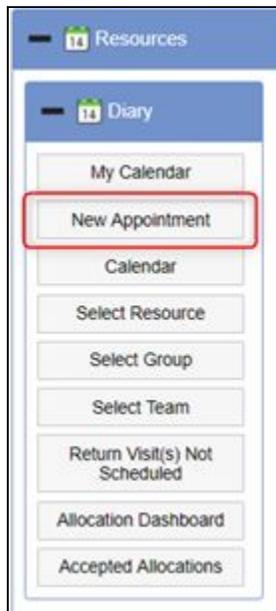


Release 32 - Alpha Tracker Release Notes

New Features / Changes (from SVN3956 to SVN4240)

1. The Calendar has had a number of improvements and additions. These include:
 - There is a New Appointment menu option available directly from the Resources>Diary menu. The New Appointment screen lets you quickly make an appointment without opening a Project or the Calendar.



- The new improved Add/Edit Event screen has a cleaner layout, improved speed and better mapping..

Add/Edit Event
✕

Appointment Details

Resource: Role: Team:

[Add other resource](#)

Project Number: Client: Duration:

Event Name/Description:

Start Time: End Time:

Override Appointment Value:

Notes:

Confirmed
 Cannot Move
 Tentative
 Write-up

Create write-up time appointment?

Location / Map

Event Location:



Routing:

Home Postcode: Office Postcode: Previous Appt:

- You can now make an appointment for more than one person at a time. Simply click the “Add other resource” link below the Resources field to open a window from which you can select other people. Hold down the Ctrl or the Shift key to select multiple people.

Add/Edit Event

Appointment Details

Resource: Dan Darkin ▼ Role: ▼ Team: ▼ Make a suggestion

Add other resource

Project Number: Client: Duration:

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

Add/Edit Event

Appointment Details

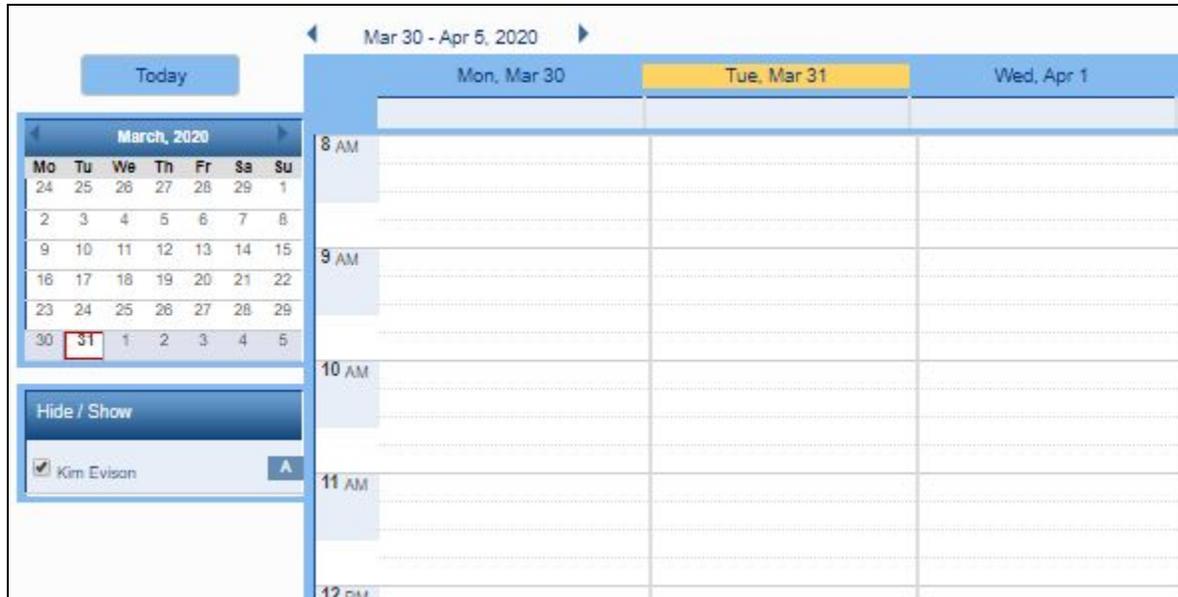
Resource: Kim Evison ▼ Role: ▼ Team: ▼ Make a suggestion

with Robin, Elaine, Dan, Ferry, Jack, Tom **Add other resource**

Project Number: B-07226 Client: Start Software Duration:

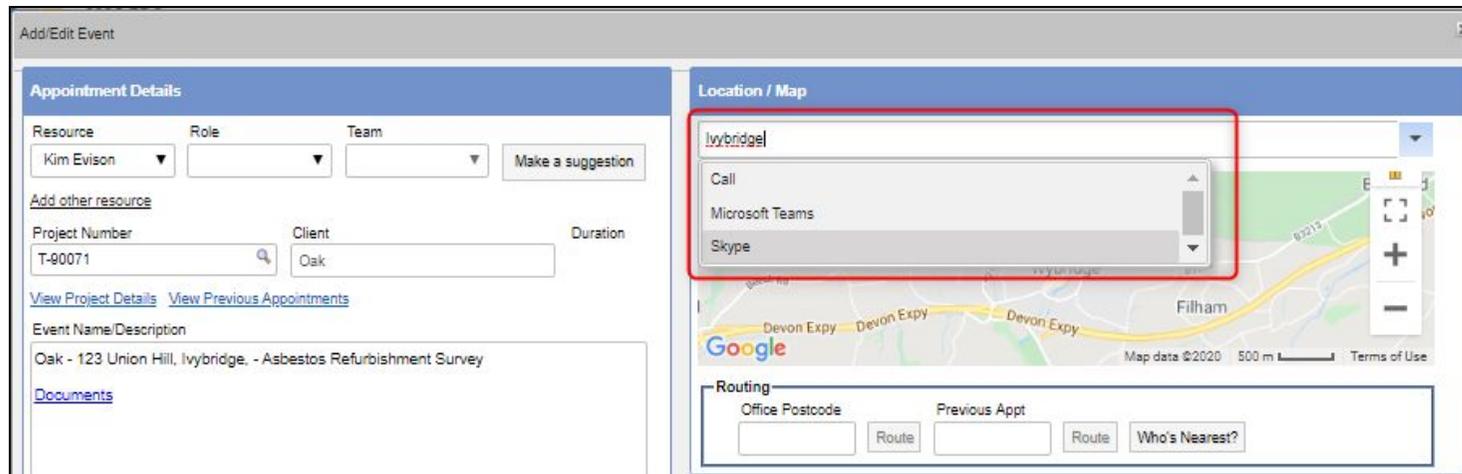
[View Project Details](#) [View Previous Appointments](#)

- There is a new “Today” button on the Calendar screen that quickly moves the display back to showing today.

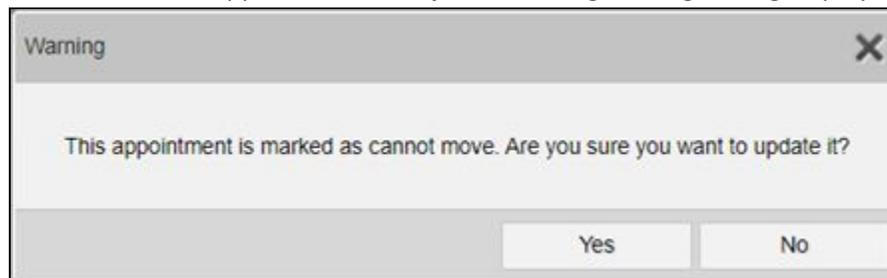


- De-selecting a person from the checkboxes on the left of the calendar is now “remembered” so that you can move between weeks or change the view entirely without having to reset your selections.

- New options are available on the Event Location dropdown when making an appointment. The Site of the selected project is displayed or you can select from the dropdown. The values on the dropdown are set by using Setup>General>Lookups and using the Category “Event Location”.



- If you want “Cannot Move” on your appointments to really mean “Cannot Move”, then set the “Enable the cannot move feature in the calendar” setting to “yes”. You will then be prevented from dragging and dropping a “Cannot Move” appointment. However, it will still be possible to change the details of the appointment with just a warning message being displayed.



- A new feature allows appointments to be split into individual appointments over multiple days if the start and end date are different. Tick the “Split into daily appointments?” checkbox if you want the appointments created to be made for working hours only between the start date/time and the end date/time. If the dates you have selected include a weekend, then a further “Include weekends?” checkbox is displayed which, if selected, allows appointments to be created for the weekend.

