

# V2.8 RELEASE NOTES

## Trimble® AllTrak™ Cloud

- Introduction
- New Features and Improvements
  - Employee Profile - Upload Employee Picture
  - Employee Certificate Improvements
  - Edit Asset Templates
  - Asset Side Panel Improvements
  - Employee Side Panel Improvements
  - Cancel the Last Transfer of an Asset
  - Dashboard - Clear Alerts
  - Web Client Navigation Improvements
  - Barcode Scanner library: basic improvements

---

## Introduction

This document provides information about new features and modifications in release v2.8 of the Trimble® AllTrak™ Cloud software, which was deployed to the alltrak.trimble.com site on October 11, 2017.

## New Features and Improvements in Version 2.8

### Employee Profile – Upload Employee Picture


A picture of an employee can now be uploaded to an employee profile. In the Add/Edit Employee popup, click on the upload image icon below the image placeholder on the popup to open a file browser. Navigate to the folder where the desired image is stored, select the file and click on open to upload the image.

The employee picture will be visible in the Employee side panel, which appears on the right side of the screen when an employee selected in the employee grid.

### Employee Certificate Improvements

Several improvements have been made to the Employee Certificate feature, including adding an attachment to a certificate, viewing an employee's certificate history, entering past certificate information, and the ability to edit certificate information after it has been entered and saved.


#### Add a certificate to an employee

- Select the Certificates tab on the Add/Edit Employee popup.
- Click on the "Select a Certificate" field, select the Certificate Type from the drop-down list and click  Add Certificate. The Add certificate card will appear.
- Enter the Certificate Number (optional), Issue Date (Required), Expiration Date (Required)
- Optionally, upload an attachment by clicking on Browse in the Attachment section and selecting the desired attachment.
- Additional information may be entered in the Comments field (up to 1024 characters)
- Click on Save, the certificate details will be displayed in a row within the Employee Certificate section of the Certificates tab

#### Renewing Employee Certificates

Use the Renew Certificate workflow to renew a certificate so the history of the certificate can be saved. If Edit Certificate is used for certificate renewals, then any history is lost.

To renew an employee certificate:


- Select the Certificates tab on the Add/Edit Employee popup.
- In the Employee Certificates section, select the certificate to be renewed and click on  Renew Certificate.
- The certificate number defaults to the previous certificate number, but can be edited.
- Select the Issue Date and the Expiration Date for the renewed certificate.
- A new attachment can be uploaded for the renewed certificate. The previous attachment will be saved in the history.
- Enter any additional information in the comments field.

- 
- Click on Renew Certificate.
  - The current certificate information will be displayed in the Employee Certificate section
  - The previous certificate information will be saved and added to the Certificate History section.

### **Editing a Current Employee Certificates**



A current employee certificate can be edited if the dates were entered incorrectly, or the attachment is missing. Editing a certificate should not be used to renew a certificate because the history of the certificate will be lost. When editing a Certificate the Certificate Number cannot be edited. If this is required, delete the certificate and add it again. The Certificate Number can be edited when renewing a certificate or in the history record.

To edit a current employee certificate:

- Select the Certificates tab on the Add/Edit Employee popup.
- In the Employee Certificates section, select the certificate to be renewed and click on  Edit Certificate.
- If an attachment has already been uploaded, but needs to be replaced, the original attachment can be deleted and a new attachment can be uploaded.
- If the Certificate Number is incorrect, the certificate will need to be deleted and added again.
- Enter the Certificate Number (optional), Issue Date (Required), Expiration Date (Required)
- Optionally, upload an attachment by clicking on Browse in the Attachment section and selecting the desired attachment.
- Additional information may be entered in the Comments field (up to 1024 characters)
- Click on Save

### **Employee Certificate History**

The history of Employee Certificates is displayed in the Certificate History Section of the Certificates tab.

- Historical certificate information can be added directly to the history section by clicking on  Add History.
- History records for certificates can be edited by selecting  Edit History. All details in the history can be edited, including certificate number, dates, comments and attachments.

## **Edit Asset Template Improvements**

The asset template name is automatically created using the model number and manufacturer of an asset. Asset template names can now be edited in the Edit Asset Template popup.

The name can be simply edited in the Template Name field, but it is also possible to select another template name in a drop down list that appears when the field is edited. Selecting another asset template name will change all assets that are associated with the template being edited and assign them to the selected template.

