# V2.5 RELEASE NOTES

# Trimble®
# AllTrak™ Cloud

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# Introduction

This document provides information about new features and modifications in release v2.5 of the Trimble® AllTrak™ Cloud software, which was deployed to the alltrak.trimble.com site on February 14, 2017.

# New Features and Improvements in Version 2.5

## Location Lifecycle Management

To help manage locations through their lifecycle, AllTrak Cloud locations now have 3 states; Active, Inactive and Archived. Any user with edit location permissions may set the state of a location to Active or Inactive, but only an Administrator may Archive a location.

**Active Locations**

The Active State for a location is the standard or default state for a location. This is the state of all locations prior to the v2.5 release.

- Assets can be transferred to and from Active locations
- Active locations are available in report location filters

**Inactive Locations**

The Inactive State for a location prevents assets from being transferred to the location, but allows assets to be transferred from the location. Any location type may be set to Inactive, but it is most commonly used for jobsite locations to indicate that the project is finished. Inactive locations are visible on the Location Page and assets at an Inactive location are visible on the Asset Page. Inactive Locations may also be selected in any Report location filters and Charges may be run on Inactive jobsite locations. Inactive locations are not available as a To Location in the Transfer Cart.

**Archived Locations**

Setting a location state to Archived hides the location from all main areas of AllTrak Cloud. Archived Locations are not visible on the Dashboard, Location page, Asset page, Charges page or in the Report filters.

- Only an Administrator can set a location state to Archived
- All Assets and Commodities must be transferred from a location before its state can be set to Archived
- Archived locations are not available as a To Location in the Transfer Cart, so assets cannot be transferred to an Archived location
- Charges cannot be run or viewed for Archived locations
- Archived locations are not available in Report location filters
- Archived locations can be restored to an Active or Inactive state by an Administrator under Company settings

**Setting the Location State**

On the Location Details tab of the Add/Edit Location popup, there is a Location State field where the state may be selected. All users with Edit Location permissions may set the state to Active or Inactive. Only Administrators can set the state to Archived.

On the toolbar above the Location Hierarchy tree on the Location Page, there is an icon to Activate / Deactivate a location and an icon to Archive a location. When an Active Location is selected in the Location tree, the Deactivate icon ⊗ will appear. When an Inactive Location is selected in the tree, the Activate icon ✓ will appear. Click on the icon to toggle the selected Location's state between Active and

Inactive.  A small ⊗ will appear on an Inactive Location's icon in the Location hierarchy to indicate that it is an Inactive Location.

Only an Administrator may Archive a Location.  On the toolbar above the Location Hierarchy tree on the Location Page, click on the Archive icon ⬇ to Archive the selected location.  A Location can also be archived in the Add/Edit Location popup by selecting "Archived" in the Location State field.

Restoring an Archived Location

In Company Settings there is a new section titled Archived Locations.  Select Archived Locations to view a list of all locations that have been Archived.  Only Administrators have access to this section of the application.  Select the desired location(s) to restore and click on either Active ✔ or Inactive ⊗ to restore the selected archived locations to an Active or Inactive state which will make them visible to all users again.

# Terminal Locations

There is a new location type called Terminal Locations.  Terminal Locations are designed to help manage assets that have become unavailable for use in the field.  Terminal Locations can be used to place Retired Assets that are no longer stored in the warehouse or to manage assets that are Lost or Stolen.  All assets placed in a Terminal Location have a State of "Unavailable" and are not visible using the Mobile App.

**Automatically set an Asset's Status upon Transfer to a Terminal Location**

Users can use the "Asset Status after Transfer" field in the Add / Edit Location popup to select a desired Status for all assets transferred to a Terminal location.  This field is optional.  When an asset is transferred to a Terminal location its status will automatically be set to the status setup for the Terminal location.  The status is only set when the asset is transferred to the location.  The status can be changed while the asset is at the location.

**Retired Asset Status**

By default the grid setting hides all assets that have a status of "Retired" including for Terminal Locations.  This means that "Retired" assets will initially be hidden when viewing a Terminal Location that sets the asset's status to "Retired".  This was done so that users who have retired assets sitting in their Default Warehouse will not suddenly see all of their Retired assets due to this update.

**No Auto-transfer of Retired Assets**

Previously, when an asset's status was changed to "Retired", the asset would be automatically transferred back to their Default location.  The impact of this functionality required all "Retired" assets to be placed at their Default location.  This feature has been turned off so that users can better manage their retired assets and place them in a Terminal location that contains assets that have been retired and potentially been scrapped.

# Collect a Signature with Mobile Transfer Workflow

When using the Mobile Transfer workflow, a signature can be collected on the mobile device to indicate who received the assets being transferred.
- On the Transfer Details screen scroll down to the Signature Card
- Click in the Signature box to open the signature card
- The employee will default to the Responsible Employee on the transfer.  If the transfer is being received by another employee, select the employee from the menu
- The receiving employee can sign in the signature box using their finger.  Click on the "X" to clear the signature and sign again
- Click on the back arrow to return to Transfer Details and click the checkmark to complete the transfer

**Transfer Delivery Notes Report**

Then name of the employee and the signature will be embedded in the Delivery Notes report that is generated automatically and stored in the Transfer Cart | Transfer History section of the Web Client.

