

V2.6 RELEASE NOTES

Trimble® AllTrak™ Cloud

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Introduction

This document provides information about new features and modifications in release v2.6 of the Trimble® AllTrak™ Cloud software, which was deployed to the alltrak.trimble.com site on May 26, 2017.

New Features and Improvements in Version 2.6

Report Template Overview

The Report system has undergone a complete overhaul to enable users to define report and save report templates for reuse so that users do not need to select filters and data columns every time they generate a report.

When the Report Page  is accessed, the page is divided into 2 tabs:

- **Templates** – this tab is where templates are created, edited and used to generate reports.
- **Recent Reports** – this tab is where reports that have been run can be accessed to download.

Templates Tab

The Templates tab is divided into 2 sections:

- **Report Categories** – the left panel displays the different report categories and displays the report templates that are available for selected category in the Template grid.
- **Template Grid** – the right panel displays a grid of available report templates for the selected report category.

Report Categories

- **All Report Templates:** selecting this category will display all available report templates regardless of the category.
- **Asset:** use an asset report category to generate inventory reports for the assets in the system including details for assets, current status information for each asset.
- **Asset Transfer:** use an asset transfer report category to generate a report that displays the transfer history for assets.
- **Asset Certificate:** use an asset certificate report to generate a report that shows what assets have which asset certificates and what assets require which employee certificates.
- **Employee Certificate:** use an employee certificate report to generate a report that shows which employees have which employee certificates.
- **Employee:** use an employee report to generate a list of employees.
- **Location:** use a location report to generate a list of locations.
- **Charge Settings:** use a charge settings report to generate a report that shows the charge setup for each asset in the system. This type of report is only available if the Charges Module is enabled for your system.
- **Location Charge:** use a location charge report to generate a consolidated closed charge report for multiple charge time periods. This report can be generated to include closed charge information for multiple jobsites in one report. This type of report is only available if the Charges Module is enabled for your system.
- **Scheduled Service:** use a scheduled service report to generate reports that show the next scheduled services for assets. Both pending and overdue services are available in this report.
- **Completed Service:** use a completed service report to generate reports that show the service history of assets.







Report Templates

There are 2 types of Report Templates:

- Pre-defined templates – these templates are the default templates provided with the system.
- User-defined templates – these templates are templates created by the logged in user.


Action Menu for Report Template Grid

The following Actions are available on the Report Template Grid:

- Add Template  – create a new report template from scratch.
- Edit Template  – edit the setup of an existing report template.
 - Pre-defined templates cannot be edited.
- Delete Template  – delete the selected report templates
 - Pre-defined templates cannot be deleted.
- Duplicate Template  – make a duplicate copy of the selected report template.
 - Duplicates of Pre-defined templates are user-defined templates and can be edited.
- Run Report  – generate a report using the selected report template.
- Export to Excel  – export the Template grid to excel.

Managing Report Templates

Create a New Report Template

- Click on the Add Template  icon to open the Add Report Template popup.

Add Report Template Popup – Template Details Tab

- Select the Report Type (Excel or PDF) for the report template.
 - PDF Reports are limited to 10 columns of data.
 - Excel Reports do not have a data column limit.
- Enter a unique name for this report template. The report name will be used as the Report Title in PDF reports.
- Select the Report Category for this report template.
 - The Report Category impacts what data filters and what data columns are available for the report template.
 - If you have selected a Report Category in the Report Categories panel, that category will be selected by default, but you may change this selection.
- Enter a description for this report template.
- Click Next to move to the Filters Tab.

Add Report Template Popup – Filters Tab




Filters for a report can be selected when a report is generated, but if you want to predefine a report with filters, you can select filters as part of the report template setup. For example if you want an inventory report just for the “Main Warehouse” you can set up a “Main Warehouse” Inventory report template that has preset the Location filter to “Main Warehouse”. When the template is used to generate a report, “Main Warehouse” will automatically be selected as a filter for the report.

- The report filters available depend on the selected Report Category.
- By default no filters are set so all data will be included in the report.
- Click on the Filter Category in the left panel and select the desired filter settings in the right panel
 - If filters have been selected in a category a number will appear next to the filter category in the left panel indicating how many items have been selected for that filter. If no number is displayed then all data for that filter category will be included.
 - When a running a report, the filter options will be displayed and can be modified or selected for this one time running of the report.
 - Changing filters at run time will not modify the report template definition.


