

# Release 37.5 - Alpha Tracker Release Notes

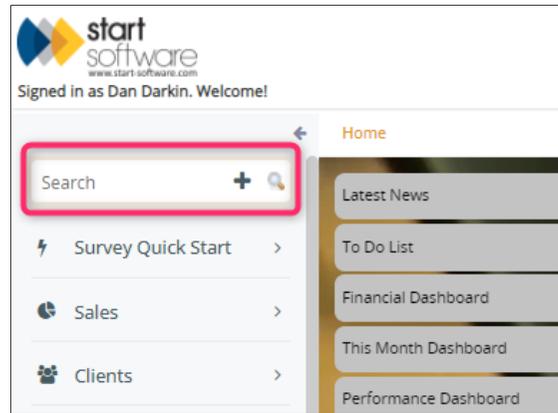
## New Features / Changes (from SVN5684 to SVN 6006)

1. Alpha Tracker has had a style makeover! With new icons, styles and colours, Alpha Tracker has a fresh new look. Check out the Project List as an example:

The screenshot displays the Alpha Tracker web application interface. At the top left is the 'start software' logo and the user is signed in as 'Dan Darkin'. The main header shows 'ALPHATRACKER' and a 'Sign Out' button. A search bar is present with the text 'Click here to search...'. Below the search bar are navigation tabs for 'Grid View' and 'Map', and a 'Refresh' button. The main content area shows a table of projects with columns: Project, Type, Client, Site, Postcode, Site Ref, Client Project Ref, Order No, Status, Value, Invoiced, Project Manager, Opened, Turnaround, and Due. The table lists several projects, including 'Asbestos Survey' and 'Bulk Sample'. A sidebar on the left contains a search bar and a list of project filters such as 'Open only', 'New Project', 'Project List', 'Master Project List', 'Open Projects', 'All Allocated Projects', 'My Allocated Projects', 'My Projects Not In Diary', 'My Open Projects', 'Projects Not In Diary', 'Projects Without POs', and 'Projects Ready To Invoice'. At the bottom of the page, there is a copyright notice for Start Software and an Alpha Software Certified logo.

Project	Type	Client	Site	Postcode	Site Ref	Client Project Ref	Order No	Status	Value	Invoiced	Project Manager	Opened	Turnaround	Due
T-56817	Asbestos Survey	7DANE Dane Environmental	Copenhagen House	CO11 1PP	PP999			New	0.00	0.00	Kim Evison	23/02/2022		26/04/2022
T-56797	Bulk Sample	00005 Wednesday	123 Manor House	TF13 6DW				New	0.00	0.00	Judy Key	01/02/2022		
T-56694	Survey	00017 ABCD	12 The Green	CH2 2CH				New	0.00	0.00	Dan Darkin	28/01/2022		11/02/2022
T-56687	Survey	00005 Wednesday	New Test					New	0.00	0.00	Robin Bennett	26/01/2022		09/02/2022
T-56686	Asbestos Survey	7DANE Dane Environmental	Priorslee House	TF2 9FT	34567				0.00	0.00	Dan Darkin	26/01/2022		06/04/2022
T-56685	Asbestos Survey	7DANE Dane Environmental	220 Emerson Road	BH15 1QT	202020				0.00	0.00	Dan Darkin	26/01/2022		06/04/2022
T-56684	Asbestos Survey	7DANE Dane Environmental	Hill House					New	0.00	0.00	Dan Darkin	26/01/2022		10/02/2022
T-56682	Asbestos Survey	7DANE Dane Environmental	12a Ivor Road	TF2 9FT	12A123		TTT		0.00	0.00	Kim Evison	26/01/2022		06/04/2022
T-56681	Asbestos Survey	7DANE Dane Environmental	Jan 22 Demo				TTT	New	0.00	0.00	Kim Evison	26/01/2022		10/02/2022

2. The "Search" box at the top of the main menu now uses the new Intellisearch feature to provide a general search as well as a menu search.