## Confirm Delivery Improvements

The Confirm Delivery process has been improved to ensure that only the appropriate personnel can confirm the delivery of assets and to enable a more efficient transfer process for warehouse employees.

**Confirm Any Delivery Permission**

A new employee role permission has been created that enables an employee to "Confirm any Delivery". Previously any user with permission to transfer assets could also confirm any delivery. These permissions have been separated so that who can confirm the delivery of assets can be managed. This permission is typically set for a limited number of users.

**Who May Confirm the Delivery of Assets**

The following rules describe who may confirm the delivery of assets:
- Any user who is the Responsible Employee of assets can confirm that they have received those assets, including field workers who do not have permission to transfer assets
- A location manager can confirm the delivery of any assets transferred to a location for which they are the manager
- A user with Confirm any delivery permission can confirm the delivery of any assets to any location

If an employee does not meet any of the above rules, they are not able to confirm the delivery of an asset.

**Auto-confirmation of Delivery**

Auto-confirmation of the delivery of assets has been enabled in the following situations:
- Delivery of assets transferred by an employee to themselves as the responsible employee are auto-confirmed
- Assets transferred by an employee with "Confirm Any Delivery" to their "Current Location" (explained below) are auto-confirmed
- When a signature is collected on the mobile app during the transfer process the delivery is auto-confirmed

**Setting an Employee's Current Location**

In Employee Settings, accessed using the menu under the user's name on the web client, a user may set a Current Location where they work most of the time. A user with "Confirm Any Delivery" permission can set this so that any transfer they perform to their current location is auto-confirmed. This enables warehouse employees to reduce the steps required to transfer assets back to the warehouse.

**Confirm Delivery on the Mobile App**

The Confirm Delivery workflow on the mobile app now displays all assets for which the logged in user is able to confirm the delivery, regardless of the Current Location selection. Field workers who are not Location Managers only see assets they are responsible for in this list. A location manager will see assets they are responsible for and assets transferred to a location for which they are the Location Manager. A user with Confirm Any Delivery permission will see all assets whose delivery needs to be confirmed in this list.

**Confirmed By Information**

Confirmed by and Confirmed date information has been added as available columns on the Asset Transfer History report. This information has been added to the Asset Side Panel in the Asset Page. On the Asset Page, select an asset in the grid to open the side panel. There is a section titled Last Transfer where the Last Transfer Confirmed By employee and Confirmed Date are displayed.

### Mobile App Asset Detail Improvements

Information regarding Alerts for an asset and completed services for an asset have been added to the Asset Details information on the mobile app.

**Asset Alerts on the Mobile App**

An Alerts card has been added to the Asset Details page of the mobile app.  This card will display any alerts on the asset.  If no Alerts exist, then the Alerts card will not show in the Asset Details.

**Completed Services on the Mobile App**

A Completed Services card has been added to the Asset Details page of the mobile app.  This card displays the name of the service and the last completion date for the service.  Click on the arrow on the card to view more details about the completed service including cost, performed by, notes and attachments.  If the mobile device has a viewing app for the attachment file type, you can download and view the attachment on your device.  Apps are typically available for viewing .pdf, .xls and .jpg file types.

# Other Changes

### All Assets selection on the Asset Page

A group called "All Assets" is listed at the top of the Asset Group hierarchy.  This group is selected by default when the Asset Page is viewed.  When "All Assets" is selected, all assets regardless of Asset Group will be displayed in the grid.  Previously, the Asset Group header had to be selected to view all assets.

If there are more than 5000 assets in the system then the Search field must be used to filter the results to less than 5000 assets.  The search box will search the following fields; Manufacturer, Model, Description, State, Status, Managed As, Responsible Employee, Location Manager, Location, Scan Code, Alternate Code, Friendly Name fields.

### Asset Page Side Panel

The Asset Details side panel has been organized into collapsible / expandable sections to make it easier to view information.  The panel is displayed by selecting an asset on the Asset Page grid.  The sections within the panel may be collapsed or expanded by clicking on the section header.

### Performance Improvements

Performance improvements have been made to the following areas of the web client:

- Location Hierarchy Display
- Grid display when using Internet Explorer
- Dashboard Alerts Display
- Searchable Dropdown Lists

## Legal Notices

### Copyright and Trademarks

### Release Notice

This is the Trimble AllTrak Cloud Software Release Notes
(Revision A). It pertains to release v2.2 of the software.

The topics within this document are subject to change without
written notice. Companies, names, and data used in any examples
are fictitious. Screenshots included in this document may not be
exactly as in the software application.

### Edition

Trimble® AllTrak™ Cloud Release Notes v2.5 (A)

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