



INSTALLATION GUIDE

Trimble AllTrak™ Software



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Trimble® AllTrak™ software

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Release Notice

This is the November 2012 release (Revision A) of the *AllTrak Software Installation Guide*. It applies to version 3.5 of the AllTrak software.

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Introduction

This manual describes how to set up and use the Trimble® AllTrak™ software.

This publication assumes that you are know how to use the Windows® operating system.

About this product

The AllTrak software enables you to track assets, so you always know exactly where they are, the condition of the asset, and the person responsible for the asset.

The AllTrak software enables you to easily check your assets in and out and transfer them between locations (where your assets are actually being used).

About this manual

This manual includes instructions on installing the AllTrak software and associated software applications (if you are using these). It also includes installing scanner software (if you are using this feature) and the preliminary steps required before you start working in the database.

Trimble recommends that you briefly review all chapters of this manual before you begin the installation process.

After you have completed the steps outlined in this manual, you are ready to begin adding assets to your database.

Related information

The AllTrak software includes both online manuals and help that detail the steps required to set up your database. You can access all manuals online from the software (select *Help / Trimble AllTrak Manuals*) or from the Windows *Start* menu. (Navigate to */ Trimble Office / Trimble AllTrak/ Documentation*). Sources of related information include the following:

- *AllTrak Software QuickStart Guide* steps you through the implementation process so you can start using the AllTrak software as soon as possible.
- *AllTrak Software Barcodes and Scanners Guide* for those who will use a scanner with the application.
- *Online Help* – the software has built-in, context-sensitive help that lets you quickly find the information you need. Access it from the *Help* menu. Alternatively, click the *Help* button in a dialog, or press **F1**.
- *Release Notes* – the release notes describe new features of the product. Release Notes and any files available to download will be available from the support area of the Trimble website.

- Trimble online training courses – Trimble strongly recommends that you attend at least one online training class before you begin to work in the AllTrak software. This will provide you with the information needed to help you successfully implement your database. With proper implementation, you will receive the most benefit from using the AllTrak software. **Note:** All classes are conducted over the internet. For class schedule information, call 1-800-441-2840.

Technical support

You can also contact AllTrak technical support at 1-800-441-2840 or at ATSupport@trimble.com.

Your comments

Your feedback about the supporting documentation helps us to improve it with each revision. Email your comments to ReaderFeedback@trimble.com.

Overview and Requirements

In this chapter:

- Network
- Stand-alone
- DataServer software
- Trimble® Quick Link
- Preliminary installation requirements

The AllTrak software can be installed on a network or on a stand-alone/single-user computer. When installed on a network, it runs in a client/server environment.

This chapter gives you an overview of the installation process and installation requirements.

Network

If you install the software on a network, the database is contained in one location with access granted to various users at certain levels. Network installation also provides a central location for database management, maintenance, and backups. After installing on the designated server, you must install the software on each workstation that needs access to the database. The database is most likely backed up daily through system backups by your System Administrator; however, Trimble recommends that you also perform regular backups of the AllTrak database using the scheduled backup feature to ensure that your data is safe-guarded.

Stand-alone

Installing the software on a single-user computer allows access to the database on only that computer. It also provides a central location for the database, but no access from workstation computers. When the AllTrak software is installed on a stand-alone computer, perform routine backups of the database and save them on a network location or other media (for example, USB drive, DVD-RW, CD-RW) to ensure that the data is not entirely lost in emergency situations.

DataServer software

The AllTrak software requires DataServer software, which is automatically installed when you install the application (either on a network or stand-alone computer). The AllTrak DataServer manages all database information.

Trimble® Quick Link



Tip – You must install Trimble Quick Link before installing Trimble AllTrak.

The Trimble Quick Link software utility allows you to easily manage licenses for your Trimble software products. ***The AllTrak software requires Trimble Quick Link for licensing and communication purposes.*** The software will not run without the Quick Link product.

The Trimble® Quick Link software has two modules available.

Trimble Recommendations:

- **Install Trimble Quick Link**
You ***must*** install Trimble Quick Link before you install the AllTrak application.
- **Trimble Quick Link Hub**
The Hub serves as the central communication link between AllTrak and Quick Link Central (licensing server) located in Trimble's corporate offices. ***The Quick Link Hub must be installed before you can install AllTrak.***



Tip – Trimble recommends that the Trimble Quick Link Hub be installed in a central location accessible by all requiring access to Trimble software applications.

- **Trimble® Quick Link Management Studio**
 - The Quick Link Management Studio allows you to manage your licenses from one convenient location.
 - Limiting the number of Management Studio installations within your organization provides better license management and security.
 - Trimble recommends that you install at least one copy of the Management Studio at each of your company's physical locations.

Preliminary installation requirements

- To install the AllTrak software, you **must** have administrative privileges.
- Refer to the *AllTrak System Specifications* document for operating system compatibility. You can obtain this document from your local Trimble distributor.

AllTrak Support cannot assist you with hardware configuration issues. It is your responsibility to install the software and connect the required hardware. For assistance in such cases, check with the vendor who supplied the equipment, your local computer dealer, the documentation included with your hardware, and/or your company's in-house computer experts.

Verifying that TCP/IP is installed

The AllTrak software requires TCP/IP (Transmission Control Protocol/Internet Protocol). Verify that it is installed on your system before you install the AllTrak software.

1. Go to the Windows *Start* menu, navigate to **Run**.

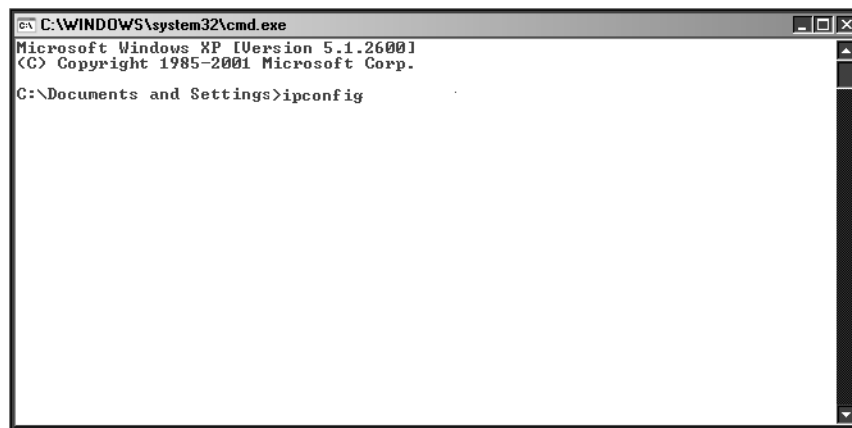
Note – The location of the *Run* command is based on your operating system:

- Windows XP users may find the command on the *Start* menu.
- Windows 7 users can simply type *Run* in the *Search programs and files* field.

2. In the *Run* dialog, enter **Command** and then click **OK**.

Note – For certain versions of the Windows operating system, you may need to enter **CMD** in the *Run* window. Click **OK**.