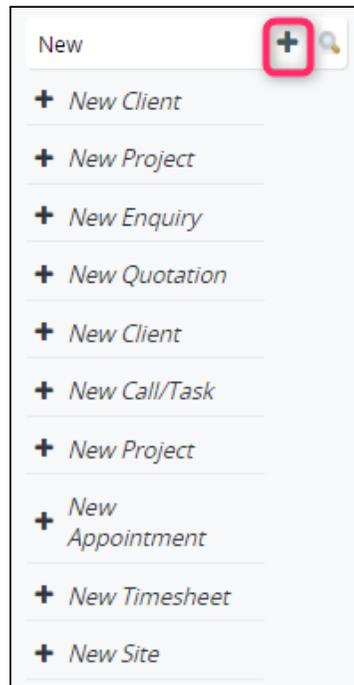


Simply start typing your search text into the Search box and a list of matching menu options is displayed beneath the box. You can select one of these to open it. If there is only one matching menu option, you can press Enter or click on the magnifying glass to open the menu option. Otherwise, pressing Enter or clicking the magnifying glass performs a general search, which might display matching clients, projects, sites, quotes etc. If there is only one matching entry it opens automatically.

Security group access is respected in the search results on projects, quotes, clients and sites, as are the allowed office letters. The project number pattern setting is recognised, so that if the search string matches the project number pattern then projects are searched. And if the search string begins with a "0", then sites won't be returned.

There is a setting available, "IntelliSearch single/multi", to choose whether Intellisearch opens just the first matching thing or a tab for anything that matches.

Also, if you are looking for the "New..." menu options to create a record in the system, try out the plus button in the Search box - it automatically enters the word "New" so that all the "New..." menu options are displayed:



3. The Alpha Draw site plan drawing app has been updated to allow automatic colour-coding of sample tags, arrow tools and the importing of drawings to use as a base. The updated app is available on the web and on the Google and Apple app stores.

There are 48 new arrows that you can attach to your drawings, and you can also add labels to these arrows.

Surveyors can manually colour-code sample tags as they place them on the drawing, or colour-coding can be done later by clicking a button to apply the colours according to the lab analysis.

If there are any plans that you want to use as a base for your drawing, for example by simply adding the position of samples taken, upload them to the project folder. Note that the drawing must be located in either the Drawing subfolder (as specified in your system settings) or in the main project folder but with the word “drawing” somewhere in its filename. It must also be an image file, eg jpg or png not pdf.

4. Alpha Draw users will now also find that they can open Alpha Draw directly from the Enter Lab Results screen (under the Survey Quick Start menu). This means that once the sample results are in, Alpha Draw can be quickly opened and sample tags colour-coded at the click of a button.

Home | Enter Lab Results x | Enter Lab Results - N-30179 x

Search

Survey Quick Start

- 1 Check client
  - + New Client
- 2 Enter job details
  - + New Project
- 3 Now do the survey
- 4 Check survey data
  - View Survey Data
- 5 View samples
  - Enter Lab Results
- 6 Produce report
  - Produce Report

Search

ID Building Sample No. Material Code

Clear Search Criteria Search

Records: 1

ID	Building	Material Code	Description	Sample No.	Identification	Asbestos Type	Product Type	Product Type Description	Condition	Surface Treatment	Material Score	Priority Score	Total Risk Score
89691	e-Innovation Centre	CMP	Cement Product	1	Actinolite	2	1	Asbestos reinforced com	1	1	5	0	5

10 Records per page Load Fibre Analysis Open Alpha Draw

You can also open Alpha Draw much more quickly and easily from the Survey Details screen, due to the addition of an “Open Alpha Draw” button. The option is still available under Choose Task too. If your system has not already been set up for Alpha Draw, then this will now happen automatically so that the button will open the Alpha Draw tab. A random n Alpha Draw password will be automatically assigned to the system.

Survey Details

1 - Survey Setup 2 - Survey Complete

Summary & Cover Sheet

Choose Task for other options

Asbestos Summary

(non-suspect)	S
2	1 (1 positive)

