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# alpha<sup>i</sup> tracker

## TECHNICAL GUIDE

Version 1.8



# DOCUMENT CONTROL

## Document

Alpha Tracker Technical Guide
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## Current Version

Version	Date	Issued Pages	Reason For Issue
1.8	January 2024	All	Removal of Run SQL Maintenance

## Previous Versions

Version	Date	Issued Pages	Reason For Issue
1.7	August 2023	All	Logo. Staff. Setting up users. All screens plus minor updates
1.6	March 2022	All	Creating users, asbestos types, materials list, system settings – linked systems, importing data
1.5	June 2021	All	Query Writer. Downloading templates.
1.4	November 2017	All	Access Log, phone number, Active Directory
1.3	Dec 2016	All	Client import, Condition and Surface Treatment Surface Treatment. Project Import updated
1.2	June 2016	All	Updates including Setting Print Queues, client portal users, access given to groups, importing including third-party re-inspection data
1.1	November 2014	All	Document Template update, Sept and Oct Release updates

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1.0	August 2014	All	First issue
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# CONTENTS

<b>1.</b>	<b>INTRODUCTION .....</b>	<b>6</b>
1.1	Who this guide is for .....	6
<b>2.</b>	<b>MAINTAINING ALPHA TRACKER USERS .....</b>	<b>7</b>
2.1	Maintaining staff .....	7
2.2	Setting up users .....	9
2.2.1	Using Active Directory .....	11
2.3	Defining the access available to a group .....	12
2.4	Setting up access for an external lab .....	14
2.5	Setting up access to the Client Portal .....	15
2.6	Monitoring client access to the Client Portal .....	18
<b>3.</b>	<b>LAB AND SURVEY SETUP .....</b>	<b>19</b>
3.1	Lab settings .....	19
3.1.1	Maintaining asbestos types .....	19
3.1.2	Maintaining the materials list .....	20
3.1.3	Maintaining lab lookup data .....	21
3.1.4	Setting lab backfill entries .....	22
3.1.5	Setting validation for fibre analysis .....	22
3.2	Survey settings .....	23
3.2.1	Maintaining approaches .....	23
3.2.2	Maintaining survey types .....	24
3.2.3	Maintaining priority assessment scores .....	25
3.2.4	Maintaining building age .....	25
3.2.5	Maintaining property type .....	26
3.2.6	Maintaining recommendations .....	26
3.2.7	Maintaining standard comments .....	27
3.2.8	Maintaining condition descriptions .....	28
3.2.9	Maintaining surface treatment descriptions .....	28
<b>4.</b>	<b>SYNCHRONISING CALENDARS .....</b>	<b>30</b>
4.1	Introduction .....	30
4.2	Setting the structure of your calendars .....	30
4.3	Linking the Calendars to Alpha Tracker .....	33
<b>5.</b>	<b>DOCUMENT PRODUCTION .....</b>	<b>35</b>
5.1	Document Templates .....	35
5.2	Report Formats .....	37
5.3	Register Formats .....	38
5.4	Sample Page Formats .....	39
5.5	Document Requests .....	39

5.6	Setting print queues .....	40
<b>6.</b>	<b>SYSTEM SETTINGS .....</b>	<b>41</b>
6.1	Access Log .....	41
6.2	App Server Diagnostic .....	42
6.3	Globals.....	42
6.4	Linked Systems .....	42
6.5	Next Number Lookup .....	43
6.6	QR Code Log .....	43
6.7	Software Updates.....	44
6.8	System Repository.....	45
6.9	Table Records .....	46
<b>7.</b>	<b>IMPORT/EXPORT OPTIONS .....</b>	<b>47</b>
7.1	Importing.....	47
7.2	Managing your reports.....	49
7.3	Importing third-party re-inspection data .....	50
<b>8.</b>	<b>DASHBOARD EMAIL OPTIONS .....</b>	<b>53</b>
8.1	Displaying alert emails.....	53
8.2	Viewing dashboard emails .....	54
<b>9.</b>	<b>QUERYING DATA .....</b>	<b>55</b>
9.1	Setting up the tables for Query Writer.....	55
9.2	Writing a new query .....	55
9.3	Running an existing query .....	57

# 1. INTRODUCTION

## 1.1 Who this guide is for

This guide is aimed at technical staff who require information on how to manipulate the settings and control the use of Alpha Tracker. It describes how the setup features of Alpha Tracker work and how you can use them.



*If you have any doubt on how to change settings or perform any actions in Alpha Tracker, please contact Start Software on 0333 301 1010 for help.*

Access to many of the features described in this guide is restricted to Superusers, that is users who have been placed in the Superuser group to give them permissions allowing wide-ranging access to Alpha Tracker's features and settings.

## 2. MAINTAINING ALPHA TRACKER USERS

There are two stages to setting up a user so that they are able to open Alpha Tracker and access data:

- creating a staff record
- setting up the user details and assigning the user to a group/defining a user's access permissions.

Two special cases are also detailed in this section, they allow specific and restricted access to Alpha Tracker:

- setting up external labs to enter fibre analysis results direct (not available with Active Directory logins)
- setting up clients to view the Client Portal.

### 2.1 Maintaining staff

You must set up staff details before you can record the involvement of members of staff in projects. Staff must also be recorded on the Staff screen before they can be assigned a user ID and access the system.

Select "Staff" from the General submenu on the Setup menu to open the Staff screen and complete the details.



*Tip: When a member of staff leaves, keep their details recorded on the system as this enables the regeneration of reports in which they appear. Simply mark them as inactive (Not Current) and remove their Group on the Staff screen. Prevent them from logging in by amending/removing their User and Group settings in Web Security.*

To maintain staff details:

1. Open the General submenu from the Setup menu and select "Staff" to display the Staff screen.

Staff ID	Photo	Name	Email Address	Mobile Number	Group	Sub-Group	Team	Office	Title	Can Project Manage	Name For Reports	Signature	Home	Password Visible
107		Brian Bennett	brian.bennett@dansoftware.com	0791 660371	Director		Telford		Telford	<input type="checkbox"/>	Brian Bennett			<input type="checkbox"/>
102		Iain Brown	iain.brown@dansoftware.com		Quality		Telford		Telford	<input type="checkbox"/>	Iain Brown			<input checked="" type="checkbox"/>
103		Iain Dargatzis	iain.dargatzis@dansoftware.com		Software		Telford Development		Telford	<input type="checkbox"/>	Iain Dargatzis			<input type="checkbox"/>
104		Ewan Foster	ewan.foster@dansoftware.com		Director					<input type="checkbox"/>	Ewan Foster			<input type="checkbox"/>
105		Ian Darnley	ian.darnley@dansoftware.com		Software		Integration		Telford Development	<input type="checkbox"/>	Ian Darnley			<input type="checkbox"/>
208		Tina Griffiths	tina.griffiths@dansoftware.com		Admin		Integration		Contractors	<input type="checkbox"/>	Tina Griffiths			<input type="checkbox"/>
212		Jack Byrne	jack.byrne@dansoftware.com		Software		Telford Development		Integration	<input type="checkbox"/>	Jack Byrne			<input type="checkbox"/>
213		Tom Hopton	tom.hopton@dansoftware.com		Software		Telford Development			<input type="checkbox"/>	Tom Hopton			<input type="checkbox"/>
214		Catherine Conroy	catherine.conroy@dansoftware.com		Project Management					<input type="checkbox"/>	Catherine Conroy			<input type="checkbox"/>

Scroll to the right to see all the fields on this screen. You can enter search criteria in the top of the screen to filter the list as required. There are also ready-made filter buttons to display current or former members of staff only.

2. To add a new member of staff, in a blank row marked with an asterisk, enter the full name and contact details of the member of staff in the **Name**, **Email Address** and **Mobile Number** fields. The **Staff ID** is automatically generated.
3. Make the member of staff active on Alpha Tracker by clicking the No button for **Inactive (Yes/No)**. If you ever want to remove the member of staff's from selection in drop-down lists, you can click the **Yes** button to make them inactive.
4. In the **Group** field set the group to which the member of staff belongs. If appropriate, you can also set a **Sub Group** and a **Team**.

The Group field determines which Calendar Group the person appears in.



*Note that if you mark a member of staff as "Inactive", then you must also remove their Group entry so that they no longer appear on the Calendar when that group is selected.*

5. Select the office to which the member of staff belongs in the **Office** field and their title for reports in the **Title** field.
6. Specify whether the member of staff is to appear in the drop-down list of Project Managers by clicking on the appropriate **Can Project Manage** radio button.
7. Type the staff member's name as it is to appear on reports in the **Name For Reports** field. This may not be used in your report templates.
8. Enter postcode and contact details in the **Home Postcode**, **Office Postcode** and **Notes** fields.
9. If you are using the Calendar Sync tool, enter the member of staff's Calendar ID in the **Google Calendar ID** field to link their Google Calendar™ and Alpha Tracker. Alternatively, if you are linking your Microsoft Outlook™ Calendar and Alpha Tracker, complete the **Exchange Email** field.



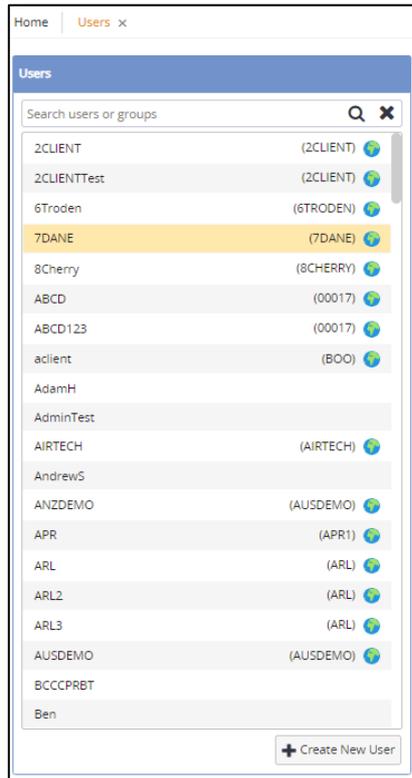
*If you are using the Calendar Sync tool, refer to Section 4, Synchronising Calendars, to set up the user's Google Calendar™. Contact Start Software if you want to synchronise with Microsoft Outlook™ Calendars.*

10. Use the **Dept Code** and **Cost Centre Code** fields to allocate each member of staff to a department and cost centre so that invoices exported to Sage (or other accounts packages) can be tagged with the correct department and cost centre.
11. If the staff member uses a mobile device for capturing survey details, enter the ID of their handheld device in the **Unit ID** field.
12. If the staff member is a Lab Analyst, set their **Default Microscope**, **Default RI Liquid** and **Default Lab**.
13. If you wish to cross refer to a payroll system, enter the staff member's **Payroll Number**.
14. If you wish to set individual monthly income targets for display on the Wallboard, complete the **Monthly Income Target** field.
15. If you wish to cross refer to another staff system, complete the **External ID** field.
16. Save any changes you have made and close the screen.

## 2.2 Setting up users

You set up users to assign them a username and password (or with Active Directory, just a Windows username) and certain default settings so that they can access the system. Setting up users is a task that can only be performed by a user with Superuser permissions. If you do not have Superuser permissions, please contact Start Software for help in setting up users.

1. Open the Web Security menu and select “Users” to display the Users screen.



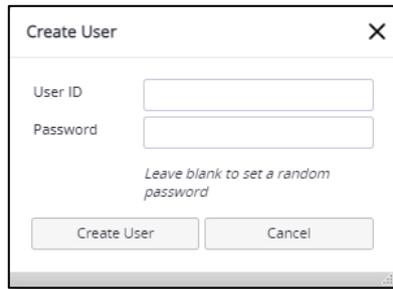
You can enter search criteria in the general search field at the top, eg a username, a client ID or a group name to filter the list as required.

2. To add a new user, click the **Create New User** button and set the **Username** and **Password** for the new user.

To ensure usernames are unique in the system, it is a good idea to use email addresses for usernames. Passwords must satisfy certain conditions, eg be of a certain length (usually 10 characters) and contain one number, one uppercase letter and one symbol.

You can let the system auto-generate a password by leaving the **Password** field blank.

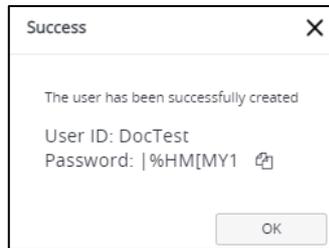
Active Directory users must specify the user’s Windows username and should leave the password blank.



The 'Create User' dialog box contains the following elements:

- User ID**: A text input field.
- Password**: A text input field.
- Leave blank to set a random password*: A note below the password field.
- Create User**: A button to confirm the user creation.
- Cancel**: A button to cancel the operation.

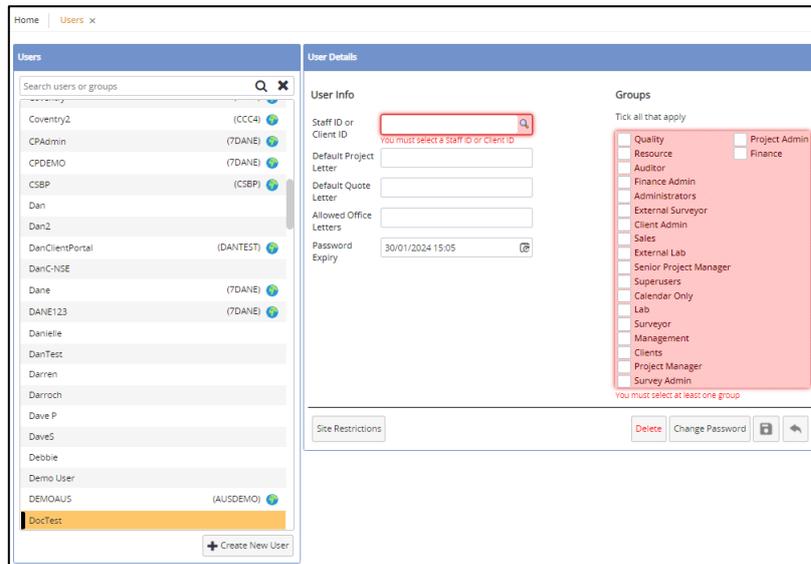
- Click the **Create User** button. The new login credentials are displayed on the screen with a Copy to Clipboard button to help you notify the new user.



