The Site Grid, for details on accessing information from a grid display.

- “Report List” – to see a list of all the reports that have been produced across all your sites
 - “This Month” – to view a list of only those reports that have been produced during the current month
 - “Pending” – to display a list of jobs that are currently in progress, where the report is not yet available
 - “Archived Report List” – to display a list of reports that have been marked as archived, for example for properties that are no longer in your portfolio. Any projects marked as archived no longer show in the Report List or Site List, but they can be seen under this “Archived Report List” menu option.
1. Display the list of reports by selecting either the “Report List”, “This Month”, “Pending” or “Archived Report List” option from the Reports/Jobs menu.

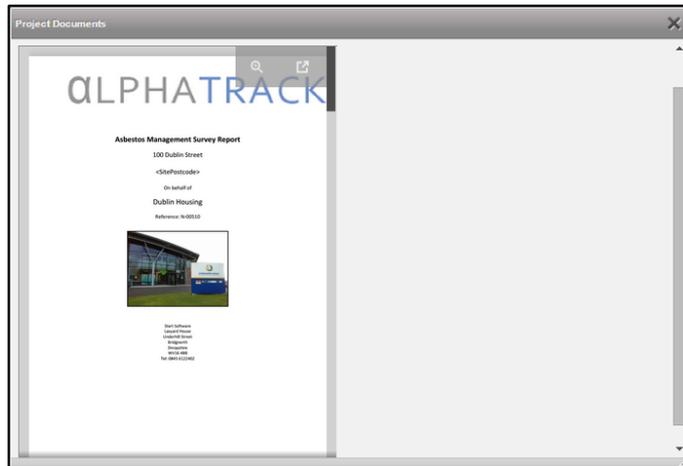
Site Name	Project Number	PO	Site Address	Post Code	Site Reference (UPRN)	Project Type	Report Produced	Invoiced
100 Duddon Street	N-00510		100 Duddon Street Edinbrough	EH1 3PX		Asbestos Survey	12/01/2015	
Daisy Bank	T-00204		Daisy Bank, Bridgnorth	WV16 4DF		Asbestos Survey	12/02/2015	
63 Hay Street	X-00005		63 Hay Street Hays-on-Wye	HR3 6AA		Asbestos Survey	16/02/2015	
Lazyard House	X-00004		Undemill Street Bridgnorth	WV16 4BB	ARL123	Asbestos Survey	16/02/2015	

The layout of the screen is the same, whether you select the “Report List”, “This Month”, “Pending” or “Archived Report List” option. The difference is in the jobs selected to display on the list. It enables you to:

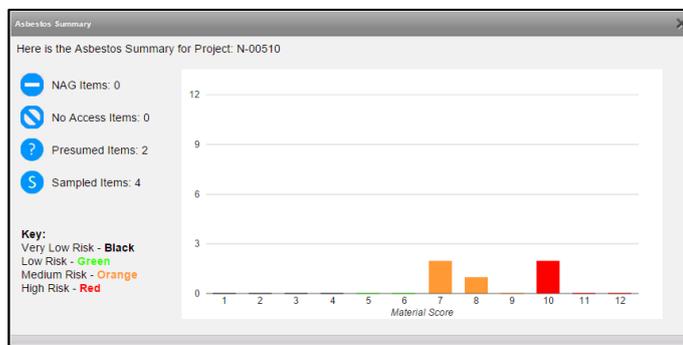
- see the front page photo of the report
 - access a PDF of the report, with the number of PDFs available displayed in brackets
 - display the asbestos summary for the survey
 - display the asbestos register from the survey, with the number of Asbestos Containing Materials (ACMs) identified in the survey displayed in brackets
 - access any documents you have uploaded related to the site
 - display site plans, with the number of files available displayed in brackets.
2. Use the search field to filter the list by searching across the site name, project number, site address, postcode, site reference (UPRN or equivalent) and project type. For example, typing “re-insp” in the search field will find all those projects that have a project type of “Re-inspection”.

3. Click the **PDFs, Summary, Register, Documents** or **Plans** button to display the required information.

- **PDFs** – gives access to the PDF of the report produced. There is a link to download the document. Holding down the **Ctrl** key and clicking on the link opens the document in a separate tab. Controls in the top right-hand corner of the screen let you zoom in or out, or view the document full-screen in a separate tab from where you can also download and print the PDF.



- **Summary** – displays an Asbestos Summary from the survey data showing the number of items present for each material score and an indicator of the risk level as identified at that survey. The risk results are colour-coded for clarity, with a key in the bottom left corner.

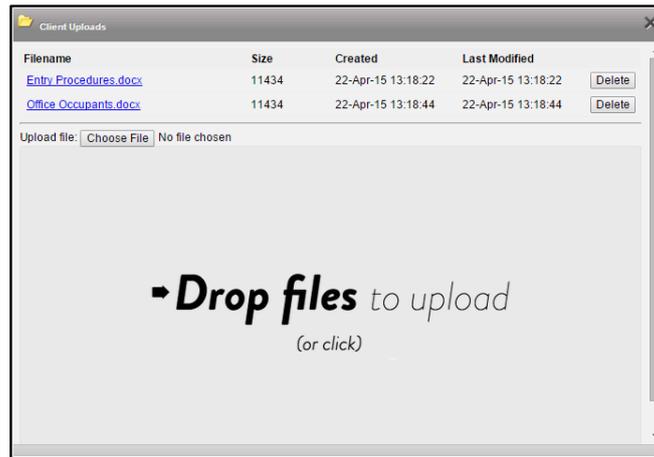


- **Register** – shows the survey data for the report, with one row for each asbestos item identified in the survey. You can search and filter the list by using the search fields at the top of the screen.

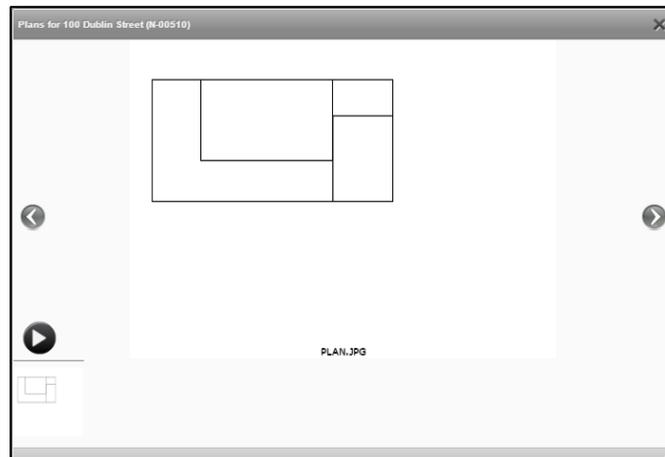
The screenshot shows a window titled "Register for 100 Dublin Street" with a search bar and a table of survey results. The table has columns for Site Name, Building Name, Floor, Location, Location Description, No Access, Item, Material, Project Number, Approach, Sample Number, Extent (to M), Identification, Material Score, Priority, Total, Recommended Action, and ID.