A window similar to the following displays:



- a. At the prompt, enter **IPCONFIG** and then press **[Enter]**. If you have TCP/IP installed, the IP address for your machine appears.



Tip – If the IP address does not appear or you get an error message, you must install TCP/IP on your computer before you can use the AllTrak software. Contact your SIT Professional for assistance.

- b. To close the *MS-DOS Prompt* window, type **exit** at the prompt and then press **[Enter]**.

Installation quick reference

Quickly locate the installation information you need using the following guide:

Installation type	Installation quick reference
Trimble Quick Link	See Chapter 3, Trimble Quick Link Installation
Network/Stand-Alone	See Chapter 4, Network/Stand-Alone Installation .
Client Workstation	See Chapter 5, Workstation Installation .

Installation type	Installation quick reference
Adobe Reader	See Chapter 6, Adobe® Reader® .
Scanners	Refer to the <i>AllTrak Software Barcodes and Scanners Guide</i> .

Trimble Quick Link Installation

In this chapter:

- [Installation Recommendations / Requirements](#)
- [Insert DVD](#)
- [Trimble Quick Link Hub](#)
- [Trimble Quick Link Management Studio](#)

The Trimble® Quick Link software utility allows you to easily manage licenses for your Trimble products. *AllTrak requires Trimble Quick Link for licensing and communication purposes.* The software will not run without the Quick Link product.

Trimble® Quick Link has two modules available.

- **Quick Link Hub**
This module is required for communicating with Quick Link Central (licensing server).
- **Quick Link Management Studio**
The Quick Link Management Studio allows you to manage your licenses. You can install it on one or multiple workstations.

Refer to the [Trimble® Quick Link](#) topic for more information.

Installation Recommendations / Requirements

To ensure proper operation of Trimble® Quick Link after installation, follow the steps below.



Tip – You must install Trimble Quick Link before installing the AllTrak software. If you have other applications using the licensing utility, you do not need to install another Hub; however, you must install the release of Trimble Quick Link included with Trimble AllTrak (as an update) to ensure proper access to licensing functionality.

- You **must** have administrator privileges in order to install the software.
- Close all Windows-based applications on the server, including e-mail software.
- The Trimble Quick Link Hub must be installed in a central location accessible by all who require access to Trimble products.
- You must install Trimble Quick Link before installing Trimble® AllTrak. If you have other applications using the licensing utility, you do not need to install another Hub; however, you must install the release of Trimble Quick Link included on this installation DVD (as an update) to ensure proper access to licensing functionality.
- If you are currently using Trimble® Quick Link for any other applications, you will need to also close the Quick Link Hub and Management Studio to complete the installation procedures. Keep in mind that any software application using Quick Link will not have access to licenses during this time. Trimble recommends that you do this during a non-busy time or after hours to minimize disruptions in your company's workflow.




Tip – For Server 2008 and Server 2008 R2, you may need to enable the .NET Framework 3.0 Features in the Server Manager. Contact your IT Professional if you need assistance with this process.

Insert DVD


1. Insert the AllTrak Installation DVD into the appropriate drive of the computer designated as the stand-alone or server computer. Wait a moment.
2. If the installation does not start a few seconds after you insert the installation DVD, proceed as follows:
 - Double-click on the **My Computer** icon.
 - Locate the drive containing the AllTrak Installation DVD. Click on it to display the contents of the DVD.
 - Double-click **AutoRun.exe** to open the AllTrak main installation screen.
3. Refer to the "[Hub Installation](#)" on [page 16](#) for complete instructions.

Trimble Quick Link Hub

 **Tip** – This installation may require a restart of your computer. Trimble recommends that you do this during a non-busy time or after hours to minimize disruptions in your company's workflow.

The Trimble Quick Link Hub provides communication with the Trimble licensing server.


- Using the Quick Link Hub typically requires internet access to allow proper communication with the license server. If you do not have access to the internet, you must install the Quick Link Hub and then contact a technical support representative for further instructions. **Note:** You must have access to e-mail.
- Trimble recommends that you install the Hub on a computer that can be accessed by all software applications using the Trimble Quick Link software application.
- Only one installation of the Hub is required for all Trimble applications (at each location).
- If your company has multiple locations using Trimble software applications, you must install the Hub at each physical location.
- If you are using the Trimble software as a Stand-Alone with no access to a network, you must install the Hub on that computer.

 **Tip** – Trimble recommends that the Trimble Quick Link Hub be installed in a location easily accessible by all who need to use the AllTrak software

Hub Installation

To install the Trimble Quick Link Hub, proceed as follows:

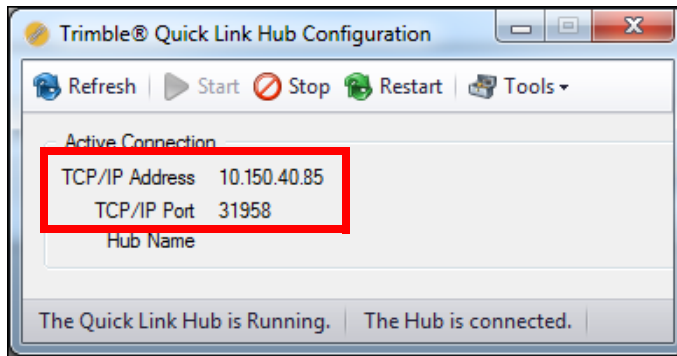
1. On the main AllTrak installation screen, click **Trimble Quick Link Installation** (under *Install*).
2. In the Quick Link install screen, click **Quick Link Hub**.
3. The welcome screen displays. Click **Next**.
4. The License Agreement displays on the screen. Read the agreement. Choose **I accept the terms of the license agreement**. Click **Next**.

 **Tip** – You must accept the terms of the agreement to proceed with the installation. If you want a hard copy of the agreement, click **Print**.


5. In the Choose Destination Location screen, click **Next**. We recommend that you accept the default location.

6. In the Ready to Install the Program screen, read the information provided. When you are ready to begin the procedure, click **Install**. The procedure installs the required files and configures the service. Please be patient as this process may take a few minutes.
7. Click **Finish**.
8. Open the Trimble Quick Link Hub to obtain the TCP/IP Address and TCP/IP Port for the computer where the software is installed. You need this information when installing AllTrak. Also, you need this information when you install the Management Studio.


Your TCP/IP address will be different than the one in the graphic. Do not use this address!



Trimble Quick Link Management Studio

 **Tip** – Trimble recommends that you limit the number of Management Studio installations within your organization. Limiting the number of Management Studio installations within your organization provides better license management and security.

1. In the Quick Link install screen, click **Quick Link Management Studio**. The routine prepares the files for installation.
2. The Welcome screen displays. Click **Next**.
3. The License Agreement displays on the screen. Read the agreement. **Choose I accept the terms of the license agreement**. Click **Next**.

 **Tip** – You must accept the terms of the agreement to proceed with the installation. If you want a hard copy of the agreement, click **Print**.