The 'Success' dialog box displays the following information:

- The user has been successfully created
- User ID: DocTest
- Password: |%HM[MY1 (with a copy icon)
- OK**: A button to close the dialog.

The User Details screen is displayed for you to complete the setup of the new user. The highlighted fields are mandatory.



The 'User Details' screen is divided into several sections:

- User Info**: Contains fields for Staff ID or Client ID (highlighted in red with a magnifying glass icon and a red box), Default Project Letter, Default Quote Letter, Allowed Office Letters, and Password Expiry (30/01/2024 15:05).
- Groups**: A list of roles with checkboxes, including Quality, Resource, Auditor, Finance Admin, Administrators, External Surveyor, Client Admin, Sales, External Lab, Senior Project Manager, Superusers, Calender Only, Lab, Surveyor, Management, Clients, Project Manager, and Survey Admin. A note states 'You must select at least one group'.
- Buttons**: Includes 'Site Restrictions', 'Delete', 'Change Password', and a refresh icon.

- Enter the following:
  - Staff ID of the user (as displayed on the Staff screen) in the **Staff ID or Client ID** field. Click the magnifying glass to search for and select the staff member so that the correct Staff ID is entered
  - office letter to be displayed on new projects by default for the user in the **Default Office Letter** field
  - office letter to be displayed on new quotations by default for the user in the **Default Quote Letter** field

- other office letters which the user is to be allowed to use in the **Allowed Office Letters** field
- date on which the user's password will expire in the **Password Expiry** field (the default displayed here is controlled by settings)
- tick at least one of the permission groups to define the user's system access. Users can be in more than one group, the access is added together.

If you do not specify default office letters then "A" is used. A setting controls this default.



*Do not put standard Alpha Tracker users into the "Clients" or "Client Admin" groups as these are for Client Portal users only. Also do not put a standard Alpha Tracker user into the "Auditor" group as this is for users who need read-only access.*



*See Section 2.3, Assigning users to groups, for instructions on using the "Groups" option, and Section 2.4, Defining the access available to a group, for details on what access is allowed to the different groups.*

5. Save the new user record.

## 2.2.1 Using Active Directory

If you are using Active Directory, then you cannot assign users to groups directly. Users are assigned to groups, that determine their permissions and which menu options they can see, from Active Directory. Alpha Tracker has a number of pre-set groups and users can be in more than one group. These groups need to be specified in the user's Active Directory details. The groups are:

- Quality
- Resource
- Auditor
- Finance Admin
- Administrators
- External Surveyor
- Client Admin
- Sales
- External lab
- Senior Project Manager
- Superusers
- Calendar Only
- Lab
- Surveyor
- Management
- Clients
- Project Manager
- Survey Admin
- Project Admin

- Finance.

If you use different names for the groups in Active Directory, you can provide the translation for the group names in the System Repository. Select “System Repository” from the System submenu on the Setup menu and search for “group name” to find the settings in which to enter the translations.

## 2.3 Defining the access available to a group

The menus to which a user group has access are fixed in Alpha Tracker. If you want to change a user’s access you should move or add them to another user group. If you are using Active Directory, then these groups need to be specified in the user’s Active Directory details.

Administrators have access to all main menu items except for Web Security. They also have access to the Setup menu. Web Security is restricted to Superusers only. Superusers also have an extra option on the Setup menu: System.

The access given to other groups is based on the following, although some individual options within menus may be excluded:

- Management
  - Calls/Tasks
  - Enquiries/Quotes
  - Clients
  - Projects
  - Resources
  - Sites
  - Contracts
  - Suppliers
  - Reports (with filtering)
- Sales
  - Calls/Tasks
  - Enquiries / Quotes
  - Clients
  - Projects
  - Resources
  - Sites
  - Contracts
  - Reports (with filtering)
- Resource
  - Calls/Tasks
  - Clients
  - Projects
  - Resources
  - Suppliers

- Reports (with filtering)
- Quality
  - Clients
  - Projects
  - Resources
  - Sites
  - Suppliers
  - Reports (with filtering).
- Lab
  - Clients
  - Projects
  - Lab
  - Suppliers
  - Reports (with filtering)
- External Lab
  - Remote Lab
- Clients (filtered view on Client Portal)
  - Sites
  - Registers
  - Photo Registers
  - Reports/Jobs
  - Data Extracts
  - Other Documents
  - Contact Details
- Client Admin (filtered view on the Client Portal)
  - Sites
  - Registers
  - Photo Registers
  - Reports/Jobs
  - Bulk Samples
  - Training
  - Data Extracts
  - Other Documents
  - Contact Details
  - Web Security
- Project Admin
  - Calls/Tasks
  - Clients
  - Projects
  - Resources
  - Sites

- Contracts
- Suppliers
- Reports (with filtering)
- Project Manager
  - Calls/Tasks
  - Enquiries / Quotations
  - Clients
  - Projects
  - Resources
  - Sites
  - Suppliers
- Survey Admin
  - Calls/Tasks
  - Enquiries / Quotations
  - Clients
  - Projects
  - Resources
  - Sites
  - Suppliers
  - Reports (with filtering)
- Surveyor
  - Projects
  - Resources
- Finance
  - Enquiries / Quotations
  - Clients
  - Projects
  - Contracts
  - Suppliers
  - Finance
  - Reports (with filtering).

## 2.4 Setting up access for an external lab

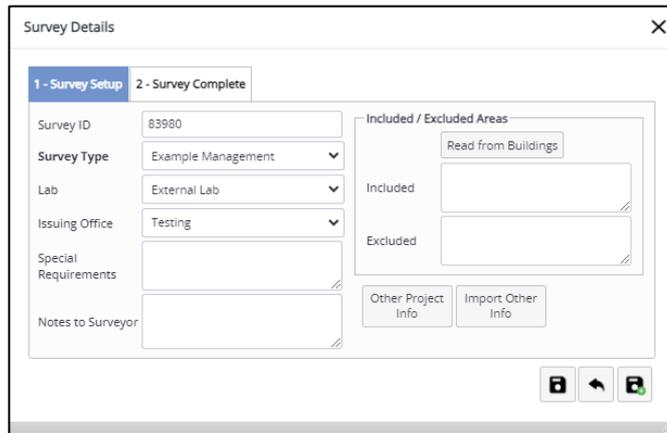
You can allow an external lab access to your Alpha Tracker if you want them to log in and record fibre analysis results directly into your system (not available with Active Directory logins). The external lab will not have general access to Alpha Tracker; they will only be able to enter an identification against the samples in the projects you specifically assign to them.

To set up access for an external lab:

1. Create a new staff member for the lab.
2. Set up the lab as a user, with a username and password.

3. Assign the lab to the External Lab user group.

Any projects that you want the external lab to see need to have the external lab selected in the **Lab** field on Survey Details.



## 2.5 Setting up access to the Client Portal

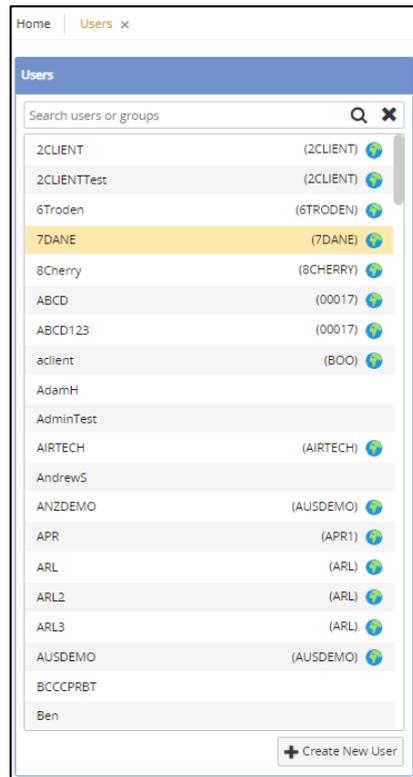
You can give your clients access to the Client Portal for them to view their Asbestos Register data. Clients do not have access to any of the usual Alpha Tracker features, they can only view their own data relating to surveys that you have specifically made available to them. You do this by ticking the **Show On Web** tickbox on the projects to be made available. This tickbox is only displayed when a date is entered in the **Report Produced** milestone. When the box is ticked, project information and the report become available on the Client Portal.



Refer to Chapter 15 in the Technical Guide, Sharing Data On The Client Portal, for further information on controlling what is displayed on the Client Portal.

The client must already be set up on Alpha Tracker so that you can use their Client ID to identify them. You can create multiple logins for a client – they would have different usernames but all be linked to the same Client ID.

1. Set up the Client as a Client Portal user on Alpha Tracker:
  - Select “Users” from the Web Security menu.



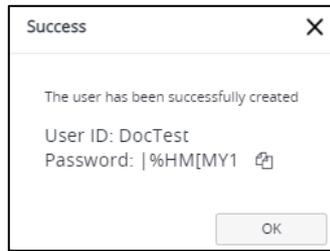
2. Click the **Create New User** button and set the **Username** and **Password** for the new user.

To ensure usernames are unique in the system, it is a good idea to use email addresses for usernames – especially for Client Portal users who can then reset their own password via the “Forgot password” link. Passwords must satisfy certain conditions, eg be of a certain length (usually 10 characters) and contain one number, one uppercase letter and one symbol.

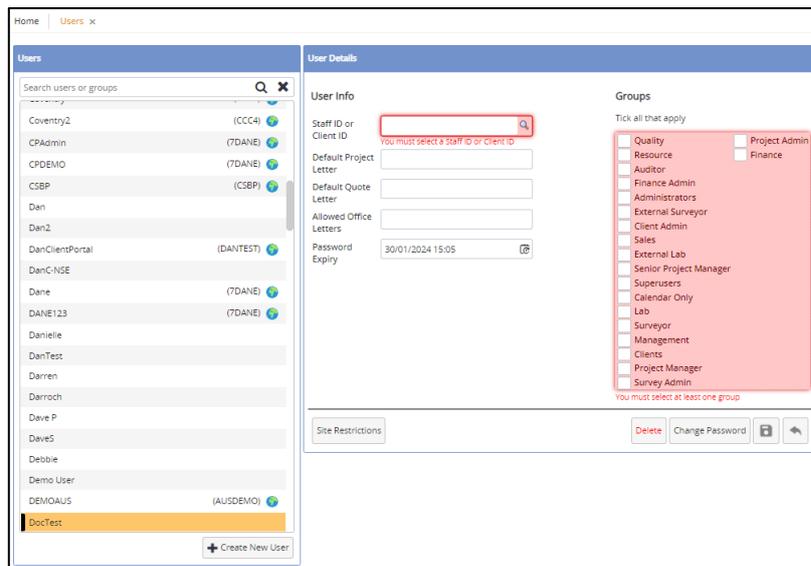
You can let the system auto-generate a password by leaving the **Password** field blank.

A screenshot of the 'Create User' dialog box. It has a title bar with 'Create User' and a close button (X). There are two input fields: 'User ID' and 'Password'. Below the 'Password' field is the text 'Leave blank to set a random password'. At the bottom are two buttons: 'Create User' and 'Cancel'.

3. Click the **Create User** button. The new login credentials are displayed on the screen with a Copy to Clipboard button to help you notify the new user.



The User Details screen is displayed for you to complete the setup of the new user. The highlighted fields are mandatory.



4. Enter the following:
  - client ID of the client in the **Staff ID or Client ID** field. Click the magnifying glass to search for and select the client so that the correct Client ID is entered
  - leave the **Show Linked Sites** box blank (unless you have set up shared sites that you want this user to see)
  - date on which the user's password will expire in the **Password Expiry** field (the default displayed here is controlled by settings)
  - tick the "Clients" permission group to define the Client Portal access.



*Do not tick any other permission groups. Client Portal users must only be in one group.*

5. Save the new user record.
6. Check what is visible using the new login. For example, log out of Alpha Tracker and then log back in again as the Client to check what they can see.



*You can also use the **+ User** button on the Client Details screen to create Client Portal users (who will automatically be placed in the "Clients" group).*



There is also a group for “Client Admin” users which gives advanced privileges, such as being able to delete any uploaded documents and save changes to the client contact details on the Client Portal.



In addition, “Client Admin” users have the ability to create further logins from within the Client Portal itself. The logins that can be created are limited to the logged-in client and new users created are automatically added into the “Clients” user group. It is also possible to restrict the sites to which the login has access. Active Directory users would need to ensure that permission groups are set in Active Directory for any users added this way.

## 2.6 Monitoring client access to the Client Portal

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

1. From the menus select Setup, System, Access Log.
2. Enter search criteria for the logs you want to view. For example, enter today’s date in both the **When From** and **To** fields. Then click **Search** to display the matching logs.

In the logs you can see, among other things:

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

ID	When	Who	What	IP	Server	Duration	Apex Score
153629	03/08/2023 14:33:37	Dane	Login (Session ID: 7de531779740e6839fee879e524d13)		Demo 82	0	1
153630	03/08/2023 14:33:37	Dane	Refresh Session	172.31.1.142	Demo 82	6.42	0.5
153631	03/08/2023 14:33:48	Dane	Refresh Requested	172.31.1.142	Demo 82	0	1
153632	03/08/2023 14:33:53	Dane	Project Pipeline (server)	172.31.1.142	Demo 82	1.15	1
153633	03/08/2023 14:33:54	Dane	Project Pipeline (client)	172.31.1.142	Demo 82	1.15	1
153634	03/08/2023 14:33:56	Dane	Client Portal Site List Compliance Summary (server)	172.31.1.142	Demo 82	0.87	1
153635	03/08/2023 14:33:57	Dane	Client Portal Site List Compliance Summary (client)	172.31.1.142	Demo 82	1.84	1
153636	03/08/2023 14:33:59	Dane	Client Portal Site Grid (server)	172.31.1.142	Demo 82	0.29	1

## 3. LAB AND SURVEY SETUP

### 3.1 Lab settings

This section explains how to maintain the following aspects of system data that support the functioning of the lab:

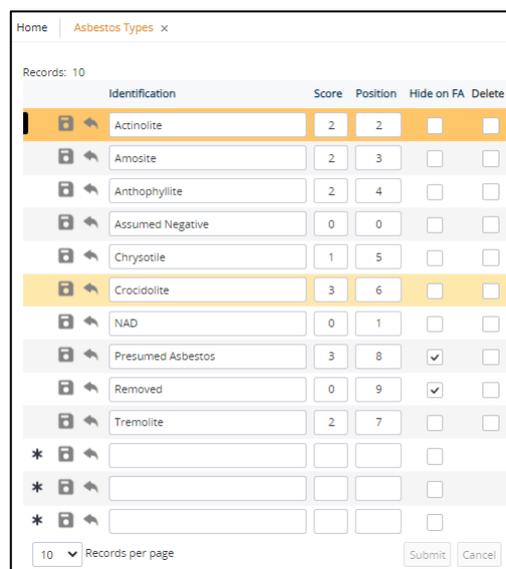
- asbestos types
- materials
- lab lookup data
- lab backfill
- priority assessment
- recommendations
- standard comments
- survey types
- validation for fibre analysis.