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- Click Next to move to the Layout Tab.

Add Report Template Popup – Layout Tab

Select the data columns that you want to appear in the report. As with the Filters, the available data columns for the report depend on the selected Report Category. Also, you may select up to 3 fields to group data by to organize the results. For example, if you want to generate a report that shows you a list of assets at each location organized by Asset Group, you would Group Data by Current Location and Asset Group with Current Location being the top Group By selection.

- Click the checkbox next to desired data fields in the left panel of the Layout tab to move them to the Included Data Columns list on the right.
- Unchecking the box next to the data field or clicking on the ellipsis  and selecting  Remove, will delete the field from the Included Data Column list.
- Excel reports can include all of the available fields, but PDF reports are limited to 10 columns
- Click on the Group By  icon to the right of a data field to add that field to the Group Data By list. The Group By icon will appear darker next to fields that have been added to the Group By list.

Note: You can add a field to the Group By list without adding it to the Included Data Column list which allows 3 additional fields of information to be included with a report without increasing the number of columns.

- The selected Group By and Data Column fields can be reordered by dragging the selected field to a new position in the list using the mouse.
- One field in the Group By list and one field in the Data Column list may be selected to sort the data by clicking on the ellipsis  next to the field and selecting the desired sort order.
- Click on Save and Exit to save the report template and return to the list of available report templates.
- Click on Save and Generate Report to save the report template, generate a report using the template and be returned to the list of available report templates.

Merged Data Fields

In the list of available data fields that can be displayed in the report, there are some fields that merge some data into one column so that you can display more information in fewer columns.

For example in the Asset Report Category, there are fields for Manufacturer, Model and Description. There is also a field “Manufacturer / Model” model that will display the Manufacturer and Model information in 1 column separated by a “/”. There is another field that merges the Manufacturer, Model and Description information into a single column.

If the field label shows an ellipsis ... next to the label, a tool tip will display the full label when the mouse pointer is positioned over the label.

There are multiple options for displaying location names in the reports.

- Location Name Full Path: this option will display the full path of a location that includes all the parent location groups, parent locations and the location name followed by the location id in “()”s.
- Location Name: this option only displays the name of the location itself.
- Location Name (ID): this option displays the name of the location followed by the location id in “()”s.

How the Group By and Data Columns are displayed in a report

Select 6 data column fields and the following Group By fields for an Asset Report:

- Current Location
- Category

- Asset Group

The resulting Layout will be:

Current Location: Location A

Category: Assets

Asset Group: Benders

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6

Asset Group: Drills

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6

Category: Commodities

Asset Group: Benders

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6

Asset Group: Carts

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6

Current Location: Location B

Category: Assets

Asset Group: Drills

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6

Asset Group: Saws

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6

Category: Consumables


Asset Group: Caulking & Paint

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6

Asset Group: Fastening

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6

Edit a Report Template


- Check the box next to the template name in the report template grid and click on the Edit  icon to make modifications to the selected template.

User-defined report templates can be edited with the following restrictions:


- The Report Category cannot be changed.
- If a report type is changed from Excel to PDF then the number of data columns must be 10 or fewer. On the Layout Tab, you must remove data columns to reduce the number of columns before the changes can be saved.

Pre-defined report templates cannot be edited, but they can be duplicated and the duplicated templates can be edited.

Delete Report Templates


- Pre-defined report templates cannot be deleted.
- Check the boxes next to user defined report templates and click the Delete  icon to delete the selected report templates.
- A popup will appear where you can enter a name for the new template. By default the duplicated template name will be prefaced with "Copy of " as the new template name.
- Duplicated templates can be modified (including the template name) using the Edit template workflow.

Duplicate a Report Template


- Check the box next to a template name in the report template grid and click on the Duplicate  icon to create a copy of the selected template.
- A popup will appear where you can enter a name for the new template. By default the duplicated template name will be prefaced with "Copy of " as the new template name.
- Duplicated templates can be modified (including the template name) using the Edit template workflow.

