

V2.9 RELEASE NOTES

Trimble® AllTrak™ Cloud

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Introduction

This document provides information about new features and modifications in release v2.9.1 of the Trimble® AllTrak™ Cloud software, which was deployed to the alltrak.trimble.com site on February 27, 2018.

New Features and Improvements in Version 2.9

Asset Template - Attachments

Attachments can now be uploaded to an Asset Template. Go to the Templates page and create or edit an Asset Template. In the popup there is now an option to upload attachments. Attachments must be less than 10MB.

Select an asset in the Asset Grid on either the Location or Asset Page and any files that have been attached to the Asset Template associated with the selected asset will be visible in the Asset Side Panel. There is an Attachments card in the panel that will display both attachments to the individual asset and attachments to the associated Asset Template. Files can be downloaded from the Side Panel.

Transfer Decimal Quantity of Consumables

AllTrak Cloud now allows the transfer of decimal quantities of a consumable. If a consumable is purchased in bulk volumes (i.e. ton, case), it is now possible to transfer a portion of the unit. For example, if there are 10 tons of a 4 foot roll of sheet metal in the warehouse, a quantity of 0.125 (1/8th of a ton) can be transferred to another location. Or, if you have a case of an item that contains 100 items per case it is possible to transfer 0.3 of the case to another location. A quantity of up to 3 decimal places may be entered as the quantity to be transferred.

It is recommended that the Units field is used appropriately to represent the consumable quantity. The system sees a consumable unit of Each or Case as the same, so it is possible to transfer .5 or an Each item or .5 of a Case item. Representative values in the Unit field for a consumable is important.



Add, Complete and Edit Asset Services

Several improvements have been made to the Add/Complete and Edit Services for an asset. An asset's service history can now be edited; including adding an attachment to a completed service, editing the date a service was completed, entering previously unlogged services, and the ability to delete a service record.

Add a service to an asset

- Select the Services tab on the Add/Edit Asset popup.
- Click on the "Select a Service" field, select the Service Type from the drop-down list and click **+** Add Service.
 - A row containing the newly scheduled service will display in the Scheduled Services grid.
 - If the selected service has a scheduled interval, the scheduled date will be set equal to the current date plus the interval.
 - If the selected service does not have a scheduled interval, then the scheduled date will be set to the current date.

Editing a Scheduled Service

- The scheduled date of a currently scheduled service can be edited by selecting the service in the Scheduled Services grid and clicking on  Edit Service.
- A scheduled service can be deleted by clicking on the  icon in the Scheduled Services grid.

Completing a Service

- To log a service complete, select a scheduled service in the Scheduled Services grid and click on ✓ Complete Service.
- The complete service panel will appear and the appropriate fields may be entered.
 - Completion Date defaults to the current date. This date can be edited, but it cannot be set to the future.
 - Cost may be entered and Currency selected.
 - Provider may be entered.
 - Attachments for the completed service can be uploaded.
 - Notes about the service may be entered.
 - Click on Save to log the service complete.
 - Click on Cancel to cancel the operation.

Managing the Service History of an Asset

The Service History grid on the Services tab of the Add/Edit Asset popup allows past completed services to be added, edited or deleted.

- To add a service that was completed prior to the currently scheduled service (enter historical information), Select a Service and click on + Add History in the Service History panel.
 - The Add History panel will appear and all completed service fields may be entered.
- To edit a completed service, select the service in the Service History grid and click on ✎ Edit History.
 - The Edit History panel will appear and all completed service fields may be edited.
- To delete a completed service record, click on the 🗑 icon in the Service History grid.

Administrator Deletion of Assets that have been Transferred

An Administrator now has the ability to delete assets that been transferred. Please note that deleting assets cannot be undone, so this feature should be used with caution.

- To enable this capability, the feature must be enabled in Company Settings.
- On the General Settings tab of the Company Settings Page select the ✎ icon to edit the settings.
- Set the “Enable Admin users to delete assets that have been transferred” to Yes.
- Selecting yes will enable individual assets to be deleted by an Administrator, even if the asset has been previously transferred.
- When deleting a selected asset, the user will be informed that deleting an asset from the system cannot be undone and asked to confirm that they want to delete the selected asset.
- If the asset has been previously transferred, the user will be informed that the asset was previously transferred “x” number of times and asked to confirm again.

Deleting Multiple Assets that have been Transferred

- Selecting “Yes” to enable transferred to be deleted also exposes an option allow Administrators to delete multiple assets that have been transferred in a single operation
 - By default, the “Enable Asset Bulk Deletion after being transferred” setting is set to 0.
 - The value sets the maximum number of times and asset can have been transferred and

still be deleted by a bulk deleting operation.

- Setting the value to 1 means only assets that have been transferred just once or never transferred can be deleted by a bulk operation.
- To bulk delete assets, select the assets to be deleted in the Asset Grid on either the Location or Asset Page
- The user will be informed that deleting assets from the system cannot be undone and asked to confirm that they want to delete the selected asset.
- If any of the selected assets have been transferred, the user will be informed that some of the selected assets have been transferred and asked to confirm again.
- When proceeding, if any of the selected assets have been transferred more than the number set in the Bulk Deletion setup on the Company Settings page, the user will be informed which assets could not be deleted.

Friendly Name for Commodities and Consumables



The Friendly Name field that was previously only available for Unique Assets, is now available for Commodities and Consumables.

User Interface Changes

Adjust the size of the Asset Side Panel

The Asset Side Panel that appears when selecting an asset in the Asset Grid on either the Location or Asset Page can be enlarged by clicking and dragging the left edge of the panel to the left.

Collapse the Location Hierarchy tree on the Location Page

- Click on  above the Location Hierarchy on the Location Page to collapse the Hierarchy panel.
- Click on  to open the Hierarchy panel.

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Edition

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