#### 3.1.1 Maintaining asbestos types

You can set up the identification of asbestos types on your Alpha Tracker, specifying the identification and the score of each asbestos type.

To set up an asbestos type:

1. Open the Lab and Surveys submenu from the Setup menu and select “Asbestos Types” to display the Asbestos Types screen.



Identification	Score	Position	Hide on FA	Delete
Actinolite	2	2	<input type="checkbox"/>	<input type="checkbox"/>
Amosite	2	3	<input type="checkbox"/>	<input type="checkbox"/>
Anthophyllite	2	4	<input type="checkbox"/>	<input type="checkbox"/>
Assumed Negative	0	0	<input type="checkbox"/>	<input type="checkbox"/>
Chrysotile	1	5	<input type="checkbox"/>	<input type="checkbox"/>
Crocidolite	3	6	<input type="checkbox"/>	<input type="checkbox"/>
NAD	0	1	<input type="checkbox"/>	<input type="checkbox"/>
Presumed Asbestos	3	8	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Removed	0	9	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tremolite	2	7	<input type="checkbox"/>	<input type="checkbox"/>
* <input type="text"/>			<input type="checkbox"/>	<input type="checkbox"/>
* <input type="text"/>			<input type="checkbox"/>	<input type="checkbox"/>
* <input type="text"/>			<input type="checkbox"/>	<input type="checkbox"/>

Records: 10

10 Records per page

Submit Cancel

- To add a new type, in a blank row marked with an asterisk, type the asbestos name in the **Identification** field and type its score in the **Score** field.
- If you want to specify an order for these entries that is not alphabetical, use the **Position** field.
- If the asbestos type is to be displayed in Tracker Mobile but not in Fibre Analysis (eg for entries like “Removed”), tick the **Hide on FA** box.
- To delete an asbestos type, click on the **Delete** tickbox on the appropriate row(s).
- Save your changes and close the Asbestos Types screen.

### 3.1.2 Maintaining the materials list

Material codes are used to identify materials surveyed and consist of a three-letter code and a description. Materials are assigned product type scores and may be defined as Asbestos-Containing Materials (ACMs).

To maintain the materials list:

- Open the Lab and Surveys submenu from the Setup menu and select “Materials” to display the Materials screen.

Material Code	Material Description	Product Type Score	ACM	Lab Points	Show In Lab	Show On Mobile	F.A. Other Notes
BAB	Brick / Block	0 1 2 3	<input type="checkbox"/>	0 1 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
BBL	Beam and block	0 1 2 3	<input type="checkbox"/>	0 1 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
BR	Brick	0 1 2 3	<input type="checkbox"/>	0 1 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
BTP	Bituminous Product	0 1 2 3	<input checked="" type="checkbox"/>	0 1 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Black sticky pad
CMP	Cement Product	0 1 2 3	<input checked="" type="checkbox"/>	0 1 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Grey, hard, dry material
CMS	Cement Sheeting	0 1 2 3	<input checked="" type="checkbox"/>	0 1 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
CON	Concrete	0 1 2 3	<input type="checkbox"/>	0 1 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
CPS	Plastic / ceramic sanitaryware	0 1 2 3	<input type="checkbox"/>	0 1 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
CPT	Carpeted / carpet tiled	0 1 2 3	<input type="checkbox"/>	0 1 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
CTB	Ceramic tiled brick / block / concrete	0 1 2 3	<input type="checkbox"/>	0 1 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
DEB	Debris	0 1 2 3	<input checked="" type="checkbox"/>	0 1 2	<input type="checkbox"/>	<input type="checkbox"/>	
DEM	Demo material	0 1 2 3	<input checked="" type="checkbox"/>	0 1 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
DMP	Demountable partitions	0 1 2 3	<input type="checkbox"/>	0 1 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
DUS	Dust	0 1 2 3	<input checked="" type="checkbox"/>	0 1 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
EXP	Exposed pipework / services	0 1 2 3	<input type="checkbox"/>	0 1 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
FBF	Flat, bitumen felt lined	0 1 2 3	<input type="checkbox"/>	0 1 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
FCS	Flat fibre cement sheet	0 1 2 3	<input checked="" type="checkbox"/>	0 1 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
FF	Free Fibre	0 1 2 3	<input checked="" type="checkbox"/>	0 1 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
FRM	Friction Material	0 1 2 3	<input checked="" type="checkbox"/>	19 0 1 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
GAS	Gaskets	0 1 2 3	<input checked="" type="checkbox"/>	0 1 2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

- To add a new value, in a blank row marked with an asterisk, type the two- or three-letter code and description in the **Material Code** and **Material Description** fields.
- Select a radio button to indicate the **Product Type Score** for this material – 0, 1, 2 or 3 – and tick the **ACM** box if the material contains asbestos.
- If you have an internal lab, set the number of lab points accrued when analysing a sample of this material.
- Tick both the **Show In Lab** and **Show On Mobile** boxes (unless you specifically want to hide this material from the lists in Fibre Analysis or Tracker Mobile).

6. To delete a material code, click on the red cross on the appropriate row. Do not delete material codes once they are in use.
7. Save your changes and close the Materials screen.

### 3.1.3 Maintaining lab lookup data

The lab lookup data defines the content of the drop-down lists on the Fibre Analysis screen. Each of the fields available on the Fibre Analysis screen is defined as a Type in the lookup data. Each of the values listed on the drop-down is defined as a Value.

To maintain lab lookup data:

1. Open the Lab and Surveys submenu from the Setup menu and select “Lab Lookup” to display the Lab Lookup screen.

The screenshot shows the 'Lab Lookup' screen with a search bar at the top. Below the search bar is a table with 121 records. The table has four columns: Type, Value, Position, and Delete. The first row is highlighted in orange. The table contains the following data:

Type	Value	Position	Delete
SamplePrep	None	6	<input type="checkbox"/>
SamplePrep	Dry	5	<input type="checkbox"/>
SamplePrep	Acid Wash	3	<input type="checkbox"/>
SamplePrep	Grinding	4	<input type="checkbox"/>
Microscope	AAA1		<input type="checkbox"/>
Microscope	BBB2		<input type="checkbox"/>
Microscope	CCC3		<input type="checkbox"/>
Morphology	Curly		<input type="checkbox"/>
Morphology	Curved/Wiry		<input type="checkbox"/>
Appearance4SPolariser	White		<input type="checkbox"/>
*			<input type="checkbox"/>
*			<input type="checkbox"/>
*			<input type="checkbox"/>

At the bottom of the screen, there is a pagination control showing 'First Prev 1 2 3 4 5 6 7 8 9 10 of 13 Next Last' and a 'Records per page' dropdown set to 10. A 'Submit' button is located at the bottom right.

You can enter search criteria in the top of the screen to filter the list as required. For example if you only want to see the values for the “RI Liquid” field, select “RI Liquid” in the **Type** field and then click **Search**.

2. To add a new value, in a blank row marked with an asterisk, select the field name in the Type field and type the value to appear in the drop-down list in the Value field.
3. To delete a lab lookup entry, click on the Delete tickbox on the appropriate row(s).
4. Save your changes and close the Lab Lookup screen.

### 3.1.4 Setting lab backfill entries

The lab backfill details are the default settings for the fibre analysis fields when a specific analysis identification is selected.



Refer to Section 8.3, Setting default fibre analysis settings, in the Alpha Tracker User Guide for details on how to set and use the lab backfill values.

To amend the default backfill values:

1. Select “Lab Backfill” from the Lab and Surveys submenu on the Setup menu.
2. Search for and select the Analysis identification for which you want to amend default settings.
3. Amend the setting as required by entering the required values in the **Field Value** field and save your changes.



You could also delete all the records for an analysis identification so that the next time you enter the fibre analysis results on the Fibre Analysis screen you can reset the default values by clicking on the **Default** button.

### 3.1.5 Setting validation for fibre analysis

If you use the lab functions in Alpha Tracker to enter fibre analysis results, it is possible to set up validation of the results entered against standard results for an identification. For example, you might specify that if “Chrysotile” is selected as the **Identification** then **Morphology** must be set to “Curly”, **RI Liquid** to “1.55”, **First Order Red Tint Plate** to “Length slow”, **Birefringent** to “Low” etc.

To set validation for fibre analysis:

1. Open the Lab and Surveys submenu from the Setup menu and select “Validation for Fibre Analysis” to display the Validation for Fibre Analysis screen.

Identification	Validation Template	Validation String	Error Message	Delete
Chrysotile	{-PREFIX-}RI_Liquid	1.55	Invalid RI Liquid for Chrysotile	<input type="checkbox"/>
Actinolite	{-PREFIX-}RI_Liquid	1.64	Invalid RI Liquid for Actinolite	<input type="checkbox"/>
Amosite	{-PREFIX-}RI_Liquid	1.67	Invalid RI Liquid for Amosite	<input type="checkbox"/>
Anthophyllite	{-PREFIX-}RI_Liquid	1.605	Invalid RI Liquid for Anthophyllite	<input type="checkbox"/>
Tremolite	{-PREFIX-}RI_Liquid	1.605	Invalid RI Liquid for Tremolite	<input type="checkbox"/>
Crocidolite	{-PREFIX-}RI_Liquid	1.70	Invalid RI Liquid for Crocidolite	<input type="checkbox"/>
* [Empty]				
* [Empty]				
* [Empty]				

2. To add a new value, in a blank row marked with an asterisk, specify the identification for which you are defining the validation in the **Identification** field.
3. List the fields contained in the validation in the **Validation Template** field.



*The fields must be listed in a certain format. If you are in any doubt how to specify the fields please contact Start Software on 0333 301 1010.*

4. Specify the values that must be present in the listed fields, in the same order as the fields are listed, in the **Validation String** field.
5. Type the text of the message that is to be displayed if fibre analysis fails the validation in the **Error Message** field. For example, you might enter “You selected an invalid configuration for Chrysotile.”
6. Save your changes and close the Validation for Fibre Analysis screen.

## 3.2 Survey settings

This section explains how to maintain the following aspects of system data that support survey report production:

- approaches
- survey types
- priority assessment
- building age
- property type
- recommendations
- standard comments
- condition description
- surface treatment description.

### 3.2.1 Maintaining approaches

It is now possible for you to choose the terminology you use and display for approaches when surveying. For example, you may want to use VS for Visually Similar rather than our standard X for Cross Reference. The “Approaches” menu option lets you set your terms and map them to our standard approach types:

1. Open the Lab and Surveys submenu from the Setup menu and select “Approaches” to display the Approaches screen.



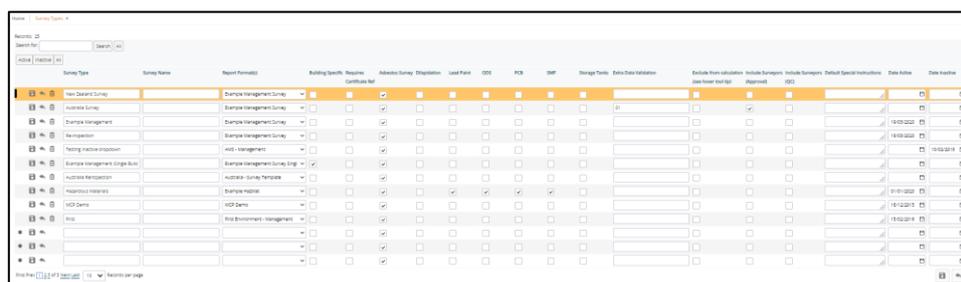
2. To add a new approach, in a blank row marked with an asterisk, type the short form of the approach, eg VS, in the **Approach** field and type its long form, eg Visually Similar, in the **Description** field. Then select the standard approach, eg X, to which it is to be mapped by clicking a radio button. The key on the left of the screen should help you choose the correct approach.
3. To delete an approach, click on the Delete tickbox on the appropriate row(s).
4. Save your changes and close the Approaches screen.

### 3.2.2 Maintaining survey types

The survey types define the type of report that you produce from your survey data, for example Management or Refurbishment/Demolition. The Survey Types screen links survey types to report formats which contain the instructions for producing your reports. There may also be other special instructions linked to your survey types.

To maintain survey types:

1. Open the Lab and Surveys submenu from the Setup menu and select “Survey Types” to display the Survey Types screen.



2. To add a new value, in a blank row marked with an asterisk, type the name of the survey type as it is to be displayed on the Survey Details dropdown in the **Survey Type** field.
3. Specify the name of the Reports Format linked to the survey type in the **Report Format** field.
4. If any extra data validation checks are to be made during data validation for surveys of this type, list the checks in the **Extra Data Validation** field, eg 01.

The tests are labelled A, B, C etc or 0, 1, 2 etc. The numbered ones (0, 1, 2...) are not automatically run when “\*all\*” is specified in the system setting that controls this feature.

5. Leave other settings to be defined at template setup.
6. Save your changes and close the Survey Types screen.



*If you require further information on survey types, report formats and templates please contact Start Software on 0333 301 1010.*

### 3.2.3 Maintaining priority assessment scores

The Priority Assessment submenu gives you access to a range of options for setting up the various descriptions and scores that are used in priority assessments. Once set up, these are rarely changed.

All these options work in the same way. Select the option you require, add or amend the score and description, then save the new or changed entry.

