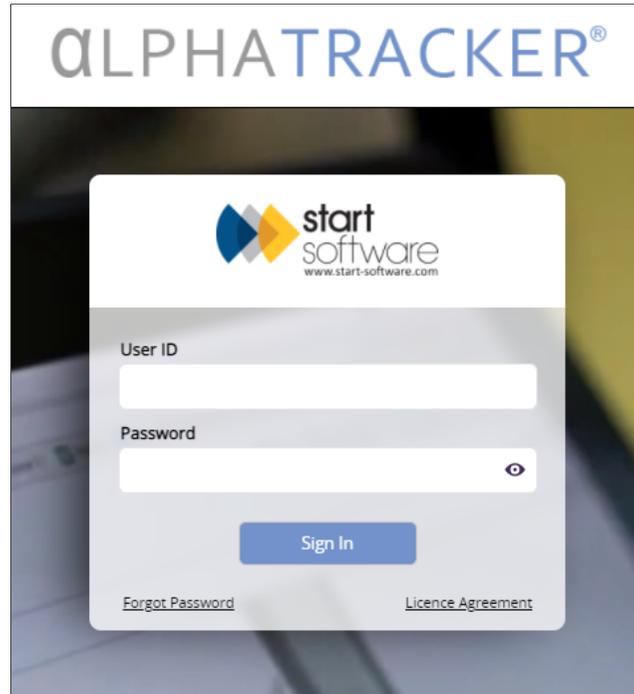


Release 37 - Alpha Tracker Release Notes

New Features / Changes (from SVN5392 to SVN5683)

1. The first thing you will probably notice in this release is the new Sign-In screen that has much more content, including your company's logo.



2. Some variation is possible on the Sign-In screen, for example control over the logo that is used, and the colour of the Sign In button background and text. You can reset your own password from the new Sign-In screen as long as you have a staff, not a Client Portal, sign-in. Enter your User ID and click the Forgot Password link, the system will email you, follow the link in the email to reset your password. The symbols that you can use in your password are no longer restricted, all are supported. When a password is changed the owner of the account is emailed (if there is an email specified on the Staff record) to inform them of the change.
3. There is also a subtle change to the Main Menu options which now have Windows 11 rounded corners and shadows.

4. This release sees some changes as a result of the new requirements of HSG248. On the Fibre Analysis screen these include negative (NAD) samples accruing two lab points, irrespective of the material. This feature is controlled by a setting, “Should NAD analysis score 2 Lab Points”, which is set to “yes” by default.

The display of the score is now obscured when carrying out blind re-checks, so as not to give away a NAD analysis.

5. Another HSG248-related change is the addition of fields to the Fibre Analysis screen for the analyst to record the start and finish times for both stereo binocular and PLM microscopes. The four new fields are located on the Overview tab. Simply click on the calendar/clock button in one of the fields and click OK to set the current date and time, or use the controls to set the required date and time and then click OK. These fields can be hidden if required.

The screenshot shows the 'Fibre Analysis' screen with the 'Overview' tab selected. The form contains several sections: 'Sample No.' (001), 'Site Name' (62 East Borough), 'Surveyor's Assessment' (Bituminous Product), and 'Analyst's Assessment' (Bituminous Product). Below these are fields for 'Other Ref', 'Survey Date', 'Sample Description', 'Sample Size', and 'Storage Area'. A 'Microscope' section includes 'Objective Lens1', 'Ri Fluid Equip No', and 'Other Equipment Ref'. At the bottom, there are four time fields: 'Stereo Binocular Start Time', 'Stereo Binocular End Time', 'PLM Start Time', and 'PLM End Time'. A calendar and time picker overlay is open, showing the date '1' in December 2021 and the time '10:45:38'. The 'Correct Analysis' section has radio buttons for 'Original' (selected), 'Re-Check', and 'Dispute'. There are also fields for 'Lab Used' (Lab 1) and a 'Sub Contracted' checkbox.

6. To allow for the requirement of 5% checking of all samples in HSG248, we have extended the Lab Check Results screen to allow checking of samples below 40 points. There is an additional section on the right of the screen which you can use for this purpose if you wish. It gives details of the number of underlimit samples that need to be checked, are marked for checking and have been checked. If the number checked is less than the number required, it is highlighted in yellow. The same highlighting is used on the over 40 point checking to draw your attention to required checks.