Start Time: 10/04/2020 11:00 [Calendar Icon] End Time: 14/04/2020 13:00 [Calendar Icon] Weekend Availability [Button]

Split into daily appts? Include weekends?

Override Appointment Value

- An audit trail has been added to the calendar. You can see the log on the Appointment screen - click the ... button to display the details of a change.

Location / Map: Ivybridge

Routing: Office Postcode [Input] Previous Appt [Input] [Route Button]

Change Log

31/03/2020 19:00	Dan	Calendar - Drag and Drop	[...]
31/03/2020 18:55	Dan	Calendar Edit - Add	

Appointment Aborted?

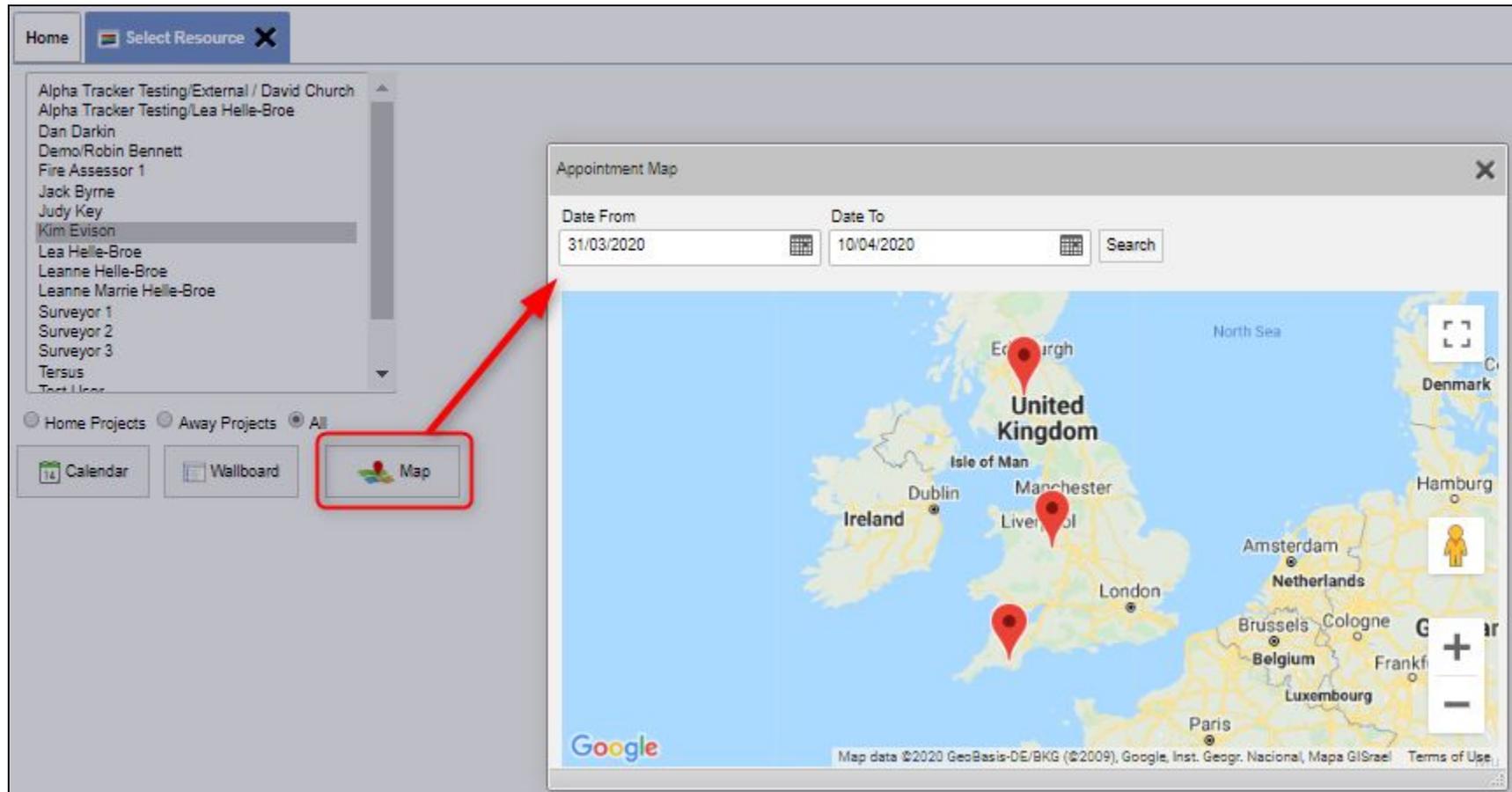
Audit Details (Modal):

Records: 2

What Changed	From	To
▶ Start Time	07/04/2020 12:00	07/04/2020 11:00
End Time	07/04/2020 17:00	07/04/2020 16:00

10 Records per page

- When creating repeat appointments, the Calendar now auto-refreshes to show the new appointments immediately.
- Changing the Start Date on an appointment to a later date updates the End Date as well so that you don't have to.
- A new map feature has been added under Select Resource, Select Group and Select Team which lets you map appointments between selected dates.



- A prompt is now displayed when adding non-working weekdays to the diary if the setting "Project Number for Non-Working Weekdays" is blank.
- If a non-working weekday is deleted, the diary appointment is removed as well.
- The appointment suggestion no longer includes aborted or write-up appointments, or blank records, in the nearby appointments suggestions.
- The "Route" buttons on the appointment screen have been enabled.
- A new setting "Google Map Routing Units" lets you change the "routing" units from Metric to Imperial (km/miles).
- Staff geocoding is now included in the Geocode Records screen so you can bulk geocode staff.

- "Who's nearest" now requires a search to be done first to ensure a radius is specified.
2. For users of the Staff Training module there is a new setting to show/hide the "Send all to Handset" button on the training module. The setting is "Show the Send to Handset Button on the Training Module". The default is to have the button shown.
 3. Users of the Fire Risk Assessment Type B screen can use a new setting to control the title of the window: "Fire Risk Assessment Type B - Window Title". There has also been a fix to the checkboxes.
 4. Two new settings allow you to control how the Approved By and Quality Control dropdowns work, allowing you to set whether users can only select their own name from these dropdowns. The settings are: "Only allow own name selection for quality control" and "Only allow own name selection for survey approval".
 5. If you are using the Alpha Tracker mobile app to manage the sign-off of reports by surveyors, then you will find that:
 - the Identification on the survey data displayed is now read-only
 - you can access the DRAFT report from a documents folder
 - only projects with a quality control date are displayed
 - it is possible to filter survey items by suspect and non-suspect
 - the report generation button has been removed
 - there have been minor fixes to "My Appointments"
 - appointments display a formatted date which includes the named day of the week.
 6. There has been a change to how the overwriting of the Material in survey data works. This feature controls what happens if the surveyor and analyst disagree on the Material of a sample. One of the options available is for the Material in the survey data to be overwritten by the analyst's assessment of the Material. The Fibre Analysis trigger has been changed so that survey items are now updated with the analyst assessment when the setting Overwrite Survey Item Material and Description with Lab Analyst Assessment = yes, Overwrite Survey Item Material and Description for NAD Items from Lab = no and the analysis is NAD. Previously the Material was only updated on positive items.
In a similar change, NAD items will now be updated with the analyst's assessment of the Material if the following setting combination is used:
 - Overwrite Survey Item Material and Description for NAD Items from Lab=yes
 - Overwrite Survey Item Material and Description with Lab Analyst Assessment=no
 - Material Code for items assessed as non asbestos by Lab=blank.
 7. The Lab Admin group can now see the "Resources" menu and the "Other Equipment" menu option, previously only "Lab" members could see these. Lab Admin can now see anything that the Lab group can see.