### 3.2.4 Maintaining building age

If Building Age is a field that is available on your Tracker Mobile, then you can set up the possible values to appear on the Building Age dropdown by using the “Building Age” menu option.

1. Open the Lab and Surveys submenu from the Setup menu and select “Building Age” to display the Building Age screen.

2. To add a new age record, in a blank row marked with an asterisk, type the value for the age in the **Building Age** field.
3. To delete an age, click on the red cross on the appropriate row(s).

4. Save your changes and close the Building Age screen.

### 3.2.5 Maintaining property type

If Property Type is a field that is available on your Tracker Mobile, then you can set up the possible values for Property Type by using the “Property Type” menu option.

1. Open the Lab and Surveys submenu from the Setup menu and select “Property Type” to display the Property Type screen.

The screenshot shows the 'Property Type' screen with a list of existing types and three blank rows for adding new ones. The existing types are: Domestic, Commercial, Industrial, Commercial/Industrial, School/Leisure, and Entertainment. The blank rows are marked with an asterisk (\*). At the bottom, there is a 'Records per page' dropdown set to 10 and a 'Submit' button.

2. To add a new type, in a blank row marked with an asterisk, type the type descriptions in the **Property Type** field.
3. To delete a type, click on the red cross on the appropriate row(s).
4. Save your changes and close the Property Type screen.

### 3.2.6 Maintaining recommendations

You can set up short forms of recommendations for surveyors to select and link these to longer paragraphs for insertion in reports. Recommendations can also be grouped together for reporting purposes.

To maintain the recommendations:

1. Open the Lab and Surveys submenu from the Setup menu and select “Recommendations” to display the Recommendations screen.

Description	Comment	Category	Screen Type
Affix ID Labels & Manage as part of	Add the signage in appropriate locations.	Manage,Label	
Encapsulate and Manage	Fix and then manage in-situ	Manage,Encapsulate	
Encapsulate, Label and Manage	Encapsulate, Label and Manage	Manage,Encapsulate,Label	
Encapsulate/Repair & Manage as par	Add to Management plan and review in 12 months.	Manage,Encapsulate,Repair	
Inspect Periodically		Manage	
Manage and Label	Manage and Label	Manage,Label	
No access - Re-visit required	No access - Re-visit required		
No action required	No action required	No further action	
Paint green	Paint green		
Painted			
*			
*			
*			

- To add a new value, in a blank row marked with an asterisk, type the short description of the recommendation in the **Description** field.
- If you want to link the recommendation to a longer piece of text, type this text in the **Comment** field.
- If you want to group recommendations, select an entry in the **Category** field.
- Save your changes and close the Recommendations screen.

### 3.2.7 Maintaining standard comments

If standard comments are used in Tracker Mobile, then you can set up the short form for use in Tracker Mobile and the longer version for use in your reports.

To maintain standard comments:

- Open the Lab and Surveys submenu from the Setup menu and select “Standard Comments” to display the Standard Comments screen.

Short Description	Description	Category
Same material	The same material was present throughout the XXXX floor.	Forms
Room locked - no key	Access was not possible because the room was locked and a key was not available.	
Meeting in progress	We could not enter the room because a meeting was in progress	
Tenant refused access	It was not possible to enter the building because the tenant refused access	
Denied key	The key holder would not release the key	Forms
*		
*		
*		

- To add a new value, in a blank row marked with an asterisk, type the short description of the standard comment in the **Short Description** field.

3. If you want to link the comment to a longer piece of text for your reports, type this text in the **Description** field.
4. Save your changes and close the Standard Comments screen.

### 3.2.8 Maintaining condition descriptions

You can maintain the descriptions of the condition score that is selected in Tracker Mobile. You might, for example, use “Excellent” for a condition score of “0”, or you might prefer to use a different term.



*You should not amend the scores or add any extra records – only the description.*

To maintain condition descriptions:

1. Open the Lab and Surveys submenu from the Setup menu and select “Condition” to display the Condition screen.

Score	Description	Delete
0	Excellent	<input type="checkbox"/>
1	Good	<input type="checkbox"/>
2	Fair	<input type="checkbox"/>
3	Poor	<input type="checkbox"/>
*		

10 Records per page

2. To amend a description, select the appropriate row and change the text in the **Description** field.
3. Save your changes and close the Condition screen.

### 3.2.9 Maintaining surface treatment descriptions

You can maintain the descriptions of the surface treatment score that is selected in Tracker Mobile. You might, for example, use “Self Sealed” for a condition score of “0”, or you might prefer to use a different term.



*You should not amend the scores or add any extra records – only the description.*

To maintain surface treatment descriptions:

1. Open the Lab and Surveys submenu from the Setup menu and select “Surface Treatment” to display the Surface Treatment screen.

Score	Description	Delete
0	Self Sealed	<input type="checkbox"/>
1	Sealed	<input type="checkbox"/>
2	Partially Unsealed	<input type="checkbox"/>
3	Unsealed	<input type="checkbox"/>
*		

10 Records per page

2. To amend a description, select the appropriate row and change the text in the **Description** field.
3. Save your changes and close the Surface Treatment screen.

## 4. SYNCHRONISING CALENDARS

### 4.1 Introduction

Alongside the Resources element of Alpha Tracker there is an optional Calendar Synchronisation tool that is designed to help users who experience lots of last-minute changes to the diary. For these users, receiving diary updates by email is not always convenient. The Calendar Sync tool automatically synchronises the Resources diary with other diaries (starting with Google Calendars) without the need to use emails to transmit the diary changes.

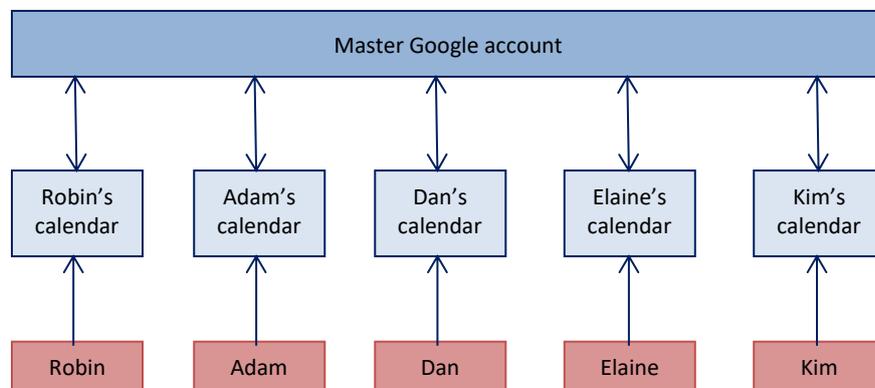
The Calendar Sync module keeps calendars updated for all your staff so that they can see their work diaries at any time from their laptops, home PCs or smartphones. Google calendars are free and can be set up in a matter of minutes and are the world's most popular online calendars being easy to use, flexible and fully integrated with Google Mail.

The Google calendars are read-only for the staff (so that they cannot amend or delete work scheduled for them). If staff already have Google calendars for personal use, the additional "work calendar" will simply appear automatically on their laptop or phone—but without the option to remove work you have scheduled for them.

Use of this module means that you no longer have to send appointments via email to staff—their own diaries will automatically sync no matter how many appointments you schedule for them, how many you move, or even how many you delete.

### 4.2 Setting the structure of your calendars

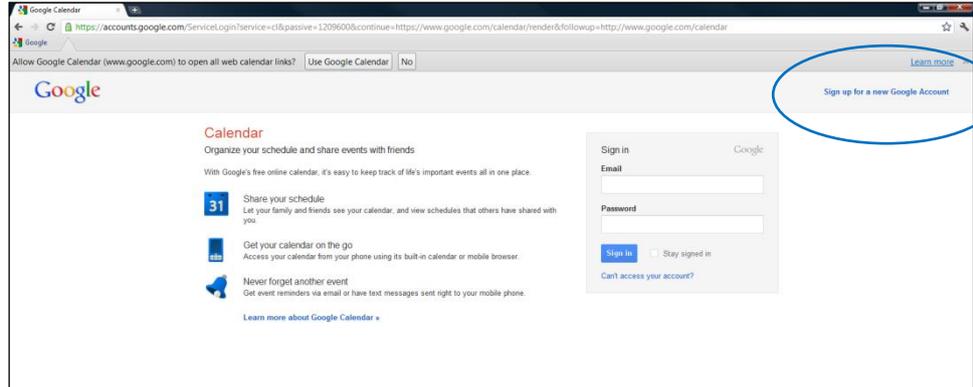
The Calendar Synchronisation service uses a master Google account to manage all calendars for your employees. The individual employee calendars are created inside the master account and each employee is then given access to one of them as their personal work calendar (in read-only mode).



To set up the calendars:

1. Go to <http://calendar.google.com>.
2. Select *Sign up for a new Google Account* which is located in the top right of the header.

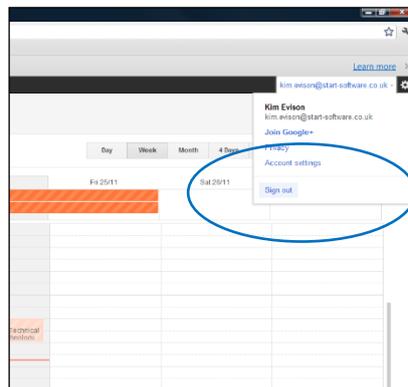
You must sign up for a new Google account so that you can create the master account for the calendars.



3. Enter the details to create a new master account.

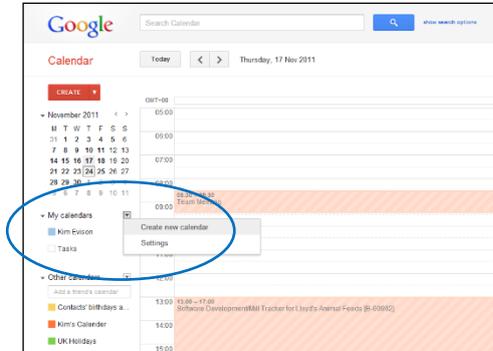
 A screenshot of the 'Create an account' form on Google accounts. The form is titled 'Create an account' and includes instructions. It contains several input fields: 'Your current email address', 'Choose a password', 'Re-enter password', 'First name', 'Last name', 'Location' (set to United Kingdom), 'Time zone' (set to GMT+00:00 London), and 'Birthday'. There is also a 'Word Verification' section with a CAPTCHA image showing the word 'Dinosaur'. A 'Stay signed in' checkbox is also present.

If you already have an account, Google may automatically log you in. If so, you will need to sign out and revisit the above link to see the signup link.



Once inside the calendar system you will see a small column along the left called 'My Calendars' and showing a small down arrow. This is the option you use to create the individual calendars within the master account.

- Click the small down arrow next to 'My Calendars' and select *Create New Calendar*.



A screen is displayed in which you can give the calendar a name (eg Ricky's Work Calendar) and enter any other information you require.

 A screenshot of the 'Create New Calendar' form in Google Calendar. The form has several sections:
 

- Calendar Details:** Includes fields for 'Calendar Name', 'Description', and 'Location'. There are also dropdown menus for 'Country' (set to 'United Kingdom') and 'Time Zone' (set to '(GMT+00:00) London').
- Make this calendar public:** A checkbox that is currently unchecked.
- Share with specific people:** A section with a table for adding people. One person is listed: 'kim.evanson@start-software.co.uk' with the permission 'See all event details' and an 'Add Person' button.

- In the **Calendar Name** field, type the name by which to identify the calendar.
- Check that the country and time zone displayed in the **Calendar Time Zone** fields are correct.
- In the **Share with specific people** section, specify who can see the calendar:
  - Enter the email address of the employee whose calendar you are creating in the **Person** field.
  - Select the 'See all event details' **Permission Setting** option.

This setting gives the employee read-only access to the current calendar.



*The email address specified must also be set as the Google account of the employee.*

- Click the **Add Person** button to add the employee with whom you are sharing the calendar to the list in the **Share with specific people** section.



Do **NOT** tick the **Make this calendar public** tickbox as this would make it available to the general public.

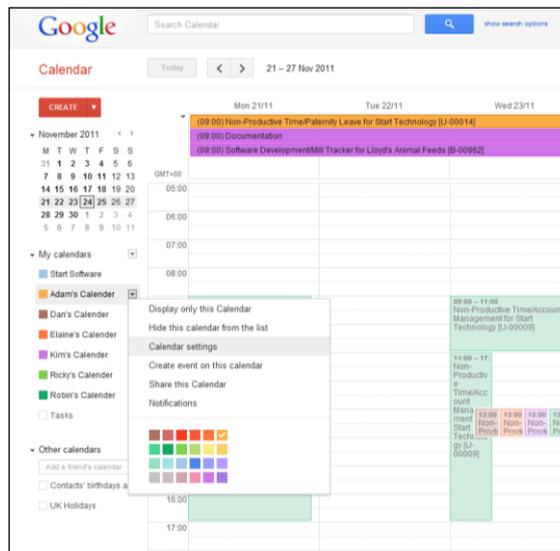
8. Click the **Create Calendar** button at the bottom of the screen.
9. Repeat from step 4 for each employee for whom you want to set up a calendar.

## 4.3 Linking the Calendars to Alpha Tracker

Once you have created all the calendars you must inform Alpha Tracker of each calendar's ID so that calendar information can be updated for each employee. To obtain the calendar IDs:

1. From the master account, move your mouse over the name of the calendar whose ID you wish to identify.
2. Click the down arrow which is now displayed next to the calendar name.

A menu is displayed.

