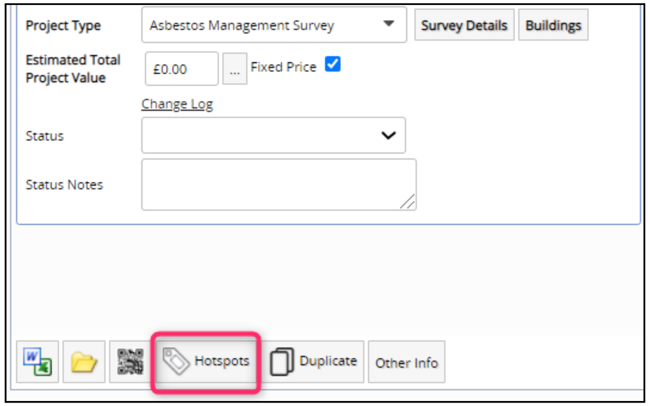
Release 35 - Alpha Tracker Release Notes

New Features / Changes (from SVN4987 to SVN5190)

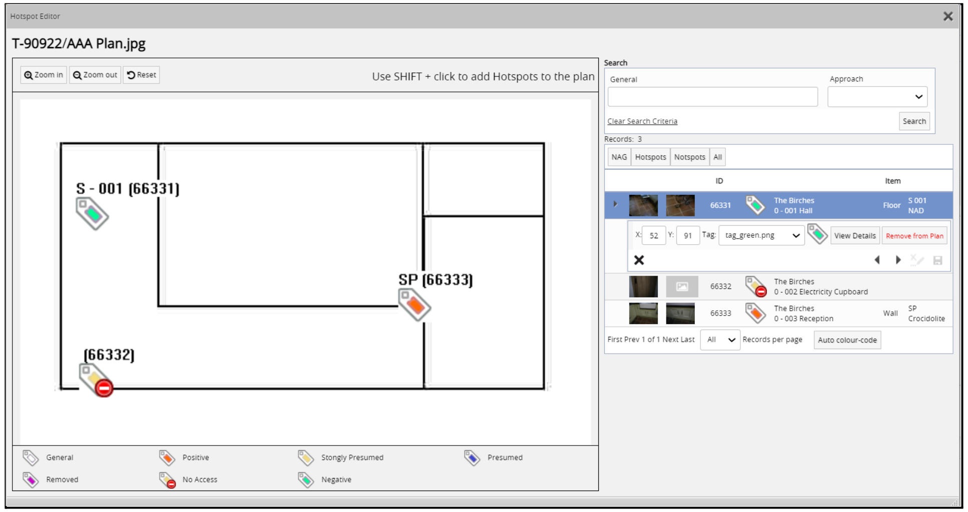
1. Look closely and you will see that the font used on all Alpha Tracker screens has changed. We have chosen a clean, modern, easy-to-read font and we hope you like it!

2. The Hotspotting feature has seen a number of recent improvements. Hotspotting lets you drop flags - hotspots - onto a plan to indicate the position of the suspect items in a project. The hotspotted plans can be viewed from the Client Portal, giving your clients an interactive plan on which they need only to hover over or click on a hotspot to see the details of the suspect item, eg the item, material, approach, sample number etc.

   You can access the hotspotting functionality more quickly now, straight from the Projects screen if the project is a survey. Simply click the new **Hotspots** button. You can still also use the Plan Hotspots option on the Choose Task menu.



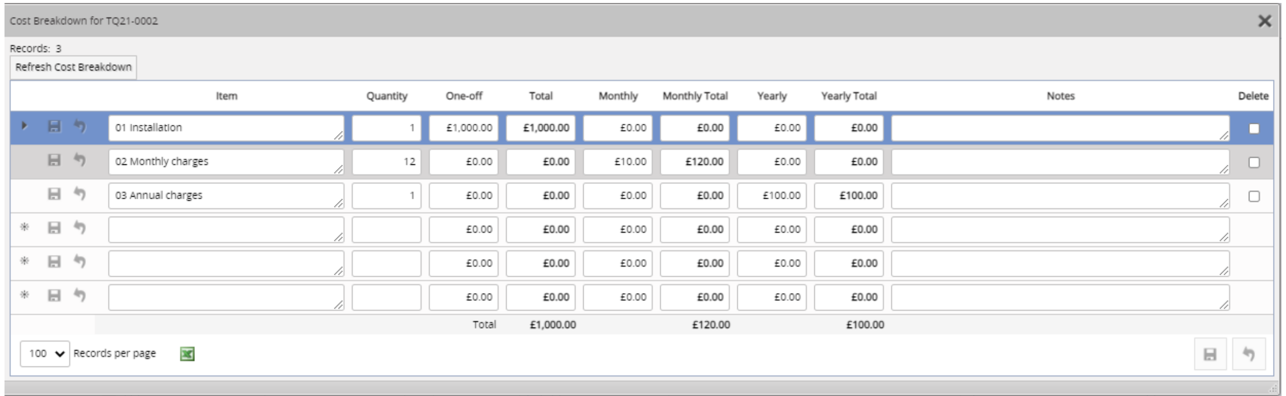
   The hotspotting process is now faster, easier to use and displays more information. Hotspots are easier to place on the plan - simply select the item from the list on the right, then hold down the Shift key and click where you want to drop the hotspot. When all hotspots are in place, click the **Auto colour-code** button to colour the tags according to their approach/identification. The key at the bottom explains the colours.