8. Emails are now sent when a Lab analyst reaches the points level indicated in the “Lab points limit #1 - level”, “Lab points limit #2 - level” and “Lab points limit #3 - level” settings, rather than just at level 3. This means that the person whose email address is specified in the “Send Lab Notifications” setting will receive emails telling them when an analyst has exceeded 40 points, 65 points or 70 points in a day without them having to check the analysts’ totals. They can then arrange for the necessary Over-40-Point checks to be carried out.
9. The setting that controls if documents from the quote folder should be moved/copied to the project folder now works with multi-site/multi-project quotations.
10. Further controls on the Client Portal allow you to show or hide the Site Responsible Person and to show or hide the date of re-inspection. You can also show the additional columns on the Client Portal site list. The settings are: “Client Portal - Show Site Responsible Person” which defaults to yes, and “Client Portal - Show Date of Re-inspection” which defaults to no.
11. There is now a full range of settings to control which menus are displayed. For example, if your company doesn’t use Alpha Tracker to log and produce your quotations then you can use one of the new settings to hide the Enquiries/Quotations menu. These are the menus that you can control in this way: Survey Quick Start, Problems, Call/Tasks, Sites, Lab, Contracts, Enquiries/Quotes, Resources, Suppliers, Finance and Reports.
12. If the “Return Visit(s) Not Scheduled” menu option is not a relevant option for you, it can now be hidden by using the setting "ShowReturnVisits".
13. Changes to the Fibre Analysis and Bulk Sample screens allow you to select whether to show the Bulk Sample ID on the Fibre Analysis screens and/or the Survey Item ID.
Three new settings control whether these are shown or hidden: "Show the bulk sample ID on Fibre Analysis", "Show the sample number on Fibre Analysis" and "Show the survey item ID on Fibre Analysis". By default the sample number is shown and the other two are hidden, which is the current functionality.
14. Images will now be hidden on the Fibre Analysis screen if the Project Category of the project is “Bulk Sample” as this type of project does not have photographs.

15. To help identify the numbers of Fibre Analysis records created, the date of creation is now stored. This enables the "Samples booked in today" on the Lab Dashboard to show the count of fibre analysis records created today rather than just the count of Bulk Samples.

The screenshot displays the Alpha Tracker Lab Dashboard. On the left is a navigation menu with options: Search Menu, Calls/Tasks, Enquiries/Quotes, Clients, Projects, Resources, Sites, Lab, and Contracts. The main dashboard area includes a 'Home' tab, a 'Financial Dashboard' section, and a 'Lab Dashboard' section. The 'Lab Dashboard' features a 'Choose office' dropdown set to 'All' and a 'Refresh' button. Below this, the 'Current Lab Activity' is shown with three large cards: 'Samples booked in today' (8), 'Samples analysed today' (5), and 'Number of Unanalysed Samples' (92). At the bottom, the 'Lab Check Dashboard' contains a table with columns: Date, Analysed By, Total Points, Checked By Analyst, Samples Over-limit, Samples Checked, and Marked. The table lists two records for 18/03/2020 and 19/03/2020, both analysed by Leanne Helle-Broe and Lea Helle-Broe respectively.

Date	Analysed By	Total Points	Checked By Analyst	Samples Over-limit	Samples Checked	Marked
18/03/2020	Leanne Helle-Broe	5	0	0	5	0
19/03/2020	Lea Helle-Broe	5	5	0	0	0

16. The Invoice List has new buttons to let you search quickly for "Printed" and "Not Printed" invoices. You can also search for a date range when searching on the date printed date.

The screenshot shows the Alpha Tracker Invoice List search interface. It includes a 'Home' tab and an 'Invoice List' tab. The search section has fields for 'Invoice No', 'Issuing Office', and 'Invoice Date' (with 'From' and 'To' sub-fields). Below the search fields is a 'Clear Search Criteria' link. The 'Records: 881' section shows a filter bar with buttons for 'Locked', 'Unlocked', 'Printed', 'Not Printed', and 'All'. The 'Printed' and 'Not Printed' buttons are highlighted with a red box. At the bottom, there are navigation icons and buttons for 'View Details', 'Email PDF', 'PDF Word', and a folder icon with the number '10'.

17. You are now able to search on Site ID from the Site lookup via the Project screen.

Project Details

Project Number: T-90680

Client: STARTSC Start Software [Send Mail](#)

Quotation Ref:

Client Order Number:

Client Order Ref:

Project Manager: Dan Darkin

Site Name/Ref: e-Innovation Center

Project Type:

Estimated Total Project Value:

ID	Site Name	Site Address	Site Postcode	Site Reference
<input type="button" value="Select"/> 69122	Queen's Court House			

Status: Records per page

Status Notes:

Milestones

- Project Opened
- Quote Produced
- Order Received
- Turnaround
- Report Produced

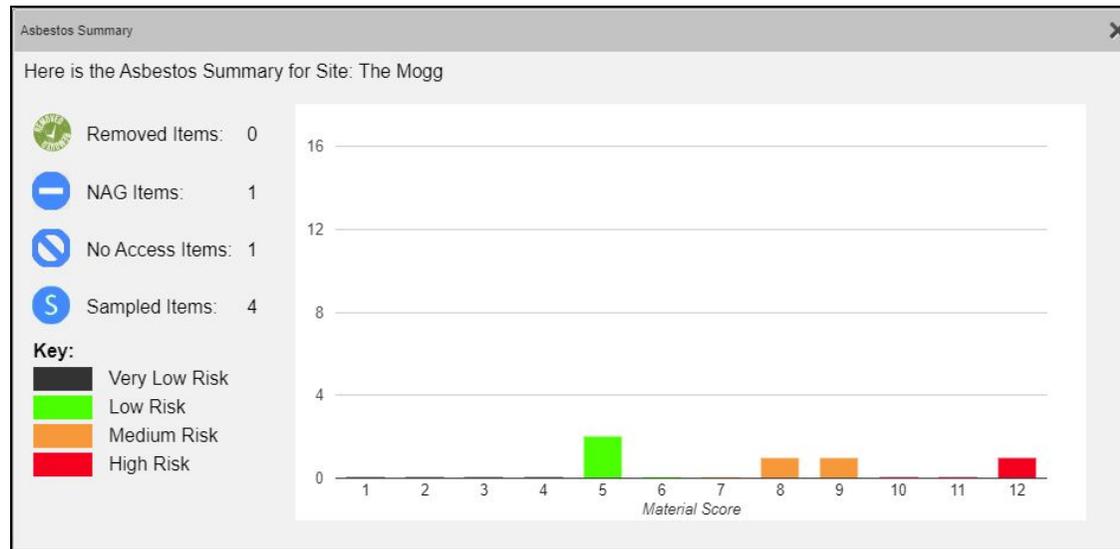
Financials/Plannin

18. New functionality has been added to help you find quotations related to projects. You can type a Project Number into the search field at the top of the Enquiries/Quotes menu, click the magnifying glass and the system will return the linked quotation.

The screenshot shows the Alpha Tracker software interface. On the left, there is a sidebar menu with options like 'Search Menu', 'Calls/Tasks', and 'Enquiries/Quotes'. The 'Enquiries/Quotes' section is active, and a search field contains the text 'T-90669'. The main area displays a search form with fields for Reference, Client ID, Client Name, Status, Produced By, Site Name, Type, and Sub Type. Below the search form, there is a table of search results. The table has columns for Reference, Type, Sub Type, Client, Site Name, Date Produced, Produced By, Status, Value, Likelihood(%), Notes, Contact, Tel #, Email, and Source. One record is shown for 'Asbestos Management Survey' with a value of \$300.00. The total value for the results is \$300.00.

Reference	Type	Sub Type	Client	Site Name	Date Produced	Produced By	Status	Value	Likelihood(%)	Notes	Contact	Tel #	Email	Source
TQ20-0015	Asbestos Management Survey		REGUS Regus Adelaide	DULWICH	19/03/2020	Leanne Helle-Broe	Won	\$300.00	100	testing	Leanne Helle-Broe	1300 946 310	leanne.hellebroe@alpha-tracker.com.au	
								Total	\$300.00					

19. If you are sending automated emails/SMS messages from Alpha Tracker, then you might want to use the new settings that allow you to exclude particular Client IDs and particular Project/Quote office letters. “Excluded Client IDs from automated SMS messages” and “Excluded office letters from automated SMS messages”.
20. When sending automated client emails from quotations, Alpha Tracker uses the email on the quotation as the main email address rather than the client’s. If there is no email on the quotation then it uses the client email. Similarly, the automated diary emails use the Report Recipient email (from the Project) rather than the client’s email address. If there is no Report Recipient email then it uses the client email.
21. You can now specify the colours that you would like to use on the Asbestos Summary in the Client Portal, rather than accepting the default colours. Four new settings control the colours. The key on the Asbestos Summary has been changed so that it also references the settings and displays coloured blocks rather than words.



The four settings are: “Asbestos Summary High Risk Colour”, “Asbestos Summary Low Risk Colour”, “Asbestos Summary Medium Risk Colour” and “Asbestos Summary Very Low Risk Colour”

You must specify the hexcode that you want to use, eg #FF9933.

There have also been some minor improvements to the display of the Asbestos Summary and the selection of items for inclusion using Show On Web and the Update button on the Site Register.