Site Name	Building Name	Floor	Location	Location Description	No Access	Item	Material	Project Number	Approach	Sample Number	Extent (to M)	Identification	Material Score	Priority	Total	Recommended Action	ID
100 Dublin Street	100 Dublin Street	0	001	Reception		Dusts	Insulating Board	N-00510	S	1	5	in3 Crocodile	7	0	7	Manage	34543
100 Dublin Street	100 Dublin Street	0	002	Stairs				N-00510	SP				0	0			34544
100 Dublin Street	100 Dublin Street	0	004	Ladies WC		Ceiling Void		N-00510	P			in3 Crocodile	8	0	0	No action required	34548
100 Dublin Street	100 Dublin Street	0	003	Kitchen		Dusts	Insulation	N-00510	S	2	5	in3 Crocodile	10	0	10	Encapsulate and Manage	34549

- **Documents** – lets you upload, store and access your own files that are relevant to the survey in some way.
 - Click the **Choose File** button to upload a document that you want to file with the site or drag a document to the drop zone.
 - Click the underlined filename to download a document to your PC.
 - Click the **Delete** button if you want to remove a document from the document folder.



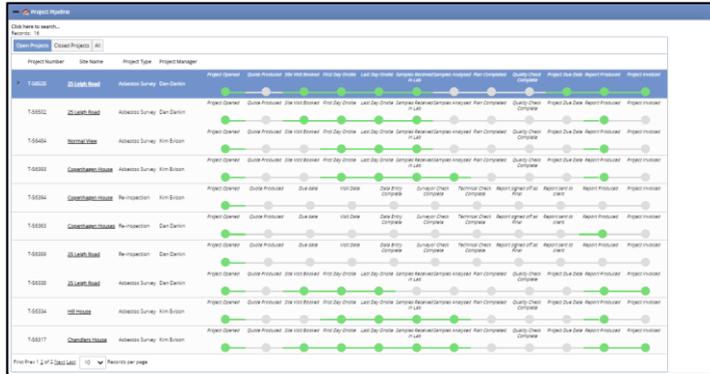
- **Plans** – lets you display any plans that have been uploaded for the survey. All images stored in (or uploaded into) the \Drawings sub-folder (or other named sub-folder) of the project folder are displayed. If no plans are available then the button is greyed out.



4.5 Exploring the Project Pipeline section

The Project Pipeline shows completed and uncompleted milestones for projects that are in progress. You can see it on the Home tab.

The Project Pipeline indicates progress through the main phases of work, with the phases varying by project type. Open projects only are displayed by default, but you can also display closed projects or all projects:



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 yet been completed.

5. CUSTOMISING THE PORTAL VIEW

The Client Portal can be customised by switching on or off different features in the System Repository.



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.
- 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 sign-in.
- 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. Different 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 field on the Project called 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 signing in.

5.1 Changing Client Contact Details

Only users in the "Client Admin" group are allowed to save changes to the client contact details on the Client Portal.

5.2 Logging Access to the Client Portal

Logging of access to information on the Client Portal is maintained within Alpha Tracker. To view the logs:

1. From the Setup menu select "System" then "Access Logs".



The screenshot shows a web browser window with a tab titled 'Access Log'. Below the tab is a search interface. The search criteria are organized into two rows. The first row contains labels for 'When', 'Who', 'What', 'IP', 'Server', and 'Duration'. The second row contains input fields for 'From', 'To', and empty fields for 'Who', 'What', 'IP', 'Server', and 'Duration'. There are small calendar icons next to the 'From' and 'To' fields. At the bottom left of the search area is a link that says 'Clear Search Criteria', and at the bottom right is a 'Search' button.

2. Enter search criteria for the logs you want to view. For example enter today's date in both the **When From** and **To** fields. Then click **Search** to display the matching logs.

In the logs you can see, among other things:

- each item viewed either in the site register or the report register
- when the document list is viewed
- when the document preview is generated (by Google Document Previewer).

6. UPLOADING FILES TO THE PORTAL

Users of the Client Portal can upload documents to folders on the Client Portal in two places:

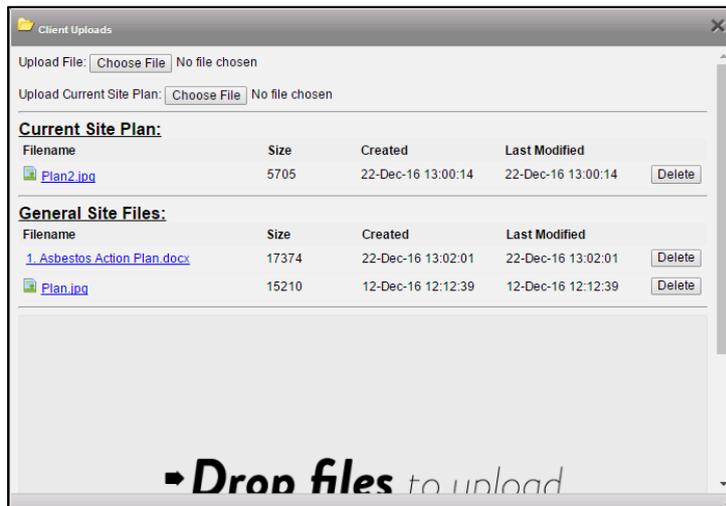
- on each Site – this folder is for documents that relate to the whole site
- on each Project – this folder is for documents that are specific to individual projects/surveys.

To upload documents:

1. Click on the folder icon:



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. With higher access permissions you might also have the ability to create subfolders in the Client Uploads section.



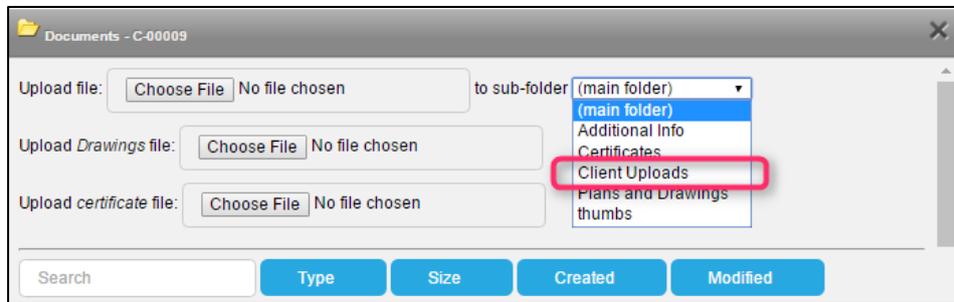
It is also only users in the "Client Admin" group who can upload the current site plan. Users in the "Clients" group can only download this file.