Zooming the plan in and out is easy with the controls above the plan. You can also pan by holding down your mouse button. The item details on the list on the right are clearer and include the item photos, with the **View Details** button giving access to the scoring details and larger photos.

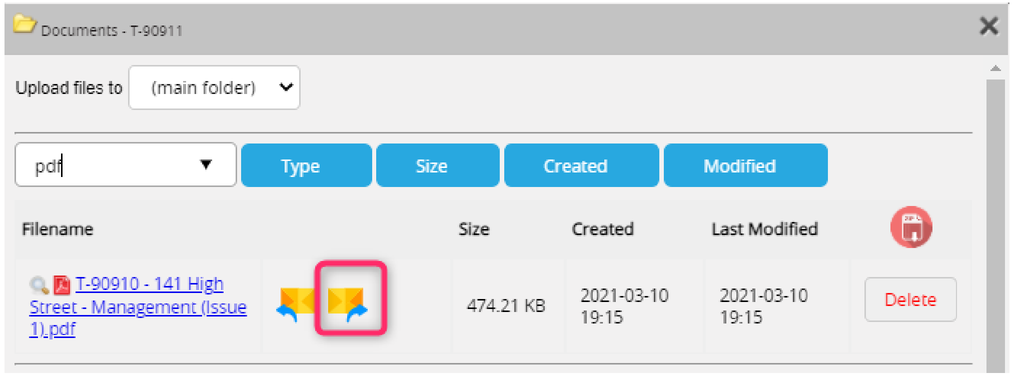
Hover on a hotspot to display brief details. Click on it to select the item on the right so that you can move it, change its tag or access more item information. Or select an item from the list and see the hotspot flash to show you where it has been placed on the plan.

3. Cost breakdowns on Quotations and Projects can now specify the frequency of costs. This is designed to allow you to separate out one-off, monthly and annual costs to make the cost breakdown clearer. Separate totals are displayed.

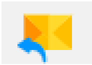


This feature is switched on by setting “Monthly & Yearly Cost Breakdowns” to yes. If you use this feature, you can change the label of the **Unit Price** field, for example to “One-off”, by using the setting: “Name: Unit Price”.

4. This release includes a new feature to email files from Document folders, giving you a quick and easy way to email files directly to clients or to yourself. So if you want to email your report out to the client, simply find the PDF in the document folder and click the **Email to Client** button.

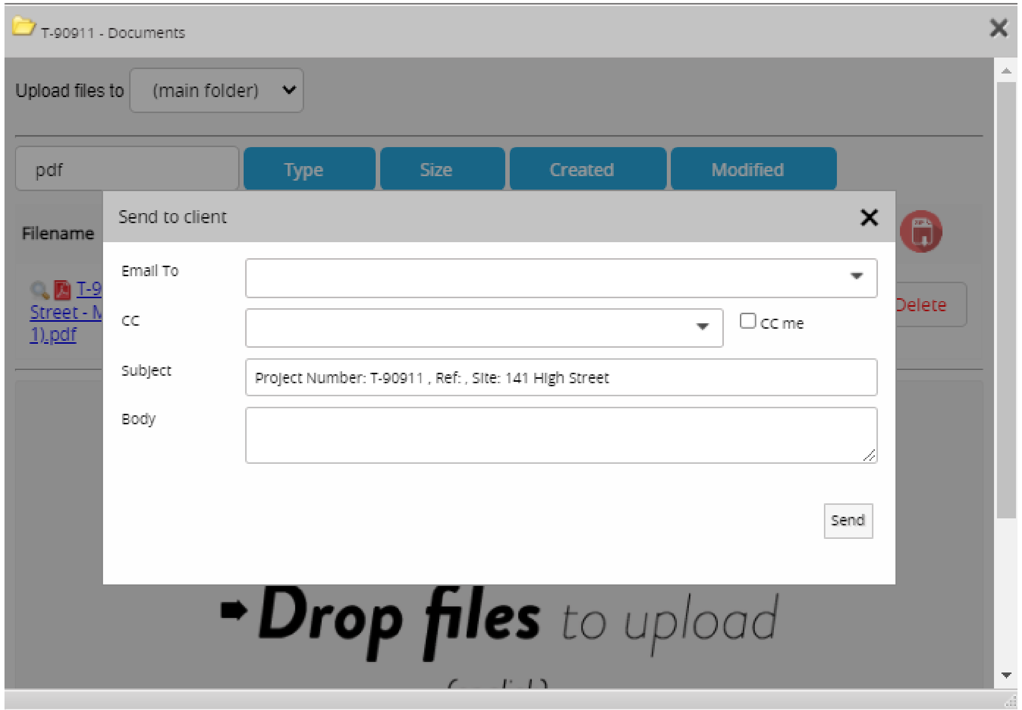


Or to email any of the files to yourself (to the email address associated with your login), click the **Email to Me** button.