22. It is now possible to specify the subfolder that a generated report or document should be stored in. New fields have been added to the Report Formats and Document Templates screens allowing you to specify the subfolder where the document should be saved. If a Document Template is used and it uses a Report Format, the folder specified on the Report Format is used.
23. It is now possible for 000 sessions to be sent to handsets with re-inspection data. The front page photo can then be updated if required and new data can be added if you have questions to answer on your 000 sessions. A setting controls whether 000 sessions are included with re-inspection XMLs: “Reinspection includes location 000”. The default is no. This also works in conjunction with the “SendBackAllData_reinspection” setting.
24. To allow the above, Extra Info records have been stopped from copying to the new project number in certain circumstances when a project is duplicated or a re-inspection project created. They will continue to be copied to the new project only if they are part of the Extra Info templates for the Project Type. Extra Info records that are created when a Location 000 session is sent in are not copied. This therefore allows new information to be sent in from a Location 000 session.

25. HazMat users can now import data and generate re-inspection XMLs for SMF, PCB, Lead Paint and ODS records. If the HazMat licence key is present, these screens can be accessed via Setup>Import/Export.
26. If you have your own lab, you will notice that the Turnaround on the Lab Project List is now coloured coded. The colour coding is determined by the Turnaround screen (Setup>General>Turnaround) and so matches the colour coding on the Projects Dashboard.

Home		Lab Project List X	Turnaround X										
Click here to search...													
Records: 14													
Fully Analysed		Partially Analysed		Not Analysed		Samples Only		All					
Project Number	Client ID	Name	Site Name	Type	Project Opened	Due Date	Turnaround	Lab Days to Deadline	Project Closed	# Survey Samples	# Bulk Samples	# Fibre Analysis Records	
View Fibre Analysis	T-90655	REGUS	Regus Adelaide	DULWICH	Asbestos Management Survey	10/03/2020				1	0	0	
View Fibre Analysis	T-90654	REGUS	Regus Adelaide	DULWICH	Asbestos Management Survey	10/03/2020	2 days	-		1	0	1	
View Fibre Analysis	T-90656	REGUS	Regus Adelaide	CBD OFFICE	Bulk Sample	10/03/2020	2 days	-		4	4	4	
View Fibre Analysis	E-00001	REGUS	Regus Adelaide	DAN TESTING SITE	Bulk Sample	11/03/2020	10 days			0	0	0	
View Fibre Analysis	T-90660	STARTSOFTWARE	Start Software	Test Site Reinspection 1103	Asbestos Management Survey	11/03/2020	10 days			2	0	2	
View Fibre Analysis	D-90006	REGUS	Regus Adelaide	DULWICH	Bulk Sample	19/03/2020	10 days			0	2	0	

27. Two new imports are available: Bulk Sample Import and Clients Import. They both use the same method as other import screens and can be found on the Setup menu, under Import/Export..

The **Bulk Sample Import** allows you to import a list of samples received by your Lab using a spreadsheet. Follow the three steps on the screen to (1) download the template spreadsheet, fill in the spreadsheet then (2) upload it. Once it is uploaded, you can review the data on screen and then (3) process it to create the required records. You could streamline this process by downloading the template spreadsheet and sending that to any of your clients who want to send you bulk sample details by spreadsheet - it will then be in the right format to upload to the system.

Please note that to avoid confusion with this new import, the previous option that was named "Sample Import" has been renamed to "Sample Results Import".

Home Bulk Sample Import X

1. Template 2. Import 3. Process

Project Number	Sample Number	Additional Client Ref	Location	Item Description	Material	Drawing Reference	Building	Floor	Extent	Condition	Observation	Lab Ref	Delete
No records in query													
*													
*													
*													
*													
*													
*													
*													
*													
*													
*													

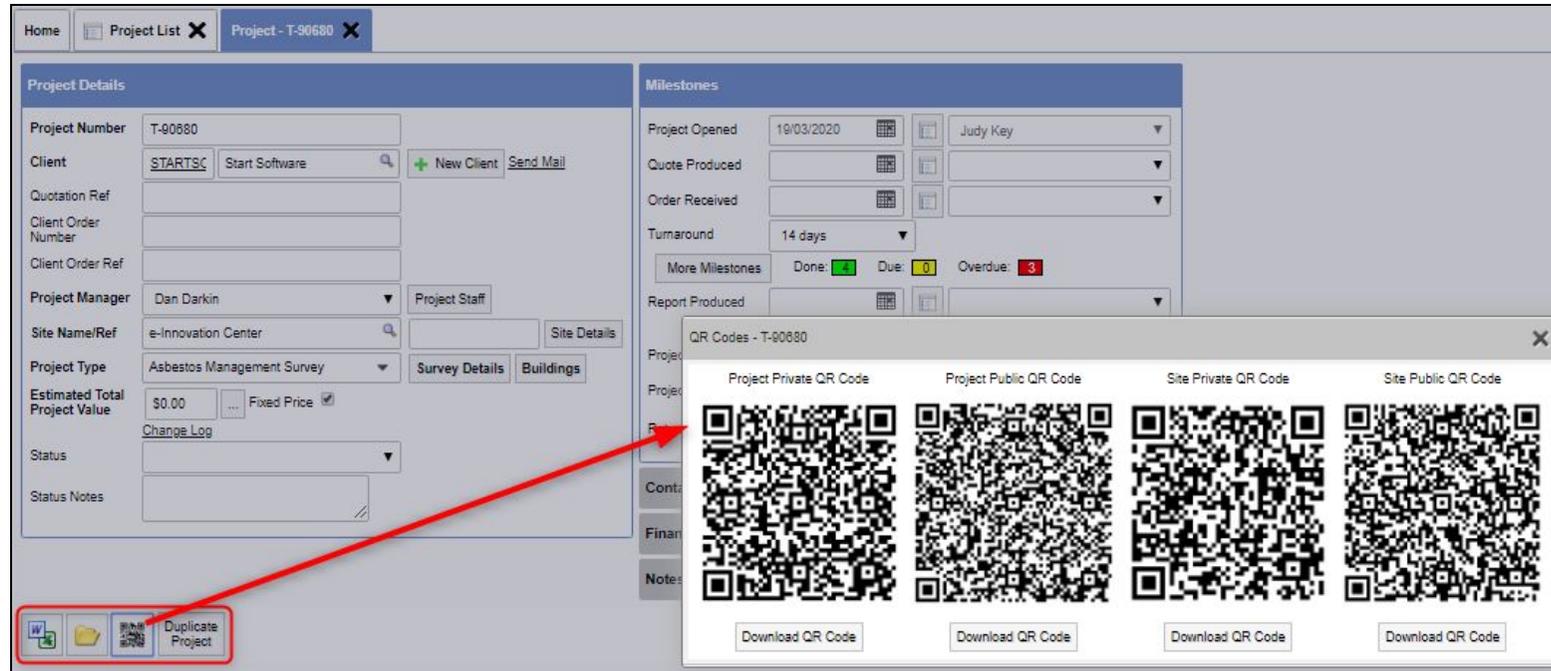
The Clients Import lets you import a spreadsheet of new client details. It also allows the specification of up to three additional contacts per client for the Client Address Book, with contact name, telephone and email address. As usual, follow the three steps on the screen to (1) download the template spreadsheet, fill in the spreadsheet then (2) upload it. Once it is uploaded, you can review the data on screen and then (3) process it to create the required records.

Home Clients Import X

1. Template 2. Import 3. Process

Client ID	Client Name	Address 1	Address 2	Address 3	Address 4	Postcode	Contact	Role	Telephone	Fax	Email Address	Direct Dial
No records in query												
*												
*												
*												
*												
*												
*												
*												
*												
*												
*												

28. There is a new button on the Projects screen that gives you quick access to the project QR codes. The QR code button sits with the Produce Document, Document Folder and Duplicate Project buttons which have all been moved slightly to the bottom of the screen.



When the QR code button is used, it shows the public and private QR codes for both the project and the site, with a button to download each one.