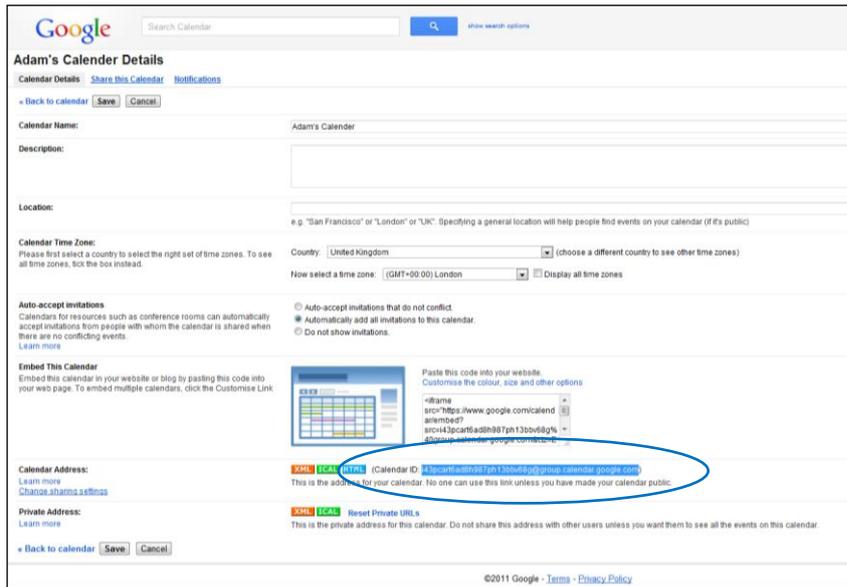


3. Select *Calendar Settings* to display the calendar's ID.

You can see the ID on the second row up from the very bottom. It is labelled 'Calendar Address'. The ID itself is made up of a long sequence of letters and numbers, for example:

[amp5hn678k93e655f2be9uoqng@group.calendar.google.com](mailto:amp5hn678k93e655f2be9uoqng@group.calendar.google.com)

The following screen shows an example with the ID highlighted:



You must now enter this ID into Alpha Tracker.

4. In Alpha Tracker, from the Setup menu, General sub-menu, select *Staff*.

The Staff screen is displayed. This screen is very wide and you may need to scroll to the left so that you can see the **Google Calendar ID** field on the far right.

Office Postcode	Name	Google Calendar ID	Exchange Email	Dept Code	Cost Centre Code	Unit ID	Default Microscope	Default BI Fluid Equip No.	Default Lab	Payroll Number	Monthly Income Target	External ID
							AAAT	BBB2				Delete
712 SPT	Maq	Rabin					AAAT	BBB2	Set 4			Delete
712 SPT	Mbe	Acar					AAAT	BBB2	Set 1	Carroll Lab		Delete
712 SPT	Mbe	Tom	tom.walton@startsoftware.com			Tom03	AAAT	BBB2	10			Delete
							AAAT	BBB2				Delete
							AAAT	BBB2				Delete
							AAAT	BBB2				Delete

5. Find the row of information for the required employee and then enter their Calendar ID in the column under **Google Calendar ID**.

*If you are copying and pasting the Calendar ID into Alpha Tracker, make sure that you do not inadvertently copy any spaces, particularly at the beginning or end of the Calendar ID.*

When you have entered the Calendar IDs for each employee for whom you have set up a calendar, Alpha Tracker and the calendars are linked. Each of the employees is then able to log in to their Google account, or sync their Google account with their smartphone, to view their up-to-date work diaries at any time and from any location.

Refer to Start Software if you would like the information displayed in the Google Calendar appointments to be customised. This can be done by amending the TitleTemplate.txt and ContentTemplate.txt files in the GoogleCalendarSync folder of your installation.

## 5. DOCUMENT PRODUCTION

The “Document Production” section of the “Setup” menu controls how your reports and standard documents are produced.

There are three distinct types of ‘report’ that you can produce from Alpha Tracker:

- **Asbestos survey reports** are defined by using the Report Formats table, Registers table, Sample Page Formats etc. The reports themselves are requested from the “Produce Report” button on the Surveys screen.



Asbestos survey reports are usually set up and amended by Start Software. There is a separate technical document available if you need to know how to define reports, this is the Alpha Tracker Document Maker Technical Guide (Internal).

- **Reports** are data extracts that are run from the various buttons within the “Reports” menu. There are for example Administrator reports, Finance reports etc. These are set up as standard SQL queries by using the “Reports” menu option in the “Import/Export” section of the “Setup” menu.



Refer to the Alpha Tracker User Guide for details on how to run the data extract reports.

- **Word and Excel** standard documents are produced from this Word/Excel icon wherever it is seen, for example on the Quotations List. They are defined by using the “Document Templates” menu option in the “Document Production” section of the “Setup” menu.

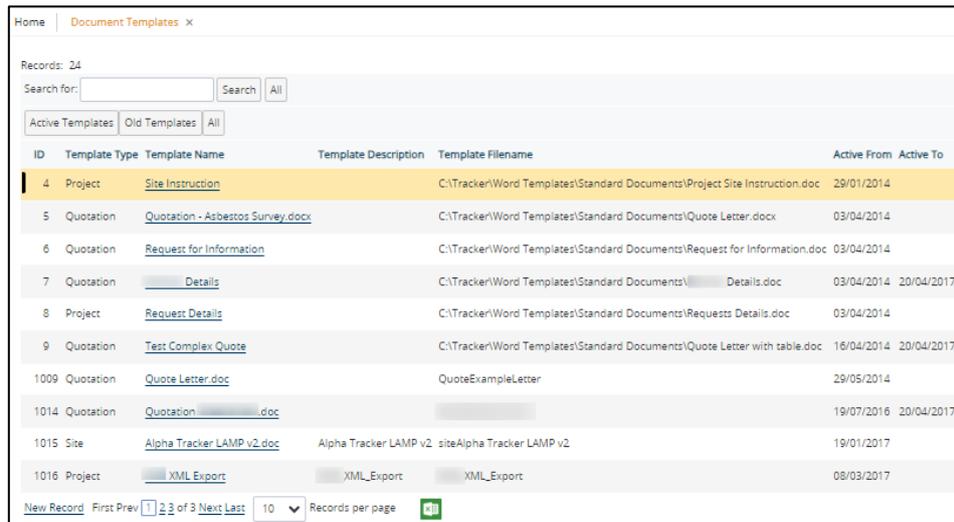


Refer to the Alpha Tracker User Guide Section 3.3, Generating and printing a quotation, for details on creating these standard documents.

### 5.1 Document Templates

The Document Templates screen lists the templates that are set up on Alpha Tracker and can be used to generate Word or Excel documents, such as quotations or scope of work documents.

1. Select the “Document Templates” menu option in the “Document Production” section of the “Setup” menu to display the Document Templates screen.



ID	Template Type	Template Name	Template Description	Template Filename	Active From	Active To
4	Project	<u>Site Instruction</u>		C:\Tracker\Word Templates\Standard Documents\Project Site Instruction.doc	29/01/2014	
5	Quotation	<u>Quotation - Asbestos Survey.docx</u>		C:\Tracker\Word Templates\Standard Documents\Quote Letter.docx	03/04/2014	
6	Quotation	<u>Request for Information</u>		C:\Tracker\Word Templates\Standard Documents\Request for Information.doc	03/04/2014	
7	Quotation	<u>Details</u>		C:\Tracker\Word Templates\Standard Documents\Details.doc	03/04/2014	20/04/2017
8	Project	<u>Request Details</u>		C:\Tracker\Word Templates\Standard Documents\Requests Details.doc	03/04/2014	
9	Quotation	<u>Test Complex Quote</u>		C:\Tracker\Word Templates\Standard Documents\Quote Letter with table.doc	16/04/2014	20/04/2017
1009	Quotation	<u>Quote Letter.doc</u>		QuoteExampleLetter	29/05/2014	
1014	Quotation	<u>Quotation .doc</u>			19/07/2016	20/04/2017
1015	Site	<u>Alpha Tracker LAMP v2.doc</u>	Alpha Tracker LAMP v2	siteAlpha Tracker LAMP v2	19/01/2017	
1016	Project	<u>XML Export</u>		XML_Export	08/03/2017	

2. Display the setup details of any existing document templates by clicking on the underlined Template Name.
3. Add a new document template by clicking on **New Record** in the navigation bar and completing the fields:
  - **Template Type** determines whether the template is visible for projects or quotations
  - **Template Name** and **Template Description** enable you to identify the template
  - **Template Filename** is the full path to the location of the template on your server, eg C:\Tracker\Word Templates\Standard Documents\Quote Letter.doc, or the report program name from Report Formats eg ProjSiteMethodStatement.

You enter a report program name when programming in complex project documents using Report Formats. Then it knows that it is a report format with instructions and picks up the template from there to generate the document. If this is the case then the **Data Source** needs to be set to "{ID}". If it is a project document, then the Report Formats program name must start with "Proj".

  - **Linked Project Type** lets you specify the project types for which the template is visible
  - **Active From** and **Active To** let you specify a date range during the template is in use
  - **Allowed Offices** lets you select specific office letters for which the template is valid
  - **Template Owner** specifies who is responsible for updating the template
  - **Data Source** is the query or statement that selects the data to populate the template, eg "select \* from [qryQuoteLetters] where [ID] = '{ID}'". If you are dealing with a complex project document, set this to "{ID}"
  - **Queue** is the document queue to which these documents are directed
  - **Email Only** allows you to specify whether folder copies of the generated document are to be stored
  - **Contains Survey Item QR Codes** specifies whether QR codes are to be output.
4. Save any changes you have made to document templates and close the screen.

You can download a copy of a document template, either to store for your own records or to mark up with required changes. If you are marking up changes, please ensure these are cosmetic only, and send the marked-up document to Start Software for uploading.

To download the template for one of these standard documents (one that runs from a Word/Excel button), search for the template on the Document Templates screen, click the underlined **Template Name** to display the details and then use the **Download Template** button.

## 5.2 Report Formats

The “Report Formats” menu option provides a list of the programs that can be run for report generation. The programs are linked to report templates. Each program has a set of instructions to run against the linked template. The following information is displayed:

- **Program Name** – this is the name of the program. It is linked by an entry in the Survey Types screen to the template name that you see in the drop-down list on the Survey Details screen, eg “Management Survey” or “Refurbishment Survey”
- **Word Template** – this is the full path and filename of the template, it shows where on your server the template file is located, eg “C:\Tracker\Word Templates\ABC Management Survey”
- **Comments** – this tells you the height of the front page photo, eg “frontpageheight = 100”.

Program Name	Friendly Name	Word Template	Comments	Save to Subfolder	Generate Survey Item QR Codes	Delete
Australia - Survey Template		D:\Tracker\Word Templates\Australia - Example Survey Tem	frontpageheight=150			
proj/invoice		D:\Tracker\Word Templates\Invoice Example.doc				
Example		D:\Tracker\Word Templates\Survey Template Generic.	frontpageheight=150			
Example Management Survey		D:\Tracker\Word Templates\Example Management Repp	frontpageheight=250			
Example Management Survey Single		D:\Tracker\Word Templates\Example Management Report.d	frontpageheight=250			
Example Management Survey TEST		D:\Tracker\Word Templates\Example Management Report.d	FrontPagePhotoEachHeight=200			
Example TEST		D:\Tracker\Word Templates\Example Management Report.d	frontpageheight=250			
Example Management Survey Test C		D:\Tracker\Word Templates\Example Management Report -	FrontPagePhotoEachHeight=100			
QuoteExampleLetter		D:\Tracker\Word Templates\Standard Documents\Quote Eva				
Example		D:\Tracker\Word Templates\Management Report.u	frontpageheight=300			

You can download a copy of a report template, either to store for your own records or to mark up with required changes. To download a report template, search for the template on the Report Formats screen and then use the **Download Template** button.

## 5.3 Register Formats

The “Register Formats” menu option provides a list of the different Register names and the associated queries in Alpha Tracker. Each Register listed represents a style of register table.

The information displayed here is for reference only, changes are made directly in Report Formats.

Home | Register Formats x

Records: 347

Search for:  Search All

Register Name	Query Name	Order By	Delete
AttentionExecSummary	qryAttentionExecSummary	<input type="text"/>	<input type="checkbox"/>
NoAccessExecSummary	qryNoAccessExecSummary	<input type="text"/>	<input type="checkbox"/>
PresumedExecSummary	qryPresumedExecSummary	<input type="text"/>	<input type="checkbox"/>
Register	qryRegister	<input type="text"/>	<input type="checkbox"/>
RegisterNAD	qryRegisterNAD	<input type="text"/>	<input type="checkbox"/>
AttentionExecSummary_Multi	qryAttentionExecSummary_Multi	<input type="text"/>	<input type="checkbox"/>
NoAccessExecSummary_Multi	qryNoAccessExecSummary_Multi	<input type="text"/>	<input type="checkbox"/>
PresumedExecSummary_Multi	qryPresumedExecSummary_Multi	<input type="text"/>	<input type="checkbox"/>
Register_Multi	qryRegister_Multi	<input type="text"/>	<input type="checkbox"/>
RegisterNAD_Multi	qryRegisterNAD_Multi	<input type="text"/>	<input type="checkbox"/>
*	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
*	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
*	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

First Prev 1 2 3 4 5 6 7 8 9 10 of 35 Next Last 10 Records per page

## 5.4 Sample Page Formats

The “Sample Page Formats” menu option provides a list of the different Photo Page styles and the associated queries in Alpha Tracker. Each Sample Page Format listed represents a style of Photo Page.

The information displayed here is for reference only – you can make changes here, eg to picture height, but changes are best made directly in Report Formats.

Sample Page Name	Query Name	Order By	Page Break?	Sheets Per Page	Picture Height	Delete
InspSheet_ExampleMan	qryInspSheet_AUSTRALIA		<input checked="" type="radio"/> Yes <input type="radio"/> No	1	180	<input type="checkbox"/>
InspSheet_EXAMPLE	qryInspSheet_EXAMPLE		<input checked="" type="radio"/> Yes <input type="radio"/> No		145	<input type="checkbox"/>
InspSheet_HazmatAsbEXAMPLE	qryInspSheet_HazmatAsbEXAMPLE		<input type="radio"/> Yes <input checked="" type="radio"/> No		145	<input type="checkbox"/>
ODSSheet_Example	qryODSSheet_Example		<input type="radio"/> Yes <input checked="" type="radio"/> No		145	<input type="checkbox"/>
PCBSheet_Example	qryPCBSheet_Example		<input type="radio"/> Yes <input checked="" type="radio"/> No		145	<input type="checkbox"/>
SMPSheet_Example	qrySMPSheet_Example		<input type="radio"/> Yes <input checked="" type="radio"/> No		145	<input type="checkbox"/>
LeadSheet_Example	qryLeadSheet_Example		<input type="radio"/> Yes <input checked="" type="radio"/> No		145	<input type="checkbox"/>
InspSheet_HazmatNonAsbEXAMPLE	qryInspSheet_HazmatNonAsbEXAMP		<input type="radio"/> Yes <input checked="" type="radio"/> No		145	<input type="checkbox"/>
* <input type="checkbox"/>			<input type="radio"/> Yes <input type="radio"/> No			<input type="checkbox"/>
* <input type="checkbox"/>			<input type="radio"/> Yes <input type="radio"/> No			<input type="checkbox"/>
* <input type="checkbox"/>			<input type="radio"/> Yes <input type="radio"/> No			<input type="checkbox"/>

## 5.5 Document Requests

The Documents Request screen lists all requests made for report or document production. It gives you information on what was requested, by whom and when.