Running and Accessing Generated Reports


Generate a Report

- Select a report template and click on the Generate report  icon to generate a report using the selected template.
- Enter part of the report name, description or category in the search box to filter the list of report templates.
- A Generate Report popup will appear where available filters can be selected for this running of the report.
- Filters do not have to be selected, so you can click on Generate Report to run the report without changing any filters.
- You can run multiple reports one after another without waiting for the previous report to complete being generated.

Access Generated Reports

- On the Reports page, click on the Recent Reports tab to access generated reports.
- Reports will be listed in descending order based on the date and time they were generated.
- Enter part of the report name or date in the search box filter the list of recent reports
- Click on the download  icon to download the generated report to your computer.

Delete Generated Reports

- On the Recent Reports tab, check the boxes for each report you would like to delete from the system and click on the Delete  icon.
- Click on the checkbox in the header row to select all generated reports.

Location Scan Code

Scan Code field for Locations

A new scan code field has been added for all locations. A location scan code can be used by the AllTrak Mobile application to find a specific location within any location selection menus in mobile workflows.

For example, if you are transferring assets into gang boxes or conex boxes that are setup in your system as container locations, you would scan the assets to transfer to the container in the transfer workflow and then scan the scan code of the container to select that specific container as the destination for the transfer.

Move Container or Employee Locations with Transfer Workflow

Container and employee locations can be transferred to become a child of another location using the transfer workflow. Scan or enter the container or employee scan code to add the location to the transfer cart the same way that would add an asset to the transfer cart.

Transfer Locations Using the Transfer Workflow

- In the web client open the transfer cart and enter the scan code of the container or employee location in the scan code field.
- In the mobile app open the transfer workflow and scan or enter the scan code of the container or employee location to the cart
- A line will be added to the cart that displays the name of the location in the name column and the quantity column will indicate how many assets are in the location being transferred.
- Individual assets can be added to the transfer cart.
- Select the “to location” and complete the transfer.
- The transferred location will display in the location hierarchy as a child of the “to location” in the transfer. This is the same behavior if the location was moved using drag and drop in the location tree.

Delivery Notes

- Delivery notes will be generated for the transfer and show all assets that were transferred.
- If a container location has 5 assets is transferred, the delivery notes will show each of the 5 assets transferred.

Addition Information on Location Transfers

- If an asset individually added to the transfer cart is currently located in a container or employee location that is also being transferred, the asset will appear in the cart, but it will be transferred with the location being transferred. A message will appear after the transfer indicating that the asset was transferred with the location being transferred. The asset will not be transferred twice.
- If a location in the cart contains asset that cannot be transferred for any reason (i.e. currently “in-transit”) the entire location will not transfer. A message will appear on the web client indicating which assets could not be transferred and the location will remain in the cart. A notification will be generated in the mobile application.
- A location scan code can be the same code as an asset. This means that a container location can use the same scan code as the gang box asset the container location represents. When using the scan code of an asset as a location scan code, you should be careful to match the scan code of an asset that will always be associated with the location.




Save Views on Asset Page

It is now possible to search for assets on the Asset Page and save the results as a named view so that you can recall the view without regenerating the search.




Asset Panel Left Panel Changes

- The left panel of the Asset Page has been modified to have a Views section and an Asset Groups section.
- To view All Assets in the system, select the All Assets view. This view is selected by default.
- Views that the logged in user has saved will appear in the Views section.
- The Asset Group section displays the hierarchy list of Asset Groups and individual groups can be selected to filter the list of assets displayed in the grid to only those assets that are assigned to the selected Asset Group.



Creating a Named View

- Select the All Assets view and enter search criteria in the search box  and/or filter column date using the column filters .
- Click on Save as View  and a Save as View popup will appear.
- Enter a name for the view and click on Save and Exit.
- The view name will appear in the left panel under Views.

Modify a View

- Select the desired view in the left panel.
- Move columns in the grid by dragging the column header to a new place in the grid.
- Modify the columns displayed in the grid using the Column Chooser  to select the specific columns you want to display in this view.
- You can also modify the column filters within the selected view.
- Click on Update View  to save these changes with the selected view.
- You may also save these changes as a new view by clicking on Save as View .
- When a named view is selected, changes to the grid layout and filters do not affect the grid display for other views or asset group views.