For general documents with a wider application, for example relating to policies and procedures, training or contractors, you can use the *Other Documents* menu options to upload files.

It is also possible to upload files from a standard Alpha Tracker sign-in 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.

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 file** option to select and upload the file to the “Client Uploads” sub-folder.



7. HANDLING DRAWINGS AND HOTSPOTS

The section describes how you can:

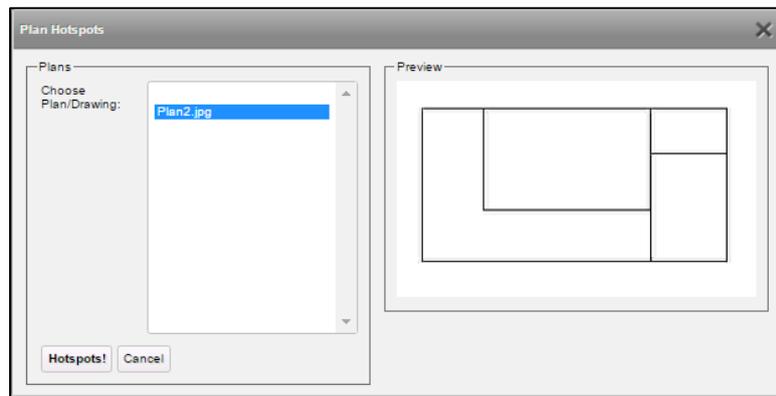
- annotate drawings with hotspots
- view Hotspot drawings on the Portal
- view CAD drawings on the Portal.

7.1 Working with the Hotspot Editor

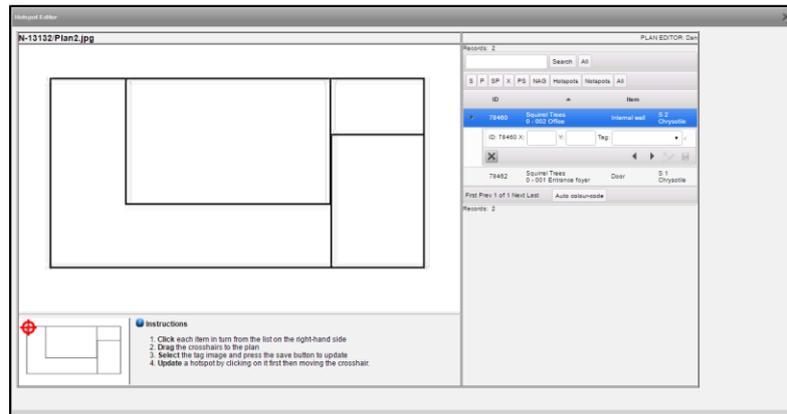
To access the Hotspot Editor:

1. Upload the required plans (as .jpg files) to the “Drawings” subfolder for the project.
You can open the project’s document folder, and use the **Choose File** button next to *Upload drawing file* to do this.
2. Open the project and click **Survey Details** to display the Survey Details, 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 and click **Hotspots!** to open the Hotspot Editor.



The list on the right displays the survey items 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).

Those that have a tag displayed next to them, have already been placed on a plan.

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 S items by clicking the **S** button, or show only items not yet placed on a plan by clicking the **Notspots** button (as opposed to **Hotspots** which have already been placed on a plan).
2. 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. Click on the cross-hairs then drag and drop them to the required position on the plan. Initially the cross-hairs are on the overview picture in the bottom left. Subsequently they are in the last position dropped.
4. If you want to specify the colour of the tag to use, select it from the dropdown on the Tag field, then click **Save** on the survey item.

(See below for applying the colours to the tags automatically.)

5. Click the next arrow button to move onto the next record, or click on another record of your choice, and repeat the operation by dragging the cross-hairs to the next position and clicking **Save**.

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. Pick up the cross-hairs and drag them to the required position on the plan, then click **Save** on the survey item.

To remove the colour from a tag:

1. Select the item on the list and click the **Clear Tag** button.
2. Click the **Save** button.

To remove a tag from the current plan so that the item can be placed on a different plan:

1. Select the item on the list and click the **Remove from Plan** button.
2. Click the **Save** 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:

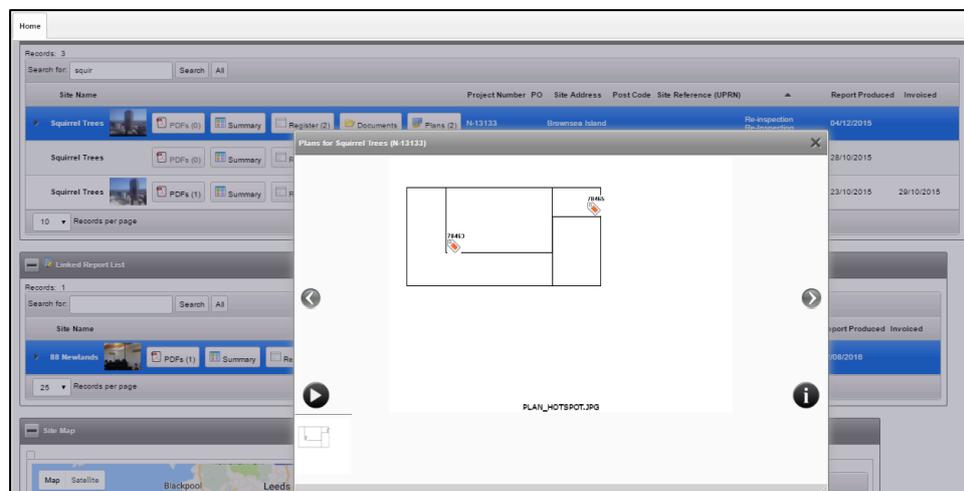
- Red = a positive S or X.
- Amber = a P or SP.
- Amber with a No Entry symbol = a NAG.
- Green = a negative (NAD) S or X.