The **Email To** and **CC** fields let you select from the Report Recipients or to type in an email address. Tick the **CC me** box to automatically send a copy to yourself too. If you are using Tracker Filer, simply enter your Tracker Filer email address in the new setting “Tracker Filer Email Address”, so that a **CC Tracker Filer** tickbox also appears.

You can even set the **Subject** and **Body** to prefill with standard text by using new settings.In “Email subject for project files sent to client” you might, for example, have “Project Number: {PN} , Ref: {Client_Project_Ref}, Site: {Site Name}” to prefill the Subject line with the project number, reference and site name. And if the name of the selected PDF includes “DRAFT”, then you will see a warning.
You can email documents from the document folders on both Quotations and Projects.
Emails sent to clients are logged in the Access Log. And if you need the email to look like it is coming from your company’s email address rather than Alpha Tracker, then this is also possible by configuring the SMTP settings.

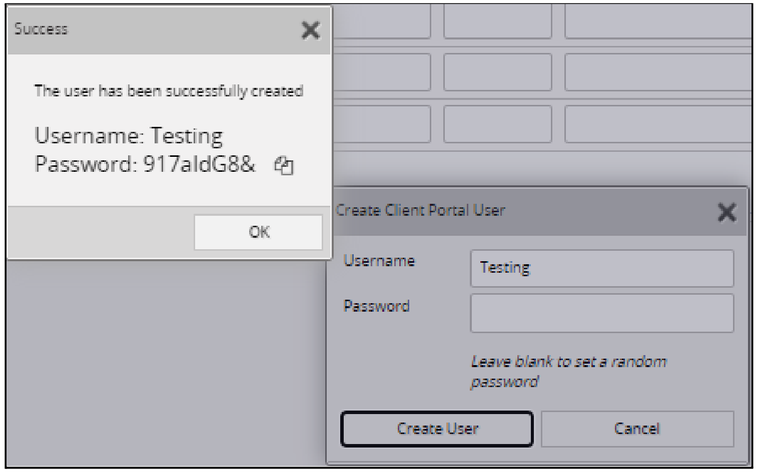


5. When setting or resetting a password for a user account on the User screen, you can now leave the Password field blank and let the system auto-generate the password.

Click the **Set Password** button and the system displays the newly generated password. Click the Copy icon to the right of the displayed password to copy it to the clipboard if needed.

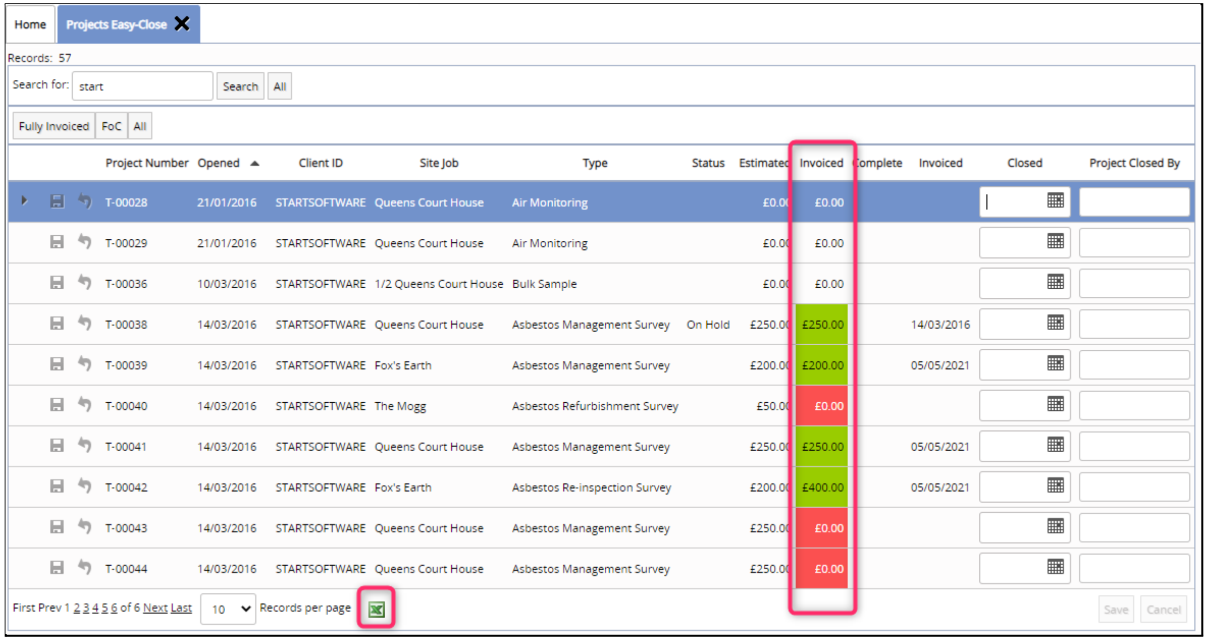
If you allow clients to create their own Client Portal users via Web Security > Users menu option, then these clients will see the same functionality.