Updating the Default Grid View Settings



- The Saved View feature also required some changes to how the default view is managed.
- The default grid view when the All Assets view or an Asset Group is selected can still be modified by using the Column Chooser  to select the specific columns to display in the grid.
- If the order of columns is changed by dragging and dropping the column header in the grid, then you must click on Save User Default View .
- Please note that filter and search settings are not saved with the default view, only the columns displayed and their order is saved.

Scheduled and Completed Services on Mobile App

Availability of the version 2.6 AllTrak Cloud Mobile App

An updated version of the AllTrak Mobile App will be available for download from the Google Play Store (Android devices) and the App Store (iOS devices) in the near future. The app is typically available on the Play Store within 1 week and on the App Store with 2 weeks of the web release deployment. The availability of the app on the respective stores is subject to the release process managed by the respective owners of these sites.

View Asset Services on AllTrak Cloud Mobile App

- The Services card on the Asset Details page of the mobile app has been updated to show both Scheduled Services and Completed Services.
- The card has 2 tabs:
 - Scheduled Services 
 - Completed Services 
- The Scheduled Services tab displays the name of each scheduled service for the selected asset and the scheduled date of the service.
- The Completed Services tab displays the services that have been completed for the selected asset. The tab displays the name of the service and most recent date of completion for each service completed for the asset.
- Click on the name of the completed service to view the details about the completed service. Attachments to the completed service can be downloaded from the Completed Service Details page.

Completing Scheduled Services

- Click on the Service Name to open the Service Details
- Select the date the service was completed in the Service Date field.
- Optional: Enter the cost of the service.
- If a cost is entered then the Currency is required. This field will default to the currency setup for your AllTrak system.
- Optional: Enter the Service vendor or person who performed the service in the Service Vendor field.
- Optional: Enter any notes about the service in the Notes field.
- Optional: Files or images of records for the service completion can be uploaded by clicking on the Upload Icon on the Attachments card.
- More information about the scheduled service, including any files attached to the scheduled service (i.e. service instructions) is available on the Info card.

Other Changes

AllTrak Cloud Mobile Application Logout

- Users who have logged into AllTrak Cloud on their mobile device are no longer logged out of the system after 12 hours.
- Users can close the AllTrak Mobile app and reopen it throughout the day and the next day without having to log back into the application.
- When the app is updated on the mobile device, the user will need to log back into the app.
- It is recommended that companies require employees to use a password on their phones for security purposes.

AllTrak Cloud Force Sync

There are times when the mobile app is not able to synchronize with the database in the cloud. If a user suspects their data is not updated on their mobile device, they can use the Force Sync option under Settings in the AllTrak Mobile Application.

- To access Settings, click on the burger button ☰ in the upper left corner of the application home page.
- Settings can also be accessed by swiping your finger from the left edge of the screen to the right to pull out the left side menu and selecting Settings.
- On the App Info card, click on Force sync and select Proceed to force the mobile device to sync with the cloud.
- Note: Force sync will only work when the device has an internet connection.

Grid Changes

- The number of assets that can be displayed in the asset grid on the Asset Page and the Location Page has been increased from 5,000 to 10,000.

Report Filters and Data Fields

Assets Report

Filters

Selecting a Filter will reduce the output of the report to include only those items that fall into the selected filter.

Filter Name	Settings	Comment
Asset Category	Asset, Commodity, Consumable	Report can be filtered to only show assets in specific categories
Asset Group	List of all asset groups defined in database	Report can be filtered to show only assets in specific asset groups
Asset Template	List of all asset templates defined in the database	Report can filtered to show only assets that are associated with specific asset templates
Asset Status	Broken, In Repair, Lost or Stolen, Operational, Retired	Report can be filtered to show only assets that have specific statuses
Asset State	In Transit, In Warehouse, On Site, Unavailable	Report can be filtered to show only assets that are in specific states
Current Location	List of all locations in data base	Report can be filtered to show only assets currently located at specific locations
Default Location	List of all locations in data base	Report can be filtered to show only assets who have a specific default location
Managed As	Fleet, Loaned, Owned, Rented	Report can be filtered to show only assets set with specific Managed As settings
Manufacturer	List of all manufactures in database	Report can be filtered to show only assets from specific manufacturers
Responsible Employee	List of all employees who can be responsible for tools	Report can be filtered to only show assets that specific employees are responsible for
Stock Level	In Stock, Low Stock, Over Stock	Report can be filtered to show only consumables that are in stock, are low in stock or are over stocked
Asset Date Range	From date through date	Enter the purchase date range