7.2 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:

1. Find the required project on the Report List and click the **Plans** button. The hotspot JPG file is displayed, for example:

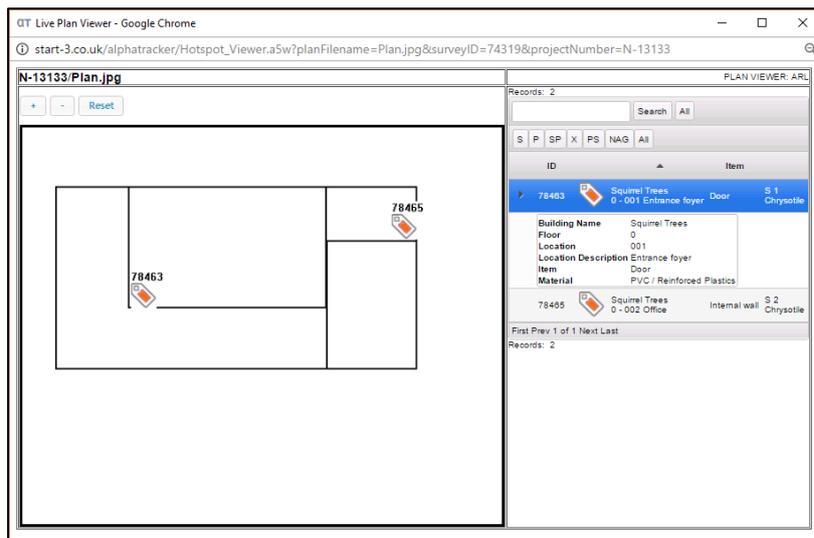


If there is more than one drawing available, then the different drawings are displayed at the bottom of the screen and you can click on the one you want to view or use the left/right arrow buttons to move between them.

- Click on the “i” button and then on the “**Click to view live plan...**” link to access the live drawing.

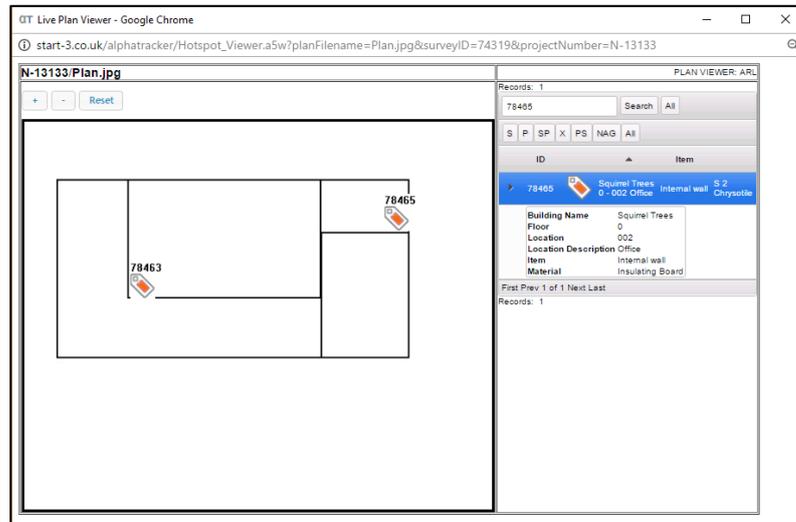


The live plan is displayed:



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:



- Print the hotspot drawing by using **Ctrl+P**.



The hotspots cannot be amended from the Client Portal.

7.3 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.

8. RECORDING REMOVAL/ REMEDIATION DETAILS

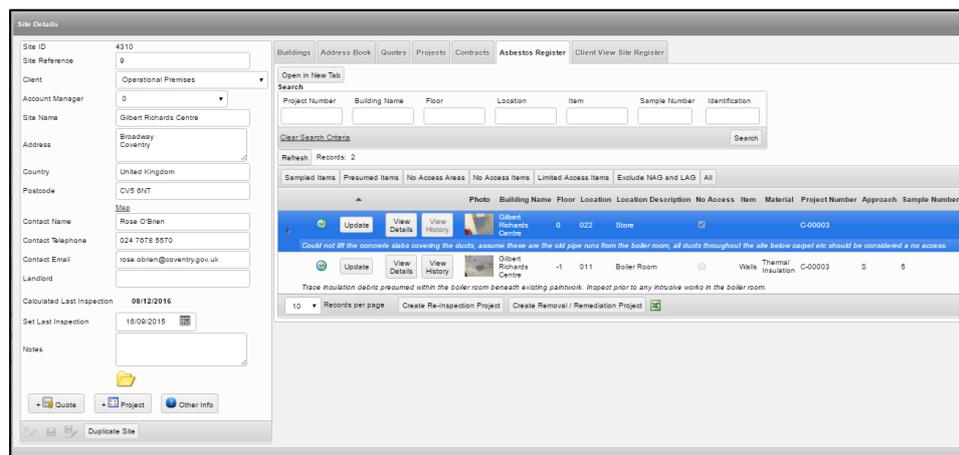
Between surveys you can update your survey items to reflect remediation or removal work. This is to be done by creating a new project from the Site Asbestos Register and updating the records in that project.

8.1 Creating a project for removal/remediation data

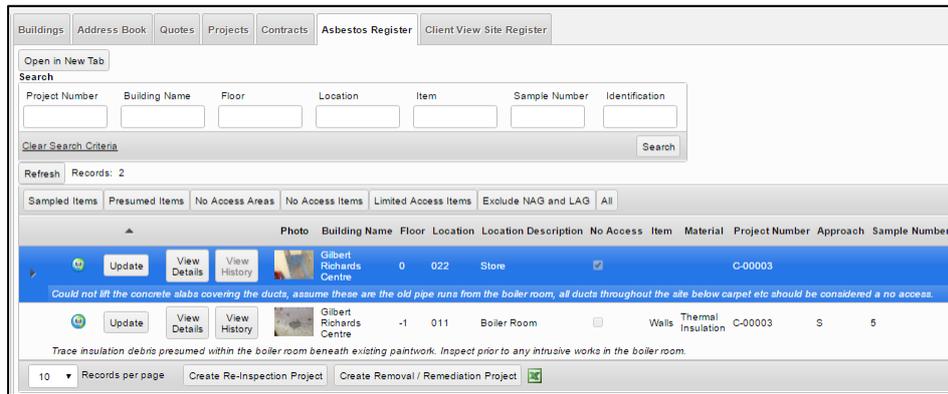
The project for removal or remediation details needs to be created from the Site Asbestos Register. This is so that you can select the items that you want to include in the new project.

