

## Release 40 - Alpha Tracker Release Notes

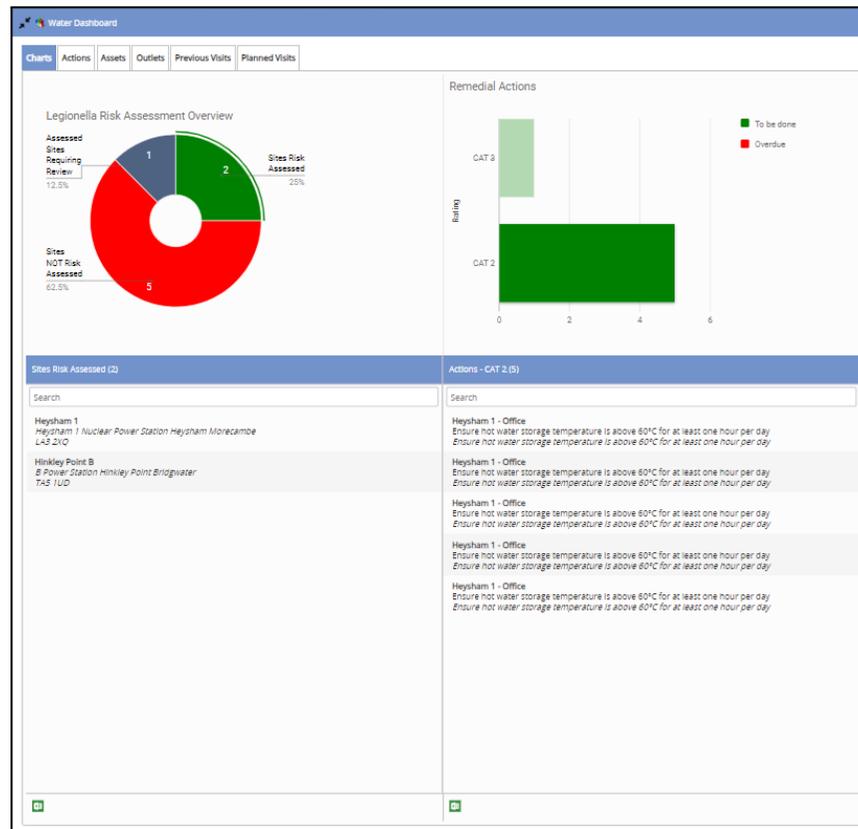
### New Features / Changes (from SVN8081 to SVN8602)

1. We know that when you want to edit a number of projects quickly, like when adding order numbers, opening the full Project Details can seem time-consuming. But now you can access and edit a selection of the project details directly from the Project List by using the “Quick Edit” feature. Simply click on the lightning bolt to open the quick edit screen on the right of the Project List. Edit the details and save. You can even click on the lightning bolt on another project to quickly change the project details displayed, meaning you can make edits to a set of projects really quickly.

The screenshot displays the 'Project List' interface. At the top, there is a search bar and various filters. Below this is a table of projects with columns for Project Number, Type, Client, Site, Postcode, Site Ref, Client Project Ref, Order No, Status, Value, Invoiced, Project Manager, Opened, Turnaround, Due, and Status. The first row, project T-57687, is highlighted in orange. A red circle highlights the lightning bolt icon in the 'Status' column of this row. To the right of the table, a 'Project Details' modal is open for project T-57687, showing fields for Client, Quotation Ref, Client Order Number, Project Manager, Site Name, Project Type, Estimated Total Project Value, and Status. The modal also includes sections for Milestones, Contacts & Addresses, Financials/Planning, and Notes/Other Info.

