

V2.2 RELEASE NOTES

Trimble® AllTrak™ Cloud

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Introduction

This document provides information about new features and modifications in release v2.2 of the Trimble® AllTrak™ Cloud software.

New Features and Improvements in Version 2.2

Employee Locations

Employee Locations can now be created when adding an employee to the system.

On the Employee Info tab when creating or editing an employee, simply check the box next to “Do you want to create an Employee Location?” question that is displayed directly below the “Do you want to provide application access to this employee?”

This will create a location using the First and Last name of the employee. The Employee Location will be placed by default in the Employee Location Group that is created by the system. The employee will automatically become the Responsible Employee for any assets transferred to the Employee Location.

Note: companies using the previous implementation of Employee Locations will need to edit those locations to update them to the new format.

To update Employee Locations created prior to April 18, 2016:

- Select the Employee Location in the Location Tree on the Location Page
- In the **Employee** Field on the Location Details tab, select the employee who should be associated with this location. This selection must be made even if the correct employee shows as selected
- The selected employee no longer has to be a “Location Manager”, but can also be a “Responsible Employee”
- The system will update the Location name to match the First and Last Name of the selected employee, the Location ID will be updated to match the Employee ID of the selected employee
- All assets at the Employee Location will remain and the selected employee will be responsible for those assets

The Transfer Cart will not allow assets to be transferred to a previously created Employee Location until it has been updated using the steps described above.

Employee Locations can no longer be created using the Add Location workflow and must be created when adding or editing employees.

Email Alerts

Alerts can now be sent to employees by email.

- To enable this feature it must first be turned on in Company Settings by an Administrator of AllTrak Cloud. Go to Company Settings, which accessed through the menu displayed by clicking on the name of the user logged into AllTrak Cloud.
- Click on Email Alerts in the Company Settings list on the left of the screen.
- Select Yes

Email Alerts (cont.)

All Asset Alerts are individually sent for each asset and alert type to the Owner of the asset, the current Responsible Employee for the asset and the Location Manager where the asset is currently located.

An Employee Certificate (HSE) alert is sent to the employee and to AllTrak Cloud Administrators.

Email Alerts can be sent to an employee who does not have application access provided and email has been set up for that employee in the Employee Details tab.

The type of email alerts that an individual employee receives can be selected in the Edit Employee dialog box.

- Select the Alert Settings tab in the Edit Employee dialog box and check the alerts the employee should receive and uncheck the alerts that should not be sent by email

Auto-generated Transfer Report

The auto-generated Transfer Report has been simplified and improved to display the assets transferred to a location in a check list layout that includes the following information:

- The Employee executing the transfer and the To Location, Address and Location Manager in the header boxes
- Line item or row number
- Scan Code and/or Alternate Code concatenated in the IDs column
- The Quantity of assets transferred (this will always be 1 for unique assets)
- The Manufacturer, Model, and Description of the asset concatenated in the Description column
- The From Location and the To Employee in the From/To column
- The Return Date

Grid Improvements

Grid Settings

Changes to what columns and what order they are displayed are now saved based on user login. This means that if you change the columns displayed and then login using a different computer or different browser, your changes will be remembered. This also means if another user logs in using your workstation and makes changes to the grid, your settings will not be altered.

Reset Grid

Click on the Reset Grid to default settings icon above the grid to reset the displayed columns and display order to the default settings.

Search in Column Chooser

The Grid Column Chooser now has a search box that enables you to search the list of available columns to find the column you need faster.

Transfer Date and Days on Site Columns

- The Transfer Date column displays the date each asset was transferred to its current location.
- The Days on Site column displays the number of days each asset has been located at the current location since its last transfer.

Location Charges Report

On the Reports Page, there is now a Consolidated Charges Report that enables you to generate a report that consolidates the asset charges for a Jobsite between a selected date range. All **Closed Charge Reports** that were closed within the selected date range will be consolidated into a single report enabling you to generate a charge report for all charges closed in 2016, or in Q2 of 2016.

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Edition

Trimble® AllTrak™ Cloud Release Notes v2.2 (A)

Monday, April 18, 2016