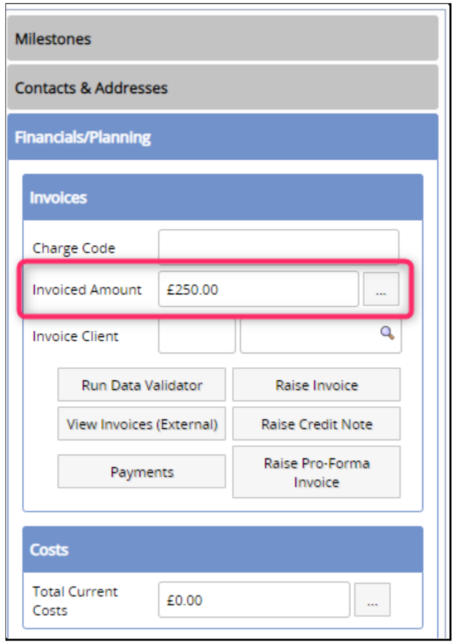
You can also use the **+ User** button on the Client Details screen to create Client Portal users (in the "Clients" group). The auto-generation of passwords is also available here. The Copy icon here copies both the username and the password so that you can easily paste both into a list or email.



6. There is a new "User Import" option under the Import/Export menu. It is only available to Superusers and allows the uploading of a spreadsheet to create new users. The information uploaded includes user ID, password, staff/client ID, default office letter, default quote letter, allowed office letters and security groups. Multiple security groups can be added as a comma-separated list. There is validation on all fields to check the user doesn't already exist, the user ID and password are valid, and the security group exists.

7. The "Invoiced" column on the Project Easy-Close screen now reads from the "Invoiced Amount" on the project rather than directly from invoice records. This screen has a new Excel download button so that you can download the contents to a spreadsheet. Also, you can now search on project status on the Project Easy-Close screen.





8. If you do not like the functionality recently introduced that automatically opens the project, client, site or quotation when the Quick Search results in only one matching record, then you can now switch it off. This is of benefit if you want your search always to display the List screen, rather than the individual record. There are new settings that let you switch this functionality off - one for each type of record, eg “Auto open client if 1 record found”. The default is “yes” for all the settings.

9. If you are using SM2, then creating a refurbishment project from the Client View Site Register will now send back all items with an approach, rather than sending back all data. There is also a new **Create Update Register Project** button on the Client View Site Register.

10. The SM2 Full Site Register now includes non-suspect items, and a **View Details** button has been added to the SM2 Full Site Register so that users can easily view an item’s details as well as any remedial information.

11. Two new settings have been created to specify the subfolders for SM1 and SM2 re-inspections:"SM1 Incoming Re-inspection Folder" and "SM2 Incoming Re-inspection Folder". Different folders can now be specified for these.

12. If your security policy requires IP addresses in the Access Log to be hidden, this is now possible via a setting. This affects the Access Log in the Superuser and Client Portal views.

13. Two new settings have been created to set the default for the Open Projects only and Open Quotes/Enquiries checkboxes on the main menu. This means that if you do not like the search automatically excluding closed projects or quotes, then you can change the setting for your system.

14. If you want a free text field on the Project screen, you could use the Status Notes field. It can now be renamed by using a setting, making it more multi-purpose.

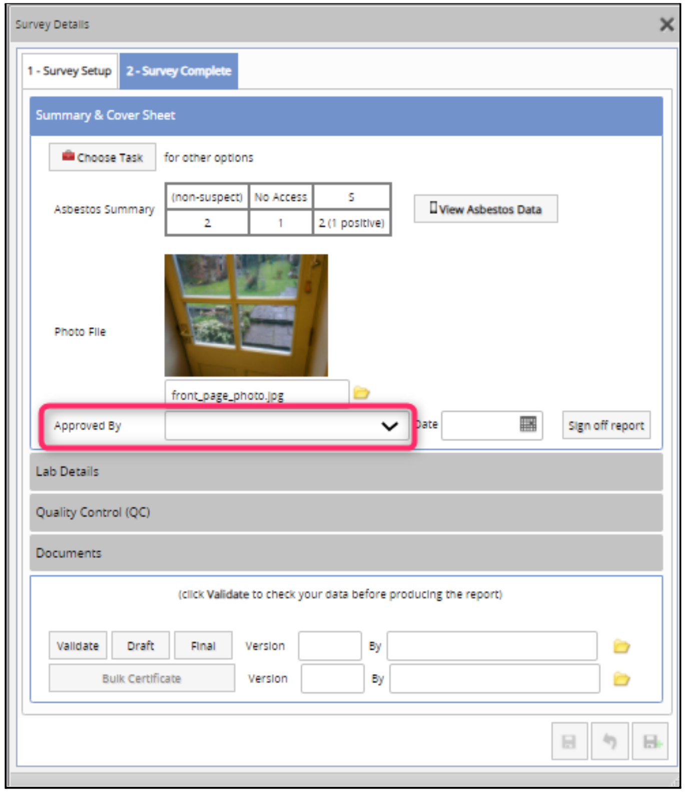
15. Hazmat users will be able to use a new setting to display either individual or combined Hazmat and Asbestos registers on the Client Portal. The default is individual. The new screens use softer colours and dynamic quick search buttons, based on settings.