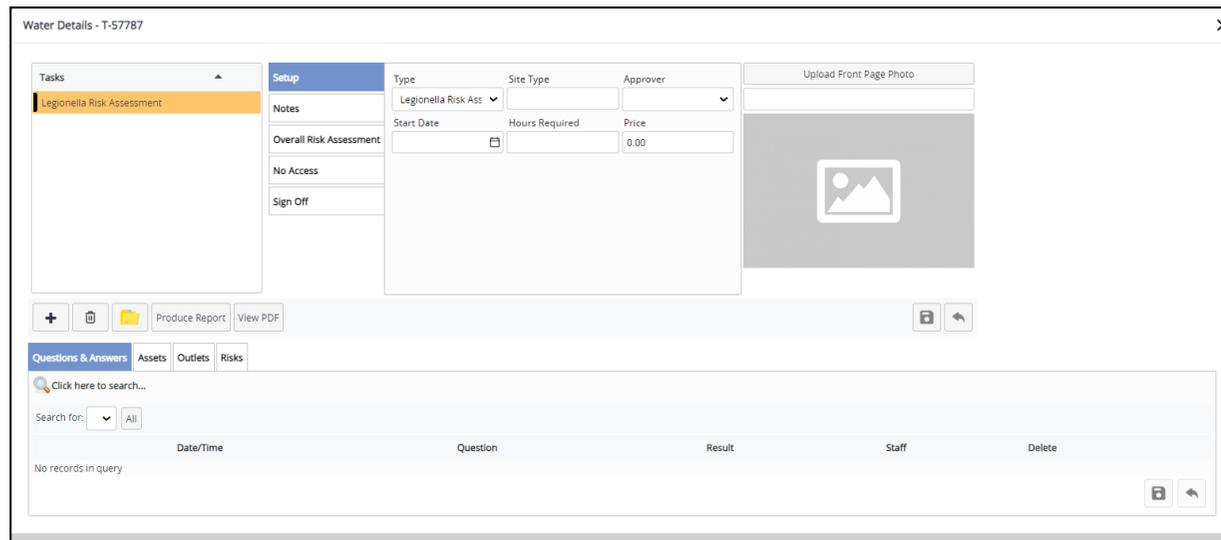
2. Re-inspections have been reworked to centralise and simplify the coding. This applies to both project- and site-based re-inspections. As part of this, the generation of re-inspection records should now be faster and more robust.

3. Work on the Asbestos Register screens should now result in much faster registers throughout the system.
4. If you are a Water Hygiene user then you may be interested to see the continuing improvements to the Water Dashboard on the Client Portal. When switched on this shows:
  - a doughnut chart of sites marked as requiring a Legionella Risk Assessment, with a breakdown of their status. You can drill down to the individual sites and projects
  - a bar chart of the remedial actions which also lets you drill down to detail
  - data related to actions, assets and outlets, where you can drill down to further detail
  - previous site visits and planned site visits.



This Water Dashboard is in addition to the Site list and Compliance Summary on the Client Portal which is now suitable for both Water and Asbestos users. All features respect site restrictions and linked sites.

- The Water Details screen has a redesigned layout, with the Tasks section listing the water subprojects. Select a water subproject under tasks to display its details on the right. Four tabs in the lower part of the screen display the associated Questions & Answers, Assets, Outlets and Risks.



- When a price is changed on a Water Hygiene sub project, it is now recorded in the price change log.
- There is a new “Duplicate” option for Water Hygiene users in Alpha Tracker Mobile. It can be found from the “...” button on Water asset/outlet details. The duplicate function copies the asset/outlet record and adds it as a new record. Asset photos are not copied when duplicating. Questions are generated for the asset/outlet type, and the answers from the previous record may also (optionally) be copied.
- It is now easier to see the priority of work on the Lab Project List. This is because the **Lab Days To Deadline** now uses the target date for Key Milestone 6 (Samples Analysed). The column displays the number of business days (including today) to the target date of the Samples Analysed key milestone on the project. When overdue the column displays the number of days the samples are overdue. You may prefer to use this date over the **Count to Due Date** which is not specific to the lab.