All Assets Data Fields

Asset Identification	Asset Details	Current Status Information	Storage Information	Managed As Information
Scan Code	Category	Current Location Full Path	Default Location Full Path	Managed As
Alternate Code	Manufacturer	Current Location Name	Default Location Name	Registered By
Scan Code / Alternate Code	Model	Current Location ID	Default Location ID	Registration Date
Serial Number	Manufacturer / Model	Current Location Name (ID)	Default Location Name (ID)	Purchase Date
Friendly Name	Description	Current Location State	Default Location Cost Center	Purchase Price
	Manufacturer / Model / Description	Current Location Cost Center	Owner	Purchase Currency
	Asset Group	Responsible Employee	Storage Location	Vendor
	Asset Template	Quantity	Min Stock Level	Purchase Order Number
	Cost Code	Asset Status	Full Stock Level	Warranty Expiration Date
	Notes	Asset State	Stock Alert Enabled	Extended Warranty
	Has Image	Return Due Date	Unit	Start Date
		Last Transfer Date		Return/Exchange Date
		Days at Current Location		Fleet Inventory Number
		Has Service Alert		Fleet Exchange / Warranty Date
		Has Certificate Alert		Fleet Organization Reference Number
		Has Stock Alert		Fleet Delivery Date
				Monthly Fleet Rate
				Fleet Cost Center
				Theft Insurance
			Loan Start Date	
			Loan End Date	
			Loan Tool Claim	
			Rental Start Date	
			Rental Return Date	
			Rental Tool Claim	

Asset Transfer Report

Asset Transfer Report Filters

Filter Name	Settings	Comment
Asset ID	Asset Scan Code or Alternate Code	User may enter multiple scan codes separated by a comma (",") to show transfers those specific assets
Asset Group	List of all asset groups defined in database	Report can be filtered to show only asset transfers of assets in specific asset groups
Location	List of all location defined in database	Report can be filtered to only show asset transfers to or from specific locations
Employee	List of all employees defined in database	Report can be filtered to show only asset transfers to or from specific employees
Confirmed By	List of all employees defined in database	Report can be filtered to show only asset transfers that were confirmed by specific employees
Transfer Date Range	From Date and Through Date	Report can be filtered to show only transfers that occurred within a certain date range

Asset Transfer Report Data Fields

Asset Identification	Asset Details	Transfer Information
Scan Code	Category	Transfer Date
Alternate Code	Manufacturer	Transaction Date
Scan Code / Alternate Code	Model	From Location
Serial Number	Manufacturer / Model	From Employee
Friendly Name	Description	To Location
	Manufacturer / Model / Description	To Employee
	Asset Group	Quantity
	Asset Template	Return/Due Date
	Cost Code	Transferred By
	Notes	Confirmed By
		Confirmed Date
		Transfer Note
		Cost Center

Asset Certificate Report

Asset Certificate Report Filters

Filter Name	Settings	Comment
Asset Certificates	List of all asset certificates defined in database	User may enter multiple scan codes separated by a comma (",") to show transfers those specific assets
Employee Certificates	List of all employee certificates defined in database	Report can be filtered to show only assets that require specific employee certificates
Asset Group	List of all asset groups defined in database	Report can be filtered to show only assets in specific asset groups
Responsible Employee	List of all responsible employees defined in database	Report can be filtered to show only asset transfers to or from a specific employee(s)
Owner	List of all employees defined in database	Report can be filtered to show only asset transfers that were confirmed by a specific employee(s)
Managed As	Fleet, Loaned, Owned, Rented	Report can be filtered to show only transfers that occurred within a certain date range
Manufacturer	List of all manufactures in database	
Asset Status	Broken, In Repair, Lost or Stolen, Operational, Retired	
Asset State	In Transit, In Warehouse, On Site, Unavailable	
Certificate Status	Current, Pending/Expired	
Date Range of Certificate Expiration	Start date through end date	

