

# v1.9 RELEASE NOTES

## Trimble® AllTrak® Cloud

- Introduction
- New Features/Enhancements

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## Introduction

This document provides basic information about new features and modifications in release v1.9 of the Trimble® AllTrak® Cloud software.

## New Features/Enhancements

The following enhancements have been added to the AutoBid SheetMetal software in Release 2015 v1:

### Dashboard


#### Alerts Panel

The Alerts Panel has been moved to the left side of the dashboard and is selected by default.

#### Alerts Grid

The Alerts Grid can be filtered by type of Alert by clicking on the Alert Type in the Alert Panel. The Alert Type row will be displayed in bold to indicate that the Alert Grid is filtered to only display the selected Alert Type.

#### Alerts Grid Action Column

Click on the  icon in the row to bring up the Action Menu.

**Add to Transfer Cart** adds the selected asset to the Transfer Cart so the asset can be transferred to a different location.

**Retire Asset** automatically transfers the asset back to its default location and sets its status to "Retired".

**View Certificate** opens the Edit Asset dialog to the Certificate tab for the selected asset, so the Certificate Date can be updated.

**View Services** opens the Edit Asset dialog to the Services tab for the selected asset, so the Service can be completed or the scheduled date updated.

**Restock** opens the Restock dialog, sets the Restock Location to the Location that generated the alert for the selected consumable and adds the selected consumable to the Restock list. The quantity and cost of the consumable must be entered. Other consumables can be added to the Restock list.

**Go to Employee View** changes the current view from the Dashboard to the Employee View.

Actions that open a dialog bring the user back to the Dashboard when the dialog is closed.

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Different actions are available for different types of Alerts.

HSE Check for Assets

- Add Asset to Transfer Cart
- Retire Asset
- View Certificate

Service Due

- Add Asset to Transfer Cart
- View Services

Return Due

- Add to Transfer Cart
- Extend Return Date

HSE Check for Employee

- View Certificate
- Go to Employee View

Stock Alert

- Restock

## Locations

### Add, Edit and Delete Assets from the Location View

Assets can now be added, edited or deleted from the Location view. The process is the same as when performing these actions from the Asset view.

When a Warehouse location is the selected location in the Location Tree, an asset being added will automatically have the settings for Default Location and Current Location default to the selected Warehouse.

When any other location type is selected when adding a new asset, the Current Location field defaults to the selected location, but the Default Warehouse must be selected.

The Asset Group field must be set in the dialog when adding an asset from the Location View.

Editing and Deleting Assets work exactly the same as from the Asset view. Assets can only be deleted if they have never been transferred. This enables the integrity of the history to be maintained. If an asset is no longer used, edit the asset and set its status to "Retired". Retired assets cannot be transferred.

### New Location Types

When creating a new location, there are 3 new location types to choose from: Location Group, Container, and Employee.

- **Location Group**  
A Location Group is used to help organize locations in a logical manner. Location Groups can be used to organize locations in the way that best fits your company.
- **Container**  
A Container location is used to represent Job Boxes or Trailers that are loaded with tools at a warehouse and transferred to jobsites. When a Container is

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moved to be a sub-location of another location via a drag and drop in the Location Tree, an asset transfer record is created for every asset in the container and a Transfer History report is created in the Transfer Cart Transfer History tab. A Container cannot have any sub-locations except other Containers.

- **Employee**

An Employee location is a location designed for the purpose of transferring assets that are intended to remain with the employee. An Employee can be a sub-location of any type of location except a Container. When an Employee location is moved to be a sub-location of another location via a drag and drop in the Location Tree, an asset transfer record is created for every asset in the Employee location and a Transfer History report is created in the Transfer Cart Transfer History tab.

## Sub-locations

Locations can be sub-locations of other location based on the following.

Location Groups may have the following location types as sub-locations.

- Location Group
- Container
- Employee
- Jobsite
- Vehicles
- Warehouse

Containers may have the following location types as sub-locations.

- Container

Employees may have the following location types as sub-locations.

- Container
- Employee

Jobsites may have the following location types as sub-locations.

- Container
- Employee
- Jobsite

Warehouses may have the following location types as sub-locations.

- Container
- Employee
- Vehicle
- Warehouse

Vehicles may have the following location types as sub-locations.

- Container
- Employee

## Employees

### Employee Roles

Administrators now have full flexibility when creating Employee Roles. A non Admin employee role can now be set to Add, Edit, Delete Employees or Locations. Previously, only the Admin role could perform these functions.

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### **Edition**

Trimble® AllTrak® Cloud Release Notes

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