Type	Project Opened	Sampled Date	Due Date	Count to Due Date	Turnaround	Lab Days to Deadline	Notes	# Survey Samples
Re-Inspection	24/11/2023		08/12/2023	2				1
Re-Inspection	23/11/2023		07/12/2023	1				2
Re-Inspection	23/11/2023		07/12/2023	1				1
Re-Inspection	23/11/2023		07/12/2023	1				1
Asbestos Survey	29/11/2023	29/11/2023	14/12/2023	8		2		2
Asbestos Survey	23/11/2023		24/11/2023	Overdue (12)		OVERDUE (-2)		0
Asbestos Survey	23/11/2023	23/11/2023	24/11/2023	Overdue (12)		OVERDUE (-2)		4
Total								11

- Two new validation settings have been added to case correct survey items automatically when the data is sent in: “Auto capitalise location descriptions” and “Auto capitalise items”.
- Further new settings allow you to change the source of data for the Sales Dashboard on the Home Page: “Sales Dashboard - Monthly Won Sales Data Source” and “Sales Dashboard - Open Opportunities by Person Data Source”. The charts can either draw the data from **Assigned To** or the **Account Manager** on quotations.
- It is now possible to produce multiple documents from one survey type. This means that you can produce more than one document with one click of the **Draft** or **Final** report button. To do this you specify multiple report formats against a survey type as a comma-separated list. One document request is created for each report format, and these can each have a friendly name so that you can distinguish them.
- Sites can be put “on stop” now as well as clients. New projects and quotations for an on-stop site cannot be saved. To put a site on stop, simply tick the Site **On Stop** tickbox on the Site Details screen.

**Flags**

Status

Category

Inspection Frequency   
*No. of months between inspections*

*(calculated)*

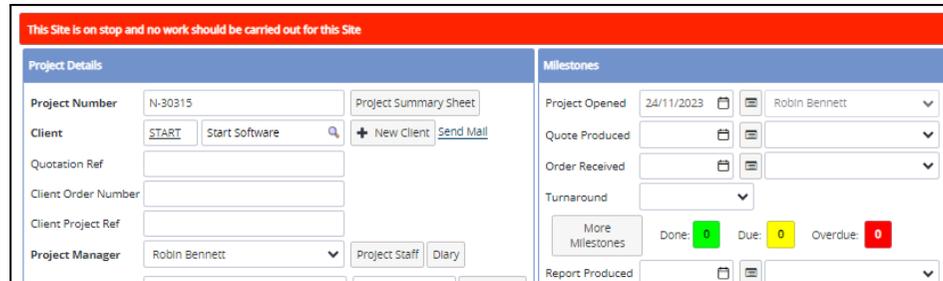
Last Re-inspection    
*(override)*

Asbestos Survey Required

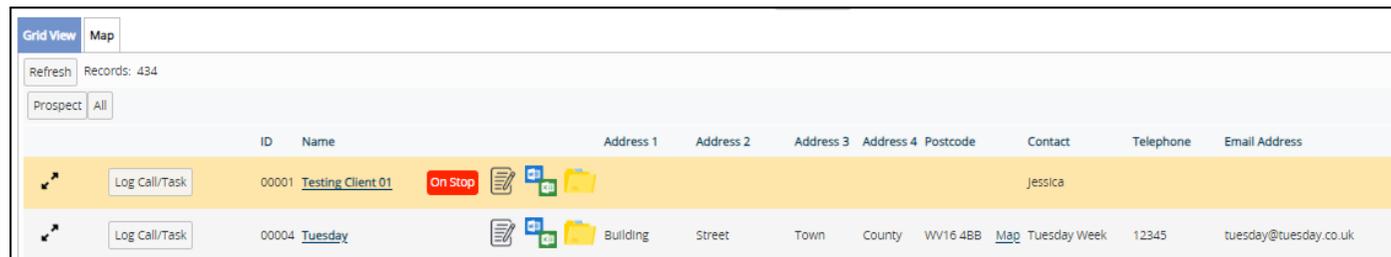
LRA Required

**On Stop**

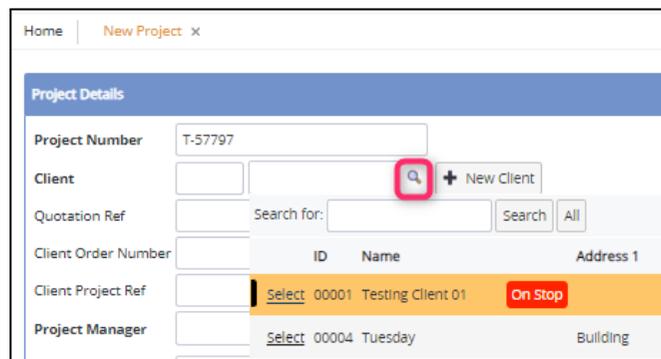
A banner is displayed at the top of projects and sites for the on-stop site. For example:



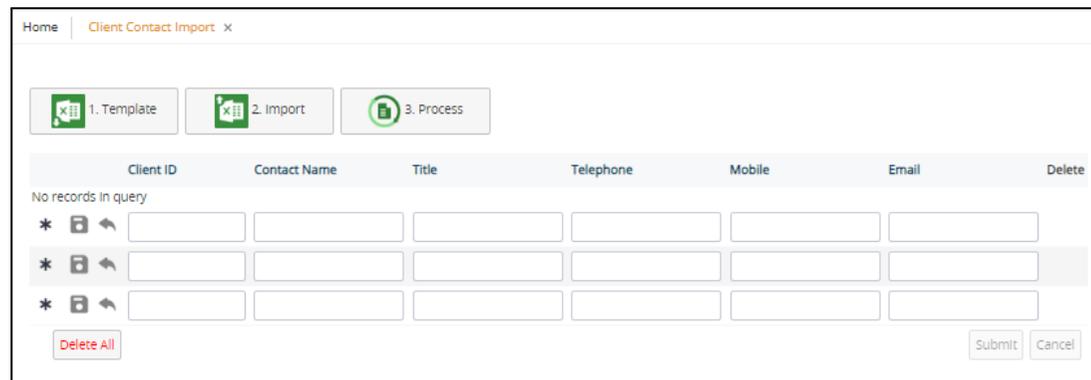
The "on stop" indicator on clients and sites has also been improved and displays in more places. For example:



- The Client lookup from the Projects screen now shows the client indicators, such as prospect and on stop. In addition, this list of clients will now exclude clients marked as inactive.



14. Pagination is now available on the Alpha Tracker API for processing large data volumes more efficiently.
15. Alpha Tracker Mobile has had a number of updates, including synchronisation and backup improvements, and photos being saved at a much lower file size. Various other bug fixes and improvements have been made.
16. Imports are now specific to individual logged in users. If you are regular users of the importing features then you will benefit from this as multiple users can run imports at the same time without seeing data being imported by other users.
17. There is a new import for Client Contacts which provides an easy method to add multiple client contacts into the system. The validation on import checks the Client ID and email are valid.



18. To help you keep on top of contact with your clients, the filter button on Account Management that was “No Phone Contact” has been changed to “No Quality Contact” so that both Teams calls and face-to-face reviews are counted with phone calls. In addition there is a new filter to select clients with whom you have had no quality contact (phone call, Teams call etc) within the last 90 days. We find this button really useful to find clients we haven’t been speaking to recently.

Key	Client	Year Value	Contacts Made	Key People	Tickets	Last Quality Contact	Total Value	Account Manager	Account Support	Key Contacts	Client Type	Industry Type
On Stop	Testing Client 01	1.7K	0	0	0		2.3K					
	Wednesday	12.0K	0	0	0	05/01/2023	15.0K	Judy Key	Judy Key	sim.euson@start-software.com		Housing Association

19. Also on the Account Management screen:

- If you are using our ticketing system, you can display a column for **Tickets (<30 days)** on Account Management. This will show you the number of tickets raised for the client within the last 30 days.
- Two columns have been added for **Client Type** and **Industry Type**.
- The Account Management screens can be switched to display project value information which is useful if you do not use Alpha Tracker for invoicing. This is controlled by the setting “CRM Value”.
- It’s possible to specify the start and end month for your financial year and to use these to control the figures displayed in the **Year Value** column on the Account Management screen. The settings are “Financial Year Month Start” and “Financial Year Month End”.
- The search has been changed to a horizontal layout.