16. Hazmat users are now able to order the Hazmat risk graphs as they wish.

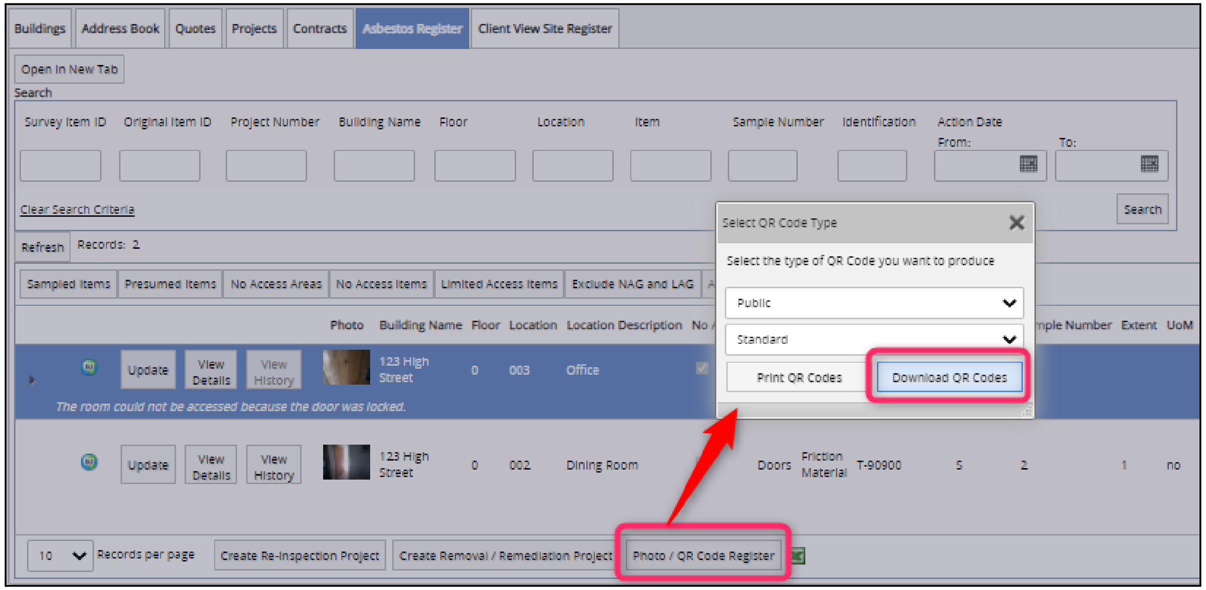
17. New security features have been added to lock the Survey Items screen and Hazmat screens to prevent changes once data is authorised. These are optional features based on settings.

    If the new setting “Should Survey Item Records lock after being approved?” is set to "yes", then approving the survey locks all Survey Item fields and buttons (except for **Show QR Code**, **Generate QR Code Label** and **Export to Excel**). The survey item records can be unlocked by clearing the Approved By field. Only people in the Quality group can clear the Approved By.

    Furthermore, it is also possible to restrict the clearing of the Approved By field to the person whose name is displayed in the Approved By field. To achieve this, the “Only allow own name selection for survey approval” setting must be “yes”.

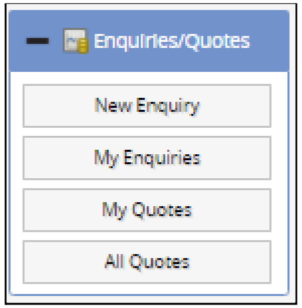


18. When QR Codes are downloaded, an Excel file is now included in the download and contains the URLs for the QR codes. QR codes may be downloaded from the site asbestos register or from a project. The URLs for the QR code may be used to access the Alpha Tracker register data from external systems.

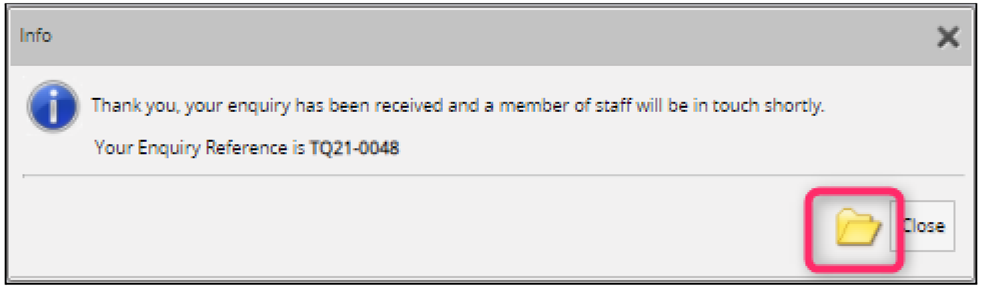


19. You can now create subfolders for Quotation document folders. The same method is used as that for projects, ie the subfolder names should be specified in the new setting called "QuoteSubfolders".

20. If you have the Enquiries/Quotes section visible in your Client Portal, you now have controls to show/hide each of the individual menu options. You can decide which menu options are available to you Client Portal users. These include: “Show all quotes button on client portal menu”, “Show my quotes button on client portal menu”, “Show my enquiries button on client portal menu”, “Show new enquiry button on client portal menu”.