Asset Certificate Report Data Fields

Asset Identification	Asset Details	Current Status Information	Storage Information	Managed As Information	
Scan Code	Manufacturer	Current Location Full Path	Default Location Full Path	Managed As	
Alternate Code	Model	Current Location Name	Default Location Name	Registered By	
Scan Code / Alternate Code	Manufacturer / Model	Current Location ID	Default Location ID	Registration Date	
Serial Number	Description	Current Location Name (ID)	Default Location Name (ID)	Purchase Date	
Friendly Name	Manufacturer / Model / Description	Current Location State	Default Location Cost Center	Purchase Price	
	Asset Group	Current Location Cost Center	Owner	Purchase Currency	
	Asset Template	Responsible Employee	Storage Location	Vendor	
	Cost Code	Asset Status		Purchase Order Number	
	Notes	Asset State			Warranty Expiration Date
		Return Due Date			Extended Warranty
		Last Transfer Date			Start Date
		Days at Current Location			Return/Exchange Date
					Fleet Inventory Number
					Fleet Exchange / Warranty Date
			Fleet Organization Reference Number		
			Loan Start Date		
			Loan End Date		
			Rental Tool Claim		
			Rental Start Date		
			Rental Return Date		
			Loan End Date		
			Loan Tool Claim		

Employee Certificate Report

Employee Certificate Report Filters

Filter Name	Settings	Comment
Employee Certificates	List of all employee certificates defined in database	Report can be filtered to only show employees with specific employee certificates
Employees	List of all employees	Report can be filtered to show the certificates that specific employees have
Certificate Status	Current, Pending/Expired	Report can be filtered to show only certificates that have a specific status
Date Range of Certificate Expiration	Start date though date	Report can be filtered to only show assets that expire within a specified date range

Employee Certificate Report Data Fields

Certificate Information	Employee Certificate Information	Employee Identification	Employee Details
Certificate Name	Certificate Number	Full Name	Designation
Notification Interval	Issue Date	First Name	Employee Type
Is Critical	Expiration Date	Last Name	Responsibility
Notes	Has Alert	Employee ID	Email
	Comments	Scan Code	Office Phone
			Mobile Phone
			Address Line 1
			Address Line 2
			City
			State/Province
			Postal Code
			City State Postal Code
			Country

Employee Report

Employee Report Filters

Filter Name	Settings	Comment
Responsibility	None, Location Manager, Responsible Employee	Report can be filtered to show only employees with a specific responsibility
User Role	List of all user roles defined in system	Report can be filtered to show only employees with a specific user role

Employee Report Data Fields

Employee Identification	Employee Details
Full Name	Designation
First Name	Employee Type
Last Name	Responsibility
Employee ID	Email
Scan Code	Office Phone
	Mobile Phone
	Address Line 1
	Address Line 2
	City
	State/Province
	Postal Code
	City State Postal Code
	Country
	User Role
	Has Certificates
	Login Access
	Login Name

Location Report

Location Report Filters

Filter Name	Settings	Comment
Location Type	None, Location Manager, Responsible Employee	Report can be filtered to show only employees with a specific responsibility
Location Manager	List of all user roles defined in system	Report can be filtered to show only employees with a specific user role
Location Name (ID)	List of all locations	Report can be filtered to show only specific locations
Location State	Active, Inactive, Archived	Report can be filtered to show only locations with a specific state
Location Creation Date Range		Report can be filtered to show only locations created within a specified date range

Location Report Data Fields

Location Identification	Location Details	Charge Settings
Location Full Path	Location Type	Time Zone
Location Name	Location Manager	Workdays
Location ID	Cost Center	Chargeable Hours per Day
Location Name (ID)	Location State	Start Time
Scan Code	Contact Number	End Time
	Description	Chargeable Days per Month
	Address Line 1	Owned Assets Discount / Markup
	Address Line 2	Rental Assets Discount / Markup
	City	Consumables Discount / Markup
	State/Province	Rental Assets Charge Holidays
	Postal Code	Cap Setting
	City State Postal Code	Cap Value
	Country	Prorate Daily
		Prorate Weekly
		Prorate Monthly