20. The Frequencies menu option that used to be under the Water Hygiene menu has been moved to the Setup, General menu and renamed Scheduling Frequencies. The Scheduling Frequencies setup screen has two new options in **Date Add Modifier** for “Day” and “Day (excl.weekend)”. These allow a schedule of daily appointments to be created, either for seven days a week or work days only.

Home | Scheduling Frequencies x

Click here to search...

Records: 8

Description	Date Add Modifier	Date Add Value	Sort Position
One Off		0	0
Weekly	Week	1	0
Fortnightly	Week	2	0
Monthly	Month	1	0
Quarterly	Month	3	0
Annually	Year	1	0
Daily	Day	1	0
Daily (excl. weekends)	Day (excl. weekends)	1	0
*			
*			
*			

10 Records per page

The Diary Scheduler on the Project screen uses these frequencies to create a series of appointments on a regular basis. Some general fixes have been applied to the Diary Scheduler for the creation and display of appointments, and issues with the start and end times.

Costs

Total Current Costs 0.00

Diary

Estimated Man Days 1 Estimated Man Days (Write Up) 1

Default Appt. Length (hours) 0 [Change Log](#)

Earliest Start Date

Latest End Date

Diary Appointments

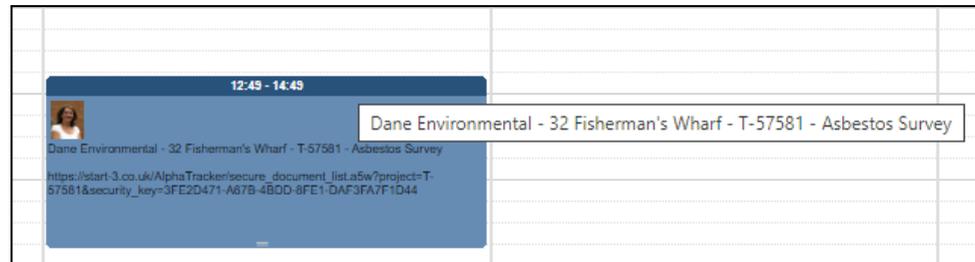
Add Timesheet

Notes/Other Info

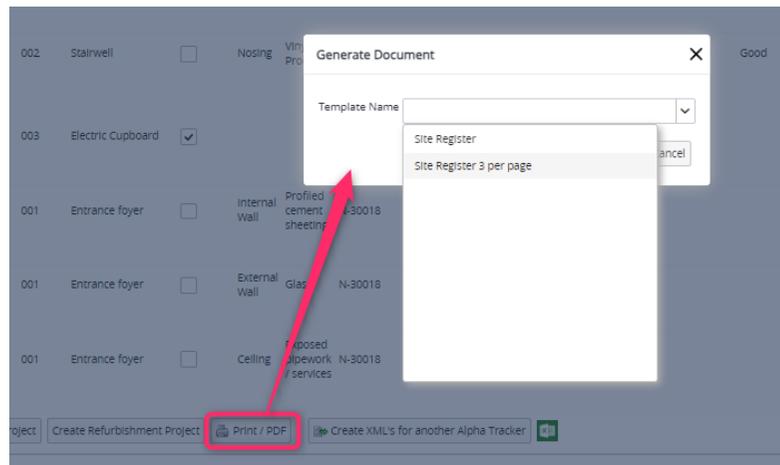
Schedule

- One Off
- Weekly
- Fortnightly
- Monthly
- Quarterly
- Annually
- Daily
- Daily (excl. weekends)

- To make it easier to see the details of an appointment, especially those that have a short duration, you can hover over the title bar of an appointment to see a summary.



- You can have multiple, bespoke register reports set up to run from the Print PDF button on the Client View Site Register. There is a new setting to enter the comma-separated list of reports - "Bespoke Register Reports".



- If you are using the new Cloud Document Maker which generates documents immediately, and you check or monitor your own document queues, then you will notice that the Document Requests screen has a tabbed view with both a "Server" tab and a "Cloud" tab.

ATDM document requests show as labels now rather than textboxes, so they look slightly different, but you can still change the queue and priority, and can delete records if necessary to manage your queues.