4. In the Choose Destination Location screen, click **Next**. **Note:** Trimble recommends that you accept the default location.
5. In the Ready to Install the Program screen, read the information provided. When you are ready to begin the procedure, click **Install**.
6. Click **Finish**. Refer to the "[Preliminary Settings](#)" section in this manual for information on configuring the Management Studio. No action is required at this time.

Return to Main Page

[Go to Main screen](#)

In order to install the AllTrak software, click
and then refer to "[Network/Stand-Alone Installation](#)" chapter for instructions.

Network/Stand-Alone Installation

In this chapter:

- Trimble Quick Link
- Installation options
- Network installation reference
- Preliminary steps
- Installation procedures
- Stand-alone/network procedures

This chapter describes how to install the AllTrak software for use on a network or a stand-alone computer.

Trimble Quick Link

The Trimble® Quick Link software utility allows you to easily manage licenses for your Trimble products. ***AllTrak requires Trimble Quick Link for licensing and communication purposes.*** The software will not run without the Quick Link product.

The Trimble® Quick Link software has two modules available.

- **Trimble Quick Link Hub**

You ***must*** install Trimble Quick Link before you install the AllTrak application. The Hub serves as the central communication link between AllTrak and Quick Link Central (licensing server) located in our offices. ***The Quick Link Hub must be installed before you can install AllTrak.***



Tip – Trimble recommends that the Quick Link Hub be installed in a central location accessible by all requiring access to Trimble software applications.

- **Trimble Quick Link Management Studio**

- The Quick Link Management Studio allows you to manage your licenses from one convenient location.
- Limiting the number of Management Studio installations within your organization provides better license management and security.
- Trimble recommends that you install at least one copy of the Management Studio at each of your company's physical locations.

AllTrak Installation Considerations

Before you begin, determine the environment in which the AllTrak software will be used.

- **Network**

If you will be using it on a network, proceed with the instructions outlined on the following pages. After you have completed the installation on the designated server computer, you must also install the software on the workstations. See [Workstation Installation, page 30](#).

- **Stand-alone**

If you are installing on a stand-alone computer, complete the procedures on the following pages.

Installation options

Network installation

When you install the AllTrak software on a network, you must install the DataServer software on a designated network server. All AllTrak workstations then connect to the DataServer computer.

Note – The AllTrak DataServer manages information in the database.

- You can access the manual from the *AllTrak Installation CD*.
- After installation, you can open the manual from the Windows *Start* menu or from the Help.

Note – For more information about using a scanner with a network/workstation installation, refer to the *AllTrak Software Barcodes and Scanners Guide*.

You can install both the AllTrak DataServer software and client-side on the designated network server. However, installing the application files (client-side) on the network server is not required. For information on the different installation options available, see [Network installation reference, page 22](#).

Stand-alone installation

When you install as a stand-alone user, you must install *all* components of the AllTrak software on the computer. You will be given this option in the installation routine.

Network installation reference

Select one of the following options that works best for your environment:

Type	Advantages	Disadvantages
AllTrak DataServer Installation	<ul style="list-style-type: none"> • All DataServer functionality is available. • AllTrak program files are not installed so less disk space is required. • Client-side security is not required at the server level. 	<ul style="list-style-type: none"> • You cannot operate the AllTrak programs (client-side) at the DataServer. • You can access the program (client-side) only from workstations.
AllTrak Stand-Alone Installation on the network server	<ul style="list-style-type: none"> • All DataServer functionality is available. • You can operate the AllTrak program (client-side) on the network computer. • You can access database functions from the server as well as from the workstations where the software is installed. 	<ul style="list-style-type: none"> • Requires additional disk space. • You may not be able to access the database if all available licenses are in use.

Preliminary steps

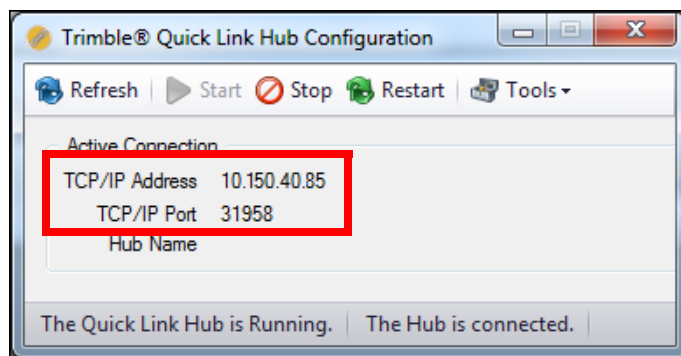
Before you install the software:

- You **must** have administrator privileges in order to install the software.
- It is your responsibility to install the required software and connect the hardware (if necessary).
- Close all Windows-based applications on the server, including e-mail software.

Quick Link Hub IP Address

Before you can install Trimble AllTrak, the installation routine must validate installation and communication of the Quick Link Hub. You must have this information available to proceed.

Your TCP/IP address will be different than the one in the graphic. Do not use this address!



Common installation commands

During the installation process, you will see the following in many of the dialogs:

- To proceed with the installation and advance to the next window, click **Next**.
- To return to the previous page, click **Back**.
- To stop the installation, click **Cancel**. You will be asked to confirm the cancellation. Click **Yes** if this was your intent. If you clicked **Cancel** in error, click **No** to continue the installation.
- To complete the installation, click **Finish**.

Installation procedures

You must install the AllTrak software on the stand-alone computer or the computer designated as the server (network installation).

Network users

Before beginning the installation, you must also know the computer location (for example, the IP address or server name).

When you install the AllTrak software on a network server, you have two options:

- Install the DataServer only
- Install a Stand-Alone version on the server

For information on the advantages/disadvantages for each of these installation types, see [Network installation reference, page 22](#).



Tip – The network installation must first be performed on the computer designated as the “network” or “database server”. This does not have to be the same computer already designated as your current network server. Workstation computers must be able to connect to this computer.

After you have completed the installation on the network server, you must install the AllTrak workstation software on all computers requiring access to the database. See [Chapter 5, Workstation Installation](#).

Stand-alone users

Stand-alone users need only install the software on the designated AllTrak computer.

Insert DVD

1. Insert the AllTrak Installation DVD into the appropriate drive of the computer designated as the stand-alone or server computer. Wait a moment.
2. If the installation does not start a few seconds after you insert the installation DVD, proceed as follows:
 - Double-click on the **My Computer** icon.
 - Locate the drive containing the AllTrak Installation DVD. Click on it to display the contents of the DVD.
 - Double-click **AutoRun.exe** to open the AllTrak main installation screen.

Stand-alone/network procedures



CAUTION – If you have not already done so, you *must* install Trimble® Quick Link before installing the AllTrak software. Refer to “*Trimble Quick Link Installation*” on page 14 for more information.

1. Select *Install: Trimble AllTrak*.
2. Trimble has built-in several validations to ensure Trimble® Quick Link and the Alltrak software can communicate properly after installation. Your Quick Link Hub must be validated before you can continue the installation.
 - a. In the Check Quick Link Installation dialog, enter the following information:

Hub Address
This is the TCP/IP Address assigned to the Quick Link Hub.