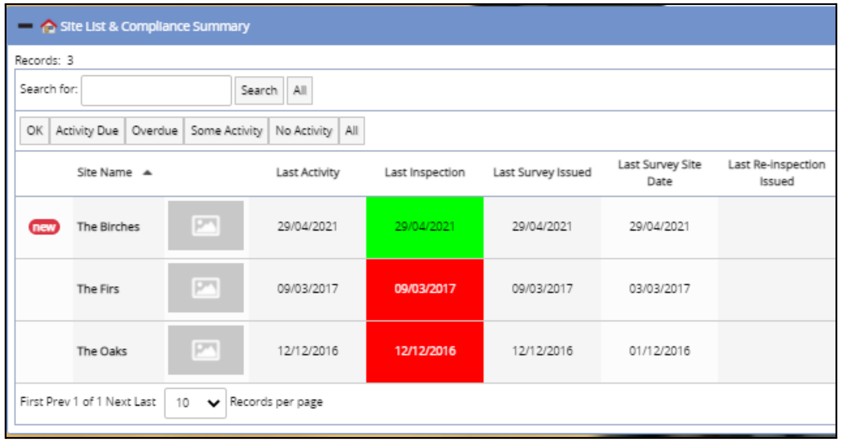
21. If you are allowing Client Portal users to log New Enquiries, then they can now upload files to support their enquiry via a folder icon. The folder icon is displayed on the confirmation message when the enquiry is created.

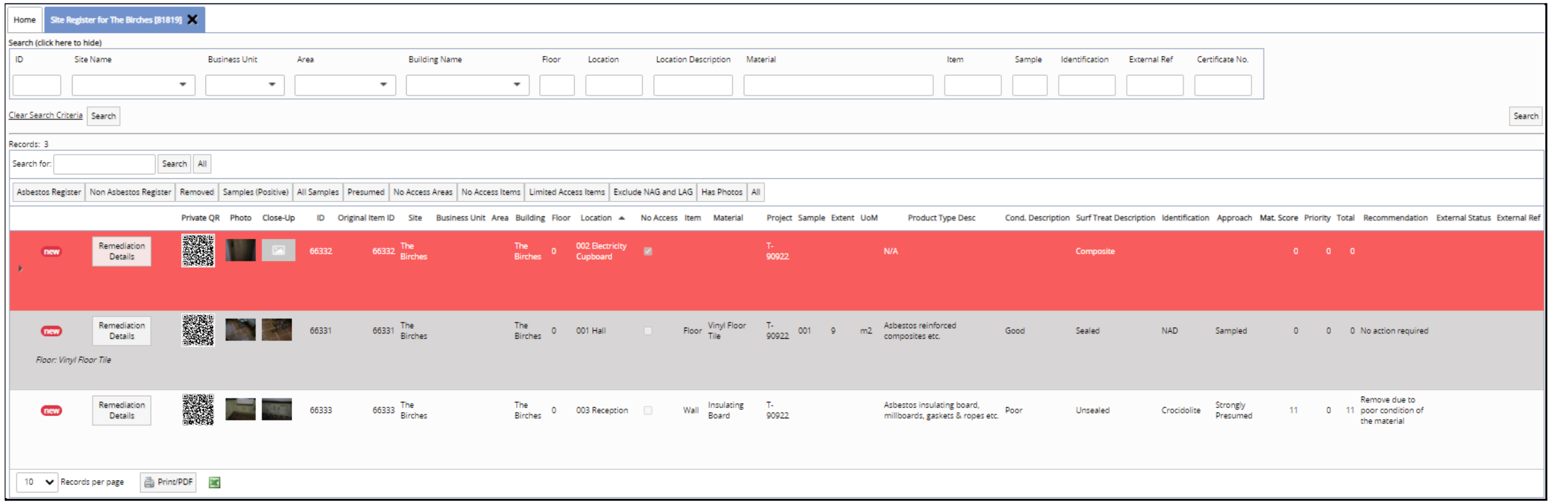


22. A new setting lets you prevent specified Client Portal users from uploading files. Simply add their username to the setting "Client portal users that can't upload files".

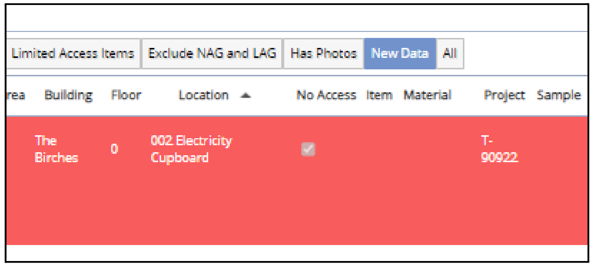
23. A new setting has been created that automatically sets both the Report Produced Date and Show On Web flag when you save a new project. This setting works with specified Project Categories only, so that it allows for example Bulk Sample-type projects to be immediately visible on the Client Portal.