Scheduled Services Report

Scheduled Services Report Filters

Filter Name	Settings	Comment
Asset Services	List of all asset certificates defined in database	User may enter multiple scan codes separated by a comma (",") to show transfers those specific assets
Asset Group	List of all employee certificates defined in database	Report can be filtered to show only assets that require specific employee certificates
Current Location	List of all asset groups defined in database	Report can be filtered to show only assets in specific asset groups
Default Location	List of all responsible employees defined in database	Report can be filtered to show only asset transfers to or from a specific employee(s)
Responsible Employee	List of all employees defined in database	Report can be filtered to show only asset transfers that were confirmed by a specific employee(s)
Owner	Fleet, Loaned, Owned, Rented	Report can be filtered to show only transfers that occurred within a certain date range
Managed As	List of all manufactures in database	
Manufacturer	Broken, In Repair, Lost or Stolen, Operational, Retired	
Asset Status	In Transit, In Warehouse, On Site, Unavailable	
Asset State	Current, Pending/Expired	
Service Date Range	Start date through end date	

Scheduled Services Report Data Fields

Service Information	Asset Services	Asset Identification	Asset Details	Current Status Information	Storage Information	Managed As Information
Service Name	Scheduled Date	Scan Code	Manufacturer	Current Location Full Path	Default Location Full Path	Managed As
Service Description	Completed Date	Alternate Code	Model	Current Location Name	Default Location Name	Registered By
Service Interval	Cost	Scan Code / Alternate Code	Manufacturer / Model	Current Location ID	Default Location ID	Registration Date
Service Notification	Purchase Currency	Serial Number	Description	Current Location Name (ID)	Default Location Name (ID)	Purchase Date
Has Attachment	Completed By	Friendly Name	Manufacturer / Model / Description	Current Location State	Default Location Cost Center	Purchase Price
	Provider		Asset Group	Current Location Cost Center	Owner	Purchase Currency
	Service Notes		Asset Template	Responsible Employee	Storage Location	Vendor
	Attachment Uploaded		Cost Code	Asset Status		Purchase Order Number
			Notes	Asset State		Warranty Expiration Date
				Return Due Date		Extended Warranty
				Last Transfer Date		Start Date
				Days at Current Location		Return/Exchange Date
					Fleet Inventory Number	
					Fleet Exchange / Warranty Date	
					Fleet Organization Reference Number	
					Loan Start Date	
					Loan End Date	
					Rental Tool Claim	
					Rental Start Date	
					Rental Return Date	

Completed Services Report

Completed Services Report Filters

Filter Name	Settings	Comment
Asset Services	List of all asset certificates defined in database	User may enter multiple scan codes separated by a comma (",") to show transfers those specific assets
Asset Group	List of all employee certificates defined in database	Report can be filtered to show only assets that require specific employee certificates
Current Location	List of all asset groups defined in database	Report can be filtered to show only assets in specific asset groups
Default Location	List of all responsible employees defined in database	Report can be filtered to show only asset transfers to or from a specific employee(s)
Responsible Employee	List of all employees defined in database	Report can be filtered to show only asset transfers that were confirmed by a specific employee(s)
Owner	Fleet, Loaned, Owned, Rented	Report can be filtered to show only transfers that occurred within a certain date range
Managed As	List of all manufactures in database	
Manufacturer	Broken, In Repair, Lost or Stolen, Operational, Retired	
Asset Status	In Transit, In Warehouse, On Site, Unavailable	
Asset State	Current, Pending/Expired	
Service Date Range	Start date through end date	