To create the new project:

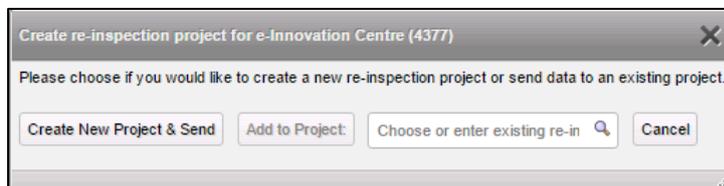
- Display the site for which you are recording removal or remediation details on the Site Details screen. You can do this by:
 - opening a previous project for the site and clicking the **Site Details** button
(eg select "Project List" from the Projects menu, search for projects at the site, click the underlined project number then click the **Site Details** button on the project)
 - opening the site details from the Site List
(eg select "Site List" from the Sites menu, search for the required site, click the underlined site name).
- Click on the Asbestos Register tab to display the Asbestos Register for the site.



- Use the filters at the top of the Asbestos Register to filter the Register to show only the items that you want to include in your new project. You can use the search fields and/or the pre-set filter buttons located immediately below the search fields, eg **Sampled Items** or **No Access Items**.



- Click the **Create Removal/Remediation Project** button at the bottom of the Asbestos Register. A box is displayed giving you options for creating the project.



You can create a new Removal/Remediation project and send the records to this project by clicking the **Create New Project & Send** button. Alternatively, you can send the records to an existing project. This lets you use multiple filters on the Asbestos Register.

For example, you might filter the Asbestos Register to show all items in the Kitchen, then use the **Create New Project & Send** button to create the new Removal/Remediation project. Then you might repeat the process but this time set the filters to show all items in the Bathroom, specify the new project number and use the **Add to Project** button. You would then have a project which included only the records from the Kitchen and the Bathroom.

- The new project is created, with a project type of "Remedials/Removal", and opens automatically. Click Survey Details to see a summary of the selected data from the Asbestos Register that is now in this project. For example:

6. Click **View Asbestos Data** to display the records.
7. Click the **Remediation Details** button on an item, complete and save the details. For example:

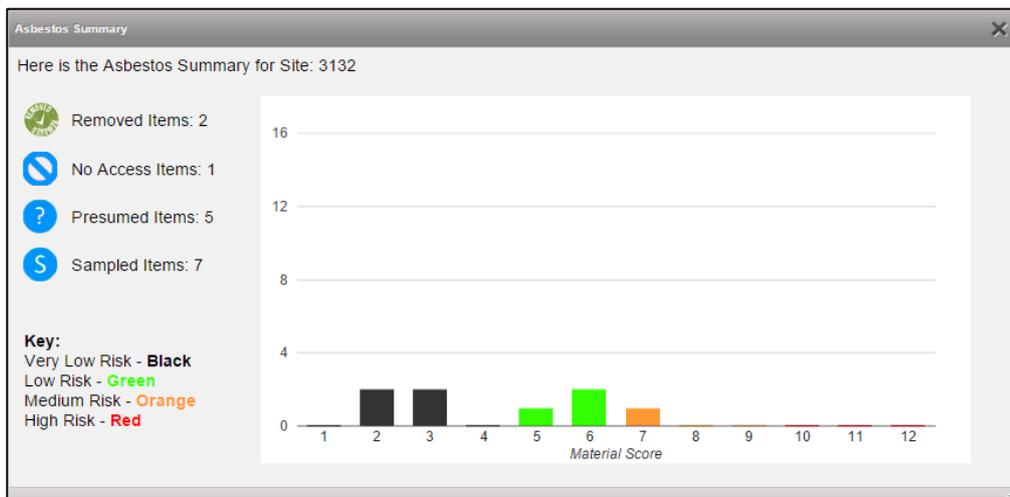
Positive items are marked as “Removed” on the Client Portal if any of the following are true:

- 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:

Photo	Site Name	Building Name	Floor	Location	Location Description	No Access	Item	Material	Project Number	Approach
	Daisy Bank	Daisy Bank	1	004	Bathroom 2	<input type="checkbox"/>	Ceiling Void	Insulating Board	T-00294	P
	Daisy Bank	Daisy Bank	1	006	Bathroom 2	<input type="checkbox"/>	Floor	Vinyl Products	T-00294	X

They are also visible on the Asbestos Summary graph:



Similarly, any items that have had remediation work recorded are visible on the Remediation Register.

9. RE-INSPECTING DATA

If you require a re-inspection at a site, you can send the survey data that you hold to a surveying company and ask them to re-inspect the data. They will be able to review the existing data on their handsets, update any scores and take new photos of the items.

The surveying company can then send the new (re-inspection) project data to your Alpha Tracker system in the usual way, and you can receive the data to update the site register.

9.1 Sending survey data to a surveying company for re-inspection

In order to transfer survey data to a surveying company your Alpha tracker and the receiving company's Alpha Tracker must be linked.



Please contact Start Software if you would like to be linked to a new company's Alpha Tracker.

You will be creating and sending XML records to the surveying company which they will re-inspect.

To create and send the XML records for re-inspection:

1. Open the Site Details screen for the site that you want to re-inspect.

You might do this by displaying a project for the site and clicking the **Site Details** button, or by using the Site List from the menu to search for and display the site details.

2. Click the Client View Site Register tab to display the asbestos items at the site.

The screenshot shows the 'Site Details' screen for '25 Leigh Road'. The 'Client View Site Register' tab is active, displaying a table of asbestos items. The table has columns for Site Name, Building Name, Floor, Location, Location Description, No Access, Item, Material, Project Number, Approach, Sample Number, Extent, Uo M, Identification, Material Score, Priority, and Total. The items listed are:

Site Name	Building Name	Floor	Location	Location Description	No Access	Item	Material	Project Number	Approach	Sample Number	Extent	Uo M	Identification	Material Score	Priority	Total
25 Leigh Road	25 Leigh Road	0	001	Reception		Floor void	Insulation	T-55000	5	1	14	m2	Asbestos, Amosite	9	0	9
25 Leigh Road	25 Leigh Road	0	001	Reception		Wall	Concrete	T-55000								
25 Leigh Road	25 Leigh Road	0	002	Office		Ceiling	Concrete	T-55000								
25 Leigh Road	25 Leigh Road	0	002	Office		Floor	Vinyl Products	T-55000	5	2	21	m2	Asbeste	7	0	7
25 Leigh Road	25 Leigh Road	0	002	Office		Wall	Glass	T-55000								

- Use the search fields at the top of the Client View Site 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.

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. First send one set of records (eg all first floor items), then re-set your selection criteria and send another set of records (eg all NAG areas), and another etc.



Note that any items marked as pending in the Asbestos Register (with a question mark symbol) will not be included in re-inspections. Pending items become "complete" items once they have both a date in the **Document Produced** milestone and have had the **Show On Web** tickbox ticked.