Port
This is the TCP/IP Port assigned to the Quick Link Hub. *Note:* The default Port should always be **31958**.
 - b. Click **Continue Install**.
 - c. **Validation Procedure**
When you click Continue Install, the application validates the installation and communication with the Quick Link Hub.
 - If the installation/communication is validated, the installation routine will proceed. Go to *Step 3* below.
 - If installation/communication cannot be validated, click **Go Back** and make sure you have entered the correct information. Make any necessary corrections and then click **Continue Install** again. Go to *step 3* below.



Tip – If you have entered the correct information and the data cannot be validated, you will need assistance from your IT Professional. Trimble has provided an *Installation Checklist* document to step through some troubleshooting procedures in order to make sure your environment allows the proper required communication.

3. The InstallShield Wizard prepares to install the software. *Please be patient.* This may take a few minutes.
4. The *Welcome to the Installation Wizard for Trimble AllTrak* dialog displays. Click **Next**.
5. The *License Agreement* dialog displays. Read the agreement. Select the *I accept the terms of the license agreement* option and then click **Next**.



Tip – You must accept the terms of the agreement to proceed with the installation. If you want a hard copy of the agreement, click **Print**.

6. Depending on the type of installation and/or operating system installed on your computer, the *Access Control Options* dialog may appear. Select one of the following options:

Option	Description
Access is allowed for anyone who uses this computer (all users)	This allows anyone who logs into your computer (regardless of user name) to access the database. However, they must be granted proper security rights in the AllTrak software.
Access is allowed only for me (computer or user name displays)	This allows only the login that matches the computer or user name to access the database.

7. Click **Next**.
8. In the *Select AllTrak Options* dialog, select one of the following options:

Option	Description
AllTrak Stand Alone (includes both DataServer and Workstation)	The Stand-Alone option on the network server provides full access to AllTrak (DataServer and client-side of the application) on the server computer. Stand-Alone users: You must select this option. Network users: You can choose this option or the DataServer option, depending on your preferences. For information on installation options, see Network installation reference, page 22 .
AllTrak DataServer	For Network users only: You can access only the DataServer on the computer designated as the server when you use this option. The client-side of AllTrak can be accessed only from workstations

Note – Do not select AllTrak Workstation for a network or stand-alone installation. For instructions on installing a workstation, see [page 30](#).

9. Click **Next**.
10. The *Choose AllTrak Destination Location* dialog appears. **Trimble recommends that you install the software in the default location.** Click **Next**.
11. Depending on your system and other software programs installed, the *Choose ASA Database Server Destination Location* dialog **may** appear. **Trimble recommends that you install the software in the default location.**

Note – If this dialog does not display, go to [Step 12](#). Click **Next**.

12. The *Select Other Options* dialog appears. Depending on your preferences, select or clear the following check boxes:

Check box	Description
Place the DataServer into the Startup menu	Automatically opens the DataServer when you log into your computer.

Check box	Description
Place an icon onto the desktop for the DataServer program	Enables easy access to the DataServer.
Place icons onto the desktop for the Workstation programs	Places icons for the AllTrak software and AllTrak utilities on the desktop.
Note – This option does not appear if you are installing only the DataServer.	

13. In the *Enter TCP/IP Port* dialog, enter the port number for the DataServer. Trimble has provided default values in these fields, but if you need assistance with the settings, contact your System Administrator. Click **Next**.
14. In the *Select Program Folder* dialog, choose how you want AllTrak information to appear in your program list. **Trimble recommends that you accept the default setting.** Click **Next**.
15. Set up scheduled backups of your AllTrak database. This enables you to back up your database on a daily basis at a specified time and location. **Trimble recommends that you set these parameters during the installation procedure to safeguard data entered into the system.**

You can modify settings later in the *AllTrak DataServer* window. For more information, refer to the DataServer Help.

- a. Select the *Yes* option to set the options for Scheduled Backups and then click **Next**.
- b. Do one of the following:
 - Enter the location (drive letter and folder) where you want to create the backups.
 - Click **Browse**, then navigate to the location and modify it.



Tip – Trimble recommends that you accept the default backup location. To create the backup in another location, Trimble recommends that you select a location other than within the AllTrak software (for example, a network location).

- c. Click **Next**.
- d. In the *Scheduled Backup Time* window, select the check box next to the time you want the backup to begin.

To back up the database, the AllTrak DataServer must be open at the designated time. For more information, refer to the Help.

16. Click **Next**.
17. A summary of your selections appears in the *Start Copying Files* dialog. To accept the settings, click **Next**. The installation begins. **This procedure may take a few minutes to complete.**
18. Click **Finish** to complete the installation.

Completion

Before you begin working in the database, complete the following procedures:

Trimble Quick Link Configuration

Refer to the [Chapter 7, Preliminary Settings](#) of this manual to configure the Trimble Quick Link Management Studio. If you have installed as a network, you should complete this configuration prior to installing the workstations.

Complete DataServer settings

Define additional values and run commands as required to set up DataServer parameters. See [AllTrak DataServer, page 40](#).

Workstation

If you installed the AllTrak software on a network, you must install the software on each workstation requiring access to the AllTrak database. (This is required in order for the workstations to run the software.) See [Chapter 5, Workstation Installation](#).

Starting the AllTrak software

When the AllTrak installation is complete, see [Chapter 7, Preliminary Settings](#) for instructions on starting AllTrak from the computer designated as the database server or on a stand-alone machine.

Adobe Reader

To view the online manuals, you need Adobe Reader. See [Chapter 6, Adobe® Reader®](#).

Windows Mobile devices

If you purchased a Trimble Nomad handheld for use with the AllTrak software, refer to the *AllTrak Software Barcodes and Scanners Guide* for instructions on configuring the device.

Workstation Installation

In this chapter:

- Preliminary steps
- Installation procedures

If you install the AllTrak software on a network, you must also install the workstation software at each workstation that needs access to the database. This step activates the software on each workstation so it can communicate with the AllTrak DataServer.

Before you begin workstation installations, install the AllTrak software on the designated server computer.

Preliminary steps

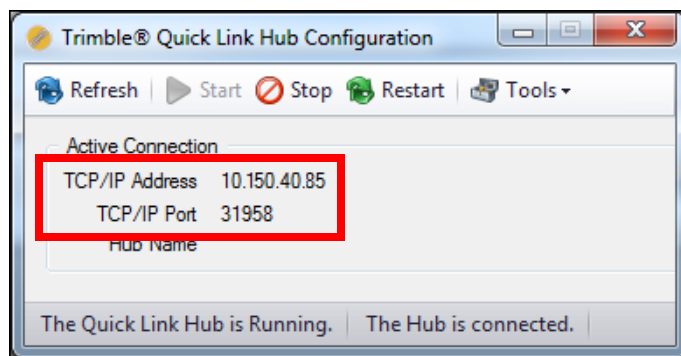
Before you install the software:

- You **must** have administrator privileges in order to install the software.
- It is your responsibility to install the required software and connect the hardware (if necessary).
- Close all Windows-based applications on the server, including e-mail software.