Home Lab Check Result X

Search

Date 22/11/2021

Clear Search Criteria Search

Records: 2 Refresh

Analyst	Summary	E Total Points + QC Points	F Samples Over Limit	Overlimit Samples			Underlimit Samples				
				G Checked	H Required	I Marked	J Checked	K Required	L Marked		
▶ Dan Darkin	A Samples Analysed - QC Samples	2 + 0									
	B Points - QC Points	2 + 0	4 + 0 = 4	0	0	0					
	C Samples Checked	1									
	D Points Checked	2									
							Enter Check Results	Select Samples	0	0	1
Kim Evison	A Samples Analysed - QC Samples	1 - 0									
	B Points - QC Points	2 - 0	2 - 0 = 2	0	0	0					
	C Samples Checked	0									
	D Points Checked	0									
							Select Samples	1	0	0	

Key:
A Samples analysed by this person on the date selected
B Points total from the samples analysed by this person on the date selected
C Samples checked by this person on the date selected
D Points total from the samples checked by this person on the date selected
E Total Points (B - D)
F Samples analysed after daily limit reached
G This analyst's Samples already checked by another analyst (> 40 points)
H Samples needing to be checked (> 40 points)
I Samples marked for checking but not yet checked (> 40 points)
J This analyst's Samples already checked by another analyst (< 40 points)
K Samples needing to be checked (< 40 points)
L Samples marked for checking but not yet checked (< 40 points)

For both over- and underlimit sample checking you use the same blind checking process. Click the **Select Samples** button to mark the samples that are going to be checked. Ensure you select red samples when doing overlimit checks, and white samples when doing underlimit checks. The person doing the checks then clicks the **Enter Check Results** button to start the blind checking process.

You can use the **Select Samples** button at any time to mark samples for checking, even if no checks are required, allowing you to use the process to check as many samples as you want.

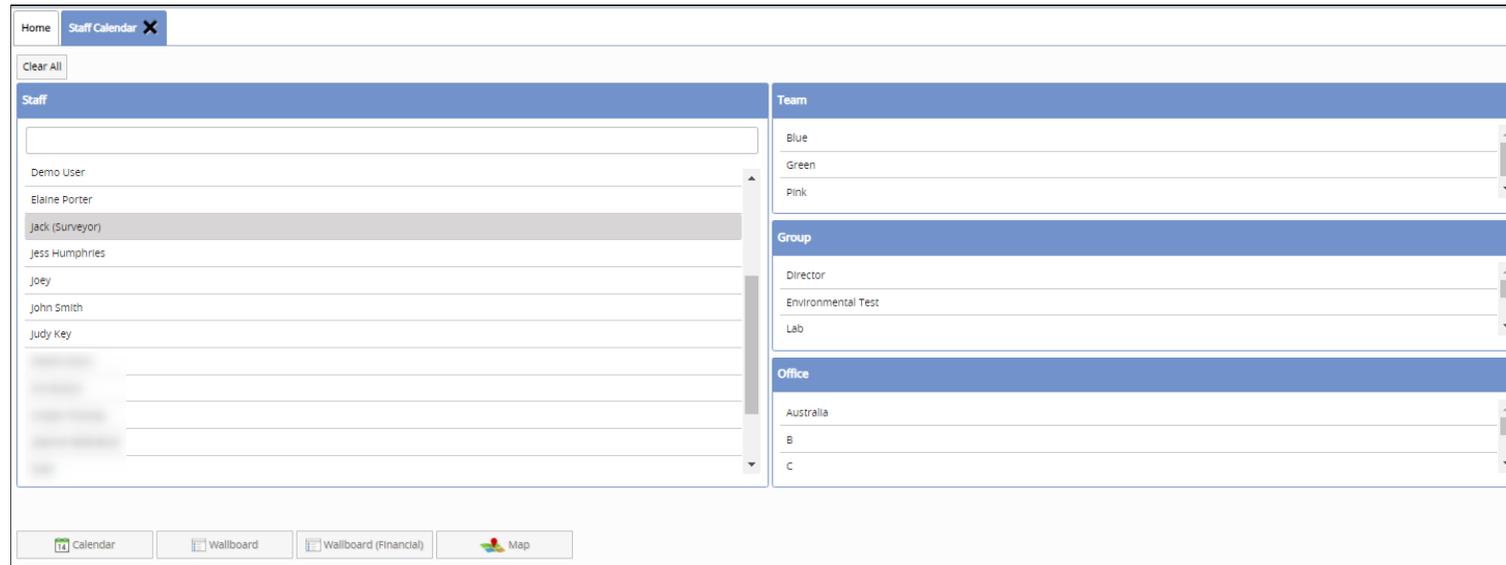
7. You will notice a number of changes to the Diary menu options in this release to help speed up the display of appointments. One of these is that the "Calendar" has been renamed "Company Calendar".

If you are using the Company Calendar, you will see that if you have more than five members of staff then all staff are switched off by default. You can either switch on (tick) individual members of staff or switch on all staff by clicking the Hide/Show title bar.



Also, if you have more than 20 members of staff, a prompt is displayed on clicking the Company Calendar option: “There are lots of staff - use the Staff Calendar instead for better performance? Yes/No”. Click **Yes** to open the Staff Calendar or **No** to continue opening the Company Calendar.