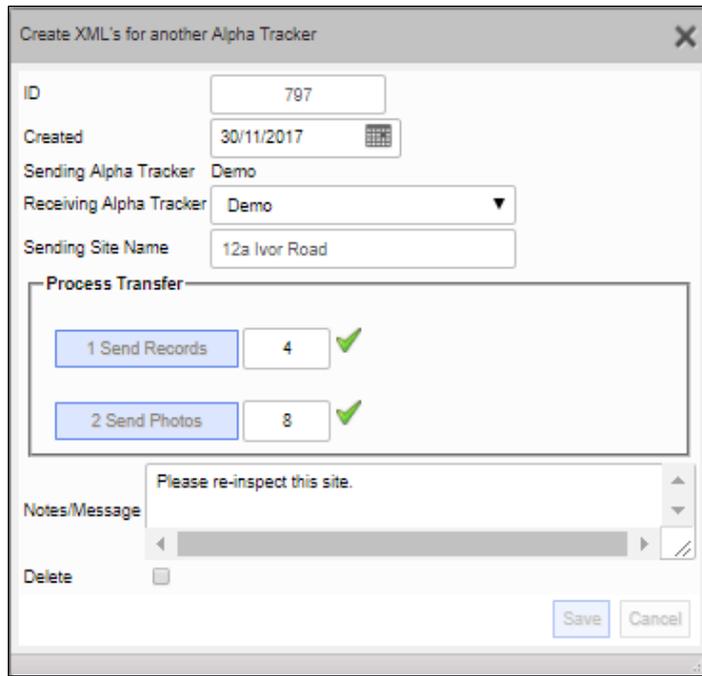
- Click the **Create XMLs for another Alpha Tracker** button at the bottom of the list. The Create XMLs for another Alpha Tracker screen is displayed.

The screenshot shows a dialog box titled "Create XML's for another Alpha Tracker". It contains the following fields and controls:

- ID:** 797
- Created:** 30/11/2017
- Sending Alpha Tracker:** Demo
- Receiving Alpha Tracker:** A dropdown menu.
- Sending Site Name:** 12a Ivor Road
- Process Transfer:** A section containing two buttons: "1 Send Records" and "2 Send Photos", each with an adjacent input field.
- Notes/Message:** A text area with the placeholder "(optional) enter a note or a message to the recipient".
- Delete:** A checkbox.
- Buttons:** "Save" and "Cancel" at the bottom right.

- In the **Receiving Alpha Tracker** field, select the system to which you are sending the data for re-inspection.
- Click **Send Records** and wait until a message confirms the records have been sent.
- Click **Send Photos** and wait until a message confirms the photos have been sent.

8. Type any notes regarding this re-inspection that you want the receiving company to see in the **Notes/Message** field.



Dialog box titled "Create XML's for another Alpha Tracker" with the following fields and values:

- ID: 797
- Created: 30/11/2017
- Sending Alpha Tracker: Demo
- Receiving Alpha Tracker: Demo
- Sending Site Name: 12a Ivor Road

Process Transfer

- 1 Send Records: 4 ✓
- 2 Send Photos: 8 ✓

Notes/Message: Please re-inspect this site.

Delete:

Buttons: Save, Cancel

9. Click **Save** and close the Create XMLs for another Alpha Tracker screen.

9.2 Receiving data for re-inspection

The surveying company who are receiving data for re-inspection can use the following instructions to receive the data and create a re-inspection project on their Alpha Tracker.

For the Surveying Company:

9.2.1 Accepting the transferred data

If you are receiving survey data from a linked Alpha Tracker system for re-inspection, then you need first to accept the transferred data and then to create the XML records for a handset.



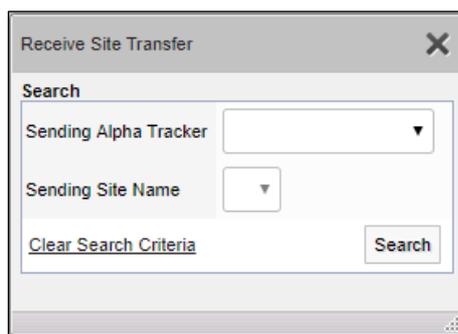
Note that the site for which you are re-inspecting data must already exist on your Alpha Tracker. If the site exists with a slightly different name, eg with a different spelling, then Alpha Tracker lets you match up the sites. If the site does not exist, it is best to create it now.

To receive re-inspection data:

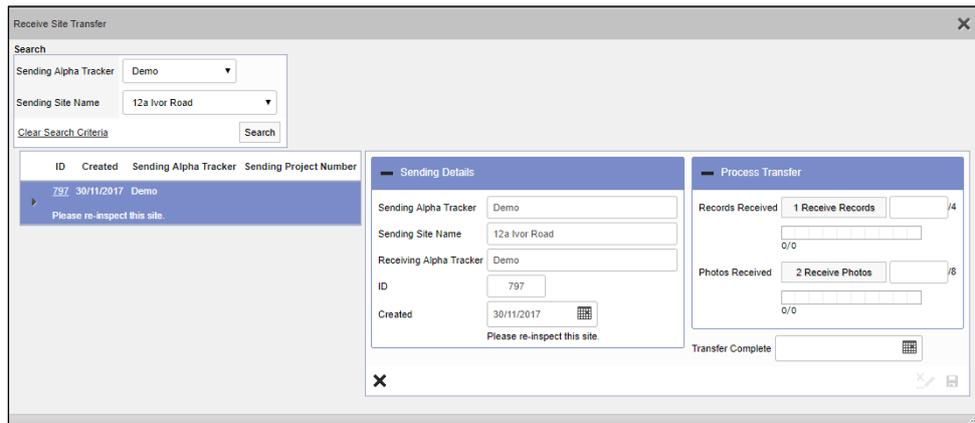
1. Go to the Setup menu and select “Import/Export”, then “Transfer XMLs”, then “Receive Data”. The Receive Data screen is displayed which may show no data at this stage.



2. Click the **Receive Data from another Alpha Tracker** button to display the Receive Site Transfer screen.



3. Select the Alpha Tracker system that sent the data and then the site name for which they have sent data.
4. Click the **Search** button to display further details of the data that has been sent, including the notes.