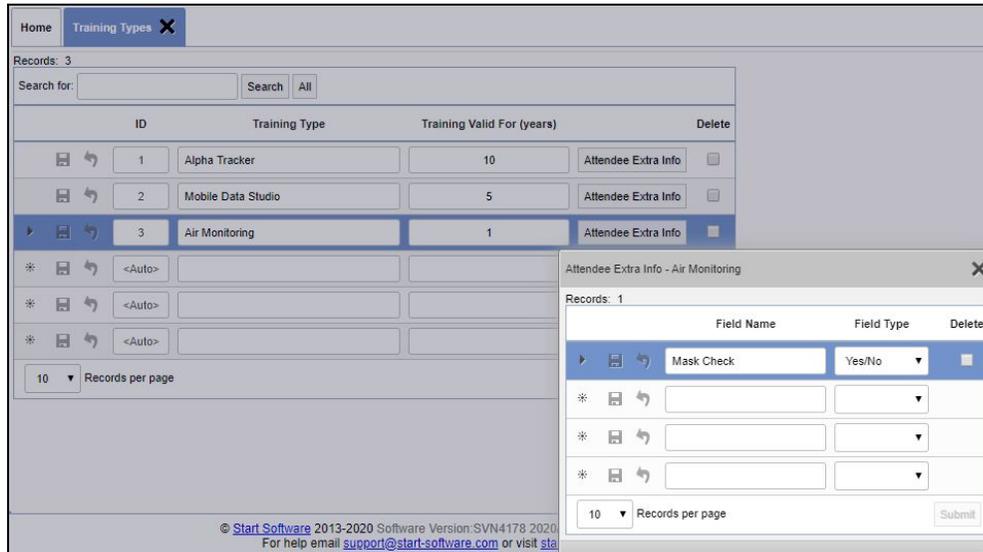
29. QR codes are also easily accessible from the Site Details screen. Either click the Site Details button on a Project screen, or search for a site on the Site List and show its details, then click the QR code button at the bottom of the screen:



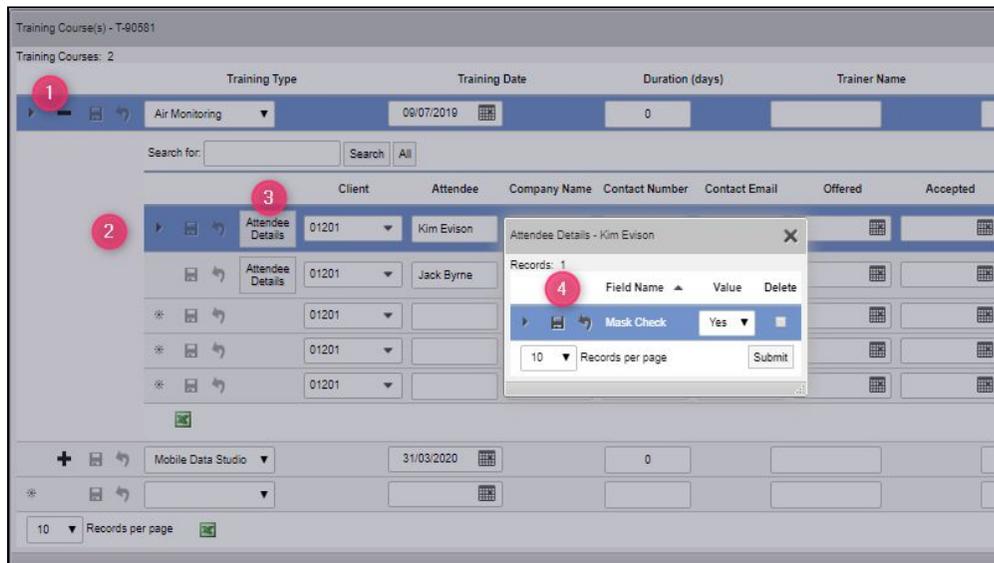
30. Audit trails are now available on re-inspection XMLs, for both project and site re-inspections. We now log each time XMLs are generated for re-inspections, recording who created the re-inspection and when, and also logging each XML that was generated.
31. When using the Reports menu options, you will now be able to mark individual reports as your favourites so that you can easily find the reports that you use most often. Simply click the star on your favourite reports to highlight them within the category.



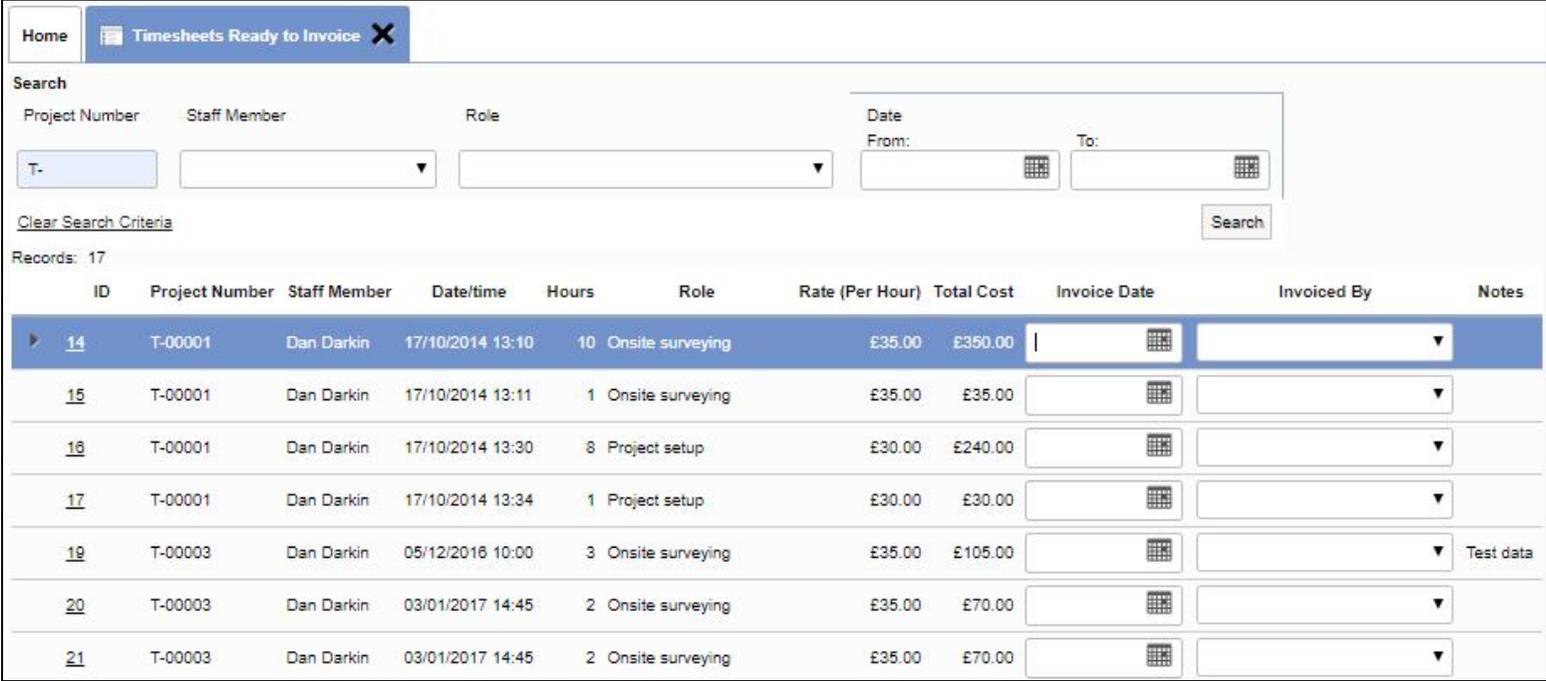
32. If you have a licence to use the Training module, you can now create your own custom fields for training courses that can be filled out for each attendee. For example, if you are giving Mask training then you might want to have a set of fields to be completed for each attendee such as "Mask Serial Number" and "Mask Fit Checked" etc. To create the list of extra fields you require, select Setup>General>Training Types and click the Attendee Extra Info button on the applicable Training Type:



Then, when you open a project with the Project Category of “Training” and click its Course Details button, you can record details of the course attendees as normal and also use the Attendee Details button to complete the relevant set of fields.



33. A new setting has been added to let you rename the Microscope field on the Fibre Analysis screen to a name of your choice. As this field lets you set a default per user and select multiple options it can be used in many ways. The setting is "Name: Microscope".
34. If you use an external system for invoicing and this is based on timesheets, then you might find a new setting useful; it is called "Timesheets can be marked as invoiced". This works alongside the "ShowTimeSheetFields" setting. When enabled, it shows an Invoice Date and Invoiced By field on the timesheets and also shows a "Timesheets Ready to Invoice" menu option under Resources>Timesheets. Mark timesheets as having been invoiced simply by entering the date and who by - double-click in the date field to insert today's date quickly and automatically.



The screenshot shows the Alpha Tracker interface with a navigation menu at the top containing 'Home' and 'Timesheets Ready to Invoice' (with a close button). Below the menu is a search section with fields for 'Project Number', 'Staff Member', 'Role', and 'Date' (with 'From' and 'To' sub-fields). A 'Search' button is located to the right of the search fields. Below the search section, it indicates 'Records: 17'. The main part of the screenshot is a table with the following columns: ID, Project Number, Staff Member, Date/time, Hours, Role, Rate (Per Hour), Total Cost, Invoice Date, Invoiced By, and Notes. The table contains 7 rows of data, with the first row (ID 14) highlighted in blue. The 'Invoice Date' and 'Invoiced By' columns contain calendar icons and dropdown menus, respectively.