Quick Link Hub IP Address

Before you can install Trimble AllTrak, the installation routine must validate installation and communication of the Quick Link Hub. You must have this information available to proceed.

Your TCP/IP address will be different than the one in the graphic. Do not use this address!



IP address

During the Workstation installation you must enter the TCP/IP address and Port number to access the computer where the DataServer is installed. For instructions on how to obtain this information at the AllTrak DataServer computer, see [Verifying that TCP/IP is installed, page 11](#). You should have this information available before you begin the installation process.

Common installation commands


During the installation process, you will see the following in many of the windows:

- To proceed with the installation and advance to the next window, click **Next**.
- To return to the previous page, click **Back**.
- To stop the installation, click **Cancel**. Either click **Yes** to confirm the cancellation or click **No** to continue the installation.
- To complete the installation, click **Finish**.

Insert DVD

1. Insert the AllTrak Installation DVD into the appropriate drive of the computer designated as the stand-alone or server computer. Wait a moment.
2. If the installation does not start a few seconds after you insert the installation DVD, proceed as follows:
 - Double-click on the **My Computer** icon.
 - Locate the drive containing the AllTrak Installation DVD. Click on it to display the contents of the DVD.
 - Double-click **AutoRun.exe** to open the AllTrak main installation screen.


Installation procedures

 **Tip** – You must have the TCP/IP Address and TCP/IP Port for the Quick Link Hub. If you have not yet installed the Trimble® Quick Link software, you must do so before you can install the AllTrak software.

1. Select *Install*: **Trimble AllTrak**.
2. Trimble has built-in several validations to ensure Trimble® Quick Link and the Alltrak software can communicate properly after installation. Your Quick Link Hub must be validated before you can continue the installation.
 - a. In the Check Quick Link Installation dialog, enter the following information:

Hub Address
This is the TCP/IP Address assigned to the Quick Link Hub.

Port
This is the TCP/IP Port assigned to the Quick Link Hub. **Note:** The default Port should always be **31958**.
 - b. Click **Continue Install**.
 - c. **Validation Procedure**
When you click Continue Install, the application validates the installation and communication with the Quick Link Hub.
 - If the installation/communication is validated, the installation routine will proceed. Go to *Step 3* below.
 - If installation/communication cannot be validated, click **Go Back** and make sure you have entered the correct information. Make any necessary corrections and then click **Continue Install** again. Go to *step 3* below.

 **Tip** – If you have entered the correct information and the data cannot be validated, you will need assistance from your IT Professional. Trimble has provided an *Installation Checklist* document to step through some troubleshooting procedures in order to make sure your environment allows the proper required communication.


3. The *Welcome to the Installation Wizard for AllTrak* dialog appears. Click **Next**.
4. The *License Agreement* dialog appears. Read the agreement. Select the *I accept the terms of the license agreement* option and then click **Next**.
5. The *Support Service Agreement* dialog appears. Read the agreement. Select the *I accept the terms of the support license agreement* option and then click **Next**.



Tip – You must accept the terms of the agreement to proceed with the installation. If you want a hard copy of the agreement, click **Print**. Depending on the operating system installed on your computer, the *Access Control Options* screen may appear. Select one of the following options:

Option	Description
Access is allowed for anyone who uses this computer (all users)	This allows anyone who logs into your computer (regardless of user name) to access the database. However, they must be granted proper security rights in the AllTrak software.
Access is allowed only by me (computer or user name displays)	This allows only the login that matches the computer or user name to access the database.

6. Click **Next**.
7. In the *Select AllTrak Options* dialog, select the *AllTrak Workstation* option and then click **Next**.
8. The *Choose AllTrak Destination Location* dialog appears. **Trimble recommends that you install the software in the default location.** Click **Next**.
9. The *Select Other Options* dialog appears. Select the *Place icons onto the desktop for the Workstation programs* option. This option places icons for the client side of the AllTrak software on the desktop for easy access. Click **Next**.
10. The TCP/IP (Internet Protocol Address) connects the workstation to the computer where the DataServer is installed. The port identifies how to access the DataServer software on the network computer. In the *Enter TCP/IP and Port* dialog, enter the following information:

Option	Description
TCP/IP	This is the address of the computer where the DataServer is installed. If you do not know the address, see page 11 or contact your System Administrator.
	 CAUTION – This field contains a default to the Stand-Alone IP address. To provide connectivity to the DataServer, you must enter the appropriate IP address for the server.
Port	Enter the port number you will use to access the AllTrak DataServer. If you need help with this setting, contact your System Administrator.

11. Click **Next**.
12. In the *Select Program Folder* dialog, you can select how you want the AllTrak software to appear in your program list. **Trimble recommends that you accept the default setting.** Click **Next**.

13. A summary of your selections appears in the *Start Copying Files* dialog. If you are satisfied with the data displayed, click **Next**. The installation begins. *Please be patient as this procedure may take a few minutes to complete.*
14. Click **Finish** to complete the installation.

Completing the workstation installation

If this is the first time you have installed the AllTrak software, complete the following procedures before you begin working in the database:

Trimble Quick Link Configuration

Refer to the [Chapter 7, Preliminary Settings](#) of this manual to configure the Trimble Quick Link Management Studio. If you have installed as a network, you should complete this configuration prior to installing the workstations.

Starting the AllTrak software

When the AllTrak installation is complete, see [Open the AllTrak software, page 45](#) for instructions on starting the AllTrak software from the computer designated as the database server or on a stand-alone machine.

Adobe Reader

To view the online manuals, you need Adobe Reader. See [Chapter 6, Adobe® Reader®](#).

Windows Mobile devices

If you purchased a Trimble Nomad handheld for use with the AllTrak software, refer to the *AllTrak Software Barcodes and Scanners Guide* for instructions on configuring the device.

Adobe® Reader®

In this chapter:

- [Adobe Reader information](#)
- [Installation requirements](#)
- [Download/Install Adobe Reader](#)

The AllTrak software includes online manuals in a portable document format (PDF). Direct access hyperlinks throughout the manuals provide easy access to various topics. You can also print all, or part of, the manual.



Tip – If Adobe Reader is already installed on the workstation, it must be at least version 7 to open and view the AllTrak manuals.

Trimble recommends that you install the latest version of the reader available.

Adobe Reader information

To verify that you have Adobe Reader version 6 or later installed on your computer:

1. Open Adobe Reader. Select *Help / About*.

Note – Depending on the version of the Reader you have installed, the command may read *Adobe Acrobat Reader* or *Adobe Reader*.

2. In the product information window, verify that the version is 6 or later.
 - If it is, no further action is necessary. **However, Trimble recommends that you install a current version of the reader.**
 - If not, you must install Adobe Reader.

Installation requirements

- If you have installed the AllTrak software on a network with workstations, you must install Adobe Reader on each workstation. This provides access to the manuals for all users using the AllTrak software.
- If you have installed the AllTrak software on a stand-alone computer, you must install Adobe Reader on the stand-alone computer.