The Cloud tab displays details of documents generated using the Cloud Document Maker.

The screenshot shows the 'Cloud' tab in the Alpha Tracker interface. At the top, there are tabs for 'Server' and 'Cloud', with 'Cloud' selected. Below the tabs is a search bar with fields for Queue ID, Shell String, Document, Email, Requested By, Started From, To, Finished From, and To. A 'Search' button is located to the right of these fields. Below the search bar, there are buttons for 'Active', 'Waiting', and 'All'. The main content is a table with the following columns: Queue ID, Priority, ID, Shell String, Document, Size, Email, Requested By, Requested Date, Started, Finished, and Delete. The table contains 10 rows of data, each representing a document request. The first row is highlighted in orange. At the bottom of the table, there is a pagination bar showing 'First Prev 1 2 3 4 5 6 7 8 9 10 of 221 Next Last' and a 'Records per page' dropdown set to '10'. A 'Submit' button is located at the bottom right of the table.

Queue ID	Priority	ID	Shell String	Document	Size	Email	Requested By	Requested Date	Started	Finished	Delete
1			"C:\Tracker\Database\Tracker Document Maker.exe" "Management" "C:\Tracker\Database\Report Formats.mdb" 2 "C:\Tracker\Documents\Project Files\N\N00000-00999\N-00003\N-00003 - Survey Report.doc"	"C:\Tracker\Documents\Project Files\N\N00000-00999\N-00003\N-00003 - Survey Report.doc"		adam.dangerfield@start-software.co.uk	Dan Darkin	15/07/2013 17:59	05/05/2016 00:00	05/05/2016 00:00	
2			"C:\Tracker\Database\Tracker Document Maker.exe" "Management" "C:\Tracker\Database\Report Formats.mdb" 2 "C:\Tracker\Documents\Project Files\N\N00000-00999\N-00003\N-00003 - Survey Report.doc"	"C:\Tracker\Documents\Project Files\N\N00000-00999\N-00003\N-00003 - Survey Report.doc"		dan.darkin@start-software.co.uk	Dan Darkin	15/07/2013 19:49	05/05/2016 00:00	05/05/2016 00:00	
3			"C:\Tracker\Database\Tracker Document Maker.exe" "Management" "C:\Tracker\Database\Report Formats.mdb" 2 "C:\Tracker\Documents\Project Files\N\N00000-00999\N-00003\N-00003 - Survey Report.doc"	"C:\Tracker\Documents\Project Files\N\N00000-00999\N-00003\N-00003 - Survey Report.doc"		dan.darkin@start-software.co.uk	Dan Darkin	15/07/2013 20:09	05/05/2016 00:00	05/05/2016 00:00	
4			"C:\Tracker\Database\Tracker Document Maker.exe" "Management\XYZ" "C:\Tracker\Database\Report Formats.mdb" 3 "C:\Tracker\Documents\Project Files\N\N00000-00999\N-00004\N-00004 - Survey Report.doc"	"C:\Tracker\Documents\Project Files\N\N00000-00999\N-00004\N-00004 - Survey Report.doc"			Judy Key	22/07/2013 04:32	05/05/2016 00:00	05/05/2016 00:00	
5			"C:\Tracker\Database\Tracker Document Maker.exe" "Management - Safe Environment" "C:\Tracker\Database\Report Formats.mdb" 3 "C:\Tracker\Documents\Project Files\N\N00000-00999\N-00004\N-00004 - Survey Report.doc"	"C:\Tracker\Documents\Project Files\N\N00000-00999\N-00004\N-00004 - Survey Report.doc"		adam.dangerfield@start-software.co.uk	Judy Key	25/07/2013 05:21	05/05/2016 00:00	05/05/2016 00:00	
6			"C:\Tracker\Database\Tracker Document Maker.exe" "Management - BCL" "C:\Tracker\Database\Report Formats.mdb" 3 "C:\Tracker\Documents\Project Files\N\N00000-00999\N-00004\N-00004 - Survey Report.doc"	"C:\Tracker\Documents\Project Files\N\N00000-00999\N-00004\N-00004 - Survey Report.doc"		adam.dangerfield@start-software.co.uk	Judy Key	26/07/2013 06:02	05/05/2016 00:00	05/05/2016 00:00	
7			"C:\Tracker\Database\Tracker Document Maker.exe" "Management - BCL" "C:\Tracker\Database\Report Formats.mdb" 3 "C:\Tracker\Documents\Project Files\N\N00000-00999\N-00004\N-00004 - Survey Report.doc"	"C:\Tracker\Documents\Project Files\N\N00000-00999\N-00004\N-00004 - Survey Report.doc"			Judy Key	26/07/2013 06:44	05/05/2016 00:00	05/05/2016 00:00	
8			"C:\Tracker\Database\Tracker Document Maker.exe" "Management - BCL" "C:\Tracker\Database\Report Formats.mdb" 3 "C:\Tracker\Documents\Project Files\N\N00000-00999\N-00004\N-00004 - Survey Report.doc"	"C:\Tracker\Documents\Project Files\N\N00000-00999\N-00004\N-00004 - Survey Report.doc"			Judy Key	26/07/2013 07:01	03/05/2016 00:00	05/05/2016 00:00	
9			"C:\Tracker\Database\Tracker Document Maker.exe" "Management - BCL" "C:\Tracker\Database\Report Formats.mdb" 3 "C:\Tracker\Documents\Project Files\N\N00000-00999\N-00004\N-00004 - Survey Report.doc"	"C:\Tracker\Documents\Project Files\N\N00000-00999\N-00004\N-00004 - Survey Report.doc"			Judy Key	26/07/2013 08:18	05/05/2016 00:00	05/05/2016 00:00	
10			"C:\Tracker\Database\Tracker Document Maker.exe" "Management - BCL" "C:\Tracker\Database\Report Formats.mdb" 3 "C:\Tracker\Documents\Project Files\N\N00000-00999\N-00004\N-00004 - Survey Report.doc"	"C:\Tracker\Documents\Project Files\N\N00000-00999\N-00004\N-00004 - Survey Report.doc"			Judy Key	30/07/2013 02:21	05/05/2016 00:00	05/05/2016 00:00	