24. It is now possible to flag new data on the Client Portal so that your Client Portal users have their attention drawn to it. Settings allow you to switch this function on and also to specify the time period that defines new data, eg 30 days. 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:





If you want to see all the new data and only the new data, you can filter the records on the register by using the New Data preset search button:



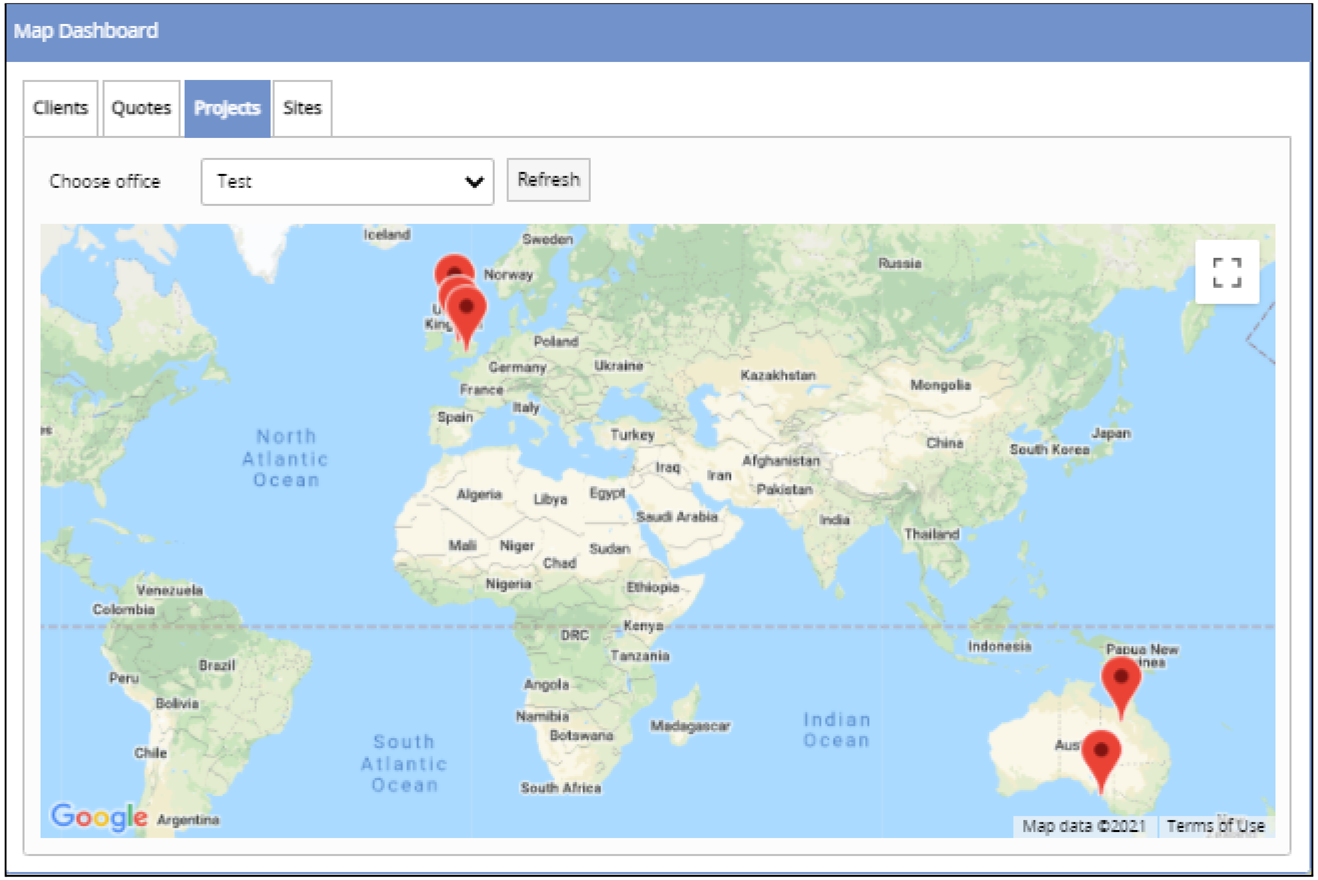
25. If you use the built-in transfer system to share project data from one Alpha Tracker to another, then you can now better control where PDF files are copied from. This is especially useful if you use subfolders to store files of different types. For example, if you file your final reports in a separate subfolder, then you can now instruct the transfer process to look in that subfolder for PDFs to include in the transfer, as well as looking in the main folder.

    The setting is “PDF Subfolders for Transfers”. Specify the additional subfolders to include as a comma-separated list. The transfer process will continue to copy PDFs from the main folder. This setting works with the blacklisted words in the usual way.

    The specified subfolders are recreated in the project on the receiving Alpha Tracker system. This prevents any potential problems with duplicate filenames.

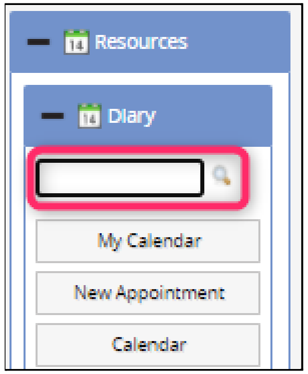
26. There is a change on the Home Page - the Client Map section is now the Map Dashboard. The Map Dashboard includes maps for your system’s Clients, Quotations, Projects and Sites. The maps for Quotations and Projects include a filter by Office so that you can, for example, easily map the sites related to

projects for just one of your offices.



27. There is now an easy way to create Refurbishment projects from the register, so that you are updating items in the register rather than adding to them - just like re-inspections. A button on the Client View Site Register lets you select the items to include, specify the handset to send the records to and create the project/add the records to a project. Two settings control this feature: “Default Refurbishment Project Type” and “Refurbishments from Client View Register” - yes/no. This development is for SM1 as a method already exists for SM2.