Download/Install Adobe Reader

To install a free copy of Adobe Reader, follow the instructions below.

Adobe Reader is not installed on your system

1. Insert the Trimble AllTrak installation DVD into the appropriate drive of the stand-alone or workstation computer. Wait a moment. The main installation screen displays.
2. Under *Install*, click **Adobe® Reader®**.
3. The Adobe Systems Incorporated website opens. Locate the *Download* area on the home page.
4. Locate Adobe Reader. Follow the on-screen instructions.

Note – the following:

If you have an older version of Adobe Reader, you may receive a message indicating that the older version must be removed prior to installing the new version. If you receive this message, proceed with the removal process. Once removal is complete, go back to *Step 1* and begin the installation again.

Preliminary Settings

In this chapter:

- [Trimble Quick Link Configuration](#)
- [AllTrak DataServer](#)
- [Backup settings](#)
- [Client-requested options](#)
- [Scheduled database backups](#)
- [Access/Final steps](#)
- [Open the AllTrak software](#)
- [Passwords and Rights](#)

When you complete the installation of the AllTrak software, you are ready to create the backup settings in the DataServer. For security purposes, you should also change initial passwords and create a system administrator for the AllTrak client (stand-alone or workstation).

Before proceeding with the directions contained in this chapter, make sure you have completed the installation steps outlined in [Chapter 4, Network/Stand-Alone Installation](#) and, if necessary, [Chapter 5, Workstation Installation](#).

This chapter provides you with preliminary instructions on procedures that you should complete immediately after the installation is complete.

Trimble Quick Link Configuration

Before you can use the Trimble Quick Link Management Studio, it must be configured to communicate with the Hub.


The Quick Link Management Studio requires a login name and password. This provides security for other sensitive information and your product licenses. Trimble Quick Link includes defaults that allow you initial access to the database. You can add users/passwords under **Tools > Quick Link Employees**. See the Trimble Quick Link online help system for instructions.

1. Open the Trimble Quick Link Management Studio using one of the following methods:

: 
Click **Quick Link Mgmt Studio** on your Desktop.

OR

Go to the Windows Start menu and navigate to **Trimble® Quick Link**. Click on it and then click **Management Studio**.

 **Tip** – The Trimble® Quick Link Hub must running before you can open the Trimble® Quick Link Management Studio.


2. In the Connect to the Trimble® Quick Link Hub screen, enter the following:

Login Name

admin

Password

admin

 **Tip** – We recommend that you change the password for the default login as soon as possible in order to protect your data. Make note of the new password.

3. If you want to save the password for future use, click the **Remember Password** checkbox.
4. Review the information presented on this screen and then enter the **IP Address** for the Trimble Quick Link Hub.



CAUTION – Do not change the Port number. Changing the Port number will cause connectivity conflicts to the Hub (based on firewall settings). It is highly recommended that the default Port number is used. Contact your system administrator for more info


5. Click **OK**. The *Quick Start Wizard* opens. This wizard guides you through setting up the Management Studio for proper licensing and communication. Refer to the Trimble Quick Link online help system for instructions on completing the wizard.

AllTrak DataServer

Opening the DataServer

Depending on your settings, the DataServer may open automatically when you start your computer. In most cases, it will also start automatically when you open the client-side of the AllTrak software. In each of these cases, the DataServer is minimized and available in the Windows System Tray. See [Minimizing the DataServer](#), page 40.

Do one of the following:

- Double-click on the  icon on your desktop.
- From the Windows *Start* menu, select *Programs / Trimble Office / Trimble AllTrak / Trimble AllTrak DataServer*.

The *AllTrak DataServer* window opens.

Minimizing the DataServer



If the AllTrak DataServer is minimized in the Windows System Tray, double-click on it and the window opens:



Trimble AllTrak DataServer

Minimize DataServer

When you are done working in the AllTrak DataServer window, you can minimize it using one of the following methods:

- In the upper right corner of the window:
 - Click .
 - Click .

Closing the DataServer

To close the AllTrak DataServer, select **File > Exit**.

Note – *If users are connected to the DataServer when you close it, everyone will be automatically disconnected. To send a message advising everyone to log out, select **Tools > Messaging** or **File > Timed Shutdown**.*

Backup settings

With any software, you should perform periodic backups of your data to safeguard against data loss.



CAUTION – You must complete the procedures outlined in order to produce accurate and timely backups of your database. Failure to complete these procedures may result in improper creation of system backups.

The procedures covered in this topic detail only setting the backup parameters. For information about creating backups and/or restoring data, refer to the *Maintenance* section in the Help.

Backup login

To perform many of the backup and restore functions, you must log in to the database. This feature provides additional security for database protection.



Tip – Initial login and password is included on the last page of this manual. You must have appropriate access rights to perform backups.

1. In the *AllTrak DataServer* window, select *Backup* and the command you want to perform. You will be required to login. The following is an example of the *Login for Backup* dialog. Other login windows are similar in content and appearance.

2. Complete the following fields:

Field	Description
Login name	Enter your login name. Note – In some cases, your Windows system login name may appear in the field. Highlight the entire text and then enter the appropriate password in the field.
Password	Enter the password required to access backups. (See the last page of this manual for password information.)

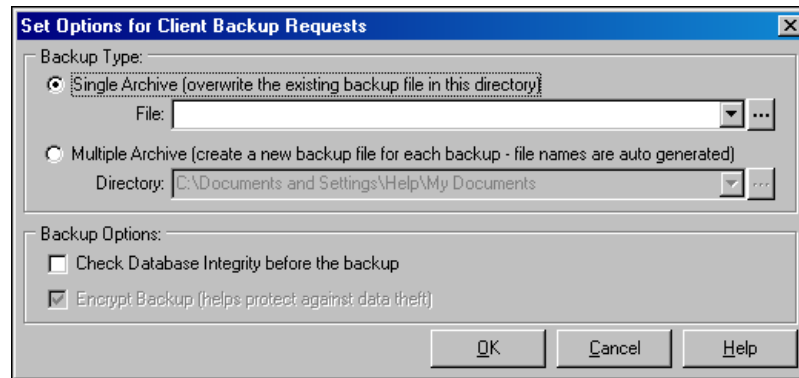
3. Click **OK**.

The window associated with the selected command opens.

Client-requested options

Default backup options are set in the AllTrak DataServer. This procedure allows you to modify the default settings based on your company policy.


1. In the *AllTrak DataServer* window, select *Backup / Client Backup Options*.
2. Log in using the instructions on [page 41](#). The *Set Options for Client Backup Requests* dialog appears:




3. Select one of the following options:

Option	Description
Single Archive	<p>This option overwrites the previous backup file. This option requires less attention to disk space maintenance, but it does not preserve previous periodic backup files.</p> <p>When you select the <i>Single Archive</i> option, you must also enter a location (drive and folder) and file name in the <i>File</i> field.</p> <p>The file name selected is the name of your single archive file each time you create a backup. For example, you could use <i>AT Full Backup</i> as the backup file name. All backup files created will be called AT Full Backup.qpb.</p>
Multiple Archive	<p>This option creates a separate file each time a back up is created. This option preserves all previous backup files.</p> <p>When you choose the <i>Multiple Archive</i> option, you must also specify the Directory (folder) where you want the backups created.</p> <p>The software automatically generates the file name in the format YYYY-MM-DD HHMM.SS.QPB. For example, a backup file created on 28 August 2009 at 11:15.25AM will be called 2009-08-28 1115.25.qpb.</p>

Because a separate file is created each time, maintenance is required to avoid disk space problems. Trimble recommends that you develop a policy for retaining older backup files of your AllTrak system.