24. There have been additions to the Australian Air Monitoring for respirable dust and groundwater monitoring. It is also now possible to prevent the Word version of documents from being saved.
25. Configuring Alpha Tracker with an Azure Active Directory/Federated Authentication/Microsoft Entra ID for Single Sign On is now available.
26. If you use the automated diary appointment SMS messages, then it is now possible to select which project types they apply to. To select a project type, tick the **Send SMS Messages** tickbox on the Project Types screen. By default the tickbox is not ticked.

## Fixes/Minor Changes

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

- The upload process for the media files for the offline Water and Forms is now significantly faster.
- Other changes to Forms on Alpha Tracker Mobile include improvements to the sync process, display being based on the same criteria as water, ie must be in the diary for the logged in user (-2 days and +1 day), improved searching and display order. There have also been improvements made to Forms on the desktop, including to the saving process, the ability to add/replace a front page photo for the report, and the ability to add/replace/delete photos on the form's Questionnaire Details screen.
- There have been various small changes to the Water app to improve performance, syncing and backing up.
- Water Hygiene subprojects now include the price from the **Estimated Total Value** when created.
- Water Hygiene users are able to edit, upload and delete additional photos on the desktop, including the description.
- Water Hygiene users can remove the parent/source asset on outlets if there is a value in the field and the checkbox is unticked. This process removes the corresponding ID.
- A new checkbox has been added for **Infrequently Used** outlets for Water Hygiene users. In addition, the last monitoring date is shown on the outlet list, and validation has been added to asset and outlet types to require a unique code and a name.
- For speed, you can open the Water Details screen directly from the Project List by clicking on the hyperlink in the **Project Type** column and also by clicking on the mobile icon.
- There have been minor changes to control the display of the Project Pipeline on the Client Portal.
- A bug causing latitude/longitude to be mapped incorrectly on the master project import has been fixed.
- Project Easy Close has been updated to use a list view, and improve performance. Some column names have been changed and the Export to Excel has been fixed.
- A problem with the **Issue Reason/Log** from the Lab Certificates screen has been fixed.