Queue	Priority	ID	Shell String	Document	Size	Email	Requested By	Requested Date	Started	Finished	Delete
<input checked="" type="checkbox"/>	1	15187	D:\Tracker\Database\Alpha Tracker	D:\Tracker\Documents\Project	5	robin.bennett@stars-soft	Robin Bennett	11/05/2023 09:48	11/05/2023 09:48	11/05/2023 09:53	<input type="checkbox"/>
<input type="checkbox"/>	1	15188	D:\Tracker\Database\Alpha Tracker	D:\Tracker\Documents\Project	18	james.holmes@stars-soft	Robin Bennett	11/05/2023 10:51	15/05/2023 14:32	15/05/2023 14:35	<input type="checkbox"/>
<input type="checkbox"/>	1	15189	D:\Tracker\Database\Alpha Tracker	D:\Tracker\Documents\Project	18	robin.bennett@stars-soft	Robin Bennett	23/05/2023 09:18	06/06/2023 01:30	06/06/2023 01:33	<input type="checkbox"/>
<input type="checkbox"/>	1	15190	D:\Tracker\Database\Alpha Tracker	D:\Tracker\Documents\Project	3	judy.key@alpha-tracker.c	Judy Key	06/06/2023 01:29	06/06/2023 01:33	06/06/2023 01:35	<input type="checkbox"/>
<input type="checkbox"/>	1	15191	D:\Tracker\Database\Alpha Tracker	D:\Tracker\Documents\Project	12	adam.dangerfield@stars	Kim Evison	08/06/2023 12:50	12/06/2023 14:08	12/06/2023 14:12	<input type="checkbox"/>
<input type="checkbox"/>	1	15192	D:\Tracker\Database\Alpha Tracker	D:\Tracker\Documents\Project	12	adam.dangerfield@stars	Dan Darkin	12/06/2023 15:24	12/06/2023 15:24	12/06/2023 15:28	<input type="checkbox"/>
<input type="checkbox"/>	1	15193	D:\Tracker\Database\Alpha Tracker	D:\Tracker\Documents\Project	2	judy.key@alpha-tracker.c	Judy Key	13/06/2023 01:27	13/06/2023 01:27	13/06/2023 01:29	<input type="checkbox"/>
<input type="checkbox"/>	1	15194	D:\Tracker\Database\Alpha Tracker	D:\Tracker\Documents\QuosenTQ23		judy.key@alpha-tracker.c	Judy Key	13/06/2023 01:51	13/06/2023 01:51	13/06/2023 01:51	<input type="checkbox"/>
<input type="checkbox"/>	1	15195	D:\Tracker\Database\Alpha Tracker	D:\Tracker\Documents\Project	0	robin.bennett@stars-soft	Robin Bennett	12/07/2023 10:33	12/07/2023 10:33	12/07/2023 10:34	<input type="checkbox"/>
<input type="checkbox"/>	1	15196	D:\Tracker\Database\Alpha Tracker	D:\Tracker\Documents\Project	17	james.holmes@stars-soft	Robin Bennett	12/07/2023 10:35	09/08/2023 14:04	09/08/2023 14:10	<input type="checkbox"/>

## 5.6 Setting print queues

There are a number of methods available in Alpha Tracker for choosing queues for survey reports.

- The first, and default, option is to have the queue numbers randomly generated.
- The second is to send documents for specific clients to specific queues.
- The third option is to enable big reports to go to one queue and smaller ones to another. ("Queue Allocation Method" set to "big22".)
- The fourth option allows you to specify different queues for different offices.
- The fifth option uses a "Tesco" queue model, assigning documents to the least busy queue.

If queues are randomly assigned, you can still use the second method above and send documents for specific clients to specific queues. To do this you would need to set the "MaxRandomQueueNo" setting. For example, if you have 6 queues and queue 5 and queue 6 are used for specific clients, then you would set "MaxRandomQueueNo" to 4 so that queues 1-4 are used randomly.

To send documents for specific clients to a specific queue only you use one of the "ClientsDocumentQueue" settings. For example, in the setting "ClientsDocumentQueue3" type the comma-separated list of Client IDs whose documents are to be sent to that queue.

If you have two queues, then you might choose to use the third option and send large documents to one queue and smaller documents to the other. To do this, set "Queue Allocation Method" to "big22". Large documents are those where the number of survey items is greater than the "Queue Size Threshold" setting.

To use the per office option, set the repository setting "Queue Allocation Method" to the value "queueperoffice". Then set or create repository settings for each office as follows: "Queue for Office X" is "1" or "2" etc. If nothing is set, it will default to queue 1.

To use the "Tesco" queue method, where documents go to the least busy queue, set the repository setting "Queue Allocation Method" to the value "Tesco". This method doesn't choose simply on the basis of how many documents are in the queues, it also looks at the size of the reports being issued.

If required, you can assign a weighting to Bulk Certificates which is then used with the "Tesco" method when determining which queue is the least busy. Setting the "Doc Size (average) for Bulk Certs" setting to, for example, "50" gives Bulk Certificates the same weighting as a survey report with 50 items. It is also possible to send all Bulk Certificates to a specific queue. By default, Bulk Certificates are sent to queue 1 but you can use the "Queue for Bulk Certificates" setting to specify an alternative queue.

You can use the "Tesco" option in conjunction with sending documents for specific clients to specific queues by using the setting "MaxTescoQueueNo". For example, set this to "4" and then you could use the "Tesco" method on queues 1-4, leaving queues 5 and 6 for documents for specific clients.

## 6. SYSTEM SETTINGS

The system settings are found under the System submenu on the Setup menu and are mainly used by Start Software to control the customisation of your system and to update the software as necessary. The system settings are:

- Access Log
- App Server Diagnostic
- Globals
- Linked Systems
- Next Number Lookup
- QR Code Log
- Software Updates
- System Repository
- Table Records.

### 6.1 Access Log

The Access Log provides you with details of who has been using the system, which areas they have been accessing and for how long. It also gives an indication of system performance by means of the Apdex score.

To display any details on the Access Log screen, you must enter search criteria, for example you could enter today's date in the From and To search fields and a username in the Who field.

An Apdex Total >0.75 shows **good** system performance; between 0.50 and 0.75 is **sluggish**; an Apdex score <=0.50 shows **poor** performance. You can also find a Performance Dashboard on the Home Page to show the Apdex Total score for the last 24 hours, converted to a figure out of 100. The figure is colour coded. If your system performance is sluggish or poor, please contact Start Software on 0333 301 1010 for help.

The screenshot shows the 'Access Log' page with search filters and a table of log entries. The search criteria are: From: 09/08/2023, To: (empty), Who: Robin, What: (empty), IP: (empty), Server: (empty), Duration: (empty). The table lists three entries, with the first highlighted in orange. Summary statistics show a total count of 3, an average apdex score of 0.67, a minimum of 0, and a maximum of 1.86.

ID	When	Who	What	IP	Server	Duration	Apdex Score
153979	09/08/2023 11:09:27	Robin	Login (Session ID: bb2451a7aa374bfc67b8c29da101f9d7)		Demo 81	0	1
153980	09/08/2023 11:09:28	Robin	Refresh Session	172.31.23.183	Demo 81	1.86	1
153981	09/08/2023 11:10:05	Robin	Project Grid	172.31.46.55	Demo 81	0.16	1

Total							1
Count	3						
Average						0.67	
Minimum							
Maximum						1.86	

First Prev 1 of 1 Next Last

Note: an Apdex Total > 0.75 shows **good** system performance; between 0.50 and 0.75 is **sluggish**; an Apdex score <= 0.50 shows **poor** performance

## 6.2 App Server Diagnostic

The “Download Advanced Diagnostic” option downloads information about the Alpha Anywhere Application Server. There is no screen associated with this option.

## 6.3 Globals

The “Globals” option defines the locations of files that perform important functions in Alpha Tracker, eg Alpha Tracker Document Maker. Their definition here enables location changes such as switching to a different drive to be quickly made.

The screenshot shows the 'Globals' settings page. At the top, there are tabs for 'Home' and 'Globals x'. Below the tabs, the 'Client' is set to 'Demo' with a note: 'Please contact [Start Software Support](#) if you need your client name changing'. The settings are as follows:

System Path	D:\Tracker\Database
Document Root	D:\Tracker\Documents
Archive Root	
Template Path	D:\Tracker\Word Templates
Tracker Document Maker Full Path	D:\Tracker\Database\Alpha Tracker Document Maker.exe
Alpha Tracker Document Maker Path	D:\Tracker\Database\Alpha Tracker Document Maker.exe
Report Formats Path	D:\Tracker\Database\Report Formats.mdb
PPCCRoot Path	D:\Tracker\Tracker Mobile
PPCC Copy Location Path	
SQL Database	Tracker
SQL Server Auth User	Please leave this field blank
SQL Server Auth Pass	Please leave this field blank
Alpha Draw URL	https://startsoftware-drawingapp.cloud.alphasoftware.com/t
Alpha Draw Password	

## 6.4 Linked Systems

The “Linked Systems” option lists other Alpha Tracker systems that your system is linked to, for the purposes of data sharing. If you are linked to another Alpha Tracker, then it becomes possible to transfer survey and re-inspection data between the systems.

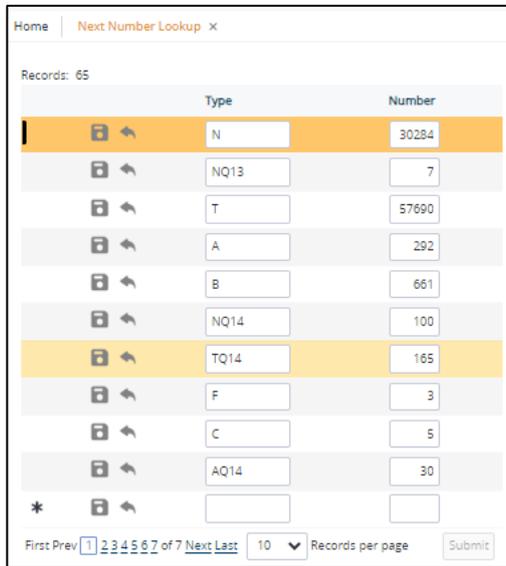
The screenshot shows the 'Linked Systems' page. At the top, there are tabs for 'Home' and 'Linked Systems x'. Below the tabs, it shows 'Records: 2'. There are two tabs: 'Sending' and 'Receiving'. The 'Receiving' tab is active. The table below shows the following records:

System 1	System 2
Alpha Tracker Testing	Alpha Tracker Testing
Alpha Tracker Testing	Dan-PC

At the bottom, there is a dropdown menu set to '10' and the text 'Records per page'.

## 6.5 Next Number Lookup

The “Next Number Lookup” option lists the next numbers that will be used for automatic numbering in the system and enables these to be reset.



Home | Next Number Lookup x

Records: 65

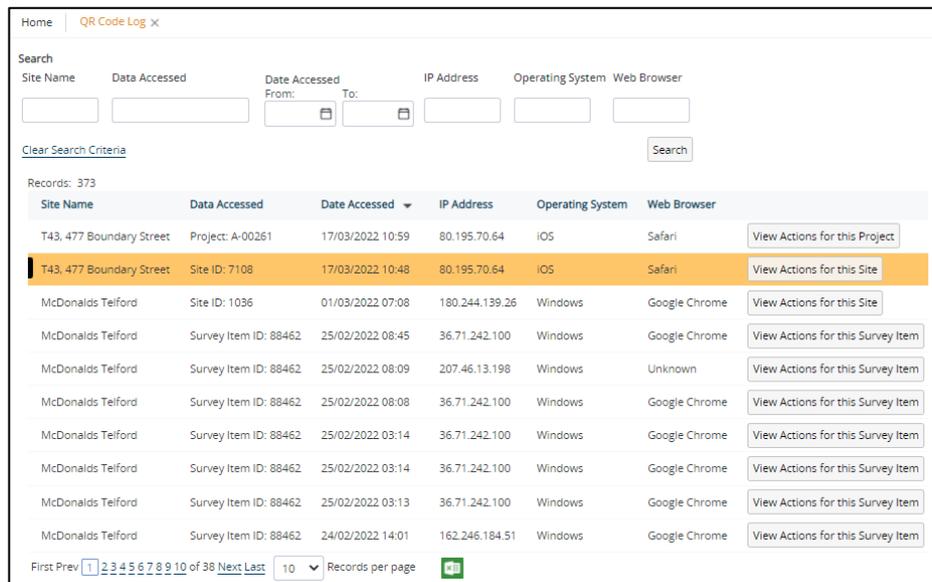
	Type	Number
 	N	30284
 	NQ13	7
 	T	57690
 	A	292
 	B	661
 	NQ14	100
 	TQ14	165
 	F	3
 	C	5
 	AQ14	30
*  		

First Prev 1 2 3 4 5 6 7 of 7 Next Last 10 Records per page Submit

The number ranges are created automatically, so if you use office letter “K”, say, for the first time by creating project K-00001, then an entry is created here for Type “K”, Number “2” to indicate what the next number will be for projects with the “K” office letter.

## 6.6 QR Code Log

If you are using the automatically generated QR codes in Alpha Tracker, then the “QR Code Log” gives you details of every time the QR code was used. Use the search fields at the top to query the list.