View Asbestos Data Open Alpha Draw

Photo File

Photos\89690.jpg

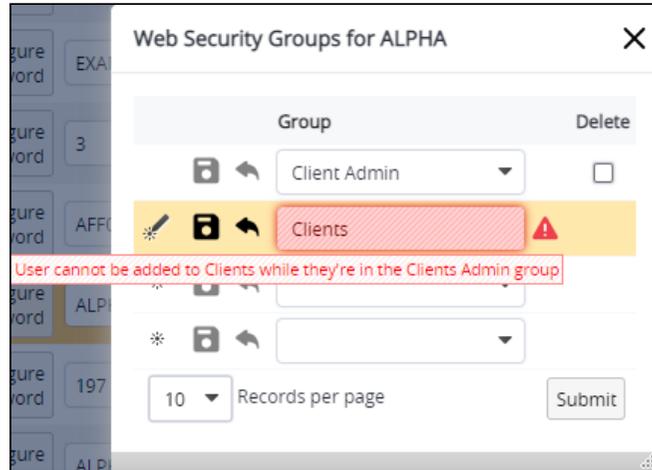
- The latest update to Alpha Tracker Document Manager is designed to save your staff time and effort when incorporating multi-page lab certificates into asbestos survey reports. Previously, when Alpha Tracker asked Word to insert a PDF lab certificate and it ran over more than one page, there would be some manual effort required to split the document as Word only inserts the first page of a PDF, not all pages. The new update automates the process and automatically splits the PDF into multiple pages and inserts them all, one-by-one. It works alongside the new setting "Convert All Pages in PDF to JPGs in Reports".
- The Enquiries/Quotes menu has had a name change. It is now named "Sales" and contains all the same menu options as it did before.
- Open Projects by Status now shows the Status Notes.

Project Number	Status	Status Notes	Project Type	Client	Site Name	Value	Project Opened	Total Invoiced	Job Complete	Project Invoiced	Project Closed	Delete
T-90991	Complete	to survey today	Asbestos Management Survey	REGUS	Morphett	£0.00	19/08/2021	£0.00	19/08/2021	19/08/2021		
Complete												
T-90669	Complete	to do survey today	Asbestos Management Survey	REGUS	DULWICH	£300.00	19/03/2020	£600.00		19/03/2020		
T-90895	Complete	to be sampled	Bulk Sample	REGUS	Morphett	£0.00	17/02/2021	£0.00	18/02/2021			
Ongoing												
T-90595	Ongoing	testing 15-8-2019	Asbestos Management Survey	REGUS	DULWICH	£250.00	15/08/2019	£0.00				
T-90572	Ongoing	test1	Asbestos Management Survey	REGUS	DULWICH	£0.00	08/07/2019	£0.00	08/07/2019	08/07/2019		
T-90486	Ongoing	test of project open from	Asbestos Management Survey	ALPHA	City	£0.00	10/09/2018	£0.00	11/09/2018	11/09/2018		

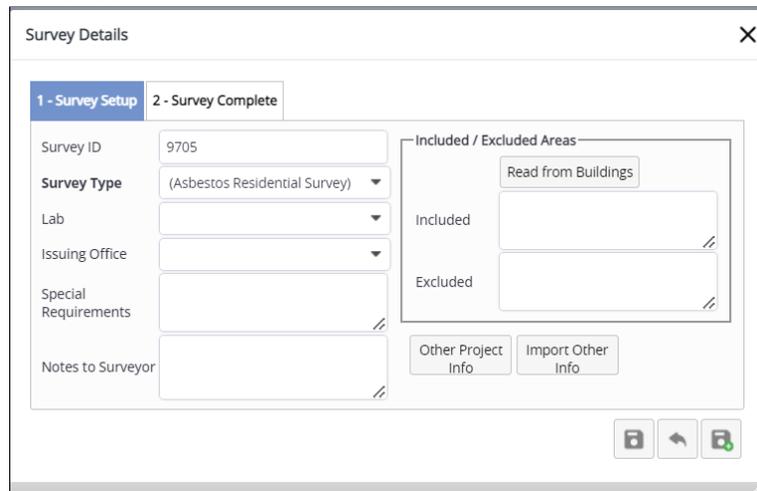
- The Recommended Action and Recommendation Comments fields have been returned to the "Enter Lab Results" screen.

ID	Building	Material Code	Description	Sample No.	Identification	Asbestos Type	Product Type	Product Type Description	Condition	Surface Treatment	Material Score	Priority Score	Total Risk Score	Lab Ref No	Recommended Action	Recommendation Comments
66636	DULWICH	INB	Insulating Board	1			2	Asbestos Insulating boan								