- On the Site List and Compliance Summary on the Client Portal, sites no longer managed are displayed in grey and searches are effective when site restrictions and linked sites are in use.
- The length of the **Report Issue Reason** has been extended.
- Changing the project number on an appointment will re-calculate the first and last diary date on the new and old project number.
- In Tracker Air, the **Work Location** field on Reoccupations has been extended to allow up to 4000 characters.
- It's now possible to automate notes on fibre analysis depending on the **Analyst's Assessment** of the Material.
- When emailing documents from the Document folder, you will now be able to see in the **Email to** list client additional contacts who are marked as Report Recipients. Report Recipients on the project are displayed at the top of the list and in bold.
- There have been some general improvements to the look and feel of the Projects Not In Diary screen, and also to its speed.
- Where the Project Pipeline is switched on on the Client Portal then the project folders are not displayed. They are only displayed on the Project Pipeline on the standard Alpha Tracker login. By default the Project Pipeline is closed when the Client Portal opens.
- The Ts&Cs dropdown on quotations now respects the active from and to dates on the templates.
- Regarding entering sample details on the go, there is a new setting that switches on the Enter New Samples options on Alpha Tracker Mobile. In addition, the setting "AllowClientEntry" has been renamed to "Client Portal users can enter samples".
- A new setting hides the "Make a Suggestion" button on appointments.
- The **Client Order Number** has been added to the Master Project List and its search.
- The search section on the Lab Project List now includes the **Type** field so that you can search for individual project types.
- A problem with charts not loading on the Client Portal has been fixed.
- The **Client Name** rather than just the **Client ID** is now available in the downloads from the Quotation List and Project List.
- A fix has been applied to correct totalling if Priority Assessment scores are updated via the Client Portal.

- When duplicating a project, **Special Instructions** will now also be copied. If the field is empty and a default has been configured, the default will be used.
- Next Number Lookup has a new search section and by default is sorted in **Type** order.
- The RPE Equipment Register has been updated to have the same columns as the other equipment register screens, eg **History, Check Date, Calibration/Service Interval, Expiry Date, Assigned To** and **Comments**.
- Building- and Room-based QR codes now use the same source of data as the registers, rather than project-level data.
- In Alpha Tracker Mobile, photos now save to the gallery and the quality of photos has been stepped down to 75 out of 100 to reduce the file size for uploading to the server.
- The sign-in process to Alpha Tracker Mobile has been improved, especially in terms of the messages returned.
- A new setting can force invoice numbers to be padded with zeroes so that, for example, invoice number 35 appears as 00035. The setting is “Use 0-padding on invoice number” and its default is yes.
- There have been some minor fixes to Projects Ready To Invoice to ensure projects are selected if there is an appointment, work record or timesheet after the invoice date, and to check for the **Report Produced** only on Asbestos Surveys, Bulk Samples, Air Monitoring and Water Hygiene projects. Projects with future appointments are not listed.
- The search on the Lab Project List is now more precise in the staff displayed on the dropdown list. Only Lab group members who are active members of staff are on the main list - inactive staff are shown in brackets.
- A problem with opening the remediation folder via Survey Items has been fixed.
- Access to the Contractor menu option on the Client Portal has been restricted to Client Admin users only.
- Blank Survey Types are now prevented on the Survey Type setup screen.
- A fix has been applied to generating reports under “Data Extracts” on the Client Portal for users with linked sites.
- In the Query Writer, the Projects view now includes the Project Type **Sales Category**.

- For Project Allocation users, the way the **Allocation Status** is set has been changed to improve reliability. Other performance and general improvements have also been made.
- If you are a Client Admin user of the Client Portal who creates their own Client Portal users, then when you create a new user you will notice that they are automatically given the same Key Services as yours. So if you only see Asbestos data on your Client Portal, any users you create will also only see Asbestos data.
- Only the “locked” Key Services, ie Asbestos and Water Hygiene, will show on the Users screen. Any extra Key Services you add will not be displayed.