ID	Project Number	Staff Member	Date/time	Hours	Role	Rate (Per Hour)	Total Cost	Invoice Date	Invoiced By	Notes
14	T-00001	Dan Darkin	17/10/2014 13:10	10	Onsite surveying	£35.00	£350.00			
15	T-00001	Dan Darkin	17/10/2014 13:11	1	Onsite surveying	£35.00	£35.00			
16	T-00001	Dan Darkin	17/10/2014 13:30	8	Project setup	£30.00	£240.00			
17	T-00001	Dan Darkin	17/10/2014 13:34	1	Project setup	£30.00	£30.00			
19	T-00003	Dan Darkin	05/12/2016 10:00	3	Onsite surveying	£35.00	£105.00			Test data
20	T-00003	Dan Darkin	03/01/2017 14:45	2	Onsite surveying	£35.00	£70.00			
21	T-00003	Dan Darkin	03/01/2017 14:45	2	Onsite surveying	£35.00	£70.00			

35. A new setting has been created called "Lookup Product Type Description from Alpha Tracker". The default is "yes". If this is set to "yes" then the Product Type Description on survey items is updated so that the description populates from the score.
36. You can now upload an icon to a Project Type to display on key services.

37. When creating a re-inspection, you can now select the project letter that you want to use.

The screenshot shows the 'Survey Details' window with the '2 - Survey Complete' tab active. A 'Summary & Cover Sheet' is visible. Below it, a 'Choose Task' section lists various options, with 'Create Re-Inspection Project' selected. A 'Re-Use / Re-Inspection Details' dialog box is open, containing the following fields:

- Unit ID:** Jack Byrne (JackByrneS8) (dropdown menu)
- Project Letter:** T (dropdown menu, highlighted with a red box)
- Pending?:**

A red text prompt above the Unit ID field reads: "Please select the unit id the re-inspection records should be sent to."

38. Air Monitoring clients in Australia will now see the Generate Report buttons available to all users.

39. Users of the Australian Air Monitoring module have a new setting to control the wording on the field label for NATA Laboratory: "Name: NATA Laboratory".

Other field changes include the separation of the Contractor Name and Address into two separate fields, and the following fields becoming text areas of maximum length: Description of Work, Work Location, Air Monitoring Results Comments.

Other changes include:

- selecting the Microscope from the Air Monitoring and Clearances table will fill out Factor, Exp Filter Diameter and Graticule Diameter
- a new sample will auto-set the 'Fields' value to 100
- the min10 or exact number rule will affect the summary of fibre counts, not each fibre count
- the NATA lab label issue on the Clearances tab has been fixed
- there is a new setting 'Flow unit of measurement' which defaults to 'L'. The average flow calculation will be divided by 1000 if the setting value is 'L'
- the flow unit of measurement has been added into Initial Flow, Final Flow and Average Flow labels.

40. A range of new settings has been created to control the naming of the document files produced in Tracker Air. For example, you could specify that the Air Monitoring certificates you generate contain the certificate number and the site name by setting “Air Report Name Template - Air Monitoring” to “<CertificateNumber> - <Site Name>”. Or perhaps your Reoccupation certificates are to be named with the app name and certificate number: “Air Report Name Template - Reoccupation” set to “Reoccupation - <CertificateNumber>”.
41. Site Classification and Survey Classification fields have been added to sites and survey items in the Client Portal registers. A setting determines whether the Classification field is displayed, and another allows you to change its name - for example, the Site Classification could be renamed to “Business Unit” if appropriate and Survey Classification to “Area”.

Setting	Date Created		Value	Help
Survey Item - Show Classification 1	09/03/2020		yes	(yes/no)
Site - Show Classification 1	09/03/2020		yes	(yes/no)
Name: Survey Item Classification 1	09/03/2020		Area	
Name: Site Classification 1	09/03/2020		Business Unit	

There is also a setup screen, under Setup>General, to create the list of values for the Site Classification (note that the name of the menu option will change according to the value of the setting).

Your clients can search the registers by these fields:

Home Site Register for The Firs [68123] X

Search (click here to hide)

ID Site Name Business Unit Area Building Name Floor

Clear Search Criteria Search

Records: 1

Search for: Search All

Asbestos Register Non Asbestos Register Removed Samples (Positive) All Samples Presumed No Access Areas No Access Items Limited Acc

Private QR Photo Close-Up ID Site Business Unit Area Building Floor Location No Acces

Remediation Details 55741 The Firs The Firs 0 001 Kitchen

10 Records per page Print/PDF

42. The previously-named menu option "Analytical Equipment" has been renamed and moved. This screen is for setting the default equipment sets assigned to analysts who carry out analytical/air monitoring projects. It was under Resources>Equipment>Analytical Equipment but is now found under Resources>Equipment>Equipment Defaults>Default Analytical Equipment. This change has been made because there is a new menu option for the maintenance of analytical/air monitoring equipment which can be found alongside the similar equipment maintenance options under Resources>Equipment>Analytical Equipment.

The screenshot displays the ALPHATRACKER software interface. The left sidebar contains a navigation menu with the following items: Resources, Diary, Staff/Training, Timesheets, Exposure Records, and Equipment. Under the Equipment category, the 'Analytical Equipment' option is highlighted with a red rectangle. The main content area shows a search form with fields for Equipment Type, Reference Number, Serial Number, Description, Check Date (From/To), Expiry Date (From/To), and Assigned To. Below the search form is a table with the following columns: Equipment Type, Reference Number, Serial Number, Description, Check Date, Expiry Date, Assigned To, and Comments. The table contains one row of data: Handset, 123456, 789000, Samsung Galaxy, 23/03/2020, 23/03/2021, Judy Key, and an empty Comments field.

43. When an item is marked as removed on a register, you can see a round, green tick symbol. This tick now also prints out on the PDF register prints available from the Client Portal.