Completed Services Report Data Fields

Service Information	Asset Services	Asset Identification	Asset Details	Current Status Information	Storage Information	Managed As Information
Service Name	Scheduled Date	Scan Code	Manufacturer	Current Location Full Path	Default Location Full Path	Managed As
Service Description	Completed Date	Alternate Code	Model	Current Location Name	Default Location Name	Registered By
Service Interval	Cost	Scan Code / Alternate Code	Manufacturer / Model	Current Location ID	Default Location ID	Registration Date
Service Notification	Purchase Currency	Serial Number	Description	Current Location Name (ID)	Default Location Name (ID)	Purchase Date
Has Attachment	Completed By	Friendly Name	Manufacturer / Model / Description	Responsible Employee	Default Location Cost Center	Purchase Price
	Provider		Asset Group	Asset Status	Owner	Purchase Currency
	Service Notes		Asset Template	Asset State	Storage Location	Vendor
	Attachment Uploaded		Cost Code	Return Due Date		Purchase Order Number
			Notes	Last Transfer Date		Warranty Expiration Date
		Days at Current Location		Extended Warranty Start Date		
				Return/Exchange Date		
				Fleet Inventory Number		
				Fleet Exchange / Warranty Date		
				Fleet Organization Reference Number		
				Loan Start Date		
				Loan End Date		
				Rental Tool Claim		
				Rental Start Date		
				Rental Return Date		

Asset Charge Settings Report

Asset Charge Settings Report Filters

Filter Name	Settings	Comment
Asset Category	Asset, Commodity, Consumable	Report can be filtered to only show assets in specific categories
Asset Group	List of all asset groups defined in database	Report can be filtered to show only assets in specific asset groups
Asset Template	List of all asset templates defined in the database	Report can filtered to show only assets that are associated with specific asset templates
Managed As	Fleet, Loaned, Owned, Rented	Report can be filtered to show only assets set with specific Managed As settings
Manufacturer	List of all manufactures in database	Report can be filtered to show only assets from specific manufacturers
Asset Status	Broken, In Repair, Lost or Stolen, Operational, Retired	Report can be filtered to show only assets that have specific statuses
Asset State	In Transit, In Warehouse, On Site, Unavailable	Report can be filtered to show only assets that are in specific states
Current Location	List of all locations in data base	Report can be filtered to show only assets currently located at specific locations
Default Location	List of all locations in data base	Report can be filtered to show only assets who have a specific default location

Asset Charge Settings Report Data Fields

Asset Identification	Asset Details	Current Status Information	Storage Information	Managed As Information	Charge Settings
Scan Code	Manufacturer	Current Location Full Path	Default Location Full Path	Managed As	Charge Type
Alternate Code	Model	Current Location Name	Default Location Name	Registered By	Asset Value
Scan Code / Alternate Code	Manufacturer / Model	Current Location ID	Default Location ID	Registration Date	One Time Charge Amount
Serial Number	Description	Current Location Name (ID)	Default Location Name (ID)	Purchase Date	Daily Charge Amount
Friendly Name	Manufacturer / Model / Description	Current Location State	Default Location Cost Center	Purchase Price	One Time / Daily Charge Amount
	Asset Group	Current Location Cost Center	Owner	Purchase Currency	Hourly Rate
	Asset Template	Responsible Employee	Storage Location	Vendor	Hours to Daily
	Cost Code	Asset Status		Purchase Order Number	Daily Rate
	Notes	Asset State		Warranty Expiration Date	Days to Weekly
		Return Due Date		Extended Warranty	Weekly Rate
		Last Transfer Date		Start Date	Days to Monthly
		Days at Current Location		Return/Exchange Date	Monthly Rate
				Fleet Inventory Number	
				Fleet Exchange / Warranty Date	
				Fleet Organization Reference Number	
				Loan Start Date	
				Loan End Date	
				Rental Tool Claim	
				Rental Start Date	
				Rental Return Date	

Location Charge Report

Location Charge Report Filters

Filter Name	Settings	Comment
Location	List of all location defined in database	Report can be filtered to only show closed charges for specific locations
Closure Date	From Date and Through Date	Report can be filtered to show all closed charges that occurred within the specified date range

Location Charge Report Data Fields

The Data Fields for the Location Charge Reports cannot be customized. The following columns are included in the report.

Current Location Full Path
Default Location Name
Current Location Cost Center
Asset Group
Asset Description
Manufacturer / Model
Scan Code / Alternate Code
Friendly Name
Cost Code
Date Arrived
Date Left
Days on Site
Workdays on Site
Avg Cost per Day
Qty
Current Charge

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

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Edition

Trimble® AllTrak™ Cloud Release Notes v2.6 (A)

Friday May 26, 2017