8. Another Diary change is that the Select Resource, Wallboard, Team and Groups menu options have gone and are replaced with “Staff Calendar”. A new screen is displayed to allow you to more easily search and select staff, teams, groups or offices.



Simply click to select/deselect staff, teams etc then select how you want to display them by using the buttons at the bottom of the screen, eg on the calendar, the wallboard or the map.

9. This release includes a new feature for Map Scheduling, specifically designed to help schedule site visits when grouped together under a master project, such as for domestic housing projects. The new option is located under the “Resource” menu. From one screen, it helps you to:
- Create sub-projects for the sites to be included in the batch to be scheduled
 - See the sub-projects in a list and on a map
 - Schedule appointments
 - Route the appointments and optimise the route
 - Send SMS messages to the sub-project contacts.

Sites/projects need to be geocoded so that they can be plotted on the map and routing features used in the Map Scheduler. To send SMS messages you will require a Twilio account. Contact us if you need further details on setting up a Twilio account.

Home **Map Scheduling** X

Site importer

Dan Darkin

Prev Next Today **Friday, December 17, 2021** Clear Refresh

Time Range: 08:00 am - 17:00 pm Duration: 2 hours

8am 8:00 - 10:00
T-56636 - Asbestos Survey. Fox's Earth @ TF13 6DW

9am

10am 10:00 - 12:00
T-56637 - Asbestos Survey. Lasyard House @ WV16 4BB

11am

12pm

1pm

2pm

3pm

4pm

5pm

Route Optimise Route

Choose Clients Search Client or Postcode Enter postcode

Projects Search Project

Master Project T-56635 View SMS Confirmations

66.67% Scheduled (2/3 properties) Clear Refresh

T-56638 42 Emerson Road Poole Dorset BH15 1QT Asbestos Survey Kim Evison +

T-56636 Fox's Earth 4 The Row Easthope Shropshire TF13 6DW Asbestos Survey Kim Evison +

T-56637 Lasyard House Underhill Street Bridgnorth Shropshire WV16 4BB Asbestos Survey Kim Evison +

Scheduled Not scheduled Target

Create the sub-projects by using the Site Importer button.

This option assumes that you have already uploaded a list of sites that are to be included in the master project into Alpha Tracker. What you are doing here is listing which of those sites you are going to be working on next and creating a sub-project for each of them. Select the client and the master project (or create one) then import or specify the list of Site Refs (UPRNs) for each of the sites to be included. A sub-project is created for each site importe

Site Importer

Import Sites

Choose Client: Kim Evlson

Choose Master Project Number: T-56631 or create one

1. Template 2. Import 3. Process

Site Reference	Delete
No records in query	
* <input type="text"/>	<input type="button" value="Delete"/>
* <input type="text"/>	<input type="button" value="Delete"/>
* <input type="text"/>	<input type="button" value="Delete"/>

See the sub-projects in a list and on a map.

Select your master project(s) from the dropdown of open master projects to display a list of the sub-projects and to plot them on map. Hover or click to get further details on map pins. Click on the underlined project number to see the project details.

The screenshot displays the Alpha Tracker software interface. On the left is a Google Map of the United Kingdom with several red location pins. On the right is a control panel with the following elements:

- Choose Clients:** Search Client or Postcode Enter postcode
- Projects:** Search Project
- Master Project:** T-56635 (dropdown menu) View SMS Confirmations
- 0.00% Scheduled (0/3 properties)** with Clear and Refresh buttons.
- A list of three scheduled properties, each in a red box with a plus icon on the right:

T-56636	Fox's Earth 4 The Row Easthope Shropshire TF13 6DW	Asbestos Survey Kim Evison	+
T-56637	Lasyard House Underhill Street Bridgnorth Shropshire WV16 4BB	Asbestos Survey Kim Evison	+
T-56638	42 Emerson Road Poole Dorset BH15 1QT	Asbestos Survey Kim Evison	+

At the bottom of the map, there are three icons: a green pin for 'Scheduled', a red pin for 'Not scheduled', and a green target icon for 'Target'.

Schedule appointments.

Select the member(s) of staff for whom you are booking appointments, the date (by using the buttons or clicking on the date on the calendar), working hours and the length of appointment.

The screenshot displays the Alpha Tracker software interface. At the top, there is a search bar containing the name 'Dan Darkin'. Below the search bar are three buttons: 'Prev', 'Next', and 'Today'. The date 'Friday, December 17, 2021' is displayed in the center. To the right of the date are two buttons: 'Clear' and 'Refresh'. Below the date, there are two sliders: 'Time Range: 08:00 am - 17:00 pm' and 'Duration: 2 hours'. The main area of the interface is a grid of time slots, with the name 'Dan Darkin' written diagonally across it. The time slots are labeled from 8am to 5pm in one-hour increments.