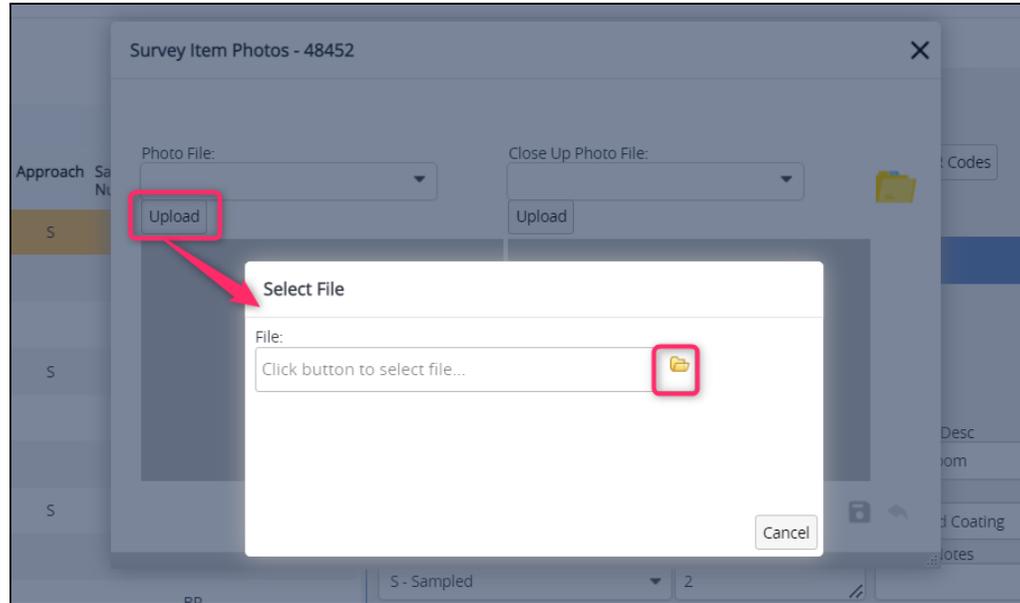
9. To make it easier to follow advice on setting up Client Portal users, the system now prevents you from putting a user in both the Client Admin and Clients user groups. A check is made on the user groups when saving and an error message displayed if both are found to be present.



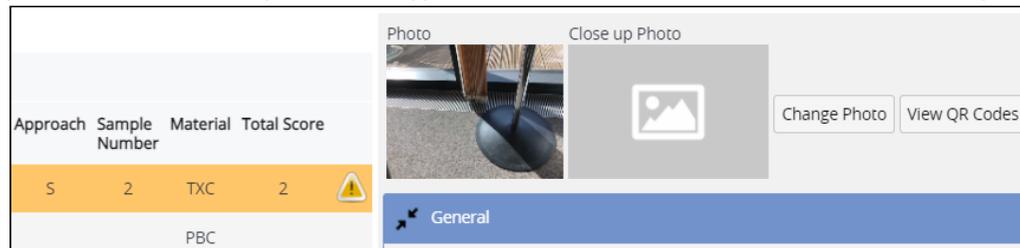
10. Inactive Survey Types are no longer displayed on the Survey Details screen, to prevent them from being selected. If an existing survey has an inactive Survey Type then it will be displayed in brackets.



11. It is now even easier to upload photos to survey items. In the Survey Data screen, simply click on the photo frame or the Change Photo button, then use the Upload button for either the main photo or the close-up photo to open a window from which you can browse to the required file.