28. There is now a Quick Search box on the Resources>Diary menu. It can be used to search by project number, staff member and start date (dd/mm/yyyy). The resulting list of appointments is displayed in a similar format to the diary appointments via a project. Appointments can be deleted and edited.



29. To enable customised display of the Quotations screen, there is a new “Frames on quotations initially closed” setting. This setting lets you specify which of the frames on the Quotations screen should be closed by default when the screen opens. So if you would prefer, say, the Follow Up frame to be closed when the screen opens, simply add “Follow Up” to the comma-separated list for this setting.

Fixes/Minor Changes

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

- When creating a new record from the Document Templates screen, the Queue field is hidden if there is only one queue on the system.
- An issue with the duplication of invoice templates has been resolved.
- The "Show on Web" checkbox on an item’s details is no longer visible to any Client Portal users, unless the setting “Show on web checkbox visible to clients” is changed to “yes”.
- Client logos, where present, will now show in the menu on the Client Portal at all times.
- The **Edit/View** buttons are now displayed on the registers when impersonating a Client Portal user.
- A problem with the **Open in New Tab** button on the Site Asbestos Register has been fixed.
- Multiple survey records are now prevented from the project import function.
- The Change Log and calculations are now hidden on quotations if the setting to hide financials is switched on.
- A problem with the updating of project buildings and site buildings has been fixed.
- An issue with some scores being returned to the handset when using the Re-use Survey Data option has been fixed.
- The height and width of the Training Matrix now fill the available space better.

- "Lab Analysis Check" now shown in sample number order correctly, with sample numbers and ID numbers created in sequence.
- Lab users will find that fibre analysis records are now inserted in numerical order so that ID numbers are in sequence.
- Lab users will also notice that if they have renamed any of the Fibre Analysis field labels, that these labels are now used in the Audit Log. So if you have renamed the Microscope field, for example, the Audit Log will refer to your name for this field to make the Audit Log more understandable.
- The Microscope Re-check field is now also being logged in the Fibre Analysis audit.
- The **Load Fibre Analysis** button has been updated to ensure it acts in a way consistent with the standard automated process.
- Auto-generated sample numbers can now extend beyond 99.
- The "ZERO_RESULTS" message on the buildings screen when selecting from the dropdown list should no longer occur.
- "ATBuildingName" has been added to XMLs generated by project re-inspections.
- Only active staff are now displayed on the Calls/Tasks staff dropdowns.
- The project number is now shown in the window title when doing re-checks.
- Sample notes are now shown on the Client View Asbestos Register. They are displayed in the "italics" section of the Notes/Non ACMs. They are only displayed if the setting is set to "yes". Sample Notes were already shown on the Client Portal but as a column, but have been moved to the same section as on the Client View Asbestos Register.
- Improvements have been made to the geocoding of diary appointments so that they can be mapped.
- Room Based QR Codes now show the location number in the header.
- A problem with displaying “My Appointments” in Alpha Tracker Mobile has been fixed.
- The External Lab login, which allows external labs to enter the identification of samples themselves, now lists samples with an Approach Type of S rather than just an Approach of S.
- When doing a quotation from the Client details, the client’s telephone number now also pulls through onto Quotations.
- A problem with copying data to new removal/remediation projects has been fixed.
- The “Enquiry” Status is no longer displayed in the search fields on the Quotation List. Enquiries are only visible via the Enquiry List.
- There have been a few minor additions/changes to the Australian Air Monitoring, such as a new “Comments” field on Samples, settings for the “Timer No” field label, standardisation of presentation in dropdown boxes, a new label on “Volume” as “L” or “mL” depending on the setting “Flow Unit of Measurement” and additional fields on the Clearances screen.
- A problem with the premature display of the amber and red colours on Quotation follow-ups has been fixed.
- On Quotations, the Follow-ups screen now opens in the top left corner. Clicking the **Thumbs Up** or **Thumbs Down** buttons on this screen first saves, then wins or loses the quotation, and closes the window.
- Sample Notes on Quick Edit Survey Data is now a text area rather than a textbox. This means that it can easily be resized.
- The show/hide settings for Site Classification on the HazMat lists are now also effective on the Client Portal.
- The automated maintenance emails have been updated so that emails are now sent directly from Alpha Tracker rather than through Tracker Dashboard.

- The Material dropdowns on the New Survey Item screen now use their own SQL views.
- A fix has been applied to allow special characters (eg “&”) in filenames when downloading QR codes via the site.
- The Contact Address on Quotations should no longer try to auto-complete using the Browser’s auto-complete feature.
- An issue with the generation of re-inspections with large Survey IDs has been resolved.
- A display issue on the Quick View Survey Data screen has been fixed.
- Minor changes have been made to the Diary Import and further logging added.
- An addition to the Alpha Tracker app lets you select the survey type in the Alpha Tracker app when creating a new project. This creates the survey record when the project is saved.
- An adjustment has been made to the Client Portal "Items by Recommendation" chart to allow for long Recommendations.
- The create document pop-up is now closed automatically when the document is requested via quotes.
- The site quick search from the menu can now search using the Site ID.
- Quote quick search on the menu now includes Linked Quotation Numbers in the search.