It is common, especially when bulk uploading assets through excel, that the manufacturer or model number of some assets will not be consistent (e.g. DW950-Dewalt and DW-950-Dewalt). This results in 2 different asset templates for the same manufacturer and model asset. By editing the name of one of these 2 templates (DW-950-Dewalt) and selecting the other template (DW950-Dewalt) as the new name, all of the assets previously assigned to DW-950-Dewalt will be assigned to DW950-Dewalt. The assets will be updated to reflect the assignment to the selected template, the model, manufacturer and description will be updated to match the template. Also, certificate and service assignments will be updated to match the new template. Service History and Certificates assigned to the individual assets will be retained.

---

## Asset Side Panel Improvements

### Download Attachments

When an asset is selected on either the Asset or Location Page asset grid, a side panel appears showing the details of the selected asset. The attachment section of the Details page now includes the ability to download attachments added on the details tab for the asset directly from the side panel.

### Asset Transfer History Tab

A new History tab has been added to the Asset side panel that displays the selected Asset's transfer history.

## Employee Side Panel Improvements


### Download Attachments

When an employee is selected on the Employee Page grid, a side panel appears showing the details of the selected employee. The section displaying Employee Certificate information now provides the ability to download any employee certificate attachments directly from the side panel. This capability is only available for users with Add/Edit rights for employees.

## Cancel the Last Transfer of an Asset

An Admin User can now cancel the last transfer of an individual asset from the History tab of the Asset's side panel. This can be used if a mistake was made and the asset was transferred to the wrong location, or it never arrived.

When the last transfer of an asset is deleted, the asset's current location will be reset to the asset's previous location as if it had never been transferred. A "Canceled Transfer" note will be generated and available for reference in the Transfer Cart Delivery Notes tab.


By default, the history grid is sorted with the most recent transfer at the top of the grid. To cancel the last transfer, select the row of the last transfer and click on the delete  icon. If the selected row is not the last transfer for the asset then the delete icon will be inactive.

The last transfer cannot be canceled if any of the following conditions exist:

- The previous location of the asset is archived
- The previous location of the asset has been moved (change in hierarchy)
- The date of the transfer is prior to a Jobsite Charge closure that includes the selected asset
- The asset was transferred as part of a scanable location transfer (transferred as part of a container transfer)
- Consumable and Commodity transfers cannot be cancelled

## Dashboard – Clear/Delete Alerts


### Delete Return Due Alerts

An Admin User can now delete a Return Due alert for an Asset from the Action Ellipsis  menu on the Dashboard Alert Grid.

Return Due Alerts are automatically deleted when an asset is transferred back to the location it was transferred from when the Return Due date was set or if the asset is transferred back to its Default Location (typically the warehouse). However, there are times when the asset is not going to be transferred back to the location where it came from and may not return to the warehouse for some time, so it is desirable to be able to delete the return due alert.

---

### **Clear Rental Due / Fleet Expiry Alerts**

An Admin User can now clear a Rental Due or Fleet Expiry alert for an Asset from the Action Ellipsis  menu on the Dashboard Alert Grid.

Editing and saving an asset will regenerate any cleared Rental Due or Fleet Expiry alerts.

### **Web Client Navigation Improvements**

When a Location is selected in the Location Hierarchy on the Location Page, the selection is remembered when navigating to another page (i.e. Asset Page, Employee Page, and Template Page) and then returning to the Location Page.

### **Barcode Scanner Improvement**

The barcode scanning library has been upgraded to improve the performance and accuracy of barcode scanning.

---

Trimble Navigation Limited  
116 Inverness Drive East, Suite 210  
Englewood, Colorado 80112  
800-234-3758

### **Legal Notices**

#### **Copyright and Trademarks**

©1998-2017 Trimble Navigation Limited. All rights reserved.

Trimble and the Globe & Triangle logo are trademarks of Trimble Navigation Limited, registered in the United States and in other countries. AllTrak is a trademark of Trimble Navigation Limited. Other brand and product names are trademarks or registered trademarks of their respective holders.

This publication, or parts thereof, may not be reproduced in any form, by any method, for any purpose, without the written consent of Trimble Navigation Limited.

#### **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 v2.6 (A)

Friday May 26, 2017