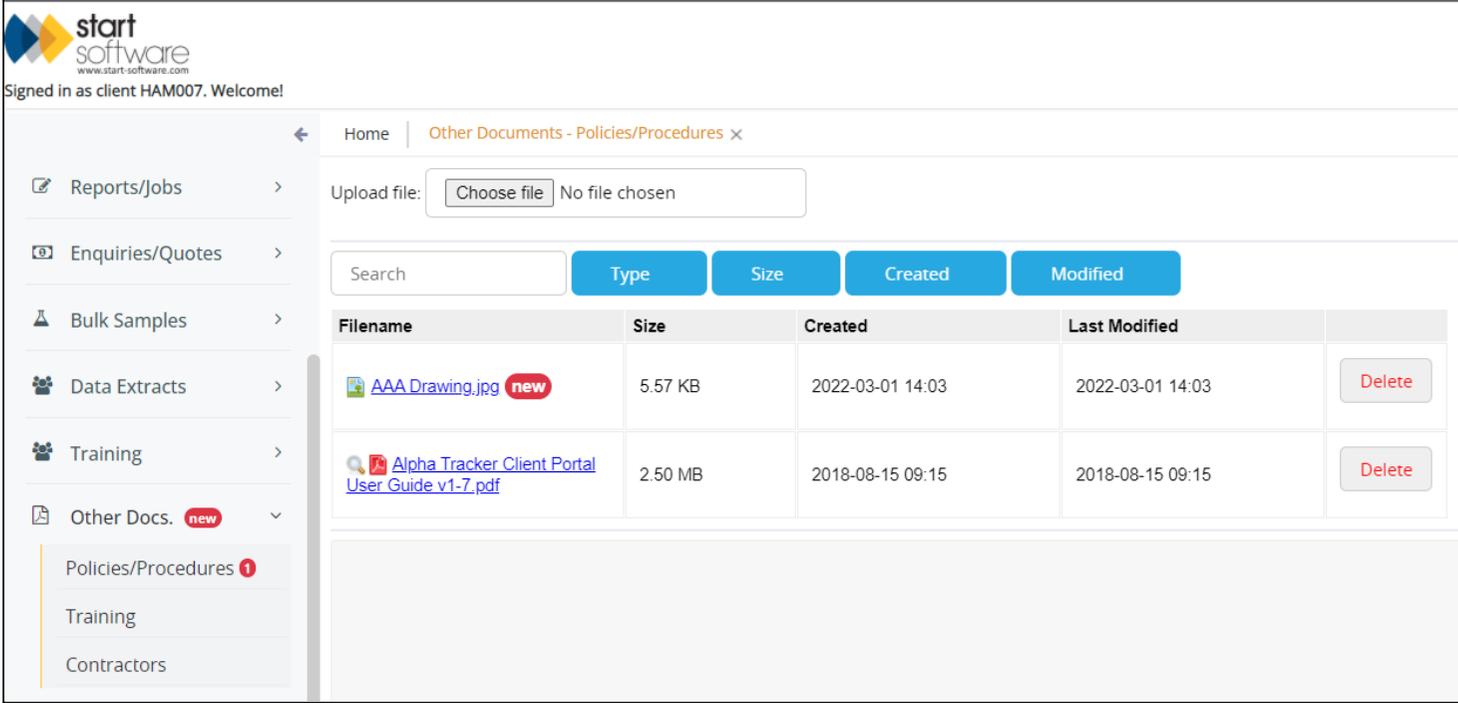
Once selected, the photo file is uploaded, taking into account the setting for specifying the subfolder that may be in use for photos, and displayed in the photo frame. It is still possible to type in a filename and to select one from the dropdown list.



- It is now possible to control the display of sample labels in Hotspot drawings by using the “Hotspot Text Template” setting and other related “Hotspot Text...” settings. You may, 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.

13. If you are flagging new data on the Client Portal, then you may also be interested in flagging new documents. The new setting “Time period for new client portal documents” allows you to specify the number of days that documents on the Client Portal will be classed as new. This applies to the documents in the Other Documents menu option. A “New” flag is displayed on the Other Documents menu if there are new documents present, and a count of the new documents is displayed on the individual menu options, eg:



Signed in as client HAM007. Welcome!

Home | Other Documents - Policies/Procedures x

Upload file:  No file chosen

Search

Filename	Size	Created	Last Modified	
 AAA Drawing.jpg <span style="color: red; font-weight: bold;">new</span>	5.57 KB	2022-03-01 14:03	2022-03-01 14:03	<input type="button" value="Delete"/>
 <a href="#">Alpha Tracker Client Portal User Guide v1-7.pdf</a>	2.50 MB	2018-08-15 09:15	2018-08-15 09:15	<input type="button" value="Delete"/>

14. A new setting lets you hide the Site Status Notes from all users apart from Superusers.
15. Key milestone 7 has now been automated so that the Quality Control (QC) section on the Survey Details screen now updates key milestone 7. These are the fields that will update the milestone:

Survey Details

1 - Survey Setup 2 - Survey Complete

Summary & Cover Sheet

Choose Task for other options

Asbestos Summary	(non-suspect)	No Access	P	PS	S	SP	X	
	4	1	1 (1 positive)	<a href="#">View Asbestos Data</a>				

Photo File

66599.jpg

Approved By: Dan Darkin

Date: 23/11/2021

Lab Details

Quality Control (QC)

Quality Control Date: 01/03/2022

Quality Control By: Dan Darkin

Quality Control Notes

Documents

Key milestone 7 is named “Report QC checked” by default, but as you can control the text label it may be named slightly differently in your system. Depending on how your milestones are set, the status of this milestone may be displayed under the More Milestones button on a project and/or on the Projects Dashboard.