Refer to the map to assess location and distances, then simply click the plus button on a sub-project to book it into the first available slot. Scheduled sub-projects turn green and move to the bottom of the list. Their map pin also turns green. The diary section fills with appointments. Continue booking appointments by clicking the plus buttons.

Route the appointments and optimise the route.

When you have scheduled appointments, click the Route button to see the proposed route between the sites - on the map and as a list of directions. Let Google choose the best route between the pins by clicking the Optimise Route button, then edit your diary appointments by double clicking on them if you want to change the order.

Dan Darkin

A Fox Earth Cottage, 4 The Row, Easthope, Much Wenlock TF13 6DW, UK

17.4 km. About 20 mins

1. Head east 4.0 km
2. Turn left onto B4368 7.6 km
3. Turn right onto A458 3.9 km
4. At the roundabout, take the 1st exit onto Ludlow Rd/B4364 0.7 km
5. Turn right onto Westgate/B4364 Continue to follow B4364 0.4 km
6. At the roundabout, take the 2nd exit onto Pound St/B4373 92 m
7. At the roundabout, take the 2nd exit onto Hollybush Rd/B4373 Continue to follow B4373 0.7 km
8. B4373 turns slightly left and becomes Underhill St/B4363 92 m Destination will be on the right

B Lasyard House, Underhill St, Bridgnorth WV16 4BB, UK

288 km. About 3 hours 32 mins

1. Head north on Underhill St/B4363 toward St Mary's Steps Continue to follow B4363 0.7 km
2. At the roundabout, take the 3rd exit onto A442 19.6 km
3. Continue onto Franche Rd/A442 1.2 km
4. At the roundabout, take the 3rd exit onto Proud Cross Ringway/ A442 0.4 km
5. Keep left to continue toward Park Butts Ringway/A456 0.1 km
6. Continue straight onto Park Butts Ringway/A456 Continue to follow A456 0.7 km

Route Optimise Route Clear Route

Send SMS messages to the site contacts.

When you are happy with the appointments and routes, click the View SMS Confirmations button. A list of the appointments, times, contacts and their phone numbers is displayed. When you confirm this list, SMS messages are sent to the site contacts.

Choose Clients or Postcode

Projects

Master Project

100.00% Scheduled (3/3 properties)

<u>T-56636</u>	Fox's Earth 4 The Row Easthope Shropshire TF13 6DW	Asbestos Survey Kim Evison	<input data-bbox="846 486 875 512" type="button" value="+"/>
<u>T-56637</u>	Lasyard House Underhill Street Bridgnorth Shropshire WV16 4BB	Asbestos Survey Kim Evison	<input data-bbox="846 592 875 617" type="button" value="+"/>
<u>T-56638</u>	42 Emerson Road Poole Dorset BH15 1QT	Asbestos Survey Kim Evison	<input data-bbox="846 687 875 713" type="button" value="+"/>

The SMS messages are configurable using settings, but usually contain the appointment details and a link to confirm, change or decline the appointment.

<input type="button" value="Yes I will be in"/>
<input type="button" value="Choose another time"/>
<input type="button" value="No - I do not want this work"/>

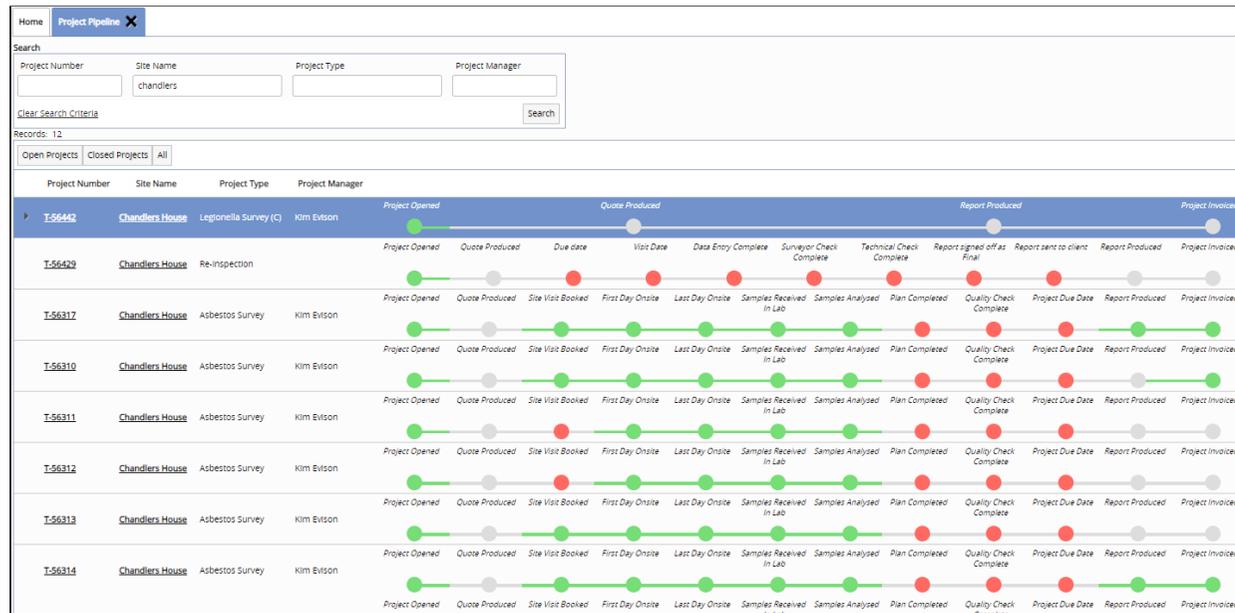
Depending on the reply received from the contact, the appointment is confirmed, aborted or rearranged. All appointments where SMS messages have been sent are marked with a new icon:



- All imports on the Setup>Import/Export menu now geocode the addresses when imported from spreadsheets. This covers, clients, sites, projects, diary and master project imports and is to ensure that all records have a longitude and latitude when imported. This will be crucial for anyone making use of the Map Scheduling tool where geocoding is necessary for mapping.

- Geocoding has changed in this release and now happens on the server-side instead of the client-side. You should see no difference in performance. Geocodes are now recorded under a table in the database named “GeocodeLog”.
- There is a new feature called “Project Pipeline”, designed to give an overview of the progress of projects through their milestones. The Project Pipeline is available from the Projects menu for staff and a more limited version can also be displayed on the Client Portal by using the setting “Show Project Pipeline on Client Portal”.

From the Projects menu the screen looks like this:



Each project’s milestones are displayed as a dot.

- If the dot is green, then the milestone has been completed - hover over the dot to see the completed date.
- If the dot is grey, then it has not been completed.
- If the dot is red, then it is overdue (passed its target date) - hover over the dot to see when it was due.

Your clients can see a version of the Project Pipeline on the Client Portal if you choose to switch this on. The setting is “Show Project Pipeline on Client Portal”, which you can use in conjunction with “Hide Project Pipeline on Client Portal from this list of users”. The Client Portal version indicates the completed and uncompleted milestones only, and only projects marked as Show On Web. For example:



Which milestones are displayed on the Client Portal can be controlled via a tickbox on the Milestone Templates. This means that you can hide specific milestones from the Client Portal view.

13. There have been lots of changes to QR codes in this release to improve how data is displayed. Close-up photos are included (and both photos and close-up photos are clickable), approach descriptions added, banners for no access and asbestos present have been added, and additional fields can be displayed. The content of the detail view can be controlled by using a range of settings.

Project level QR codes have been amended to only show data from the project, rather than using the site register. This will mean that all data from the project is displayed, even if it has been changed (eg removed) in a subsequent project.

14. Users of the standard version of the Tracker Air module will have some additional fields available in their apps and screens. If you are using the standard Tracker Air module and haven't yet arranged the update of your apps, please contact us. The changes are for the updated HSG248 guidance and include:
- If Test Type = Personal, show additional fields for contextual information on the same page. On the Air Monitoring app only.
 - Method for showing date and timestamp on photos (we are currently recommending using the Timestamp Camera app for this).
 - Near-source and Far-source added as default Test Types.
 - Result displayed to a different number of decimal places for Far-source Test Types.
 - Hide/Show option for the Temperature and Pressure, Barometer and Thermometer fields. If you want to continue to record these, you can.
 - Additional field on the Reoccupation app - Record receipt of completed handover form. Date and Time.
 - Additional field - Filter Batch Number.
 - Additional prompt text in the stages of the Reoccupation and Hygiene apps to remind analysts of the standard photos they should be taking. From tables 6.1 and 6.2 in the new guidance.
 - Easier pooling of samples. Apply a flag to a sample (pool group selection, eg Pool Group A, B, C) to indicate that it is pooled. Show this flag on the Sample Summary screen too. Everything else is done in templates, eg indicating that a sample is pooled, insertion of the pooled result.