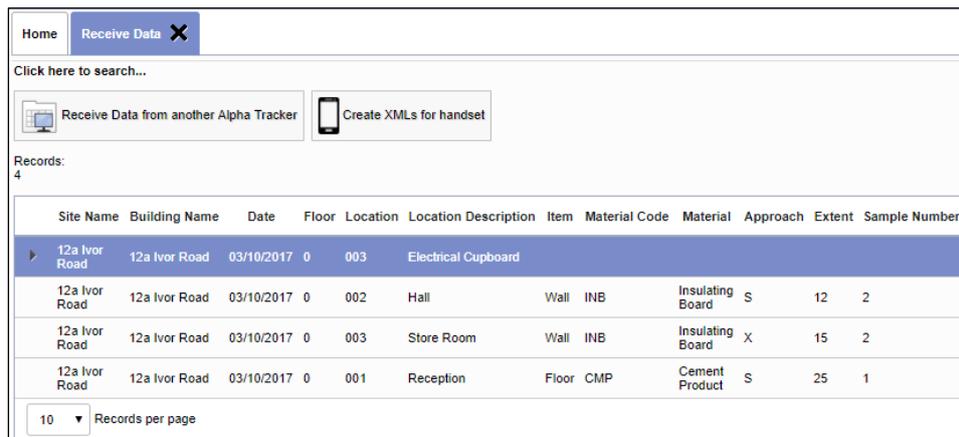
5. Check that you are working with the correct details and then click the **1 Receive Records** button and wait for the message to confirm the records have been received.
6. Click the **2 Receive Photos** button and wait for the message to confirm the photos have been received.
7. Select the date in the **Transfer Complete** field to indicate when you received the data.
8. Click **Save** and close the Receive Site Transfer screen.

The received records are now displayed on the Receive Data screen and you can now create XML records for the handset.

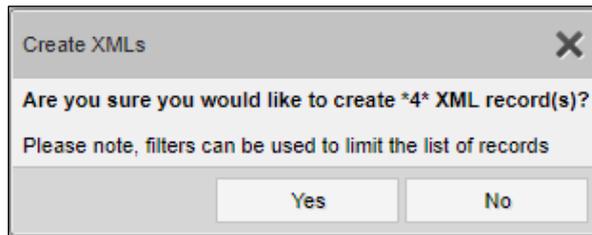
9.2.2 Creating XML records for the handset

The received records for re-inspection are displayed on the Receive Data screen.

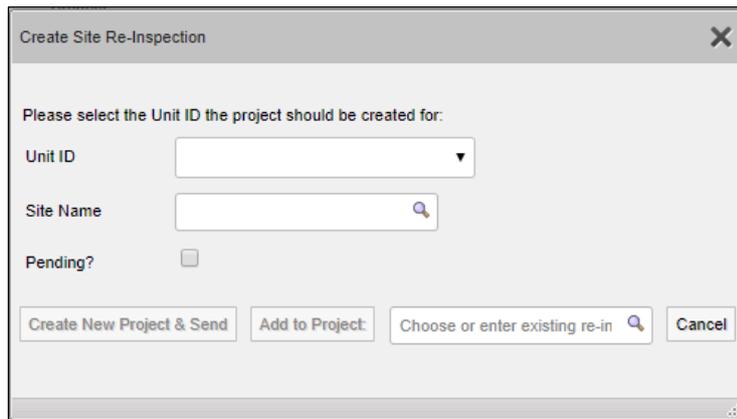
1. Filter the Receive Data screen by site name if there are records for multiple sites present. (Click on **Click here to search...** to display the search fields.) You only want records for your site to be displayed.



2. Click the **Create XMLs for handset** button. A message asks for confirmation and informs you of the number of XML records that will be created.



- Click **Yes** to create the XML records. The Create Site Re-inspection screen is displayed.



- Select the Unit ID of the handset to which XML records are to be sent.
- Click the magnifying glass on the **Site Name** field, then search for and select the site in your Alpha Tracker.



The site must exist already in your Alpha Tracker system. If it does not exist, then you should create it. If it exists in a slightly different form, eg with a different spelling to that provided by the property management company, by selecting it here you are matching up the two.

- Then click **Create New Project & Send** to create a new Re-inspection project and send the records to the handset under the new project number. Alternatively, you can send the records to an existing Re-inspection project by selecting the project number and clicking **Add to Project**.
- If you clicked **Create New Project & Send**, the new Re-inspection project is created and opens on screen. This is the one to which the surveyor will send data and the one that will subsequently be sent to the property management company as a normal Re-inspection data transfer.
- Ensure the **Project Type** of the new project is "Re-inspection" and that the appropriate re-inspection **Survey Type** is selected.

When the surveyor connects their handset, they will receive the data items for this project to re-inspect.

If you return to the Receive Data screen, you will see that the records for the site are no longer present. You can still access the records by going to the Archived Data screen – which allows you to resend /recreate the XMLs if necessary.

9.2.3 Carrying out the re-inspection

Carry out the re-inspection and synchronise the data. Then produce your Re-inspection report in the normal way.

9.2.4 Sending the completed re-inspection project data

When your Re-inspection report is complete, send the re-inspection project data back to the property management company, making sure that you use the “Send Re-inspection to another Alpha Tracker” option on the Choose Task menu.

To send the completed re-inspection project:

1. Open the 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 of the screen, select “Send Re-inspection to another Alpha Tracker” and click **OK**. A screen is displayed for you to enter details of the data transfer.

Setup Transfer

ID: 798

Created: 30/11/2017

Sending Alpha Tracker: Demo

Receiving Alpha Tracker: [dropdown]

Sending Project Number: T-56000

Sending Site Name: 12a Ivor Road

Re-inspection?

Process Transfer

1 Send Records [input]

2 Send Photos [input]

3 Send PDFs [input]

4 Send Drawings [input]

Notes/Message: (optional) enter a note or a message to the recipient

Delete

Save Cancel

3. Select the property management company to which you want to send the re-inspection data 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, and the **Re-inspection?** box is ticked.

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 re-inspection data
- **Send Photos** – to send the photos in the re-inspection
- **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 re-inspection in the **Notes/Message** box.
6. Click **Save** to save the transfer details and close the screen.

This is the end of the instructions for the surveying company.

9.3 Receiving the completed re-inspection

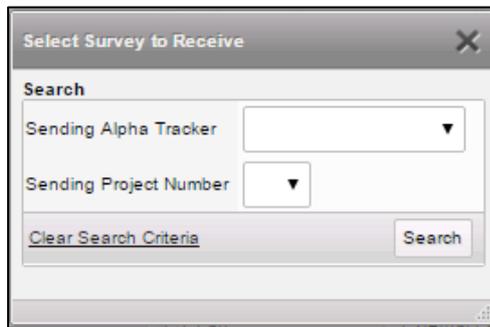
When the surveying company has sent you the completed re-inspection, you can receive it into your Alpha Tracker.

To receive a completed re-inspection:

1. Use the “New Project” option from the Projects menu (or an alternative method) and create a new project.

Get the next number for the project and select the client. Enter the site name where the re-inspection was carried out and select the Re-inspection project type.