16. There are also two new key milestones: for Survey Approved (key milestone 10) and Lab Approved (key milestone 11). Together this means that you can have automated milestones for approving the survey, the fibre analysis and the QC:

Survey Details

1 - Survey Setup 2 - Survey Complete

Summary & Cover Sheet

Choose Task for other options

Asbestos Summary	(non-suspect)	No Access	P	PS	S	SP	X
	4	1	1 (1 positive)				

View Asbestos Data

Photo File

66599.jpg

Approved By Dan Darkin Date 23/11/2021

Lab Details

Date of Analysis 23/11/2021 Analysed By Leanne Helle-Broe

Date Reviewed Reviewed By

Approved by Date Approved By

Certificate Ref

Quality Control (QC)

Quality Control Date 01/03/2022 Quality Control By Dan Darkin

Quality Control Notes

Note that the Lab Approved can also update from the fields on a Bulk Sample project. Note also that you must have milestone templates defined for the applicable project types, and link your milestones to the required key milestones for the automation to occur.

If no date is added to the Approved By fields on Survey Details or the Bulk Sample screen, then Key Milestones are updated with today's date rather than no date.

- When you are working with Bulk Sample projects, the Results tab will now display a generated table of results based on the Identifications configured in Setup>Lab and Surveys>Asbestos Types. This means that the actual Identifications in the table heading are dynamically generated, allowing Australian

users to display values such as “Organic” and “SMF” if these are set up. Ticks are displayed as required to indicate the results.

Home | Sample Setup - T-91019 x

1. Overview | 2. Sample Setup | 3. Enter Fibre Analysis | 4. Lab Analysis Check | 5. Results | 6. Register

Load Results | Version: 2 | [Issue Reason/Log](#)

Generate Certificate | Produced By: Leanne Helle-Broe

Sample ID	Actinolite	Amosite	Anthophyllite	Chrysotile	Crocidolite	NAD	Not Detected	Organic	SMF	Tremolite
001		✓								
002		✓								✓
003					✓					

Submit | Cancel

18. Asbestos re-inspection XMLs are now generated from a template rather than being fixed, which means that re-inspections can fully accommodate Tracker Mobile customisations. We can use this to add additional tags to the XML or modify the content of a tag, if needed.
19. There is a new feature in the document folders that will automatically back up a document if you upload a file with the same filename as one that is already present in the document folder. If required, you can specify the subfolder where the auto-backup file should be stored by using the setting “Enter backup subfolder name for existing files”.
20. A change has been made to the Staff Calendar selection on the Resources menu to show Sub Groups when a Group is selected. If you select a Group that has Sub Groups on the Staff Calendar screen, then these Sub Groups are displayed and you can select all those you wish to display.

The screenshot displays a vertical list of categories and sub-categories in a software interface. The categories are: Team, Group, Sub Group, and Office. Each category has a list of items below it. The 'Sub Group' section is highlighted with a red border. The items listed are: Admin, Surveyors (under Team); External, Office, Surveyor (under Group); Accounts, Admin, Director (under Sub Group); and Example (under Office).

Category	Items
Team	Admin Surveyors
Group	External Office Surveyor
Sub Group	Accounts Admin Director
Office	Example

21. There are a few small changes on the Add/Edit Event screen to help make booking appointments clearer and easier.

- The Project Number and Client are now the first things you see on the Add/Edit Appointment screen.
- When you select a Project Number, the Resource dropdown now updates to include a list from the Project Staff.
- Selecting a person from the Resource dropdown will pull in their role from the Project Staff.
- When inputting the Project Number the staff role will change to reflect the project staff.

**Add/Edit Event**

**Appointment Details**

Project Number: T-90002 Client: Oak Duration: 1 day

Resource: Dan Darkin Role: Asbestos Sur Team:   Make a suggestion

[Add other resource](#)

[View Project Details](#) [View Previous Appointments](#)

Event Name/Description

**Location / Map**

Event Location

22. There is a new facility to allow surveyors to approve and/or QC their own surveys. Two new columns have been added to the Survey Types setup screen which need to be ticked if the surveyor’s name is to be added to the dropdown list of valid names on the Approved By and Quality Control By fields on the Survey Details screen, for those Survey Types. So if the surveyor is to be allowed to approve and QC their own work on Management surveys, then these boxes need to be ticked for the Survey Type “Management”.