15. If you want to give priority to the generation of your Tracker Air certificates, then you will welcome the addition of the new repository setting that lets you specify which document queue these requests go to. The setting is “Queue for Air Monitoring Documents”.
16. Project types can now have a default Survey Type associated with them. When you save a “survey-type” project, the Survey record is created immediately, with the default Survey Type if it has been configured. This means you do not need to click the Survey Details button to create the survey record. You specify the default Survey Type on the Project Types screen:

Name	Description	Nominal Code	Department Code	Accounts Ref. Code	Category	Sales Category	Default Turnaround	Default Survey Type	Quotation Template Text
Testing	Testing	9999999	222		Testing				
Survey	Asbestos Survey	Asbestos	222		Asbestos Survey	A		Example Management	
Re-inspection	Asbestos Reinspection	123456			Asbestos Re-Inspection	B		Re-inspection	
Asbestos Survey	Asbestos Survey				Asbestos Survey			Example Management	
Compliance Tracker	Compliance Tracker								

Related functions, such as project imports, have been updated to handle this new feature. For example, if the Survey Type is left blank then the default is used, if one is specified then the imported value is used.

17. The Project Details screen now lists all staff involved in a project and their role below the Project Manager field, so that you can see them immediately. The list is all staff who have been added, either manually or automatically, to the list under the Project Staff button.

Client Project Ref

Project Manager

Dan Darkin (Surveyor)

Site Name/Ref

Project Type

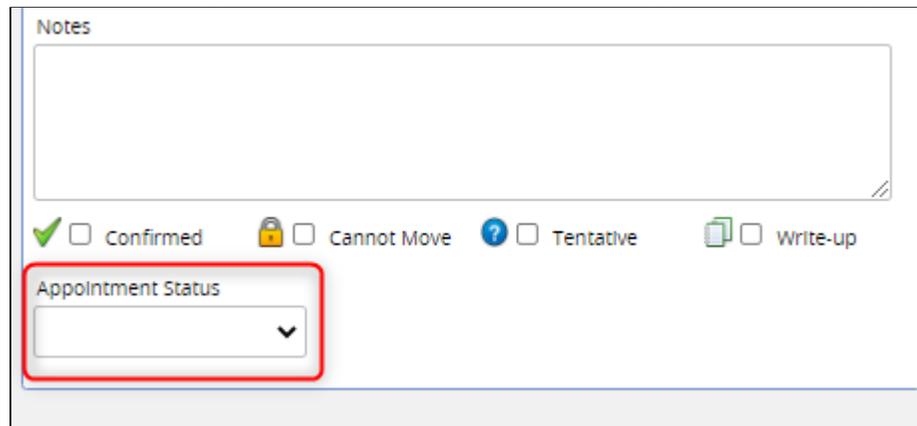
18. You can now adjust which projects appear on the Projects Ready to Invoice list in a number of ways. Here are the features you can use:

- The Projects Ready to Invoice screen does not show closed projects.
- It continues to show projects until they are fully invoiced.
- Projects with no value are not displayed.
- Projects with a status that is flagged to appear on the list are displayed.
- Projects with a Report Produced Date are displayed (if they have not been fully invoiced and the project is still open).

The "Due Date" has been removed from the search fields on Projects Ready to Invoice.

19. Clicking "Add project to invoice" from the Invoice Details screen shows a list with the same criteria as the Projects Ready to Invoice screen. The total value and invoiced value are also displayed on the list.
20. When using the Project Import option, you no longer have to find out the next available project number. You can now leave the Project Number field blank and the import process will automatically get the next number for you. Other changes to the Project Import include:
- Project Manager validation on the Project Import now only occurs if "projectManagerRequiredOnNewProjects" is set to yes.
 - The Project Notes field has been added to the Project Import.
 - If you have the Sales Contact field visible on the Project screen, then it will also be available on the Project Import.
 - Up to three report recipients can now be included in a project import, and the fields accept 255 characters.
21. Hazmat Item Imports now include columns for the photo filename and close-up photo filename. Also, when records are processed, a repository setting is checked to see if a photo subfolder exists. If one does exist, then it is used in the import.
22. One of the key milestones has been updated to better reflect working practices. Key Milestone 6 (Samples Analysed) now only updates once all samples have been analysed via Fibre Analysis, rather than happening when the first analysis is completed. This means that any milestones you have in the More Milestones section of the Project screen that are linked to Key Milestone 6 (Samples Analysed) will now be completed only when all samples in the project have had their analysis completed and thereby give a better indication that analysis has been completed.

23. There is a new Appointment Status field available on appointments if required. It is located below the Confirmed, Cannot Move and Tentative tick boxes.

A screenshot of a software interface showing a 'Notes' text area at the top. Below it are four status options: 'Confirmed' with a green checkmark icon, 'Cannot Move' with a yellow padlock icon, 'Tentative' with a blue question mark icon, and 'Write-up' with a green document icon. Each option has an unchecked checkbox. Below these options is a dropdown menu labeled 'Appointment Status' with a downward arrow icon. The dropdown menu is highlighted with a red rectangular border.

The field can be switched on by using the setting "Show Appointment Status" and the values for the dropdown can be listed in the setting "Appointment Statuses".