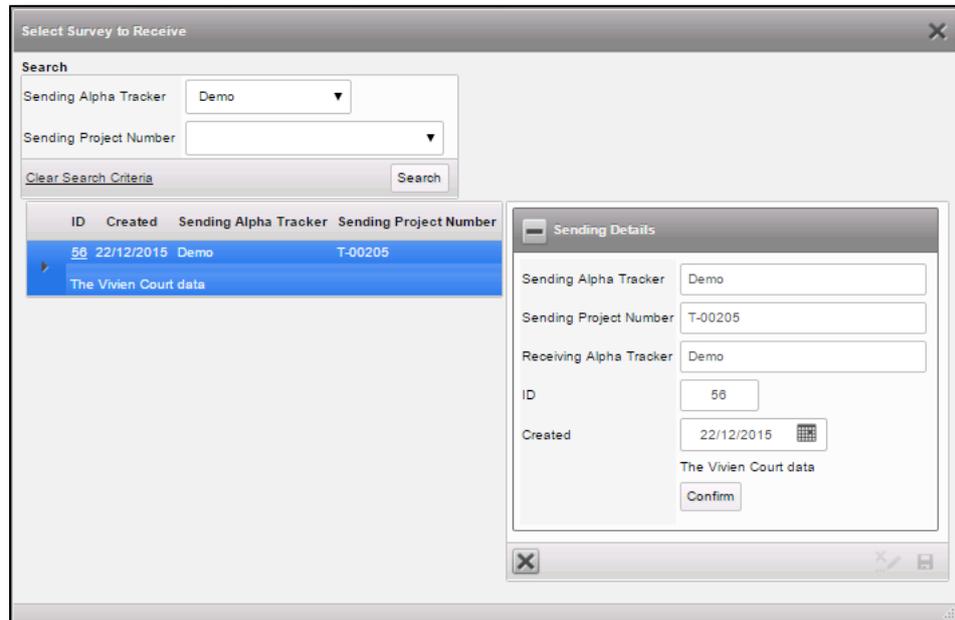
2. Click the **Survey Details** button to display the Survey Details screen, select the Re-inspection **Survey Type** and save the Survey Details.
3. Return to the Survey Details screen, click on the second tab “2 – Survey Complete” and from the Choose Task menu select “Receive Re-inspection from another Alpha Tracker” and click **OK**. A screen is displayed for you to select the data to receive.



4. In the **Sending Alpha Tracker** field, select the system from which you want to receive data.
5. In the **Sending Project Number** field, select the project number that you want to receive into your project.

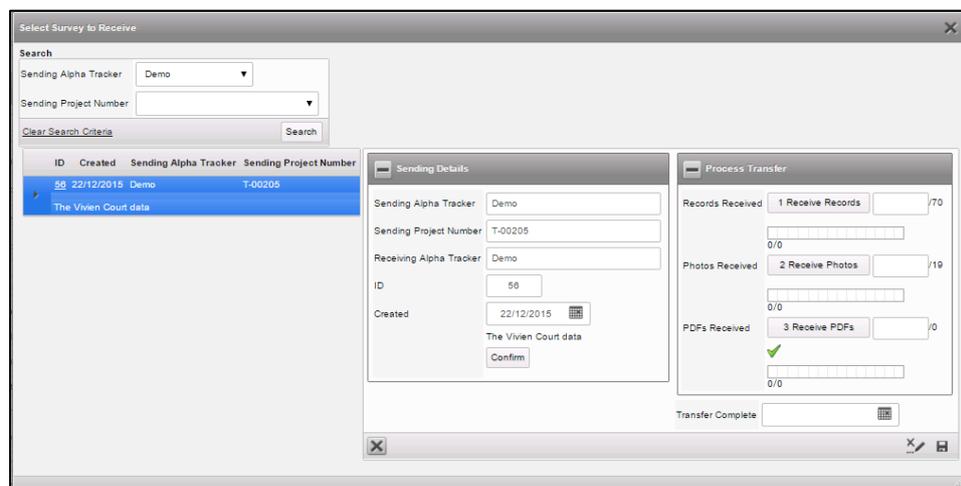
The list contains the re-inspection projects that have been sent to you by the system specified in the **Sending Alpha Tracker** field and are waiting to be received by you.

6. Click **Search**. Details of the project are displayed, including any message attached to the project.



7. Check the details displayed in the Sending Details area of the screen and click **Confirm** if this is the project that you are expecting.

The Process Transfer area of the screen is displayed, with buttons to process the data.



8. Click each of the Process Transfer buttons in turn to receive the data, starting with **Receive Records**. 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 re-inspection data
- **Receive Photos** – to receive the photos in the re-inspection
- **Receive PDFs** – to receive the PDF files in the project
- **Receive Drawings** – to receive the drawings in the project.

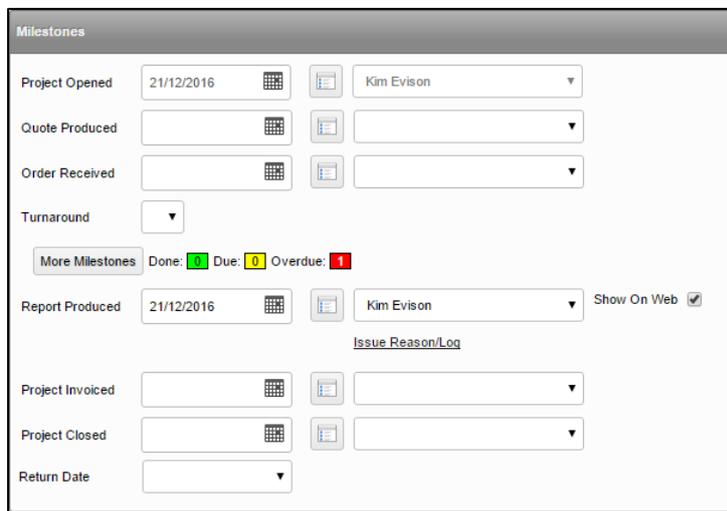
There are numbers displayed next to the buttons to indicate the number of records that should expect to receive. If the data is retrieved correctly, then the number of records actually received is also displayed as well as a tick to indicate that the data has been pulled down.

9. Select the date in the **Transfer Complete** field when all records have been received.
10. Save and close the screen.

If you return to a refreshed Survey Details screen you can see the summary data for the received re-inspection, as well as the front page photo of the report on the second tab "2 – Survey Complete".

The re-inspection data is now present on your system as if you carried out the re-inspection yourself.

11. Return to the Project screen for this project, add a Report Produced date and tick **Show On Web**.



12. Click the **Site Details** button on the project and display the updated Register for the site by clicking on the Client View Site Register tab.