Site Register Print - The Oaks

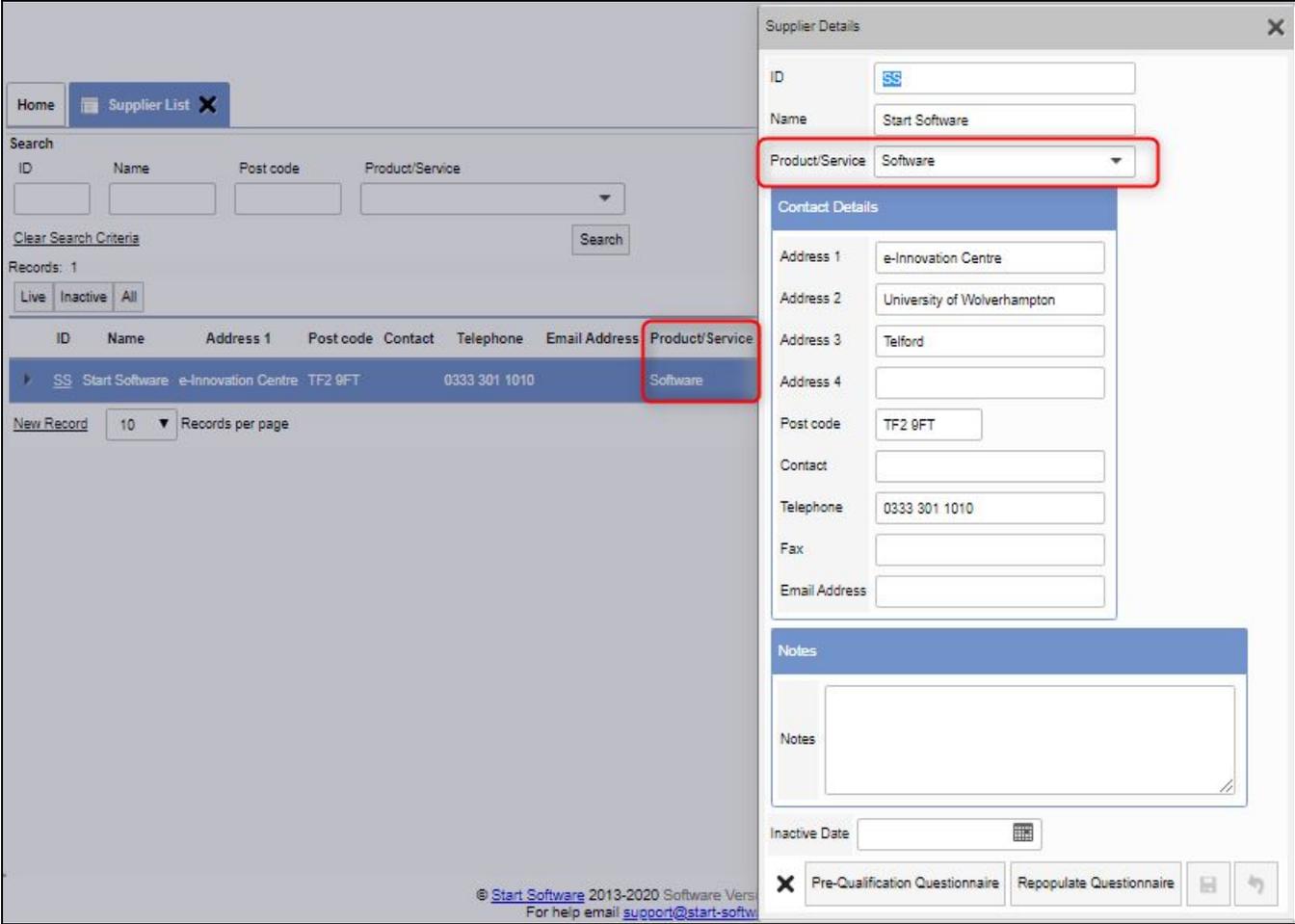
Portal_Site_Register (2758/1) 1 / 1

Register Print The Oaks

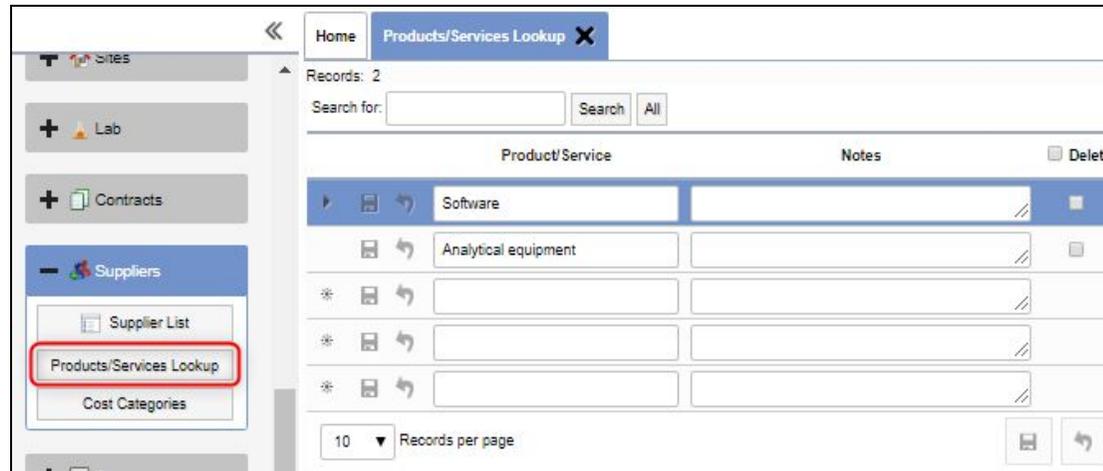
Building	Floor	Location	Item	Material	Ref	No.
The Oaks	0	001 Hall	Ceiling	Textured Coating	T-90008	S 001
 The Oaks	0	002 Kitchen	Sink pad	Bituminous Product	T-90008	S 002

Sink pad: Bituminous Product

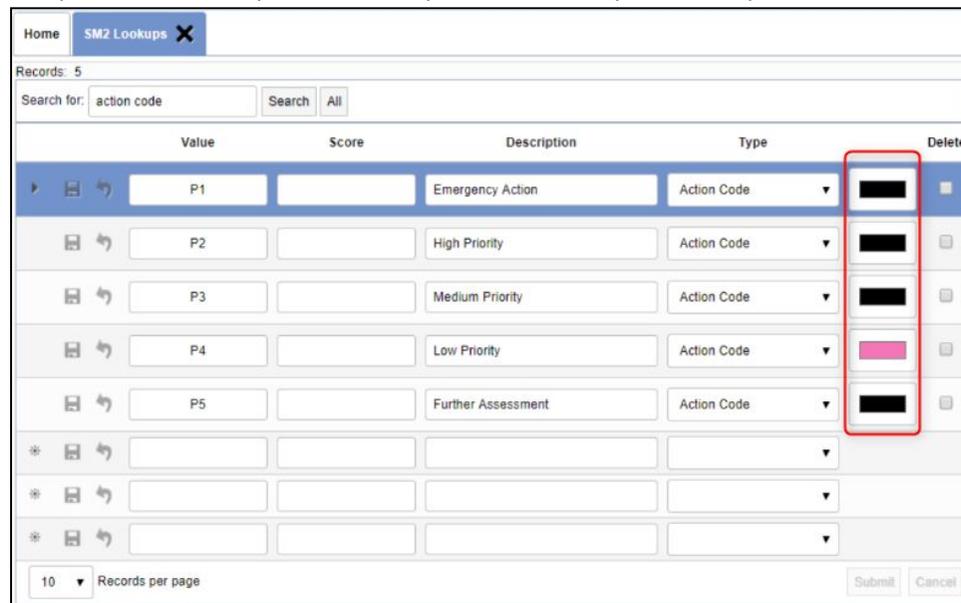
44. A new feature on the Suppliers screen lets you specify the product or service that a supplier provides.



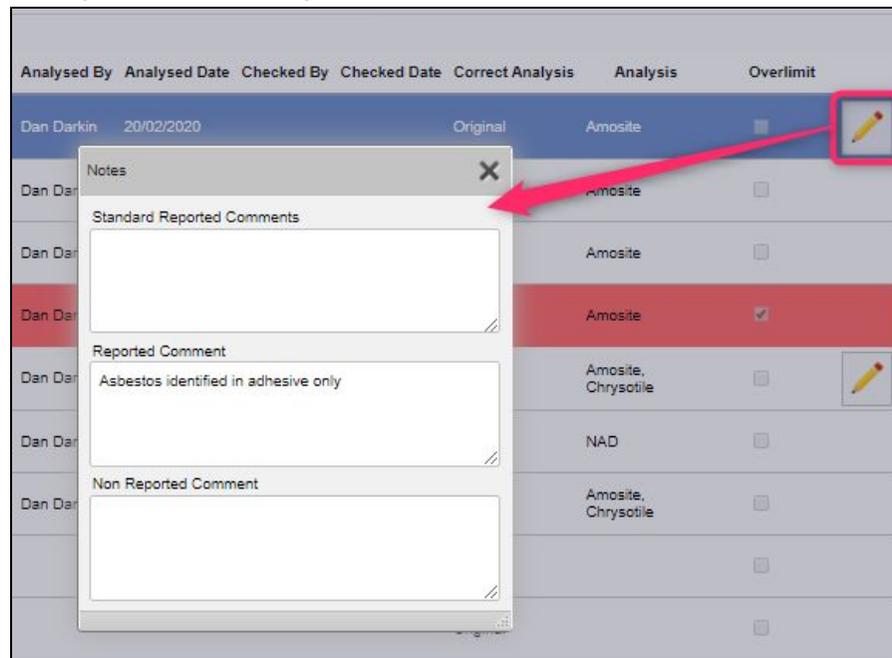
You can set the possible values for the Products/Services dropdown by using the Suppliers>Products/Services Lookup menu option.



45. Users of Scoring Method 2 (SM2) can now offer the Client Portal to view registers. Items on the registers can be colour-coded by Action Code by using Setup>Lab and Surveys>SM2 Lookups. The colour option is only available on items with the Type of “Action Code”.



46. SM2 users can also now generate Repair Instructions based on a Survey Item ID. There are new screens to list and to edit Repair Instructions. Settings control whether the Repair Instructions option appears on the menu, and whether Repair Instructions are automatically created when Survey Items are added with an Action Code of P1 or P2. This feature requires a licence key.
47. A new setting lets you show/hide the Sample Notes on registers on the Client Portal. The default is hidden. The setting is “Should the sample notes be shown on the client portal”.
48. You can now have unique invoice numbers per office, rather than unique numbers across all invoices. This is controlled by a setting. If the setting is enabled then invoice PDFs are stored in a sub-folder within the invoice folder - the sub-folder is the office letter.
49. You are now able to rename the Date Sent field on Quotations by using the new setting “Name: Quotation Date Sent”.
50. There is a new “notes indicator” available on the Fibre Analysis Records screen. This is controlled by a setting which is disabled by default. If enabled, then a new pencil icon is displayed if the record has a Reported Comment or Non-reported Comment. When you click the pencil icon, you can see the details of the Reported and Non-reported Comments.