24. Some clients like to restrict access to the Client List in Alpha Tracker. A new feature adds to this by letting you prevent users from downloading the Client List. If the setting "Excel export available on Client List" is set to no, then the Excel download button is hidden on the Client List to all except Superusers. The default is no.

25. Auto-numbering of survey items has been updated. Clicking the Auto-Number button brings up a dialog box which has two options: "Auto number from 1" and "Auto Number From {custom number}". The Auto number from 1 option works in the same way as previously, ie all suspect items are numbered starting from number 1. The new option allows you to specify the starting number as something other than 1. In case you are using sequential numbers for a client, the highest number used in the External Ref field across all projects for the current client will be shown on the screen. It is also possible to make the External Ref field more accessible by adding it to the Survey Items grid, ie to the left-hand side of the Survey Items screen.

The column is labelled using the same “Name:” setting as the External Ref field.

The screenshot displays the Alpha Tracker interface with a table of suspect items. The table has columns for ID, Date, Building, Floor, Location, Location Desc, Itemxx, Approach, Sample Number, Material, Total Score, and External Ref. The 'External Ref' column is highlighted with a red box. Below the table, there is a toolbar with buttons for 'New', 'Load Fibre Analysis', 'Auto Number', 'Case-fix Items', 'Case-fix Locations', 'Find & Replace', 'Fix Photo Filenames', 'Hide/Unhide', 'Delete Selected', 'QR Code Labels', and 'Buildings'. The 'Auto Number' button is also highlighted with a red box. An 'Auto Number' dialog box is open, showing options to number items from 1 or from a specific number (66007). The dialog box text reads: 'Auto Number', 'This process will automatically number each item for this survey.', 'Select a method for numbering the items.', 'Number from 1', 'Number from 66007', '(66006 is the highest external ref for this client)', 'OK', and 'Cancel'.

ID	Date	Building	Floor	Location	Location Desc	Itemxx	Approach	Sample Number	Material	Total Score	External Ref
89343	06/05/2020	25 Leigh Road	0	000						0	001
89344	06/05/2020	25 Leigh Road	0	001	Kitchen	Ceiling			PBC		002
89345	06/05/2020	25 Leigh Road	0	001	Kitchen	Sink pad	S	1	BTP	16	003
89346	06/05/2020	25 Leigh Road	0	002	Dining Room	Ceiling			PBC	0	004
89347	06/05/2020	25 Leigh Road	0	002	Dining						
89348	06/05/2020	25 Leigh Road	0	003	LIVING						
89350	06/05/2020	25 Leigh Road	0	003	LIVING						
89351	24/03/2021	25 Leigh Road	0	004	Rece						
89352	24/03/2021	25 Leigh Road	0	004	Rece						

26. You can now give your clients permission to create subfolders in the Client Uploads section of the Client Portal. Only the Client Admin users will see the new Add Subfolder button, and only if the setting “Allow client admin to create subfolders within the client uploads screen” is set to yes.

27. Document folders have been added to the Vehicle screen so that you can upload supporting documents to vehicle records.

The screenshot shows the 'Vehicles' screen with a table of records. The first column contains document folder icons, highlighted with a red box. The table has the following columns: Registration Number, Year Of Registration, Assigned To, Assigned Date, MOT Expiry, Service Expiry, Make, Model, Comments, and Delete.

Registration Number	Year Of Registration	Assigned To	Assigned Date	MOT Expiry	Service Expiry	Make	Model	Comments	Delete
HY04 WEU	2004	Judy Key	01/02/2017	08/08/2017		Renault	Megane		
HGU 876	2006	Leanne Helle-Broe	04/01/2018			HOLDEN	TEST		
DN59 NFL	2009	Kim Evison	01/12/2009	20/12/2019		Nissan	Qashqai		
	0								
	0								
	0								

28. Expiry countdown and expiry filters have been added to the Equipment screens, where applicable. This change is to match the countdown on the Staff/Training Equipment screen.

The screenshot shows the 'Survey Equipment' screen with a search filter and a table of equipment records. The search filter includes fields for Equipment Type, Reference Number, Serial Number, Description, Check Date, Expiry Date, Inactive Date, and Assigned To. The table has the following columns: Equipment Type, Reference Number, Serial Number, Description, Purchase Date, Purchase Value, Location, Out of Service, Check Date, Expiry Date, Count to Due Date, Inactive Date, Assigned To, and Comments. The 'Count to Due Date' column is highlighted with a red box.