Exclude from calculation <i>(see hover tool tip)</i>	Include Surveyors (Approval)	Include Surveyors (QC)	Date Active	Date Inactive
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	22/01/2016	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	22/01/2016	<input type="text"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	22/01/2016	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	22/01/2016	<input type="text"/>

The survey items in a project are checked and, if the tickbox on the Survey Type is ticked, then the surveyor's name is added to the dropdown list.

Survey Details

1 - Survey Setup 2 - Survey Complete

Summary & Cover Sheet

Choose Task for other options

Asbestos Summary	(non-suspect)	5	View Asbestos Data
	3	3 (3 positive)	

Photo File

Approved By

Date

Sign off report

Lab Details

Quality Control (QC)

Quality Control Date

Quality Control By

Quality Control Notes

23. Tracker Air users have the ability to further control the filetypes of the certificates sent to Analysts and to the central email address by using the new setting "Tracker Air - Send PDF to Analyst and DOC + PDF to Central email".
24. Hazmat users will now find that they can use the QR codes in the system to display Hazmat details.

Site QR codes will have options to display both Asbestos and Hazmat registers, as well as Reports. The Hazmat register will display the category of Hazmat item as specified in the (per client) setting "Display Hazmat Items on Client Portal...", for example if the setting only specifies "Lead,SMF" then only lead and SMF items will be displayed on the Hazmat register.

Item QR codes will show Hazmat information related to the item. The new QR Code Labels button on the Hazmat screens lets you download or print the public or private item QR codes, in one of the available formats:

The screenshot displays the 'Lead Paint Data - T-90797' interface. A modal window titled 'Select QR Code Type' is open, prompting the user to 'Select the type of QR Code you want to produce'. The modal offers two options: 'Public' and 'Avery 45 x 45mm'. Below the options are 'Print' and 'Download' buttons. The background interface includes a search bar, a table of records, and a detailed view of a record with fields for ID, Date, Surveyor, Floor, Location, Location Desc, Approach, Sample Number, Notes, Recommendation Comments, Colour, Condition, Disturbance Potential, Lead Paint Result, Lead Paint %, Lead Dust Concent. %, Lead Dust Status, Timescale, Risk Rating, and Property Type.

If you download the QR codes, then they are downloaded together with a summary Excel file in a zip file. All access via QR codes is logged.

25. Client Portal user accounts can now reset their Alpha Tracker password via the "Forgot password" option if their username is an email address.
26. The Queue Number and Priority are now editable on the Document Requests screen, allowing users with sufficient permissions to see this screen to have some control over documents in queues. If the document has already started, then the queue number cannot be changed.
27. There have been some additions to the Project Import, allowing you to import values for a wider range of fields.
  - The Project Opened Date and Who By have been added. These columns are only displayed if the "LockProjectOpenedOnceSet" setting is set to "no".

- A Lab column has been added (for Survey Details).
- The Project Due Date column has been added. It is only displayed if the setting “Project Import: Includes Project Due Date” is set to “yes”. If the Project Due Date milestone is linked to the key milestone, then the target date of that milestone is set. This action overwrites the default target date that is set on the milestone creation. If the project due date is blank, then the original target date is retained.
- 16 new columns have been added for Cost Breakdowns. This allows a maximum of four 4 cost records, as each cost has four columns: Item, Quantity, Price and Notes. These columns are only displayed if the new setting “Project Import: Includes Project Cost Breakdown” is set to “yes”. If cost breakdown records are generated with the import, then the Estimated Total Value field on the project is updated with the result. This calculated value will overwrite any entry inserted from the “projectValue” column on the project import.
- Validation has been updated in the import process.

## Fixes/Minor Changes

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

- Some improvements have been made to the generation of cost breakdown records from templates.
- An error on the Project Pipeline has been fixed.
- The display of the HTML editor in Log/Call Task (CRM) has been fixed.
- The Contact Name on Log/Call Task now only displays client contacts not also site contacts.
- Register printing from the Client Portal now handles large numbers of items better.
- Security on the Staff Matrix / Training screen has been amended.
- Room-based QR codes now show the location number when accessing via a private QR code.
- Project numbers are now showing in order on Choose Task>Move Survey Data.
- A couple of bugs have been fixed on the Sign-in screen, including on the auto-fill.
- An issue with the display of the Correct Analysis field when re-opening re-checks subsequent times has been fixed.