51. When creating re-inspections from a project, you will now find that the new re-inspection project will use the Project Manager from the original project, if one is present. If there is no Project Manager, then the name specified in the "Default Asbestos Project Manager" setting will be used. If both values are blank, then the new re-inspection project will have no Project Manager set.
When creating re-inspections from a site register, the name specified in the "Default Asbestos Project Manager" repository setting will always be used. If this is blank, then no Project Manager will be set.
52. Users of the Type B Risk Assessment app will now be able to record an additional signature on a risk assessment. In the Alpha Tracker screen that displays the captured risk assessment details, the name of the person signing, their signature and the filename of the signature are displayed.
53. The Assigned To field has been added to New Quotations so that you can assign a quotation to a member of your staff as part of the creation process. This is useful if you are using the Calls/Tasks area of Alpha Tracker.

The screenshot shows the 'New Quotation' form in Alpha Tracker. The form is titled 'Contact' and includes the following fields and controls:

- Reference:** TQ20-0003
- Status:** Radio buttons for Enquiry, Open (selected), Won, and Lost. Below are links for Enquiry and Quote.
- Client:** Text input with 'START' and 'Start Software' suggestions, a search icon, and a 'New Client' button.
- Produced By:** Dropdown menu with 'Dan Darkin' selected.
- Assigned To:** Dropdown menu, highlighted with a red box.
- Date Enquiry Received:** 21-04-2020
- Date Produced:** 21-04-2020
- Date Sent:** (empty)

Additional controls include 'Import from CRM', 'Other Info', and 'Scoping' buttons, and icons for folder, Word document, and PDF document.

Fixes/Minor Changes

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

- A fix has been applied to the "Asbestos Summary" displayed from the Site List & Compliance Summary on the Client Portal so that the data refreshes when the site is changed.
- QR codes now use the "IsLatest" flag to show the "latest" survey item in the same way that registers do. And the Item History shows the text "There is no history for this item" when there are no history records.
- The "Loading" message now disappears cleanly from the screen when clicking on the QR codes on the client portal register.
- A change to invoice type D prevents the invoice recipient name cutting off after 50 characters.
- The Download button on the Training Matrix now reflects the filters selected and downloads the records displayed on the screen.
- The Training Matrix can now display dates for Training Types where they contain an ampersand in the name.
- A bug has been fixed in the survey options code when creating re-inspection projects.
- The contact email on Calls/Tasks now accepts 250 characters.
- The "diary being edited" prompt now works on new appointments.
- The Building Name field on the Building screen now matches the table and allows 250 characters.
- A problem with Fibre Analysis not opening from the "Choose Task" menu has been fixed.
- Problems with the generation of certificates from the Survey Details screen and the Bulk Samples screen have been fixed.
- A problem with saving Fibre Analysis records when the "Analysed By" field is blank has been fixed.
- An issue with blank options not being available on Fibre Analysis dropdowns has been fixed.
- There have been some minor changes to the Survey Items screen, including: the green tick for NAD items is slightly smaller, the validation message displayed if the building field is blank is friendlier, and the location number validation message now appears on the location field itself rather than at the top of the screen.
- Non-standard approaches now work when generating re-inspections for projects and sites.
- Site re-inspections now also work with SM2 items.
- It is no longer possible to close the Enquiry/Quote screen if you have not saved the data on the screen - the X has been removed from the top right-hand corner until the data is saved.
- There has been a small change to the way the SM2 Action Code is being calculated.
- Inactive projects types now no longer show on the Project Type dropdown when creating a new project.
- An issue with the "Import Other Info" button not working has been fixed.
- Some fixes have been applied to the "Results" tab on the Bulk Samples screen to correct styling, the storing of the Certificate Produced By and the display of samples.
- The Category field on the Extra Info table has been extended to 255 characters.
- A small change has been made to the Survey Items Import to allow for recommendations with the same name.
- Also, Ease of Access, Recommendation Comments, Condition Description and Surface Treatment Description have been added to Survey Items Import, Survey Items Export and Re-inspection Import screens.

- The Office filter on the Home screen Dashboard is restricted to the allowed office letters for the login. Selecting "All" also only shows the allowed office letters.
- A change has allowed the Training Matrix to work with large training types.
- A problem with training qualification checks when linked training types were deleted has been resolved.
- Issues with the display of logos on the Client Portal have been fixed.
- The "ChangeRecommended ActionOnNegative" setting has been updated to allow changes to the Identification from anywhere in the system.
- There have been a number of improvements to Diary Suggestions, including the order of suggestions, the exclusion of U projects, and scrollable lists of suggestions.
- Directions are now shown on the Appointment screen when the "Route" button is clicked.
- An issue with removing the Inactive Date on Client Details has been resolved.
- Double clicking the Draft or Final report buttons no longer causes problems.
- There have been minor changes to the Enquiries/Quotations screen to hide the extra Quotation Status field, standardise the style of the Calculations frame and prevent the Details frame from displaying unnecessarily.
- For SM2 users, the ReasonNotAccessed field has been added to the Survey Data screen.
- Also for SM2 users, changes have been made so that when the Identification changes on SM2 items, the Approach and Action Codes are updated accordingly.
- The Staff Training Matrix download now reflects the on-screen data and the Excel file generates with the same styling as displayed on screen..
- The Invoice screen has been resized.
- Extra Info records have been stopped from copying to the new project number in certain circumstances when a project is duplicated or a re-inspection project created. They will continue to be copied to the new project only if they are part of the Extra Info templates for the Project Type. This prevents Extra Info records that are created when a Location 000 session is sent in from being copied, and therefore allows new information to be sent in from a Location 000 session.
- The excess settings created for whether a user is able to create or update items on the Client Portal have been stopped. The redundant settings will be removed.
- A fix has been applied to ensure appointments for today or the future are updated within Google/Exchange if the Project or Site details change. An update has also been applied to the triggers for appointments.
- Users without permissions to the Enquiries/Quotations menu can no longer open quotations via the Project screen.
- The Quote, Project and Other Info buttons on the Site Details screen have been tidied.
- A recurring error message on Trace Analysis has been resolved.
- Two settings have been renamed: the setting "shouldConditionDescriptionPullThroughFromTrackerMobile" is now "Lookup Condition Description from Alpha Tracker"; the setting "shouldSurfaceTreatmentDescriptionPullThroughFromTrackerMobile" is now "Lookup Surface Treatment Description from Alpha Tracker".
- Logs are now created for the Advanced Site Report on the Client Portal. These are visible via the Access Log and include information on the criteria selected when it was requested. In addition, the log of individual items on the register now shows the location information rather than just the item ID.

- When using the Excel button to download equipment details from any of the Equipment screens, you will now find that the Equipment Type Name is included rather than ID.
- A problem with opening PDF documents via the Client login on Alpha Tracker app has been resolved.
- A problem with filtering data when using the Query Writer has been fixed.
- An issue with the message box when importing Other Info has been fixed.
- An issue with the option to not save a document into the document folder when it has generated has been fixed.
- A fix has been applied to the extracted_via_API_datetime field to prevent it from resetting itself on the Sites table.
- A "saving.." message is displayed when you change the Status on a Quotation to prevent the Reason being entered before the record has saved.
- Write conflict and refresh issues when amending timesheets have been resolved.
- The "Accept Project" button on the Project List now only shows when the Sample Submission settings are on.
- When the Site is changed on a Project, the Site QR codes are now updated to reflect the new Site ID.
- A problem with filtering on the Site export to Excel has been fixed.
- A change has been made to how dynamic milestones calculate to allow for position numbers not following directly after each other, e.g. 10, 20, 30 rather than 1, 2, 3.
- A change has been made to the error handler when deleting project types.
- The Associated Cost Items Template under Project Types now displays the Cost Categories correctly.
- A minor change has been made to Fibre Analysis Tab 4 to ensure all field labels are renamed correctly.
- An issue with using the "Switch to client portal" link via the menu has been fixed.
- A fix has been applied to the Site dropdowns on the Client Portal to apply any site restrictions.
- An error on the Client Portal has been fixed so that the Asbestos Register displays even if the "showNonACMSRoomSummaryOnSiteRegister" setting is set to "no".
- Security groups have been added onto the "Update" button in the Site Asbestos Register to ensure only users with permissions can update items.