Equipment Type	Reference Number	Serial Number	Description	Purchase Date	Purchase Value	Location	Out of Service	Check Date	Expiry Date	Count to Due Date	Inactive Date	Assigned To	Comments
Microscope	2509		I57588 Type D microscop					20/05/2015	20/01/2022	36		Kim Evison	Annual checking
Microscope	123		RE4544 Stereo microscop					09/05/2017	29/12/2021	14		Dan Darkin	Annual checking
Objective Lens	001		TEST					04/01/2016	03/01/2021	-346		Leanne Helle-Broe	6 Monthly Check

29. When duplicating a project , it is now possible to include the Project Staff list and the Diary appointments in the duplication. Two new settings control whether this data is included in the project duplication: “Copy project staff when duplicating projects”and “Copy diary appointments when duplicating projects”. Both default to “no”.

30. SM2 users have a new Survey Items Import screen based on the structure of their survey data.
31. If you use Alpha Tracker Mobile and have a client login, with the setting "sampleSubmissionEntryRequired" set to yes, then an Enter New Samples screen will now be displayed.
32. If you use risk categories rather than the material scores, then it is now possible to display a different Print/PDF Report on the Client Portal. The setting "Client Portal - Show Risk Category" must be set to "yes" to display the alternative Print/PDF Report. The report hides material, priority, and total scores, and shows the risk category. Risk category label can be renamed as required by using the setting "Name: Risk Category".

Fixes/Minor Changes

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

- A new method is now used to generate document filenames for document requests. No change apparent to the user.
- Various fixes are also included in this release that relate to document request issues.
- The Asbestos Register Excel downloads are now given a user-friendly name, such as "Asbestos Register", "Non Asbestos Register" etc.
- Survey Special Requirements and Client Contact have been added to the fields available to be displayed on appointment.
- There have been a number of improvements to Australian Air Monitoring, including new checks, fields and settings. The visibility of all Australian Air Monitoring (form) columns is now controllable via settings. A blank option has been added to all name dropdown boxes so the user can select blank staff. The calculation on reported results has been updated.
- Improvements have been made to Hazmat re-inspections, including sending back photos.
- Searching on Calls/Tasks has been improved.
- Some fixes have been applied to the document queue allocation methods to make them work better in the event of only one queue being used, and to resolve a null issue in the Tesco queue allocation method.
- A problem with colour indication on the Site List and Compliance Summary on the Client portal when using "Last Survey Site Date" has been fixed.

- The standard search and sort buttons have been added onto all the Client Portal document folders making it easier to find specific files.
- An error with switching to the Client Portal has been fixed.
- Various buttons on the Quotation screen are now disabled until the record is saved, eg Other Info.
- The list of projects under the row expander on the master project list will no longer show duplications.
- On the Project Staff list, selecting from the dropdown will no longer blank the role column.
- The keyboard selection mode on Fibre Analysis has been improved, especially when navigating to subsequent pages.
- Scores are now fully recorded in the Survey Item audit.
- Validation warnings on the Project screen use the applicable "Name:" settings so that warnings relate to individual screen configurations.
- Various small improvements have been made to the External Lab screen to ensure data is saved and displayed correctly.
- The new document request process now allows for suffixes and prefixes to filenames, eg "(Original)" in documents produced via the Air Processor, and the Site Diary filenames use the appropriate filename template settings.
- An issue with the Site dropdown not showing records on "manually add items" within the Client Portal has been fixed. In addition, Site Name and Building Name dropdown searches have been added to the Remediation Client Portal Register.
- A bug found when receiving PDFs from the Transfers screen has been fixed.
- The header on the Print/PDF report (SM1) now repeats on every page.
- The Site Address on the Master Project List is now a text area rather than a textbox, so that it supports line breaks.
- A change has been made to the master project calculation.
- Contacts on Calls/Tasks are now filtering by Client ID.
- You can now use the thumbs up/thumbs down on quote follow-ups when opened from the row expander on the Quotation List.

- Some minor display improvements have been made to follow-up text on Quotations.
- New quotes from a client or site can now be immediately marked as Won or Lost.
- The project number is displayed on the document folders from Hazmat screens.
- The headers and site grouping have been improved on the Site Register PDF prints.
- A display issue when clicking the Word/Excel button on the Project List has been fixed.
- The project document folder is now created immediately when a re-inspection project is created from the Site Register.
- A problem with entering samples on the Client Portal has been fixed.
- Survey Item auto numbering now works with numbers the same as or greater than the length specified in the "ItemAutoNumberDigits" setting.
- There are new settings to control the decimal rounding for soils calculations, with a minimum of 1 and a maximum of 6.
- Project level QR codes now show data from the project rather than using the site register. This will mean that data can't disappear. Shows all data from the project.
- Updated project QR codes to include all recent changes to QR codes, now all should look the same.
- The Excel download on the Master Project List has been fixed.
- The Project Status Notes field on the Project screen now accepts unlimited characters (previously only 500). The same field on the Projects Dashboard is scrollable to display long Project Status Notes.