- A problem with the updating of survey records when using Project Import has been fixed.
- A minor change has been made to Risk Assessment Type A (the detailed format) - a field has been added for Assistant Surveyor and the Submit/Cancel buttons have been moved to the right hand side.
- Various improvements have been made to speed up the signing-in process.
- There has been a change to the way PDF files are found via the Site QR Codes. The search now looks in each document folder and picks up the PDFs. The Show On Web flag and blacklist settings are respected.
- A problem with displaying unprocessed data on Survey Items Import has been fixed.
- Minor improvements have been made to logging and error handling.
- The Setup>Help menu has been removed, as has Setup>System>Error Log (event.log), as neither are used.
- A "Classification1" field has been added to re-inspections.
- The Select Samples button on Lab Rechecks will now also be displayed, whether settings show lab checks are based on samples or on points.
- Improvements have been made to the Master Project Import to improve efficiency and fix issues with apostrophes and survey records.
- A fix has been applied to ensure the site address is used on new quotations when using the + Quote button on the Site Details screen.
- The generation of a Tracker Air report will only update the Report Produced date if the "UpdateReportProduced" setting is enabled.
- The width of the Sample ID field has been increased on the Sample Setup screen.
- A range of functionality that happens when projects are saved in Alpha Tracker is now also available in Alpha Tracker Mobile, eg adding the site name as the building if the setting is enabled, and emailing the project manager when a project is allocated if the setting is enabled.
- A problem with filenames when downloading certificate zip files has been fixed.
- An issue with the "Receive Photos" button not displaying during a file transfer has been resolved.
- An issue with the sort order on PDF reports on the Client Portal Asbestos Register and the Client View Register has been fixed.

- There have been some improvements to Australian Tracker Air, including combining separate Air Monitoring buttons into one button for speed, a calculation update to output the reported result, roles dropdown, sending of approval reports and generation of alerts and document requests, the addition of ten checkboxes on the Samples screen and settings to control these.
- The Site Import process has been updated to include the Account Manager, Landlord and Notes fields.
- New columns have been added to the SM2 Import Survey Items.
- The Site Name field on Quotations has been extended to allow 250 characters, as has the Action Required field on the Survey Items screen.
- When importing projects, you only need to enter the Site ID, then the system will look up and set all site-related fields. However, if you include the site name, address etc in the spreadsheet, the system will use the entered values and by pass the lookup process.
- If you are adding a new Project, Quote or Enquiry, and you use the New Client button to add the client "on the fly", you no longer have to then select the newly added client. Instead, the newly added client is automatically selected and displayed.
- The Master Project Import now uses the Site Name and the Site Reference to get the Site ID.
- When emailing a document to your client via the document folder, the "CC" dropdown list now includes active staff email addresses. This makes it easier for you to copy members of your own staff into the emails.
- A problem with the population of site information when creating a quotation from the site has been fixed.
- The "Open quotes/enquiries only" label to the tickbox below the general search box on the Sales menu has been changed to read "Open only". In addition, the "Open projects only" label on the Projects menu has been changed to read "Open only".
- A problem importing the Surface Treatment Description via Survey Items Import has been resolved.
- The size of the "What" field on the Access Log has been increased to 500 characters from 250 characters to accommodate the logging of emails sent from document folders.
- An issue occurring on Fibre Analysis when eight analyses are recorded has been fixed.
- Duplicating a project now creates the project folders on the server.
- The upload progress bar on imports has been updated to make it clearer that the import is being processed.

- An amendment has been made to the position of the scores in the Survey Items Export (grid and Excel sheet).
- It is now possible to select the project letter before generating a Hazmat re-inspection project.
- For SM2 users, SM2 Import Survey Items has an additional process to split the "building" value into building name and UPRN.
- The message "This isn't the person's normal role" will no longer appear when creating appointments.
- There have been some changes to the handling of emails. Two settings "SMTP Authentication Required" and "SMTP Use SSL" have been replaced by one setting "SMTP Protocol". "SMTP Protocol" can either be SSL or TLS. TLS is the default. In addition, a new setting named "SMTP From Alias" has been added which allows us to set a friendly name for the email.
- Validation on quotation numbers ensures that they are in the correct format, don't contain whitespace and don't already exist. It also only allows numbers after the hyphen.
- When selecting a Standard Document, you can select the template and then click Enter to activate the 'Send document request' button.