 **Tip** – Trimble recommends that you save your backup to a location outside of the AllTrak program files on your computer; for example, a network drive.

4. If required, select the **Check Database Integrity before the backup** checkbox to locate and correct errors. This locates errors and broken links and automatically corrects them.


5. Click **OK**.
6. When you finish working in the AllTrak DataServer, do one of the following:
 - To minimize the software, click  in the upper right-corner.
 - To close the AllTrak DataServer, select *File / Exit*.

The defaults are now set and will be used for future client-requested backups. You can overwrite these defaults when you perform backups from the AllTrak DataServer, but backups performed from the client-side of the AllTrak software are created based on the settings selected in the *Client Backup Options* dialog.

Scheduled database backups

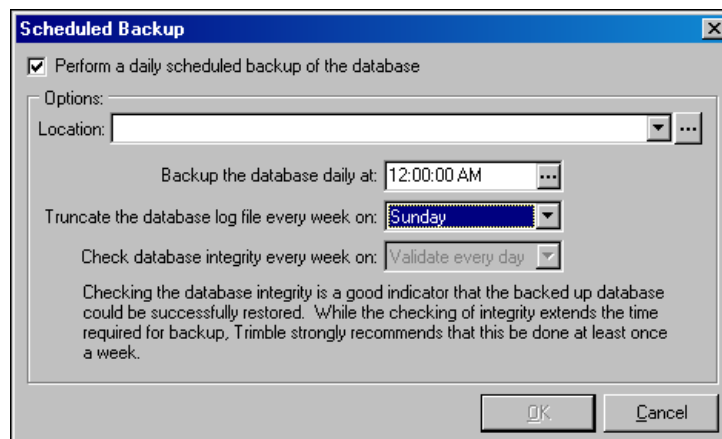
The AllTrak software includes the option of creating regularly scheduled backups, daily at the time you specify. This option protects your data without requiring your action. Other options can be scheduled at the same time scheduled backups are performed.

Scheduled backups are not automatically saved from day to day. Each backup overwrites the backup from the previous day. Contact your system administrator for information on how your company-wide system backups are handled.

 **Tip** – The AllTrak DataServer must be running to produce a scheduled backup. If the DataServer is closed, a backup cannot be created.





Parameters for daily backups *may* have been set during the installation process. If these were not set or you want to modify these parameters, complete the following steps.

1. In the *AllTrak DataServer* window, select **Backup > Scheduled Backup Options**.
2. Log in using the instructions on [page 41](#). The *Scheduled Backup* dialog opens:



3. Select the **Perform a daily scheduled backup of the database** check box.

4. Complete the following information in the *Options* group:

Field	Description
Location	<ol style="list-style-type: none"> 1. Enter the location (drive letter, folder, and file name) where you want the scheduled backup created. You can select <i>Default Backup Location</i> from the list or click  to browse to the required location. The <i>Select scheduled backup up file</i> dialog appears: 2. Browse to the required backup location. 3. Enter the required backup file name and then click Save. <p>Note – Trimble recommends that you select a location other than the hard drive where the AllTrak software is installed.</p>
Backup the database daily	<p>Note – Network users: Ensure that you allow enough time for your daily backup to complete before your server system backup begins. Because the DataServer must remain open for a scheduled backup, none of the AllTrak files will be included in your server backup. The scheduled backup file will be included if you create the file on your network server, provided it is completed. For more information, contact your system administrator.</p> <p>Do one of the following:</p> <ul style="list-style-type: none"> • Click  and then select the time you want the scheduled backup created. • Enter the data in the format: HH:MM:SS AM or HH:MM:SS PM. <p>You might want to choose a time when no one is working in the AllTrak software. While the backup is being created, it will slow processing for other users.</p>
Truncate the database log file every week on	<p>Choose an option from the list. The AllTrak DataServer saves all transactions made in the database. The information is stored in the database log file. After extensive use of the database, the size of this file may become unmanageable. The truncate feature reduces the size of the file on a weekly basis.</p> <p> CAUTION – The database log file is included in all full backups. Trimble recommends that you truncate the database logs on a weekly basis only if you have performed periodic full backups.</p>
Check the database integrity every week on	<p>Checking the database integrity locates errors and broken links and automatically corrects them.</p> <p>Note – This feature does not look at individual projects.</p> <p>To check the integrity of the database before creating a backup, select the <i>Check Database Integrity before the backup</i> check box in the appropriate window.</p> <p> CAUTION – Trimble recommends that you regularly check the integrity of the database. Keep in mind that the integrity check may take several hours (depending on the size of your database). Ideally, perform this function when no one is using the AllTrak software.</p> <p>Click OK. The backup will be created at the time you specify. Ensure that you leave the AllTrak DataServer open or the backup cannot be created.</p>


Access/Final steps

Additional information

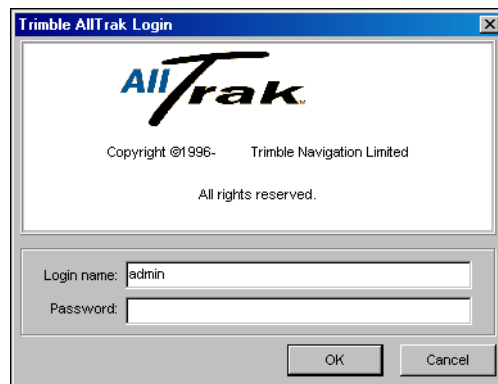
Before you can open the AllTrak software, the DataServer must be open and running:

- Verify that the Trimble Quick Link Hub is running.
- If you are using the application on a stand-alone computer, the DataServer automatically opens when you start the AllTrak software.
- If you are using the application on a network, ensure that the DataServer is open and running on the computer designated as the server.

Open the AllTrak software

1. Do one of the following:
 - Double-click the  icon on your Windows desktop.
 - From the Windows **Start** menu, navigate to **Trimble Office > Trimble AllTrak**.

The *AllTrak Login* dialog opens:



The copyright date may change from version to version.

2. Complete the following fields:

Option	Description
Login name	Enter admin in the <i>Login name</i> field.
Password	Enter the password to access the AllTrak software. The password is provided on page 52 .



CAUTION – Your Windows login name may display as a default in the *Login name* field. Highlight the entire field and then enter the login name specified.

3. Click **OK**. The main *AllTrak* window opens.

Passwords and Rights

The software includes a default user and password. The default user has system administrator rights, which means that anyone logging in using this default has access to all areas of the AllTrak software. The AllTrak software contains security that allows each employee access to only those areas required. For more information on access rights, refer to the *Employees and Security* section in the online help system.