Home | QR Code Log X

Search

Site Name Data Accessed Date Accessed From: To: IP Address Operating System Web Browser

Clear Search Criteria Search

Records: 373

Site Name	Data Accessed	Date Accessed	IP Address	Operating System	Web Browser	
T43, 477 Boundary Street	Project: A-00261	17/03/2022 10:59	80.195.70.64	iOS	Safari	View Actions for this Project
T43, 477 Boundary Street	Site ID: 7108	17/03/2022 10:48	80.195.70.64	iOS	Safari	View Actions for this Site
McDonalds Teiford	Site ID: 1036	01/03/2022 07:08	180.244.139.26	Windows	Google Chrome	View Actions for this Site
McDonalds Teiford	Survey Item ID: 88462	25/02/2022 08:45	36.71.242.100	Windows	Google Chrome	View Actions for this Survey Item
McDonalds Teiford	Survey Item ID: 88462	25/02/2022 08:09	207.46.13.198	Windows	Unknown	View Actions for this Survey Item
McDonalds Teiford	Survey Item ID: 88462	25/02/2022 08:08	36.71.242.100	Windows	Google Chrome	View Actions for this Survey Item
McDonalds Teiford	Survey Item ID: 88462	25/02/2022 03:14	36.71.242.100	Windows	Google Chrome	View Actions for this Survey Item
McDonalds Teiford	Survey Item ID: 88462	25/02/2022 03:14	36.71.242.100	Windows	Google Chrome	View Actions for this Survey Item
McDonalds Teiford	Survey Item ID: 88462	25/02/2022 03:13	36.71.242.100	Windows	Google Chrome	View Actions for this Survey Item
McDonalds Teiford	Survey Item ID: 88462	24/02/2022 14:01	162.246.184.51	Windows	Google Chrome	View Actions for this Survey Item

First Prev 1 2 3 4 5 6 7 8 9 10 of 38 Next Last 10 Records per page

## 6.7 Software Updates

Software updates are applied to an Alpha Tracker system by using the Software Updates menu option on the System submenu. Updates are performed by Start Software in case app server or table updates are also needed.

You are advised to ensure that all “Major” updates are run to keep your Alpha Tracker running efficiently.

Updates should be run in SVN order. To ensure that they are run in order you may find the **Run Update** button on some updates is greyed out until other updates have been run. After each update, Alpha Tracker needs to be refreshed by logging out and back in again.

There are two main types of software update: “sticky” and “non-sticky” updates.

“Sticky” updates are those which always show on the list of available Alpha Tracker updates. They do not disappear when the user has selected them. For example, the User Guide file can be a sticky update so that users can refresh their user guide file at any time. There should only ever be one sticky update for the user guide but its content should be updated to reflect the latest version of the user guide.

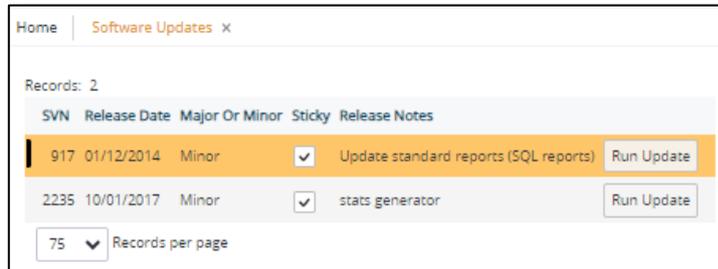
A “non-sticky” one drops off the list once the update has been applied.

“Sticky” updates are things that users might want to apply more than once. For example there might be sticky updates for different Alpha Tracker styling packs so that users can select Style A one week, Style B the next, then go back to Style A.

Running a “sticky” update should not change the version number in the user’s Alpha Tracker. Therefore, the version.txt file (which controls the version number shown on the Alpha Tracker screen) should not be included in the update ZIP.

To run an update:

1. Open the “System” submenu on the “Setup” menu and select “Software Updates” to display the Software Updates screen.



2. Locate the software update that you want to run and click its **Run Update** button.

If the update run was a “sticky” one it will remain on the list; if it was a “non-sticky” update then it will disappear from the list once run.

All software updates now automatically zip and back up the webroot folder to a backup subfolder before the software update is applied, ensuring that a backup of the software is kept. Table record counts are captured to allow usage monitoring.

3. Refresh Alpha Tracker by logging out and back in again.

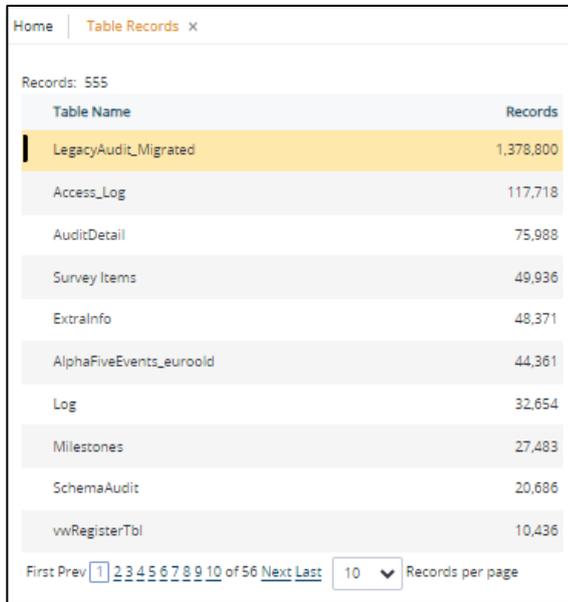
## 6.8 System Repository

The System Repository contains a number of settings that allow Start Software to customise the look, feel and behaviour of your Alpha Tracker software. The repository settings contain help text to define how they are used and what they do.

Setting	Date Created	Value	Help
Style	25/03/2013	StartSoftware	Not used
Show Help	28/03/2013	yes	Displays the Help on the Home screen (yes/no)
Show Site Frame	28/03/2013	yes	Shows the Site frame (yes/no)
Show Lab Frame	10/04/2013	yes	Shows the Lab frame on the main menu (yes/no)
DefaultLab	23/04/2013	no	Defines the Lab to be selected by default on the Survey screen and when setting up Bulk Sample projects
ShowPromaster	25/06/2013	no	Shows the Promaster settings (yes/no)
Show Testing Info	25/06/2013	No	Start setting. Not used (yes/no)
Default Office Letter	25/06/2013	A	Defines the office letter to be used by default on projects and quotations
Show Material/SurveyTypes	15/07/2013	yes	Shows the Materials and Survey Types options on the menu (yes/no)
ProjectNumberLength	14/11/2013	7	Specifies the length of the project number
CalendarEndTime	15/11/2013	18	Sets the end of the day on the Calendar; the latest time at which a booking can be made
CalendarStartTime	15/11/2013	8	Sets the start of the day on the Calendar; the earliest time from which a booking can be made
ShowCRM	19/11/2013	yes	Shows CRM options on projects, quotations, main menu etc (yes/no)
Vat	09/12/2013	.20	Sets the VAT or Tax amount; eg 0.20 is 20%
QuickStart	02/01/2014	yes	Displays the QuickStart menu (yes/no)

## 6.9 Table Records

The “Table Records” option gives you a count of the number of records in each table. It is display only.



The screenshot shows a web interface for 'Table Records'. At the top, there is a breadcrumb 'Home' and a tab 'Table Records' with a close icon. Below this, it says 'Records: 555'. The main content is a table with two columns: 'Table Name' and 'Records'. The table lists several tables, with 'LegacyAudit\_Migrated' having the highest record count at 1,378,800. At the bottom of the table, there is a pagination control showing 'First Prev 1 2 3 4 5 6 7 8 9 10 of 56 Next Last' and a dropdown menu for 'Records per page' set to '10'.

Table Name	Records
LegacyAudit_Migrated	1,378,800
Access_Log	117,718
AuditDetail	75,988
Survey Items	49,936
ExtraInfo	48,371
AlphaFiveEvents_euroold	44,361
Log	32,654
Milestones	27,483
SchemaAudit	20,686
vwRegisterTbl	10,436

## 7. IMPORT/EXPORT OPTIONS

The “Import/Export” section of the “Setup” menu provides a way for you to:

- import data into Alpha Tracker
- display any exports that may have been set up on your system
- define data extract (SQL) reports on your data
- import third-party survey data for re-inspection.

### 7.1 Importing

There are separate import menu options available under the “Import/Export” option on the Setup menu that enable you to import:

- bulk samples (“Bulk Sample Import”)
- clients (“Clients Import”)
- diary appointments (“Diary Import”)
- projects (“Project Import”)
- project staff (“Project Staff Import”)
- sample analysis results (“Sample Results Import”)
- sites (“Site Import”)
- survey data (“Survey Import”)
- survey items (“Survey Items Import”)
- user records (“User Import”).

The import process starts with you downloading a template which you populate with the data to import. You then import the data to display it on screen, amend it as necessary and then process the data to complete the import. Click the buttons at the top of the screen to perform each step:

1. Template
2. Import
3. Process.

You can now create sites during the import, either as part of the “Project Import” or by importing sites separately using the “Site Import”. When creating sites as part of the project import, sites are or are not created as follows:

- If the Site ID entered already exists the import adds the project to the Site
- If no Site ID is entered but the Site Name already exists the import adds the project to the Site
- If a new Site ID or Site Name is entered then the import adds a new Site
- If the Site ID exists with a different Site Name then the import adds the project against the Site ID



Note that if you are using the “Project Import” and a Project Number already exists it will not import.



Also note that the columns available on the downloaded spreadsheet will depend on how the settings in your system are set.

The “Project Import” automatically creates buildings if the setting to auto add buildings on project creation is set to yes. It inserts both projects and surveys at the same time, and also adds in any required Extra Info data for projects of the specified type automatically.

The “Client Import” checks that no duplicate clients are created and auto-generates all client IDs using the Get Next Number function.

To import data:

1. Select the appropriate Import option, eg “Client Import”, “Diary Import”, “Project Import”, “Site Import”, “Survey Import” or “Survey Items Import”, from the Import/Export submenu on the Setup menu.

Three numbered buttons at the top of the screen indicate the import steps.

2. Click the first button, **1. Template**, to download the template for the data you want to import.

The blank spreadsheet appropriate to the type of data is downloaded.

3. Open the downloaded spreadsheet, fill in the details and save the file.



You must be very careful when entering the data to import, especially with project numbers, project type IDs and client IDs etc, so as not to introduce duplicate numbers into your Alpha Tracker data. If you have any doubt, please contact Start Software for help.

4. Upload the completed spreadsheet by clicking the **2. Import** button, select the file and click **Upload**.

A report of the number of records successfully imported and any errors is displayed.

5. Review the data that you are about to import.
6. If you are happy with the data click the **3. Process** button to import it. If not, correct the data on screen, or in the spreadsheet and upload it again, then process it.

## 7.2 Managing your reports

The “Reports” option on the “Import/Export” menu controls your standard reports – these are the data reports that you produce by using the “Reports” menu option.

There is a set of standard reports, which comes as part of Alpha Tracker, and these reports are always present. This set of reports is refreshed automatically whenever your software is updated. You cannot modify any of these reports.

You can, however, create your own reports by using the “Reports” option on the “Import/Export” menu. These user-written reports are distinguished by the **User** tickbox being ticked, which happens automatically. The ability to create and modify user-written reports is restricted to Superusers.

To create your own reports:

1. Open the “Import/Export” submenu on the “Setup” menu and select “Reports” to display the Reports screen.

2. In a blank row at the bottom of the displayed list of reports, enter the details to define your own report:
  - **Category** – this is the option in the Reports menu under which the new report is to appear
  - **Report Name** – type the name that you want to give the report
  - **Report Description** – type a fuller description of the report to identify its content or use
  - **Report SQL** – specify the SQL that is to select and sort the data that you want to appear in your report

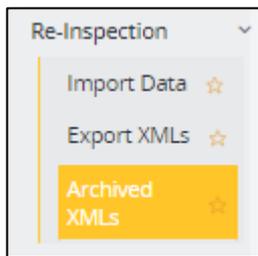
- **Available To** – leave this field blank unless you want this report to only be visible to one client on the Client Portal, in which case specify their Client ID.

The **ID** is automatically assigned and the **User** tickbox is automatically ticked to indicate that you are creating a user-written report.

3. Save your changes and close the screen.

## 7.3 Importing third-party re-inspection data

The import facility for re-inspections allows you to import data from third parties for re-inspection. It imports the data from Excel into a table and XMLs can be generated from the table and sent to a particular person/handset. The new menu options are under Setup | Import/Export | Re-inspection.



1. Select the “Import Data” option.
2. Type in the data for re-inspection or use the **Export Data to Excel (for Template)** button to download and populate Excel template.

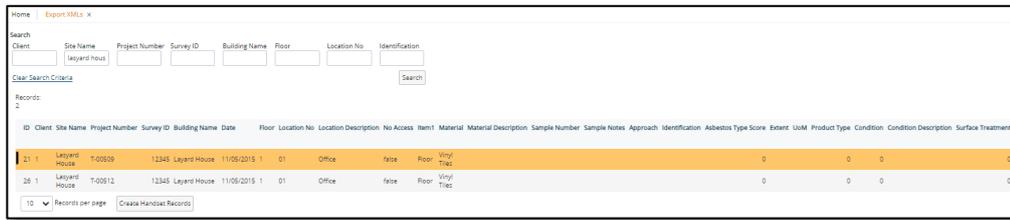


*Note that you need to set up the re-inspection project and the survey in advance of importing the data.*

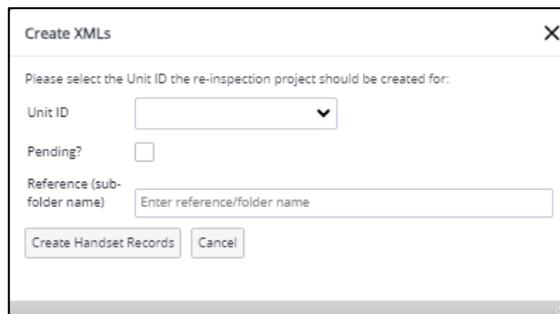
3. Click the **Import Data from Excel** button to import the data from the Excel spreadsheet. The imported data is then visible and editable on the Import Data screen.