You can continue using the provided defaults, but to safeguard your data, **Trimble recommends that you change the password immediately** and that you create a system administrator in the database that is specific to your company.


For more information, see [Changing the initial password, page 46](#) and [Creating a system administrator, page 48](#).

Changing the initial password

The initial access password provided allows access to all areas of the AllTrak software. To protect your data, Trimble recommends that you change this password immediately.

1. In the main *AllTrak* window, select *Settings / Employees*. The *List of employees* window opens.
2. Do one of the following:
 - Click Admin and then select **Edit > Edit Employee**.
 - Right-click Admin and then select **Edit Employee** from the shortcut menu.
 - Double-click *Admin*.


The *Employee: Admin Admin* dialog appears:

 **Tip** – If you are using a Proximity Card and Security Reader, scan the card for this employee while on this tab. This information will automatically populate the *Security ID* field, linking the card codes to this employee.

3. Select the **Security** tab.
4. Click in the **Password** field. Highlight the entire field and then enter the new password and then click **OK**.

Note – *Make a note of the new password.*

5. After you modify the default password, Trimble recommends that you close the AllTrak software completely (including the AllTrak DataServer) to allow the DataServer to recognize the new password.

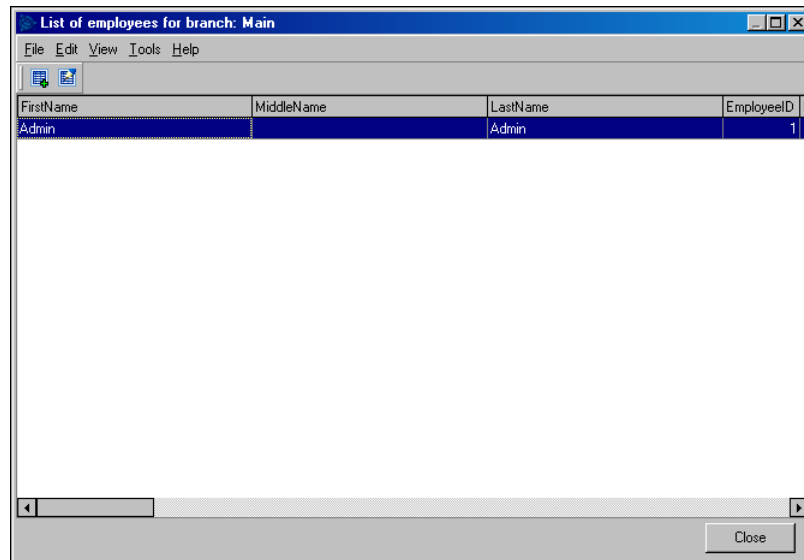
 **Tip** – When you reopen the software, you must use the new password.


To continue with the remaining procedures, reopen the AllTrak software and the AllTrak DataServer.

Creating a system administrator

Trimble recommends that you add at least one AllTrak system administrator who will be the primary person(s) responsible for maintaining the AllTrak database. To add an employee administrator to the AllTrak database:

1. In the main *AllTrak* window, select *Settings / Employee List*. The *List of employees* dialog appears:



2. In the *List of employees* window, do one of the following.
 - Click on the  on the toolbar.
 - Select **Edit > Add Employee**.
 - Press **Ctrl+Insert** on your keyboard.

The *Add Employee Details* dialog appears:

Add Employee Details

General | Certification | Address | Picture/Notes | Notifications

First Name:

Middle:

Last Name:

Initials:

Employee Code:

Security ID:

Title:


Branch: Main

ID Badge Expires:

General Settings:

- ☐ Can use Trimble AllTrak
- ☐ Can be responsible for assets
- ☐ Can be a Location Manager
- ☐ Can be a Location Field Supervisor
- ☐ Is Hidden


The choices you make in the *General Settings* group, determine what tabs are available.

 **Tip** – All fields that appear in **bold** are *required*.

General tab

1. Enter the following applicable information in the fields provided:
 - **First Name**
 - **Middle**
 - **Last Name**
 - **Initials** – If applicable, this field can also be used for nicknames.
 - **Employee ID Security ID** – This field is required if you are using a Proximity Access/Security Card to log in to the AllTrak software or when performing asset transactions. Place the cursor in this field and then scan the security card. This associates the employee with the card identification.

Note – *The access code appears in the field with asterisks. This ID **must** match the ID/Login scanned on the AllTrak Login screen or when performing asset transactions. Access codes must be unique for **each** employee.*

 - **Title**
2. Choose Main from the *Branch* list. You can change this assignment later.
3. If you are producing employee ID badges from the AllTrak software (as defined in the Reports module) and you want to monitor dates, enter a value in the **ID Badge Expires** field in the format MM/DD/YYYY. Alternatively, click  to select a date from the system calendar.
4. In the *General Settings* group, select the following applicable check boxes:

Option	Description
Can use AllTrak	This option is available only if you have system administrator rights. This setting allows the employee to work in the AllTrak database. When this option is selected, you must also set Security and Access rights. See Security tab, page 51 .
Can be responsible for assets	When this option is selected, the employee is allowed asset responsibility in transactions. When an asset transaction is performed, only those employees who have this option selected can be responsible for the asset.

5. Select the *Security* tab to continue setting up this employee.
The *Security* tab is visible only when the **Can use Trimble AllTrak** option is selected on the *General* tab.

Security tab

Set the Login name, Password, and Access Rights for an employee:

Add Employee Details

General Security Access Certification Address Picture/Notes Notifications

Login Name:

Password:

Access Rights:

- ☐ System Administrator
- ☐ Can transfer assets
- ☐ Can add assets
- ☐ Can edit assets
- ☐ Can delete assets
- ☐ Can backup/restore data
- ☐ Can print reports/validate assets
- ☐ Can add/edit/delete reports
- ☐ Can edit asset history
- ☐ Can delete transactions originated by the employee
- ☐ Can add/hide locations
- ☐ Can edit locations
- ☐ Can add/edit/delete employees
- ☐ Can add/edit/delete other companies
- ☐ Can add/edit/delete service items
- ☐ Can access ALL branches
- ☐ Can access ALL asset families
- ☐ Can access (not edit) assets from all branches

Clear All Options Set All Options On

Another OK Cancel

1. Enter the employee's **Login Name**. The field is required in combination with the *Password* when the employee opens the AllTrak software.
2. Enter a **Password** for the employee. The field is required in combination with the *Login name* when the employee opens the AllTrak software.
3. In the *Access Rights* group, select the **System Administrator** check box. When you select this option, the employee can perform all functions in the AllTrak software. *Trimble recommends that you limit the number of employees assigned system administrator rights.* This provides better protection of the AllTrak data. If you select this option for the employee, all required data is complete on this tab.

Default Login Details

Login name: Admin

Initial password: admin

Note – Trimble recommends that you change the initial password immediately after installation to prevent unauthorized individuals from accessing the database.



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