Client	Site Name	Project Number	Survey ID	Building Name	Date	Floor	Location No	Location Description	No Access	Item	Material	Material Description	Sample Number	Sample Notes	Approach	Identification	Asbestos Type Score
1	Layard House	T-0550	12345	Layard House	11/05/12	1	D1	Office	<input type="checkbox"/>	Floor	Vinyl Tiles						0
+	+								<input type="checkbox"/>	Floor	Vinyl Tiles						0
+	+								<input type="checkbox"/>								0
+	+								<input type="checkbox"/>								0

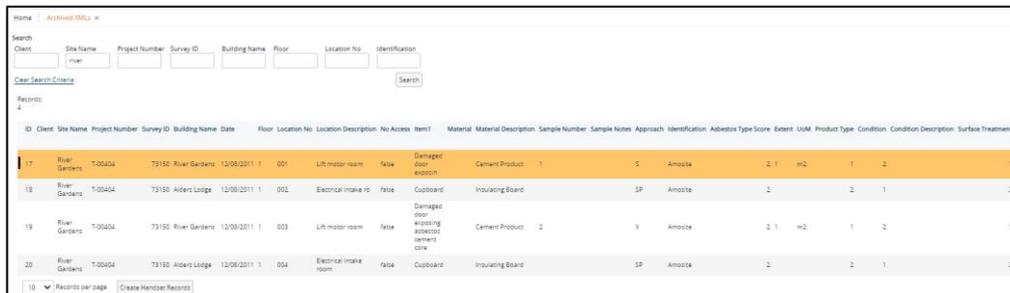
4. When the data is all present, use the “Export XMLs” option to show the data ready to export.
5. Show all the required data on one screen by setting the number of records per page (you can show up to 500 records per page here).
6. Click the **Create Handset Records** button to generate the XML records.



First there is a check of the number of XML records you are creating. Then you must specify the handset (Unit ID) to which you want to send the records – Pending and Reference do not need to be specified unless you are storing the records to release later.



7. Select the handset (Unit ID) to send the records to, then click **Create Handset Records** to create and send the XML records to the specified handset.
8. Display the exported XMLs on the Archived XMLs screen. You can also export the XMLs from the Archived list to a handset for re-inspections. This works in exactly the same way as from the Export XMLs screen, allowing you to re-use or re-send data.



In summary, the steps to import third-party data for re-inspection are:

1. Set up the new project for the re-inspection.
2. Give the new project a project type of “Re-inspection”.
3. Make sure you have clicked on the Survey Details button on the project and selected a survey type (“Reinspection”).
4. Go to *Setup/Import/Export/Re-inspection/Import Data* and download the Excel template, by using the **Export Date to Excel (for Template)** button.
5. Fill in the Excel template with the survey details that you have, leaving the heading row exactly as it is, and paying attention to the format of data required by Alpha Tracker.

6. Import the data from the Excel template, by using the **Import Data from Excel** button.
7. Check and edit the data as necessary.
8. Go to *Setup/Import/Export/Re-inspection/Export Data* and show all the required records on one page.
9. Click the **Create Handset Records** button to generate the XML records.
10. Select the handset to which you want to send the XML records then click **Create Handset Records** to create and send the XML records to the specified handset.

The records should then be available for re-inspection on the specified handset using the standard Tracker Mobile.

## 8. DASHBOARD EMAIL OPTIONS

There are two types of email that Alpha Tracker can send automatically:

- alerts – these emails are sent when a specified event happens. An event triggers the sending of the alert email, eg a new project is created so a Manager receives an alert email
- dashboards – these emails are sent at scheduled times, showing the current status. For example, a new projects dashboard email might be sent at 16:00 each day listing the new projects created.

You can view the details of both alert and dashboard emails.



*Please contact Start Software if you would like additional alert or dashboard emails set up.*

### 8.1 Displaying alert emails

You can display a list of the alert emails that have been sent out by Alpha Tracker. To do this:

1. Open the “Dashboard Emails” submenu on the “Setup” menu and select “Alerts” to display the Alerts screen.

ID	To	Cc	Subject	Body	Timestamp Created	Timestamp Dispatched	Delete
1023E	robin.bennet@start-software.com		Late diary change!	Please check your diary. An appointment has been added for N-50283 at e-iC 8.8.2023 on 09/08/2023 12:00	09/08/20		<input type="checkbox"/>
1023E	robin.bennet@start-software.com		!!ERROR SENDING EMAIL!! Late diary	Please check your diary. An appointment has been added for N-50282 at e-iC 8.8.2023 on 08/08/2023 12:00	08/08/20		<input type="checkbox"/>
1023F	adam.dangerfield@start-software.co		Late diary change!	Please check your diary. An appointment has been added for T-07440 at Jack Water #1 on 03/08/2023 11:15	03/08/20		<input type="checkbox"/>
1023E	judy.hey@start-software.com		HTML: A new sample request has been submitted.	A new sample request has been submitted. Client ID: ARL Client Name: ARL Analytical Reference Laboratory Site Name: e-Innovation Centre Project Number: B-00980	03/08/20		<input type="checkbox"/>
1023E	jack.byrne@start-software.com		HTML: Samples Submitted Successful	Your samples have been successfully submitted for e-Innovation Centre. For reference your project number is B-00980 List of samples entered	03/08/20		<input type="checkbox"/>
1023E	judy.hey@start-software.com		HTML: A new sample request has been submitted.	A new sample request has been submitted. Client ID: ARL Client Name: ARL Analytical Reference Laboratory Site Name: e-Innovation Centre Project Number: B-00980	03/08/20		<input type="checkbox"/>

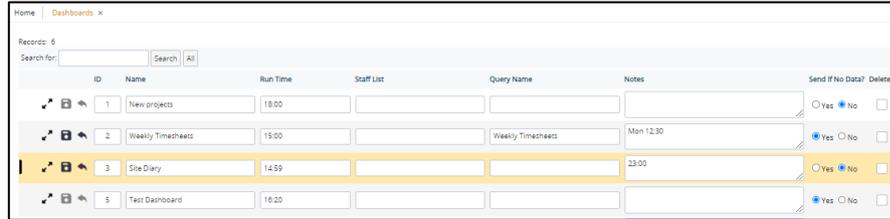
This screen tells you who the emails went to and when, it displays the Subject line as well as the email text.

2. Scroll through the list to view the alert emails.

## 8.2 Viewing dashboard emails

You can see any dashboard emails active in your Alpha Tracker. To do this:

1. Open the “Dashboard Emails” submenu on the “Setup” menu and select “Dashboards” to display the Dashboards screen.



Home | Dashboards x

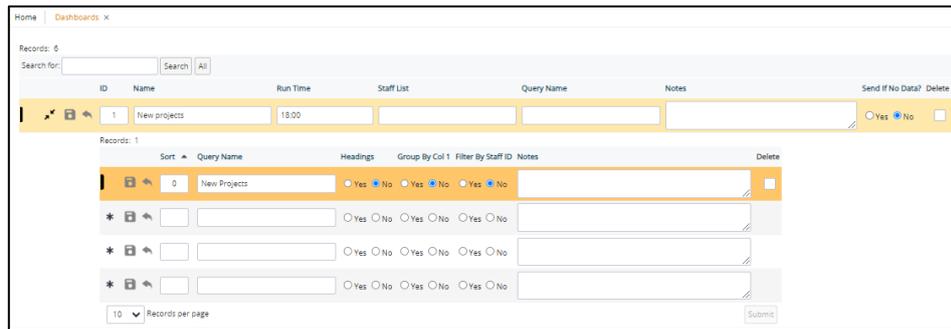
Records: 6

Search for:  Search All

ID	Name	Run Time	Staff List	Query Name	Notes	Send If No Data?	Delete
1	New projects	18:00				<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="checkbox"/>
2	Weekly Timesheet	15:00		Weekly Timesheet	Mon 12:30	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
3	Site Diary	14:59			23:00	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="checkbox"/>
5	Test Dashboard	18:20				<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>

This screen shows any dashboard emails already set up, including information such as the time that they run and who they are sent to.

2. Scroll through the list to view the dashboard emails. To see the details of a dashboard email, click its row expander button.



Home | Dashboards x

Records: 6

Search for:  Search All

ID	Name	Run Time	Staff List	Query Name	Notes	Send If No Data?	Delete
1	New projects	18:00				<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="checkbox"/>

Records: 1

Sort: Query Name Headings Group By Col 1 Filter By Staff ID Notes Delete

0	New Projects	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="checkbox"/>
*		<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="checkbox"/>
*		<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="checkbox"/>
*		<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="checkbox"/>

10 Records per page Submit

## 9. QUERYING DATA

This section describes how you can use the Query Writer in Alpha Tracker to run your own simple queries against your data. You can save these queries and execute them whenever needed.

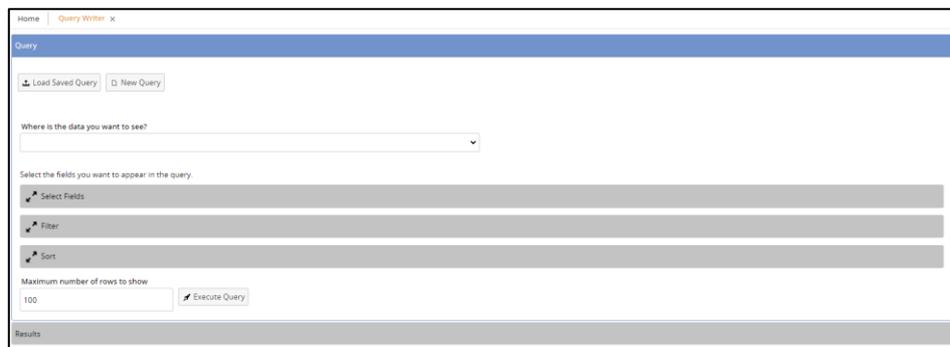
### 9.1 Setting up the tables for Query Writer

The tables or views that are to be available for use in queries have to be set up on the Query Writer Setup screen. This will be done by Start Software after discussion with you. The setup includes defining which groups should have access to queries based on specific tables or views.

### 9.2 Writing a new query

Once the tables have been setup, you can define your own queries in Alpha Tracker by using the Query Writer screen. This lets you select a table or view to query, to specify the fields to be output, and to define any filters and sort orders to be applied.

1. Select the “Query Writer” option from the Reports menu. The Query Writer screen is displayed.



If the fields on the screen are not blank, click the **New Query** button to blank them.

2. Select the table or view to query by making a selection from **Where is the data you want to see?** For example, you might select the Clients table.
3. Expand the “Select Fields” section by clicking on it so that you can select which fields from the table you want to include in your query.



The fields you want to include need to be listed in the **Selected Fields** box. To do this, use these methods:

- Click the **Select All** button to move all fields to the **Selected Fields** box.
- Select a field on the left, click **Select** to move it.
- Double-click a field on the left to move it.

To reverse a selection:

- Click the **Deselect All** button to move all fields back to the **Available Fields** box.
- Select a field on the right, click **Deselect** to move it back to the **Available Fields** box.
- Double-click a field on the right to move it.

Then use the **Move Up** and **Move Down** buttons to list the fields in the desired order.

4. Expand the “Filter” section by clicking on it so that you can specify the records to select.



Fill in the fields to define your query. For example, to get all Client records created after 01/01/2021, select the **Field Name** “Created”, the **Operator** “>=” and the **Value** “01/01/2021”.

You can enter multiple filters and use the **And/Or** selector to specify how they are linked.

5. Expand the “Sort” section by clicking on it so that you can specify the sort order for the results of your query.



You can enter up to three fields to order by, and select whether the direction of the sort is ascending or descending.

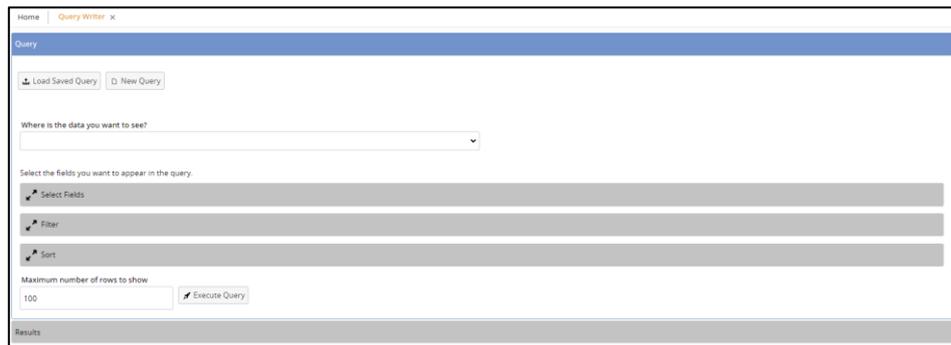
6. If you want to limit your results, specify the maximum number of rows to be returned in the **Maximum number of rows to show** field.
7. Click **Execute Query** to run the query. The results are displayed on screen.
8. If required, export the results to a spreadsheet by using the **Export to Excel** link.

9. If you might want to run this query on another occasion, click the **Save Query As** link, name the new query and click **Save**.

## 9.3 Running an existing query

If you have saved your queries, you can run them again at any time. Simply select the query name and Execute Query.

1. Select the “Query Writer” option from the Reports menu. The Query Writer screen is displayed.



The screenshot shows the 'Query Writer' interface. At the top, there are two buttons: 'Load Saved Query' and 'New Query'. Below these is a dropdown menu labeled 'Where is the data you want to see?'. Underneath, there are three sections for configuring the query: 'Select Fields', 'Filter', and 'Sort', each with a plus icon and a grey bar. At the bottom, there is a 'Maximum number of rows to show' field set to '100' and an 'Execute Query' button. A 'Results' section is visible at the very bottom.

2. Click **Load Saved Query** to display the list of previously saved queries.



The screenshot shows the 'Query Writer' interface with the 'Load Saved Query' button clicked. A 'Saved Queries' list is displayed, containing two entries: 'New Projects Opened 2023' and 'Dane Projects'. To the right of the list are 'Load' and 'Cancel' buttons. Below the list is a dropdown menu labeled 'Where is the data you want to see?' with 'Projects' selected.

3. Select the query from the list and click **Load**. The query is loaded. You can adjust the query if required.
4. Click **Execute Query** to run the query and display the results.